MainBoss Advanced 3.4, Update 1
Operating Reference Manual

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Introduction
Welcome to MainBoss Advanced

Thank you for licensing MainBoss Advanced. We think you'll find it provides all the features you need for managing your organization's maintenance work. However, the manual is not intended to be read from start to finish; instead, we recommend that you read:

☐ The *Getting Started* guide

☐ People involved with set-up should read the *Quick Configuration* guide or the full *Configuration* manual.

☐ People involved with day-to-day operations should read the *Quick Operations* guide or the full *Day-to-Day Operations* manual.

☐ The *Installation and Administration Guide* covers details of interactions between MainBoss, the Windows operating system, and Microsoft SQL Server.

If you're an experienced MainBoss user:

☐ The document *Migrating from MainBoss Basic to MainBoss Advanced* gives an overview of the differences between older versions of MainBoss and the current one.

☐ The *Configuration* guide explains how to set up MainBoss Advanced.

If you've never used MainBoss before:

☐ *MainBoss Concepts* on page 15 is a short introduction that gives an overview of terminology and how to use MainBoss.

☐ *Table Viewers and Editors* on page 59 provides general information for working with MainBoss table viewers and editors. Since these are an important part of working with MainBoss, we strongly recommend that you read this section.

Documentation conventions

This guide uses the following documentation conventions:

☐ Control panel items are shown in bold face:
  Select **Work Orders** from the control panel.
When one item is under another, the items are separated by bars. For example,

Requests | Reports | History refers to the **History** item under **Reports** under **Requests**.

☐ Menus and menu items are shown in italics:

Select **Zoom in on View** from the **View** menu.

References to menu entries typically use arrows. For example, **View → Zoom in on View** refers to the **Zoom in on View** entry in the **View** menu.

☐ Data-entry fields are shown in bold face, enclosed in double quotes:

Fill in the "**Date**" field...

☐ Buttons are shown in bold face and underlined:

Click the **Edit** button.

☐ Keyboard keys are shown in bold face enclosed in **<angle brackets>**:

Press the **<Tab>** key.

Using the Mouse: Whenever this guide tells you to click on a button, a menu item, or some other object on the screen, click with the left button of the mouse. When the guide says to *right-click* an object, click with the right button of the mouse.

MainBoss Concepts

This section explains a number of concepts that underlie MainBoss Advanced. It does not describe the fine details of using the software, but looks at how MainBoss is organized and how you can adapt that organization to the work you do.

Basic Terminology

Table
> A table is a list of entries, each of which contains information about something. For example, the **Contacts** table lists contact information for people involved in your operations. Each entry in the **Contacts** table contains contact information for a single person.

Identifier code
> Each entry in a table must be given an identifier code. No two entries in the same table should be given the same code.

Location
> *Locations* refer to anywhere you perform maintenance. The simplest type of location is a *postal address*: a building or a set of buildings that all have the same postal address.
>
> Locations may contain *sublocations*. For example, you might consider the floors in a building to be separate sublocations of the building, and the rooms on a floor to be sublocations of the floor. You might even divide large rooms into more sublocations (e.g. "northeast corner", "southeast corner", etc.) so that workers can quickly find work sites.
>
> Almost everything you do with MainBoss has location information attached. For example, work orders specify the location(s) where work should be performed.

Unit
> "Unit" is a general term for anything that might require maintenance. For example, this includes pieces of equipment and locations. It's up to you to decide what constitutes a separate unit. For example, you might consider a complete assembly line as a single unit, or you might choose to regard the line as a *system* made up of many separate units.
>
> Units may contain *subunits*. For example, you might think of a forklift truck as containing two subunits: the lift mechanism and the truck. This may be a useful distinction if your maintenance department has specialists that only deal with certain parts of a piece of equipment.
>
> Every unit has an associated location. In fact, units are considered locations—

sublocations of larger locations. (Sometimes it's more useful to tell a worker, "Go to Drill Press #4," than to say, "Go to the northeast corner of the manufacturing floor.")

Request

A request (or work request) is typically based on a complaint from someone outside the maintenance department. It states preliminary information about the problem: the location, the name of the person reporting the problem, the date/time the report was received, and a brief description of the problem itself.

Work order

A work order is a detailed description of work to be done; typically, this can be printed off and handed to the personnel assigned to do the work.

A work order is more detailed than a work request. For example, a work order may specify the amount of time the job is expected to take, the materials to be used, and so on. Such details are not present in a work request. In general, work requests are designed so they can be filled out by non-maintenance personnel (for example, a department secretary) while work orders are usually filled out by maintenance management.

When you create a new work order using the information from an existing work request, we say that the work request has been *transferred* to the work order.

Corrective and planned work orders

A *corrective* work order specifies work to be done in order to solve a problem.

A *planned* work order is prepared automatically by MainBoss's facilities for scheduling planned preventive maintenance. Planned work orders usually specify check-lists or step-by-step *tasks* that need to be done in planned maintenance operations.

Report

A report provides information extracted from MainBoss's files. MainBoss can create many different types of reports, including work histories, cost summaries, equipment lists, and so on. Reports can be run off on a printer or displayed on your monitor screen.

Items

Items are materials used in the course of your maintenance work, such as spare parts, chemicals, and so on.

Coding Definitions

Your coding definitions are tables which contain information that isn't expected to change on a day-to-day basis. For example, this includes information on the vendors from whom you purchase materials. Most maintenance departments buy from the same set of vendors most of the time. Since information about vendors (e.g. phone numbers and addresses) won't change very often, it's separated from other maintenance activities where information changes frequently (e.g. your work

orders and requests).

In some sense, coding definitions reflect the underlying structure of your maintenance operations, as opposed to the day-to-day details. For this reason, many maintenance departments only allow administrators to change coding definitions.

MainBoss Administration

A collection of operations usually reserved for the person who is in charge of MainBoss in your organization. The administrative features of MainBoss can control who is and isn't allowed to use specific MainBoss functions, who is permitted to archive MainBoss data, and so on.

Security Roles:

Security roles determine what you can and can't do within MainBoss. Your MainBoss administrator assigns security roles to you. These determine what MainBoss operations you can perform.

Important: Your security roles determine what you can and can't see in MainBoss. For example, if you aren't permitted to see a certain type of information, that information won't be displayed in MainBoss windows. Therefore, what you see on your screen may differ from the pictures displayed in this guide.

The MainBoss Control Panel

When you first start MainBoss, you'll see a window that has the MainBoss *control panel* on its left-hand side. This control panel looks much like the list of folders on the left-hand side of Windows Explorer. The window that contains the control panel is the most important window used in MainBoss.

The MainBoss control panel organizes MainBoss operations and provides access to them. For example, the **Requests** entry provides access to operations related to work requests. Clicking **Requests** itself lets you see a list of current work requests. This list is shown in the right half of the window. The right half of the window also has buttons that let you create new work requests, edit existing requests, and so on.

Clicking a + sign in the control panel displays further MainBoss operations (just as clicking the + in a Windows Explorer folder displays subfolders). For example, the **Requests** entry has several subentries, including **Reports**. Clicking the + on this **Reports** will provide a list of reports related to work requests.

The MainBoss control panel is your starting point for almost all MainBoss data and operations. Looking at entries in the control panel is one way to learn what MainBoss can do.

The Life Cycle of a Corrective Work Order

This section outlines the usual sequence of events in dealing with a problem report received from outside the maintenance department.

☐ Create a request (see *Requests* on page 284). This is done by the person who receives the problem report.

In some companies, individuals outside the maintenance department may be authorized to prepare their own requests. For example, there might be someone in each department who is authorized to create and submit requests for the maintenance department to deal with.

Requests may also be submitted by e-mail if your site has the **MainBoss Service** module or through a web page if your site has the **Web Requests** module.

☐ Create a work order based on the request (see *Work Orders* on page 309). This is usually done by a maintenance manager. The original request contains a basic description of the problem. The person drawing up the work order may add more information including:

- ☐ priority of the job
- ☐ date/time the job should be done
- ☐ personnel assigned to do the job (possibly including labor costs based on the workers' wages)
- ☐ length of time the job is expected to take
- ☐ materials expected to be needed for the job
- ☐ detailed description of the work to be performed

☐ You may use *assignments* to bring the job to the attention of personnel who may have an interest in it. MainBoss automatically creates assignments for people who'll be working on the job, but you may want to create additional assignments for supervisors, clients, and others. For more information, see *Assignments* on page 32.

