MainBoss Advanced 3.2, Update 2
Web Operations

Introduction
Welcome to MainBoss Advanced

This guide offers a quick introduction to using the MainBoss Advanced **Web Requests** and **Web Access** modules. These modules make up the **MainBossRemote** software package. They provide the ability to deal with work orders and requests through the Internet.

> This document is intended for people who'll *use* MainBossRemote. For information on *setting up* web-based access, see the *MainBoss Installation & Administration Guide*.

Connecting to the Web

The people in charge of MainBoss at your site will create a web site that provides access to MainBoss. Connect to this web site using any web browser (e.g. Internet Explorer or Firefox).

> **Note:** The site may appear differently in different browsers. In particular, if you connect to the web site using a mobile device, the web page is formatted for a smaller viewing screen.

The Web Requests Module

In MainBoss, a *request* asks maintenance personnel to fix a problem or to perform some other job. You might submit a request if you notice something broken, or if you need some other work done.

The **Web Requests** module lets you submit requests via your organization's MainBoss web page. This chapter assumes that your organization has a **Web Requests** license.

Submitting a Request

When you connect to your organization's MainBossRemote web site, you'll see a web page containing a box labeled "**Enter your e-mail address to submit a MainBoss request**". To submit a request, type your e-mail address into the box, then click **Enter my Request**.

Note: You must be authorized to submit requests. To be authorized, the people in charge of MainBoss for your organization must put your e-mail address on a list of authorized addresses.

Once you click **Enter my Request**, you will go to a web page where you can enter more information. This page contains the following:

Number: A tracking number that will be used for your request. You cannot change this value.

Subject: Fill in this box with a brief summary of the request.

Request Priority (optional): If you wish, you may click the drop-down button and choose a priority from the available choices. (Setting a priority usually isn't necessary unless there's something special about your request.)

Description: Fill in this box with a full description of the problem.

When you've finished filling in the desired information, click the **Create** button. MainBoss will create the request, submit it to your maintenance department, and return to your site's initial MainBossRemote page.

The Web Access Module

In MainBoss, you may be *assigned* requests and work orders. Typically, this means that you have an interest in the associated work. Either you've been scheduled to do the actual job, or you need to keep track of the job for some reason. (For example, if you receive phoned-in problem reports, you may be assigned to the resulting requests so that you can keep track of the work's progress.)

The **Web Access** module lets you check your active assignments. This chapter assumes that your organization has a **Web Access** license.

Viewing Your Active Assignments

To view your active assignments, go to your organization's MainBossRemote web page.

- If your organization has a **Web Access** license but not a **Web Requests** license, you will immediately go to a list of your assignments.
- If your organization has both licenses, the web page will contain a link labeled **View your assignments**. Click this link.

Your list of active assignments contains information about the following:

- New requests assigned to you. These are requests which have been created, but may still be subject to significant revisions. New requests may even be voided (rejected or cancelled) by the maintenance department.
- In-progress requests assigned to you. These are requests which have been accepted by the maintenance department. Work may have already begun on these requests.
- Draft work orders assigned to you. These are work orders which have been created but may still be subject to significant revisions.
- Open work orders assigned to you. These are work orders which are considered "ready to go"—ready to be handed to the workers who will actually do the job. Work may have already begun on these jobs.

The web page tells you how many of each you have. The page also provides links which let you see more about your assigned in-progress requests and open work orders.

Note: When a job is finished, the associated work order is *closed*. It will no longer be included with your open work orders. Similarly, requests are closed when the requested work is done; at that point, they are removed from your list of "in progress" requests. Thus, the web page only lists requests and work orders that are *active* (not yet finished).

The assignments web page contains a **Refresh** button. If you click this button, MainBoss updates the page to reflect any recent changes (e.g. new requests that have been received since you first accessed the web page).

Viewing In-Progress Requests

On the **View Assignment Status** web page, click **In Progress**. This links to a page listing your assigned in-progress requests. Each line in this list contains:

- The ID number of the request. This is a link; if you click it, MainBoss opens a page displaying information from the request.
- The priority of the request (if any)
- The subject line of the request.

Each line in the list also has a **Close** button. Clicking this button will close the request. More specifically, MainBoss opens a web page where you can enter any final information about the request, including comments that should be e-mailed to the requestor (if possible). Once you've entered this final information (if any), clicking **Close Request** will close the request. (There is also a **Cancel** button if you decide you don't want to close the request after all.)

