

Quadpro Help Desk

The Preferences – Assets & Works Orders

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To access this page from the Home Screen, select **Admin > Preferences** , once in this window select **Assets** from the bottom tab.

The screenshot shows the 'Assets & Works Orders' preferences window for Quadpro v03.12.41. The window has a title bar with the version number and a close button. The main area is titled 'Assets' and contains several configuration options. At the top, there's a section for 'Field Label' and 'Type of data that can be held in field'. Below this, there are two input fields: 'CYCLE' and 'COST', both set to 'Character (Max 30)'. To the right of these fields, there's a note: 'Custom fields will appear on the form if a Field Label is filled in.' and a link 'Click here to see the form'. Below the input fields, there's a text box for 'Asset Photos' with a backslash character. At the bottom of the main area, there are two dropdown menus: 'Default Priority' set to 'Cyclic & Statutory' and 'Default Job Type' set to 'Maintenance'. The window has a bottom navigation bar with tabs: 'General', 'Building & Space', 'Assets' (selected), 'Maintenance', 'Works Order', 'Counters', and 'Restricted'. At the very bottom, there are 'Save' and 'Exit' buttons.

Assets

General Custom Fields:

Enter your description labels for up to 2 custom fields. These labels and fields will appear on the asset screen when a description is entered. By default, they will not appear.

- To view the custom labels, use the 'Click Here' link to the Asset Screen, Be sure to return to the Preferences by clicking the Exit button on the Asset screen so that the new custom labels can be saved.

Asset Photo:

This is the location where you can store asset photographs. This Folder will automatically be set up on your computer when Quadpro is installed and should not be moved or renamed.

To view the contents of the folder, click on the '...' button at the end of the path name.

Works Orders

Quadpro v03.12.41 12:44 PM Thursday, 19 April 2018 Preferences

Work Order Title: Works Order Work Order Ref Lab: BLDG

Work Order Completion Note: Please Sign and Date all Work Orders only when work is complete and remember to fill in the Follow on works section, Materials used etc. Additional time and material sheets are available from the office.

Work Order Note: The Asbestos Register must be consulted before any work commences, (this can be located in the filing cabinets in the circulation area) The information contained within the filing cabinets must not be removed under any circumstances!!! "if in doubt ask!!"

Work Order Note: All Operatives must observe all relevant Health and Safety Regulations and requirements, read any RAMS. Take note of any "RAMS" which the work requires!, or fill out a minor Risk Assessment form, available from the office. Appropriate signage and Barriers must be in place before work commences!

Approve WO before issuing: ☐ Update WO Issue Date

Default Work Order Type: External

Default Job Request / Work Order Location Format: Site, Building

Job Type Mandatory: ☒

Allow budgets to be changed on issued WOs? ☐ **WARNING! Allowing budgets to be changed on issued Works Orders affects the auditability of the system. Use with caution.**

Send to BCC:

Email Body Text:

Send internal / timesheet WO by email? ☐

General Building & Space Assets Maintenance **Works Order** Counters Restricted

Save Exit

Work Order Title:

Enter your preferred description for a Works ORDER.

Works Order Note 1 & 2:

Enter any general clauses or instructions that apply to any Works Order. These notes appear in the footer of the printed order.

Approve WO Before:

Works orders sometimes need to be independently checked and approved before issuing.

Tick this check box to require works orders to be approved before issuing.

Default Work Order Type:

Select internal or External from the drop-down menu if you predominantly issue one of other type of order. This saves having to select the type every time.

Default Job Request/ Work Order Location Format:

Ticking this option allows you to choose where works orders and job requests are directed to, there is a list which you can choose from.

Update Storage and Barriers must be in place before work commences! Update \

Location Format: Site, Building

Issued WOs? ☐

Site address fields gets to be changed on issued works orders. Use with caution

Building address fields

Job Type Mandatory:

When filling out a Job Request, the Job Type can be required or not by ticking this box.

Allow Budgets to be change on Issued Works Orders?:

We strongly advise to leave this box blank, however should you need to please contact a senior administrator and then turn it off immediately after use to ensure no data is changed.

Send BCC:

If you would like to have works orders sent to the team who deals with them , please enter the emails required.

Email Body Text:

Here you can enter text which you want to accompany the email sent out with works orders.