☐ Print off the work order and give it to the workers assigned to the job (see *Printing Work Orders* on page 329).

☐ If your site has the **Web Access** module, workers can also obtain their work orders by accessing a web page through any web-enabled mobile device, e.g. an iPhone or BlackBerry. Workers may also use work order *notes* to record comments about a job and to communicate with other MainBoss users. (Notes are more useful than other forms of communication because MainBoss keeps them directly associated with the work order itself. If you use normal e-mail to communicate, there's no connection between the e-mail messages and the work order—the messages will probably get lost. However, if you use MainBoss notes, your database keeps a permanent record of the communications, so information is never lost.)

□ During the course of a job, problems may arise that put the job on hold; for example, you may have to wait to get a building permit or customer approval. If so, you can indicate the nature of the hold using *status codes*. For more information, see *Work Order Status Codes* on page 278.

□ Close the work order and the request when the work is actually completed. This may be done by a maintenance manager or by the workers who actually did the job. When you close a work order, you record actual information about the job, as opposed to the estimates you made when you originally created the work order. For example, when you first create a work order, you can estimate the time required for the job and the materials that will probably be used; when you close the work order, you can record the actual time and materials.

You also assign a closing code to each work order. For example, your closing codes may be based on the type of problem (HVAC complaint, plumbing problem, vandalism, etc.) or they might be based on what you did to deal with the problem (repair, replacement, adjustment, etc.). Closing codes provide a way to classify and track the type of work that your maintenance department does.

At any point in the process, you can edit the results of previous stages. For example, when you originally create a work order, you may not have enough information to estimate the expected labor and material costs. When you do get this information, you can go back and add it to the work order.

Scheduling Planned Maintenance

This section outlines the usual sequence of events for scheduling planned (preventive) maintenance.

□ Specify the task (see *Tasks* on page 184). This means drawing up step-by-step instructions describing everything that should be done in a particular planned maintenance operation. The task may include the materials to be used (such as replacement parts), the personnel normally assigned to the job, the time the job usually takes, and so on.

□ Create one or more *timing descriptions* (see *Maintenance Timing* on page 168). For example, if a particular job should be done every three months, you create a timing description that specifies "every three months".

□ Assign tasks and timing to specific units. For each unit that requires a particular type of planned maintenance, you specify the task (the work that should be done) and the timing (how often it should be done). For more details, see *Unit Maintenance Plans* on page 158.

□ Tell MainBoss to create work orders for all tasks that should be scheduled in the near future (see *Viewing Planned Maintenance Generation Records* on page 409). For example, every Friday you might have MainBoss generate work orders for all planned maintenance that should take place in the upcoming week. These work

orders can then be given to your personnel so they know what work they'll be doing every day and what each job entails.

☐ When you ask MainBoss to print open work orders, it will print work orders for each scheduled PM task (as well as for corrective jobs). Printed work orders can then be given to the workers assigned to each job.

☐ When a planned maintenance job is finished, you close the associated work order in the same way as any other work order. During the closing process, you can record labor costs, materials usage and other details associated with the job.

General Inventory Control

This section outlines a number of actions associated with setting up inventory control. (Purchasing and receiving is treated separately in a later section.)

☐ For each item you keep in inventory (spare parts and other materials used in your maintenance work), you may create an entry in the **Items** table (see *Inventory Item Records* on page 445). This entry specifies information about the item, including:

☐ Where the item can be found. There may be more than one storage location if your stock of the item is divided amongst several different storerooms.

☐ The minimum quantity of this item that you want to have on hand at any time in each storeroom. If your stock goes below this quantity, MainBoss can notify you that it's time to reorder.

☐ The maximum quantity of this item that you want to have on hand in each storeroom. When MainBoss reorders, it recommends that you buy the quantity required to get back up to this maximum.

☐ Where the item is used. For example, if a particular spare part can be used in many different pieces of equipment, you can record all the equipment that uses the spare part. This kind of cross-reference can be useful in projecting future materials use. The cross-reference is also helpful if you need to take spare parts from one piece of equipment in order to repair more important units.

☐ The quantity of the item currently on hand in each storeroom, and the cost of that quantity.

☐ As materials are used, MainBoss automatically adjusts inventory counts according to the information recorded when you close a work order. For example, if a particular work order states that you put a new tire on a forklift truck, MainBoss automatically reduces the count of tires in your inventory.

Purchasing and Receiving

MainBoss has detailed facilities for reporting which inventory items need to be restocked, for creating purchase orders, and for tracking shipments received. This section outlines the usual sequence of events for purchasing and receiving. For more information, see *Purchase Orders* on page 462.

☐ You begin by creating a restocking report which lists items that are currently below their minimum stock level. If you want, you can restrict the report to list items you have previously purchased from a specific supplier.

☐ You prepare a purchase order for a specific supplier. During the process, you state the items and quantity you want to buy, and where the items will be stored once they're received. You can also specify payment and shipment details.

☐ Once you have created an appropriate purchase order, you issue it and print off the order. The printed purchase order may be submitted to management for approval or may be sent directly to the supplier.

☐ As goods are received, receipts can be compared to the purchase order and checked off against it. MainBoss updates your inventory records to reflect the items that have been received. It also keeps track of items on back order so that you know which items you should be receiving in future.

☐ When all the goods associated with a purchase order have been received, you close the purchase order.

At any point, you can make corrections. For example, you might prepare a draft version of a purchase order and submit it to your management for approval. If some items are not approved, you can remove those items from the purchase order before you issue it and send it to your supplier.

If your supplier tells you that some prices have been changed or that there will be extra charges (e.g. for faster delivery), you can add those charges to the purchase order. Finally, if some of the requested items cannot be supplied (or if you cancel your order and buy from someone else), you can make appropriate adjustments to MainBoss's records.

Accounting Facilities

MainBoss lets you keep track of various types of costs: the amount you pay for equipment, materials, outside contractors, etc., and the amount you charge for your maintenance department's work.

Note: MainBoss is not a full-fledged accounting package. However, it does keep track of the transactions needed by such a package. This information can be exported for use with an accounting package.

MainBoss's accounting facilities are intended to simplify day-to-day operations, so that workers using MainBoss don't have to know which ledger account is used for which expenses. In order to make this possible, someone familiar with your organization's accounting practices must set up a number of definitions that workers can then use.

For advice on how to set up MainBoss's accounting facilities, see the *Configuration* guide. The description here is only an overview of the basic concepts.

MainBoss's accounting facilities generate a reliable audit trail of accounting records based on your general ledger accounts. However, there is currently no direct method for using these records in conjunction with any accounting software package. You will have to export the information from MainBoss and process it into a format acceptable to your accounting package.

MainBoss's accounting facilities are based on the following types of information:

- *Cost Centers*: If you have licensed the MainBoss **Accounting** module, you will be able to define cost centers. Most organizations will set up a single cost center for each general ledger account used by the maintenance department. However, it is possible to set up multiple cost centers all corresponding to a single general ledger account. This makes it possible to have detailed cost breakdowns for your department's purposes, even if such detailed breakdowns aren't required by your organization as a whole.

  For example, suppose you only use a single ledger account for material expenses. You can create a single cost center named `Materials` for that ledger account. However, you might decide to create multiple cost centers like `Electrical Materials`, `Plumbing Materials`, `Mechanical Materials`, and so on, all corresponding to the same single ledger account. This lets MainBoss give you a more detailed breakdown of your materials expenses, even though your actual accounting system doesn't subdivide expenses in this way.

  If you have not licensed the MainBoss **Accounting** module, MainBoss hides all references to cost centers. Therefore, you won't define any cost centers and you won't see them used anywhere in the software.

- *Expense Models:* An expense model is a type of MainBoss record that describes how you're going to "cost out" a particular work order. For example, on jobs that you do for Client X, you might be required to categorize expenses in one way; on jobs for Client Y, you may have to use a different system of classification. As another example, organizations that receive government grants may have to write up expenses in different ways on grant projects than on other types of work.