This web page contains a **Refresh** button. If you click this button, MainBoss updates the page to reflect any recent changes.

Adding Comments to Requests

The web page for viewing a specific request contains an **Add Comment** button. This button lets you add a comment to the request's associated history. For example, you might add a comment to note if the job will be significantly delayed.

Clicking **Add Comment** opens a web page where you can enter the comment, as well as other information (especially the estimated completion date of the work). Once you've entered any information you wish to, click **Add Comment** to save what you've entered. (There is also a **Cancel** button if you decide not to add a comment after all.)

Viewing Open Work Orders

On the **View Assignment Status** web page, click **Open**. This links to a page listing your assigned open work orders. Each line in this list contains:

- The ID number of the work order. This is a link; if you click it, MainBoss opens a page displaying information from the work order.

- The priority of the work order (if any)
- The subject line of the work order.

Each line in the list also has a **Close** button. Clicking this button will close the work order. More specifically, MainBoss opens a web page where you can enter any final information about the work order, including the amount of downtime on the unit and a closing code. Once you've entered this final information (if any), clicking **Close WorkOrder** will close the work order. (There is also a **Cancel** button if you decide you don't want to close the work order after all.)

This web page contains a **Refresh** button. If you click this button, MainBoss updates the page to reflect any recent changes.

Work Order Displays

When MainBoss displays the contents of a specific work order, the display includes several special pieces of information:

- The unit involved in the work (e.g. a piece of equipment that needs to be repaired). The unit's name is a link; if you click on it, MainBoss will display a web page containing information on the unit. This may be useful for workers who must work on the unit.
- History records associated with this work order. This may include useful comments from other people involved with the work order.
- A list of *resources* associated with the work order. This list shows any materials that were expected to be used on the job. It also shows any labor that was scheduled for the job, plus any expected *miscellaneous* expenses. (These are called *demands* for materials, labor, and miscellaneous expenses.)

Adding Comments to Work Orders

The web page for viewing a specific work order contains an **Add Comment** button. This button lets you add a comment to the work order's associated history. For example, you might add a comment to note if the job will be significantly delayed.

Clicking **Add Comment** opens a web page where you can enter the comment, as well as other information (especially the estimated completion date of the work). Once you've entered any information you wish to, click **Add Comment** to save what you've entered. (There is also a **Cancel** button if you decide not to add a comment after all.)

Closing Work Orders

Before you close a work order, you should record all the materials and labor that were used on the job. This is done in the **Resources** section of the web page that displays the work order.

To begin with, the **Resources** section displays information that was specified when the work order was originally written up. This means that it shows *estimates*: the labor, materials, and miscellaneous expenses that the job was expected to need. Once the job is finished, you should record the *actual* expenses for the job.

To record expenses, you use the **Actualize** column of the **Resources** section. Initially, the numbers in this column show the original usage estimates:

- For materials, this is the quantity used.
- For labor, this is either the hours and minutes spent on the job, or the number of "per job" units (for jobs like oil changes, where a flat rate is charged per job, regardless of the actual time spent).
- For miscellaneous costs, this is the actual cost.

For each entry in the **Resources** list, you should check to see if the number in the **Actualize** column equals the actual usage on the job.

- If the number in the **Actualize** column is correct, just checkmark the associated checkbox. (You'll do this when the actual usage matches the original estimate.)
- If the number in the **Actualize** column is not correct, enter the correct value in place of the value shown. (You'll do this when the actual usage is different from the original estimate.) After you've entered the correct value, make sure the associated checkbox is checkmarked.

You don't have to record actual usages all at the same time. For example, suppose a job takes several days to complete. At the end of each day, you might record the actual usages of materials and labor for that day. Thus, if Joe Smith was expected to spend a total of 20 hours on the job, you might record Joe's actual time as eight hours the first day, eight hours the next day, and four hours on the final day. As you record this information, you'll see that MainBoss updates the **Actual** and **Remaining** values that are shown on the line for Joe's labor.

Once you have recorded one or more actual usages, click **Actualize Resources**. MainBoss makes a permanent record of the readings on every line where the checkbox is checkmarked. (Lines where the checkbox is blank are ignored.)

When you have finally recorded all actual expenses on a job, you can close the work order. To do so, click the **Close** button above the work order's **History** section.

MainBoss opens a window where you can record any final information for the work order. Click **Close WorkOrder** when you have entered any such information.