  When you create a work order, you choose the appropriate expense model for the job. You should have a separate expense model for all the different expense-reporting formats that you may have to use.

☐ *Expense Categories:* Each expense model has a set of associated expense categories. These are the categories that must be used to classify expenses in this particular situation. You might have categories like

```
Spare parts
Work materials
Labor from outside contractors
```

When you prepare a work order, you look at each expense and ask, "What *type* of expense is this?" You choose the expense category from the list of available categories associated with the expense model.

If you have licensed the **Accounting** module, each expense category within an expense model has an associated cost center. This indicates the general ledger account that should be used for that expense category within that expense model. Linking an expense category to a cost center is called an *expense mapping*.

As an example, suppose that a property management company creates two separate general ledger accounts for each tenant: one for labor expenses and one for material expenses. This might lead you to set up the following cost centers:

```
    Cost Centers        Ledger Account
TenantA Labor               00001
TenantA Materials           00002
TenantB Labor               00003
TenantB Materials           00004
TenantC Labor               00005
TenantC Materials           00006
```

For each tenant, you create an expense model: `TenantA Model`, `TenantB Model`, `TenantC Model`. The `TenantA Model` would contain the following expense categories:

```
    Category          Associated Cost Center
     Labor                TenantA Labor
     Materials            TenantB Materials
```

`TenantB Model` and `TenantC Model` would be similar.

Whenever you create a work order, you have to assign it an expense model. Suppose you're doing a job for Tenant A. You look at your list of expense models and see that there is one especially associated with Tenant A; you therefore assign that expense model to the work order.

Next you have to assign an expense category to each expense on the work order. When you look at the list of categories associated with `TenantA Model`, you see there are only two: `Labor` and `Materials`. Therefore, you just have to assign one of those two categories to each expense on the work order. If you have the **Accounting** module, this also associates a cost center with each expense, and therefore a general ledger account.

Note, however, that when you fill out the work order, you only have to make two types of decisions:

☐ Which model do we use (what general approach will we use to "cost out" this job)?

☐ For each expense on the work order, which available expense category does it belong to?

Default Accounts: The MainBoss accounting facilities let you separate out expenses in a sophisticated way (e.g. if you keep separate accounts for each tenant). If your needs are more simple, MainBoss has default expense models and expense categories that you can use, with or without modification.

If you don't need accounting at all, just use the default expense model for all work orders. Choose the default expense categories for every item on the work order.

Whenever you create a work order, you *must* specify an expense model. If you haven't set up your own expense models, use the default model.

Similarly, whenever you add an item to a work order, you *must* specify an expense category. If you haven't set up your own categories, use the default ones.

Displaying Accounting Records: To display the accounting records that MainBoss creates, you use **Administration** | **Accounting**. For more information, see *Accounting Records* on page 532.

Corrections

Some editors have a **Correct** button. **Correct** is used to make corrections to information that has already generated accounting transactions (e.g. records of actual costs on work orders). To maintain an accurate audit trail, MainBoss doesn't let you change or delete existing accounting records. Instead, you have to create new *correction* records which add or subtract from previous monetary values.

On a similar principle, *physical count* records resulting from taking inventory can't have their numbers altered once the record is saved. Instead, you have to *void* (cancel) a physical count, then record a new count. Again, the point is to prevent numbers from being fudged—you always leave an audit trail.

Drop-Down Lists (Pickers)

Editor windows often specify information using *drop-down lists*, also known as *pickers*. For example, the "**Requestor**" field in a work request editor is a drop-down list:

Requestor [▼ | ⋯ | ▼]

As shown above, a drop-down list ends with three symbols:

☐ The left-most arrow displays a list of available values for the field. In the case of "**Requestor**" this will be a list of the people whom you've authorized to submit work requests.
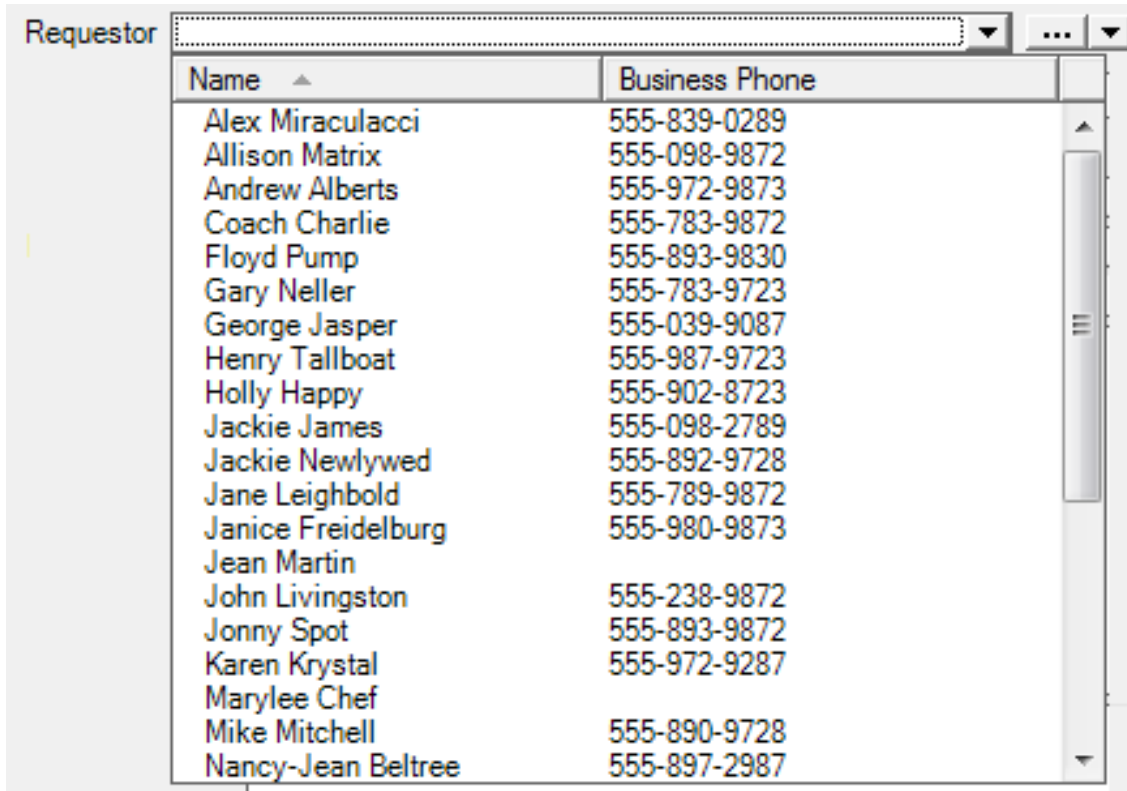
☐ The "..." opens a window showing the complete table. For example, if you click the "..." for "**Requestor**", you get the **Requestors** table. Click an entry in the table, then click **Select** to fill in the original field.
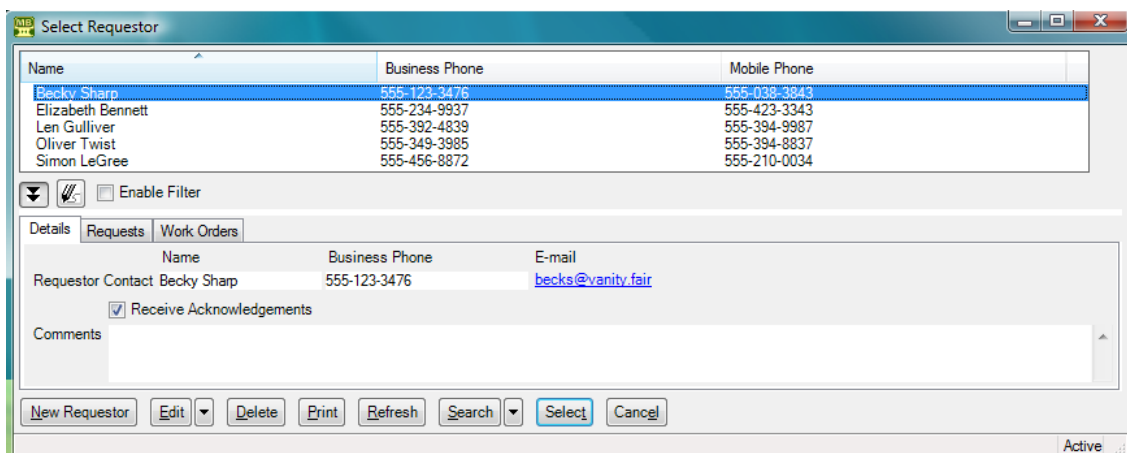
☐ The right-most arrow of the drop-down list opens a menu that gives you a number of options. For example, if you click this arrow for the "**Requestor**" field, you'll see the following:
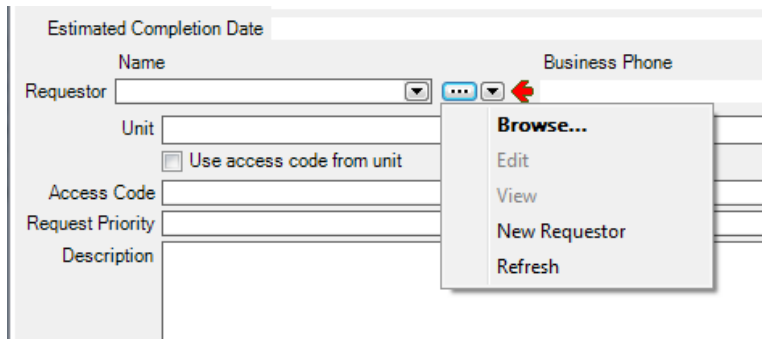
Browse lets you look at the existing **Requestors** table, just like the "..." button. **Edit** lets you edit the selected requestor record, while **View** lets you look at the record (but not change it). **New Requestor** lets you create a new requestor record; if you do this, the requestor will be filled into the original "**Requestor**" field once you save and close the new record. This makes it easy to create new records as needed if you don't already have an appropriate record. **Refresh** lets you update the drop-down list of **Requestors** to show any changes since you first opened the current window.

If you want to delete (clear) the value that's currently shown in this kind of field, right-click on the field itself and choose **Clear**. (With drop-down lists, the **Clear** option only shows up in non-mandatory fields; you can't clear the value of a mandatory drop-down list once it's been given a value, although you can give the field a different value.)

Multi-Select Features

A *multi-select drop-down list* lets you select more than one entry from the list. Such lists are designated with a "double-image" drop-down button:

When you click the button, MainBoss opens a window where you can select elements from the list. To select more than one list element, you use the standard Windows methods of selection:

☐ You can drag the cursor along a section of the list; this selects all the elements you drag the cursor across

☐ You can hold down the **<Ctrl>** key and click individual elements; this selects each of the elements you click

☐ You can hold down the **<Shift>** key and click any two elements; this selects the elements you clicked, plus all the elements between them

When you select multiple elements in a list, the result depends on the context. If, for example, you're in the **Assignees** section of a work order and you select multiple

assignees, all the people you select will be assigned to the work order. If you're in the **Security Roles** section of a user record, the user will be given all the security roles that you select.

> **Right-Clicking:** When looking at a multi-selection list, you can right-click on the list to get a menu of useful actions that can be performed. For example, the menu gives you the option of checkmarking all the entries in the list or blanking them out. With long lists, we recommend that you click the "..." button to get a selection window, then right-click on the list in the window to select the entries you want.

Number Formats

MainBoss lets you specify the format of identification numbers for requests, work orders, and purchase orders. For example, you might want to give work orders identification numbers like `WO-000001`, `WO-000002`, and so on.

Number formats are specified in the appropriate default sections. For example, you specify the number format for work orders in the **Defaults for Work Order** section of the **Work Orders** table viewer.

The default format of work order identification numbers is given by

```
WO {0:D8}
```

This means the letters `WO`, followed by a blank character, followed by a number. The number is 8 digits long (specified by the `D8`) and is padded with leading zeros if necessary. To get the format discussed above, you would specify

```
WO-{0:D6}
```

This means the characters `WO-`, followed by a six-digit number, padded with leading zeroes if necessary.

> If you have programming experience, you can specify very sophisticated number formats. These formats are represented by *format strings* which will be passed to the Microsoft .NET `String::Format` library function. For more information, see Microsoft's .NET documentation.

MainBoss Modules

MainBoss consists of a number of modules. You can pick and choose which modules you want, licensing only the modules that you actually intend to use.

Modules are controlled by license keys. If you do not have a license key for a particular module, information related to that module will not be displayed in the MainBoss control panel or in MainBoss windows. For example, if you do not license the

MainBoss Service module, you will not see **Administration** | **MainBoss Service** in the control panel.

Below we list MainBoss's modules and give an overview of what MainBoss features are associated with the module.

The **MainBoss** module
> Supports work orders and units. It lets you track the materials you use on work orders, but does not provide inventory control (e.g. where specific items are stored in your storerooms). It also lets you track labor by your own employees and by outside contractors.
>
> Your **MainBoss** module license specifies how many users can appear in the **Users** table (Administration | User**s**).
>
> All other modules require the **MainBoss** module.

The **Planned Maintenance** module
> Adds facilities for automatically creating planned maintenance work orders (e.g. inspections and preventive maintenance jobs). Planned maintenance can be scheduled by date or by meter reading.

The **Inventory** module
> Adds the ability to track the location of materials in storerooms. This includes the ability to specify maximum and minimum quantities desired for each item in each storeroom, plus facilities for taking physical inventory and tracking item prices.

The **Purchasing** module
> Adds facilities for creating purchase orders and tracking the receipt of ordered items. Purchase orders can include the cost of materials, outside contractors, and miscellaneous expenses.

The **MainBoss Requests** module
> Supports work requests. As noted in *Basic Terminology* on page 15, a request is a simple problem report that might be written up by a help-desk.

The **MainBoss Service** module
> [Requires the **MainBoss Requests** module] Provides a facility that automatically processes work requests submitted by e-mail. This module also emails out notifications to assignees when a new history record is created for a request, work order or purchase order.

The **Accounting** module
> Adds a facility that creates accounting records of a form that may be useful in connection with accounting software. At present, however, MainBoss has no facilities for integrating MainBoss accounting records with any other accounting package.

Security Roles and Permissions

In order to use MainBoss, users need to be assigned one or more security roles. The available roles are listed in **Administration** | **Security Roles**. The comments provided in each role record indicate what permissions that role provides.

Security roles affect what a user sees: if a user doesn't have permission to see a particular type of information, that information will be blanked out or missing entirely from MainBoss windows. Security roles also affect what a user can do; for example, if a user has permission to view work orders (`WorkOrderView`) but not to close them, the **Close Work Order** button will be disabled for that user.

> **Important:** When information is blank because you don't have appropriate permissions, move the cursor to the blank; MainBoss will tell you what security roles will give you permission to see that information. Similarly, if a button is disabled, move the cursor to the button; MainBoss will tell you what security roles will allow you to use that button. Note, however, that in some cases, information will disappear entirely (e.g. sections of records just won't be displayed); in this case, you may not even know that something is missing.

To assign security roles to a user, you use the **Security Roles** section of a user record (**Administration** | **Users**). In order to decide what roles an individual user should be granted, you must consider what that user is expected to do in his/her job. For example, consider someone working on a help-desk and receiving problem reports from clients outside the maintenance department. What does that person need to do?

☐ He or she will need to create work requests describing problems; that requires `Request` permission.

☐ Help-desk personnel also need a small amount of information on work orders (so that they can tell a client, "Your work has been scheduled for Thursday"). This suggests the `WorkOrderSummary` security role.

☐ The `UnitSummary` role might also be useful. It gives help-desk personnel enough information about units to make sure they understand which unit the client is talking about.

Other roles may also be appropriate, depending on what help-desk personnel are expected to do, and on your organization's policies.

Related Security Roles: Security roles tend to come in related groupings; for example, `WorkOrder`, `WorkOrderView`, `WorkOrderFulfillment` and `WorkOrderSummary` are all roles related to work orders.

In such a grouping, some roles automatically include others. For example:

☐ `WorkOrder` automatically includes all the other roles in the grouping.

☐ `WorkOrderView` automatically includes `WorkOrderSummary`.

For this reason, there's no point in giving someone both `WorkOrder` and `WorkOrderView` (for example), because `WorkOrder` automatically includes all the permissions of `WorkOrderView`.

In general, a `View` role automatically includes the related `Summary` role and a role with a simple name automatically includes roles of the same name with extra words (e.g. `PurchaseOrder` automatically includes `PurchaseOrderView`, `PurchaseOrderSummary`, and `PurchaseOrderReceive`).

Cost-Related Security Roles

Only a few security roles allow users to see monetary values. For example, the `AccountingWorkOrder` role lets a user see the actual costs of materials (but not labor) on a work order.

Someone with the `WorkOrder` security role but not `AccountingWorkOrder` will be able to create work orders but will not be able to see or specify material costs on the work order. For example, you'll be able to record that you used a particular spare part on a job but you won't know how much the part cost. You'll only be able to see material costs if you have the `AccountingWorkOrder` role (or some other accounting-related role). Furthermore, `AccountingWorkOrder` isn't sufficient to see labor costs; for that, you need `Accounting` or `AccountingView`.

If you don't have an appropriate accounting security role, you can't directly enter monetary values. However, MainBoss can enter monetary values for you. Loosely speaking, if you record that Joe Smith worked five hours, MainBoss can calculate the cost of that work based on Joe's salary, even if MainBoss doesn't tell you what that cost is.

More specifically, when someone creates a demand for labor or materials on a work order, the person creating the demand has a choice of three options related to the actual cost of the labor or materials:

Current value calculation: If you choose this option, you tell MainBoss to calculate costs based on the current value of labor and materials.

For materials, MainBoss checks its inventory records and determines the historic cost of the materials used; it uses this cost as the actual cost of the materials. For example, if you specify that a particular job uses a quart of oil, MainBoss determines the cost of a quart of oil from its inventory records. That cost is then used as the actual cost of the oil used.

For labor, MainBoss checks its labor cost records (hourly inside, per job inside, hourly outside, per job outside) and uses the costs specified in those records. For example, if you specify that employee Joe Smith worked five hours, MainBoss checks its hourly inside records to determine Joe's hourly wage. MainBoss then uses that hourly wage to determine the actual cost of five hours of Joe's time.

Demand estimate: This is similar to **Current value calculation** except that it uses costs as they were at the time of the original demand rather than the time the actual materials and labor were recorded. This makes a difference, for example, if a worker's hourly wage changes between the time of the demand and the time that actual hours are recorded.

Current value calculation and **Demand estimate** are useful in situations where costs can be specified by the person who creates the original demand, but not by the person who eventually records actual labor and material usage. This might happen when work orders are created by a dispatcher who has the roles `WorkOrder` and `AccountingWorkOrder`, but then the work orders are closed off by workers who only have the `WorkOrderFulfillment` role.

Manual entry: When this option is specified, the person who records actual costs must have `AccountingWorkOrder` or some other accounting role that allows costs to be entered directly. In this case, the "actualizer" may either choose the same calculations as **Current value calculation** or **Demand estimate**, or may manually enter some different cost.

Note that these options specify *defaults* to be used in situations where the person who records actual labor and material usage doesn't have permission to specify costs. If the person recording actual usage has cost permissions, that person can override the defaults if and when desired.

Costs on Reports: In every report window, the **Advanced** section has a **Suppress Costs** option. This tells MainBoss not to print any costs that would normally appear in the report. This option is always in effect if you don't have an appropriate accounting-related security role.

Testing Security Roles

It can be difficult to figure out the effects of various security roles, especially when a user has several different roles combined. To test what a particular user can and can't do, you can use the **Evaluate Security As** button in **Administration** | **Users**. (You must have the `Administration` security role to use **Evaluate Security As**.)

If you select a user in the **Users** table, then click **Evaluate Security As**, your MainBoss session changes to have the same security permissions as the selected user. If certain types of data are invisible to that user, they'll become invisible to you too; if certain buttons are disabled, they'll be disabled for you too.

In this way, **Evaluate Security As** lets you see all the consequences of a user's security roles. Once you've examined what the user can and can't do, you can return to your own security roles by going to the **Session** menu and clicking **Reset to user YOURNAME security**.

Note: If you use **Evaluate Security As** to evaluate the security roles of someone who doesn't have `Administration` or `AdministrationView`, the first thing that will happen is that you lose permission to see **Administration** | **Users**. This may look as if you're being told that you don't have permission to use **Evaluate Security As**; however, it really means that the person you're evaluating doesn't have that permission.

Evaluate Security As gives you the same security roles as the selected user, but it does *not* change who you are. In particular, you keep your own set of assigned requests, work orders and purchase orders.

Assignments

Requests, work orders, and purchase orders can be assigned to people. Someone assigned to a record is called an *assignee*.

Typically, you assign someone to a request if that person has some interest in the request. People who might be assigned to a request include:

- The requestor
- The person who received the request from the requestor (e.g. help-desk personnel)
- Whoever is responsible for seeing that the request is handled satisfactorily (e.g. a maintenance supervisor)

Similarly, you assign someone to a work order if that person has some interest in the job. People who might be assigned to a work order include:

- The requestor
- The dispatcher who created the work order
- Whoever is responsible for seeing that the work is done (e.g. a maintenance supervisor)
- A bookkeeper or accountant who has to keep track of work expenses

Any worker who appears in a labor demand (inside or outside, hourly or per job) is automatically an assignee for the associated work order (provided that the worker is on the list of recognized Work Order Assignees). You don't have to create an assignment explicitly in the work order's **Assignees** section.

You assign someone to a purchase order if that person has some interest in the purchase. People who might be assigned to a purchase order include:

- The vendor
- Whoever created the purchase order
- Whoever will receive materials specified on the purchase order

☐ A bookkeeper or accountant who has to keep track of purchase expenses

Different organizations will have different policies for who is and isn't assigned to a record. For example, an organization might choose to assign requestors to requests but not to work orders. Similarly, help-desk personnel might be assigned to requests but not to work orders associated with those requests.

Assignee Tables: In order for someone to be assigned to a record, that person must first be in the **Contacts** table. That person must also be authorized to be an assignee by being in one of the three **Assignee** tables:

☐ **Requests** | **Assignees** or **Coding Definitions** | **Requests** | **Assignees**

☐ **Work Orders** | **Assignees** or **Coding Definitions** | **Work Orders** | **Assignees**

☐ **Purchase Orders** | **Assignees** or **Coding Definitions** | **Purchase Orders** | **Assignees**

MainBoss Users: When you run MainBoss, you'll see that the control panel has an entry labeled **Assigned to current user**. If you expand this entry, you'll see

☐ **In Progress Requests**

☐ **Open Work Orders**

☐ **Issued Purchase Orders**

These tables list active requests, work orders, and purchase orders to which you've been assigned. In other words, your **Assigned to current user** section lists the requests, work orders and purchase orders that you're most likely to care about.

The Assignment Status Display

The **Assigned to current user** entry of the MainBoss control panel displays information on requests, work orders and purchase orders assigned to you.

☐ For requests, the window displays the number of new requests and the number of in-progress requests assigned to you. Graphs break down these numbers by date, priority, and status.

☐ For work orders, the window displays the number of draft work orders and open work orders assigned to you. Graphs break down these numbers by "**Work End Date**", priority, and status.

☐ For purchase orders, the window displays the number of draft purchase orders and issued purchase orders assigned to you.

The **Refresh** button in this window updates the numbers and graphs to reflect any recent changes made by other people.

MainBoss Sessions

A MainBoss *session* begins when you start the MainBoss program. It ends when you quit the program and close all associated windows.

Your Maintenance Organization List

MainBoss lets you create individual databases for separate *maintenance organizations*. For example, consider a property management company that serves several different clients. The management company may choose to create a different database for each client; in this way, costs and information for each client are kept separate from all other clients.

> **Note:** When you have several separate MainBoss databases, each database must have its own MainBoss license (except when you are creating databases for testing purposes). For more information on MainBoss licenses, see your dealer or MainBoss representative.

If you have access to multiple MainBoss databases, one of them may be designated as your *default maintenance organization*. Whenever you start MainBoss, you begin looking at information for your default organization. You can easily switch to a different organization:

To specify which maintenance organization you want to work with:

1. In the **Session** menu, click **Change Maintenance Organization**. This opens a window listing all databases that are available to you.

2. In the list, click on the database you want.

3. Click **Open Organization**.

4. MainBoss will change to using the specified database.

> **Note:** You will not be able to open a database in any mode unless you have been granted permissions to access that database. For more information on database permissions, see *Users* .

The window for specifying databases contains the following buttons:

Open Organization: Opens the database that's currently selected in the list. This button has the following additional options on its drop-down list:

MainBoss: Full MainBoss mode with all available modules operational.

MainBoss Assignments: Opens the selected organization in Assignments mode. The control panel will only display the **Assigned to current user** entry, under which you can see requests, work orders and purchase orders that have been assigned to you. For more on assignments, see *Assignments* on page 32.

MainBoss Requests: Opens the selected organization in Requests mode. The control panel will only display entries relevant to dealing with requests. You can always open MainBoss in this mode, provided you have a **MainBoss Requests** license key and you have been granted permissions to access the database. Opening MainBoss in this mode does *not* count against the maximum number of users allowed to connect with the database; therefore, it is recommended for people who only intend to create requests (e.g. help-desk personnel).

Administration: Opens the selected organization in a mode that allows you to use functions in the **Administration** part of the control panel. You can always start MainBoss in this mode, even if you currently have no valid license keys. In fact, when you create a blank organization, you *must* start MainBoss in this mode in order to enter your license keys. Once you've done so, you can quit and start MainBoss again in its normal mode.

Some **Administration** functions can only be used if you have been granted Administrator privileges. For more on these privileges, see *Editing User Records* on page 514.

View Sessions: Opens the selected organization in a mode that shows who else is using MainBoss. This may be useful if you're trying to upgrade the database but can't because someone else is using it. For more, see *Viewing MainBoss Sessions* on page 53.

Add Existing Organization: Adds a new database to your list of available databases. For more information, see *Existing Maintenance Organizations* on page 38. This button has the following additional options on its drop-down list:

Create New Organization: Creates a new database and adds it to your list of available database. For more information, see *New Maintenance Organizations* on page 37.

Import MainBoss 2.9 Organization: Imports data obtained from a MainBoss Basic database. For more information, see *Imported Maintenance Organizations* on page 39.

Restore Organization: Restores the selected database from a backup file. Note that you must first select a database from the Maintenance Organization list; this database will be overwritten with the data from the backup file. For more information on this operation, see *Overwriting a Maintenance Organization with Data from a Backup File* on page 42.

Create New Organization from a Backup: Creates a new database using data obtained from a backup file. For more information on this operation, see *Creating a New Maintenance Organization from a Backup File* on page 44.

Create Demonstration Organization: Creates a new database with *demonstration mode* license keys. This database will let you test MainBoss operations, but puts limitations on the database contents (e.g. a limited number of work orders, locations, requests, etc.). For more information, see *Demonstration Maintenance Organizations* on page 41.

Edit Organization: Lets you change information about the organization (e.g. if you want to change the "**Organization Name**" which is displayed when you are using MainBoss). For more on this operation, see *Changing Organization Information* on page 47.

Set Start Default: Lets you specify which database is opened by default whenever you start using MainBoss. Clicking this button specifies the current database as your default. This button has the following additional options on its drop-down list:

Clear Start Default: Specifies that you do not want a default database. If you do not have a default database, your list of available databases will be displayed every time you start using MainBoss. This lets you select which database you want to use.

Remove from list: Removes the selected database from your list. This does not delete the database; it simply says that you no longer want the database to appear on your personal list.

Upgrade: Upgrades a database made under an older version of MainBoss Advanced. Note that if you want to import old data from MainBoss Basic, you use **Import MainBoss 2.9 Organization** (described earlier). For more on upgrading, see *Upgrading Maintenance Organizations* on page 52.

Exit: Exits MainBoss.

Start-Up Modes: As an example of the use of start-up modes, your help-desk personnel might set their starting mode so that they always access the database in requests-only mode unless they manually open it in some other mode. In this way, they only see control panel entries relevant to their usual work.

If you sometimes want to open a database in full mode and sometimes in requests-only mode, you can give the same database multiple organization names. For example, suppose your database has the "**Database Name**" MyMainBoss. You could use **Add Existing Organization** to create two different lines in the organization list:

☐ One line might have the "**Organization Name**" MyMainBoss-Full, with a start mode of **MainBoss**. To set the start mode, select it from the drop-down list labeled "**Default MainBoss mode**" (in the window for specifying organization details).

☐ A second line might have the "**Organization Name**" `MyMainBoss-Requests`, with a start mode of **MainBoss Requests**.

If you click **Open Organization** on `MyMainBoss-Full`, MainBoss opens in full **MainBoss** mode. If you click **Open Organization** on `MyMainBoss-Requests`, MainBoss opens in requests-only mode.

You can also use command line options to specify start mode and maintenance organization you wish to access. This makes it easy to create desktop icons that each open a different organization or open the same organization in different modes. For more information, see *Command Line Options* on page 49.

The first time you run MainBoss: The first time you run MainBoss on a database, the database will not contain any license keys. You must open MainBoss in **Administration** mode by clicking the drop-down arrow on **Open Organization** and clicking **Administration**. This mode will let you enter your license keys, as described in *Entering Multiple License Keys* on page 89. Once you have entered the license keys, you can return to the window for selecting the database and open the database normally.

New Maintenance Organizations

You can create a new maintenance organization database by clicking **Create New Organization** in the Maintenance Organization window (see *Your Maintenance Organization List* on page 34). MainBoss opens a window where you can specify information about the new organization:

Database Server: The network location of the SQL Server through which you will access the database. For more information, see the *Installation and Administration Guide*.

If you click the accompanying "..." button, MainBoss displays a list of database servers that are known to your Windows system. There may be additional servers that you can use but that Windows doesn't currently know about. For more, see *The Database Server List* on page 48.

Database Name: The name you want SQL Server to give to the new database. This name must be different from the names of any other databases on the server. For example, you can't name every database "MainBoss". If you want to see what MainBoss databases already exist, click the "..." button at the end of the "**Database Name**" line. (For more, see *The Database Name List* on page 48.)

"**Database Name**" must obey SQL Server's rules for database names. In particular, the name can't contain spaces or special punctuation characters.

Organization Name: A name that you will use for this database. The value of "**Organization Name**" may contain spaces and other punctuation characters.

Make browsers smaller by not showing details for selected record by default: If you checkmark this box, MainBoss will automatically hide the details panel when displaying tables in this database. For more, see *Hiding the Details for a Selected Record* on page 65. Note that you can still ask MainBoss to display the details panel for a particular table by pressing the button for displaying details.

Default MainBoss mode: The default mode in which this database should be opened. If you do not specify a mode explicitly, the database will be opened in the given mode. For more on modes, see *Your Maintenance Organization List on page 34*.

OK: MainBoss attempts to create a new maintenance organization database with the name you specified. You must have appropriate permissions to create this database.

Cancel: Closes the window without creating a database.

When you create a new database in this way, the "**Organization Name**" that you specify becomes that database's default organization name. When other people use **Add Existing Organization** to add that database to their list, they'll automatically inherit this default name. However, users can then use **Edit Organization** to assign a different "**Organization Name**" to the database. If a user does this, the new name is considered that user's personal name for the database—a name for that single user's convenience. When a user changes a personal "**Organization Name**", it has no effect on other users; it doesn't change the name/address printed on requests, work orders and purchase orders, nor does it change the default "**Organization Name**" when users add the database to their list of known organizations.

In order to use a new database, it must have license keys. You must record your license keys before you can proceed to use MainBoss. After creating a new database, MainBoss automatically opens in **Administration** mode to let you enter the keys. Follow the steps in *License Keys* on page 521 to enter your license keys. Then quit MainBoss and start again for the keys to become active.

Existing Maintenance Organizations

You can add an existing organization to your list of maintenance organizations by clicking **Add Existing Organization** in the Maintenance Organization window (see *Your Maintenance Organization List* on page 34). MainBoss opens a window where you can specify database information:

> The person who originally created the database should tell you what values to enter in "**Database Server**" and "**Database Name**" below.

Database Server: The network location of the SQL Server through which you will access the database. For more information, see the *Installation and Administration Guide*.

If you click the accompanying "..." button, MainBoss displays a list of database servers that are known to your Windows system. There may be additional servers that you can use but that Windows doesn't currently know about. For more, see *The Database Server List* on page 48.

Database Name: The name of the database, as known to the SQL Server. The name must be the name given to the database when it was created. If you click the accompanying "..." button, MainBoss displays the names of all MainBoss databases managed by the specified "**Database Server**". (For more, see *The Database Name List* on page 48.)

Organization Name: A name that you personally will use for this database. By default, this will be the organization name that was specified by whoever created the database. You may, however, change "**Organization Name**" to any other value for your own convenience. Changing your own version of "**Organization Name**" will not affect anyone else who uses the database.

Make browsers smaller by not showing details for selected record by default: If you checkmark this box, MainBoss will automatically hide the details panel when displaying table viewers in this database. For more, see *Hiding the Details for a Selected Record* on page 65. Note that you can still ask MainBoss to display the details panel for a particular table by pressing the button for displaying details.

Default MainBoss mode: The default mode in which this database should be opened. If you do not specify a mode explicitly, the database will be opened in the given mode. For more on modes, see *Your Maintenance Organization List* on page 34.

OK: Adds the specified database to your list. MainBoss attempts to access the specified database and add it to your list of known databases.

Cancel: Closes the window without adding any database.

Imported Maintenance Organizations

To move from MainBoss Basic 2.9 to MainBoss Advanced, you should follow the instructions given in the guide titled *Migrating from MainBoss Basic to MainBoss Advanced*. The essential steps are:

1. Export data from your MainBoss Basic 2.9 database.

2. In MainBoss Advanced, click **Import MainBoss 2.9 Organization** in the Maintenance Organization window (see *Your Maintenance Organization List* on page 34). This action creates a new maintenance organization and imports your old data into the new database.

When you click **Import MainBoss 2.9 Organization**, MainBoss Advanced opens a window containing the following:

Database Server: The network location of the SQL Server through which you will access the database. For more information, see the *Installation and Administration Guide*.

If you click the accompanying "..." button, MainBoss displays a list of database servers that are known to your Windows system. There may be additional servers that you can use but that Windows doesn't currently know about. For more, see *The Database Server List* on page 48.

Database Name: The name you want SQL Server to give to the new database. This name must be different from the names of any other databases on the server. For example, you can't name every database "MainBoss". If you want to see what MainBoss databases already exist, click the "..." button at the end of the "**Database Name**" line. (For more, see *The Database Name List* on page 48.)

Organization Name: A name that you will use for this database. The value of "**Organization Name**" may contain spaces and other punctuation characters.

Make browsers smaller by not showing details for selected record by default: If you checkmark this box, MainBoss will automatically hide the details panel when displaying tables in this database. For more, see *Hiding the Details for a Selected Record* on page 65. Note that you can still ask MainBoss to display the details panel for a particular table by pressing the button for displaying details.

Default MainBoss mode: The default mode in which this database should be opened. If you do not specify a mode explicitly, the database will be opened in the given mode. For more on modes, see *Your Maintenance Organization List* on page 34.

2.9 Export Data: Should give the name of an XML file containing data exported from MainBoss Basic 2.9. For more information on importing information, see the *Installation and Administration Guide*.

OK: MainBoss attempts to create a new maintenance organization database with the name you specified and to fill it with data taken from the "**2.9 Export Data**" file. You must have appropriate permissions to create this database. If the database can be created, it will be added to your list of organizations.

Cancel: Closes the window without taking any action.

When you create a new database in this way, the "**Organization Name**" that you specify becomes that database's default organization name. When other people use **Add Existing Organization** to add that database to their list, they'll automatically inherit this default name. However, users can then use **Edit Organization** to assign a different "**Organization Name**" to the database. If a user does this, the new name is considered that user's personal name for the database—a name for that single user's convenience. When a user changes a personal "**Organization Name**", it has no effect on other users; it doesn't change the name/address printed on requests, work orders and purchase

orders, nor does it change the default "**Organization Name**" when users add the database to their list of known organizations.

In order to use a new database, it must have license keys. You must record your license keys before you can proceed to use MainBoss. After creating a new database, MainBoss automatically opens in **Administration** mode to let you enter the keys. Follow the steps in *License Keys* on page 521 to enter your license keys. Then quit MainBoss and start again for the keys to become active.

Demonstration Maintenance Organizations

You can create a demonstration organization database by clicking **Create Demonstration Organization** in the Maintenance Organization window (see *Your Maintenance Organization List* on page 34). MainBoss opens a window where you can specify database information:

> **Database Server**: The network location of the SQL Server through which you will access the database. For more information, see the *Installation and Administration Guide*.
>
> If you click the accompanying "..." button, MainBoss displays a list of database servers that are known to your Windows system. There may be additional servers that you can use but that Windows doesn't currently know about. For more, see *The Database Server List* on page 48.
>
> **Database Name**: The name you want SQL Server to give to the new database. This name must be different from the names of any other databases on the server. For example, you can't name every database "MainBoss". If you want to see what MainBoss databases already exist, click the "..." button at the end of the "**Database Name**" line. (For more, see *The Database Name List* on page 48.)
>
> **Organization Name**: A name that you will use for this database. The value of "**Organization Name**" may contain spaces and other punctuation characters.
>
> **Make browsers smaller by not showing details for selected record by default**: If you checkmark this box, MainBoss will automatically hide the details panel when displaying tables in this database. For more, see *Hiding the Details for a Selected Record* on page 65. Note that you can still ask MainBoss to display the details panel for a particular table by pressing the button for displaying details.
>
> **Default MainBoss mode**: The default mode in which this database should be opened. If you do not specify a mode explicitly, the database will be opened in the given mode. For more on modes, see *Your Maintenance Organization List* on page 34.
>
> **OK**: MainBoss attempts to create a new demonstration maintenance organization database with the name you specified. You must have appropriate permissions to create this database.

Cancel: Closes the window without creating a database.

When you create a new database in this way, the "**Organization Name**" that you specify becomes that database's default organization name. When other people use **Add Existing Organization** to add that database to their list, they'll automatically inherit this default name. However, users can then use **Edit Organization** to assign a different "**Organization Name**" to the database. If a user does this, the new name is considered that user's personal name for the database—a name for that single user's convenience. When a user changes a personal "**Organization Name**", it has no effect on other users; it doesn't change the name/address printed on requests, work orders and purchase orders, nor does it change the default "**Organization Name**" when users add the database to their list of known organizations.

When you create a demonstration database (by clicking **Create Demonstration Organization**), the database is created using license keys that only allow operation in demonstration mode. This mode places restrictions on various tables (e.g. you can only create a limited number of work orders and requests). However, the database is ready to go as soon as it's created. You can turn a demonstration organization into a fully usable database by replacing the demonstration license keys with full-usage license keys supplied by Thinkage Ltd. or your MainBoss dealer.

Overwriting a Maintenance Organization with Data from a Backup File

You should backup your maintenance organization database on a regular basis. For an explanation of how to do this, see *Backups* on page 527. The *Installation and Administration Guide* provides additional information about backups and restores, including how to use SQL Server facilities directly.

To restore a backed-up database, you can use **Restore Organization** in the Maintenance Organization window (see *Your Maintenance Organization List* on page 34). This restore operation uses SQL Server facilities to overwrite an existing database with the data contained in a backup file.

Important Notes about Restoring Databases: There are two operations for restoring databases from backup:

☐ **Restore Organization** overwrites an existing database. First you select the database to be overwritten (by clicking on the entry for that database in your Maintenance Organization list), then you click on **Restore Organization** to specify the backup file you want to use.

Typically, you would use **Restore Organization** if you made some sort of large-scale error that you wanted to undo (e.g. mistakenly generating and committing a large number of planned maintenance work orders). **Restore Organization** is not intended for situations where your database is no longer usable (because it's been deleted or corrupted).

☐ **Create New Organization from a Backup** creates a new database using data from a backup file.

Typically, you would use **Create New Organization from a Backup** if your original database has been deleted or corrupted. You could also use this operation if you wanted to create a test database using data obtained from your production database.

In both cases, MainBoss performs the operation by submitting requests to SQL Server. You must therefore have SQL Server Administrator privileges to perform either operation.

Restore operations are run by SQL Server itself on the computer where SQL Server is running. Because SQL Server does the work, the backup file that will be used must be accessible to the login name under which SQL Server runs. Furthermore, the name of the backup file should be relative to the computer where SQL Server is running. Unless the file name explicitly begins with `\\computer` or a drive name (e.g. `C:\`), the file name will be assumed to be relative to SQL Server's home directory. (This is true even if the file name begins with a `\`.)

For example, suppose SQL Server is running on Computer X and you submit a restore request while working on Computer Y. MainBoss will ask you to specify the name of the backup file containing the database you want to restore. Suppose you give the name

```
C:\MyBackups\Monday.bak
```

You may think this refers to a file on Computer Y's `C:` drive. However, the restore operation is performed by SQL Server on Computer X; therefore, SQL Server will try to find the file on Computer X's `C:` drive, not Computer Y. If the directory `C:\MyBackups` doesn't exist on Computer X (or if SQL Server's login name doesn't have permissions to read that folder), you'll get an error message and the restore operation won't work.

For this reason, we recommend that you only submit restore requests while logged in to the computer where SQL Server is running. You should also be aware of what permissions SQL Server has and what files will actually be accessible to SQL Server's login name.

Command Format: When you click **Restore Organization**, MainBoss displays a window that contains the following:

Database Server: The network location of the SQL Server through which you will access the database. For more information, see the *Installation and Administration Guide*.

If you click the accompanying "..." button, MainBoss displays a list of database servers that are known to your Windows system. There may be additional servers that you can use but that Windows doesn't currently know about. For more, see *The Database Server List* on page 48.

Database Name: The name of the database you want to overwrite. If you want to see what MainBoss databases already exist, click the "..." button at the end of the "**Database Name**" line. (For more, see *The Database Name List* on page 48.)

Organization Name: A name that you personally will use for this database. It is *not* necessarily the name of the database itself (although it can be). Since this is just a label for your own convenience, it can contain blanks and other characters that aren't allowed in actual database names.

Note: MainBoss automatically fills in "**Database Server**", "**Database Name**" and "**Organization Name**" from the Maintenance Organization you selected before you clicked **Restore Organization**.

Make browsers smaller by not showing details for selected record by default: If you checkmark this box, MainBoss will automatically hide the details panel when displaying tables in this database. For more, see *Hiding the Details for a Selected Record* on page 65. Note that you can still ask MainBoss to display the details panel for a particular table by pressing the button for displaying details.

Default MainBoss mode: The default mode in which this database should be opened. If you do not specify a mode explicitly, the database will be opened in the given mode. For more on modes, see *Your Maintenance Organization List* on page 34.

Restore Data: Fill in the field with the name of a backup file or with an entry from your list of backup names (as given in **Administration** | **Backups**). If you choose a name from your list of backup names, MainBoss tries to restore from the associated backup file. For more on backup names, see *Backups* on page 527.

OK: MainBoss submits a request to SQL Server asking to overwrite the given database with data from the backup file. You must have appropriate permissions to perform this operation.

Cancel: Closes the window without restoring.

Note: Instead of using **Restore Organization**, you may prefer to use the standard restoration facilities within SQL Server Management Studio or Management Studio Express. For more information, see the *Installation and Administration Guide*.

Creating a New Maintenance Organization from a Backup File

You should backup your maintenance organization database on a regular basis. For an explanation of how to do this, see *Backups* on page 527 or the *Installation and Administration Guide*.

To create a new database using data from a backup file, you can use **Create New Organization from a Backup** in the Maintenance Organization window (see *Your Maintenance Organization List* on page 34).

Important Notes about Restoring Databases: There are two operations for restoring databases from backup:

☐ **Restore Organization** overwrites an existing database. First you select the database to be overwritten (by clicking on the entry for that database in your Maintenance Organization list), then you click on **Restore Organization** to specify the backup file you want to use.

Typically, you would use **Restore Organization** if you made some sort of large-scale error that you wanted to undo (e.g. mistakenly generating and committing a large number of planned maintenance work orders).

☐ **Create New Organization from a Backup** creates a new database using data from a backup file.

Typically, you would use **Create New Organization from a Backup** if your original database has been deleted or corrupted. You could also use this operation if you wanted to create a test database using data obtained from your production database.

In both cases, MainBoss performs the operation by submitting requests to SQL Server. You must therefore have SQL Server Administrator privileges to perform either operation.

Restore operations are run by SQL Server itself on the computer where SQL Server is running. Because SQL Server does the work, the backup file that will be used must be accessible to the login name under which SQL Server runs. Furthermore, the name of the backup file should be relative to the computer where SQL Server is running. Unless the file name explicitly begins with \\computer or a drive name (e.g. C:\), the file name will be assumed to be relative to SQL Server's home directory. (This is true even if the file name begins with a \.)

For example, suppose SQL Server is running on Computer X and you submit a restore request while working on Computer Y. MainBoss will ask you to specify the name of the backup file containing the database you want to restore. Suppose you give the name

```
C:\MyBackups\Monday.bak
```

You may think this refers to a file on Computer Y's C: drive. However, the restore operation is performed by SQL Server on Computer X; therefore, SQL Server will try to find the file on Computer X's C: drive, not Computer Y. If the directory C:\MyBackups doesn't exist on Computer X (or if SQL Server's login name doesn't have permissions to read that folder), you'll get an error message and the restore operation won't work.

For this reason, we recommend that you only submit restore requests while logged in to the computer where SQL Server is running. You should also be aware of what permissions SQL Server has and what files will actually be accessible to SQL Server's login name.

Command Format: When you click **Create New Organization from a Backup**, MainBoss displays a window that contains the following:

> **Database Server**: The network location of the SQL Server through which you will access the database. For more information, see the *Installation and Administration Guide*.
>
> If you click the accompanying "..." button, MainBoss displays a list of database servers that are known to your Windows system. There may be additional servers that you can use but that Windows doesn't currently know about. For more, see *The Database Server List* on page 48.
>
> **Database Name**: The name you want SQL Server to give to the new database. This name must be different from the names of any other databases on the server. For example, you can't name every database "MainBoss". If you want to see what MainBoss databases already exist, click the "..." button at the end of the "**Database Name**" line. (For more, see *The Database Name List* on page 48.)
>
> **Organization Name**: A name that you personally will use for this database. It is *not* necessarily the name of the database itself (although it can be). Since this is just a label for your own convenience, it can contain blanks and other characters that aren't allowed in actual database names.
>
> **Make browsers smaller by not showing details for selected record by default**: If you checkmark this box, MainBoss will automatically hide the details panel when displaying tables in this database. For more, see *Hiding the Details for a Selected Record* on page 65. Note that you can still ask MainBoss to display the details panel for a particular table by pressing the button for displaying details.
>
> **Default MainBoss mode**: The default mode in which this database should be opened. If you do not specify a mode explicitly, the database will be opened in the given mode. For more on modes, see *Your Maintenance Organization List* on page 34.
>
> **Restore Data**: Fill in the field with the name of a SQL Server backup file containing a backup of a MainBoss database.
>
> This field has an associated "..." button. If you are logged in to the same computer where SQL Server is running, clicking "..." opens a standard "file open" dialog to let you find the backup file you want.
>
> If you are logged in to any other computer, the "..." button does nothing and you must type in the backup file's name by hand. The name should start with \\computer or a drive name (e.g. c:\), or else it should be relative to the SQL

Server's default folder on the computer where SQL Server is running. (See above for more details on specifying the file name.)

OK: MainBoss submits a request to SQL Server asking to create the database you specified by restoring data from the backup file. You must have appropriate permissions to create this database.

Cancel: Closes the window without restoring.

> **Note:** Instead of using **Create New Organization from a Backup**, you may prefer to use the standard restoration facilities within SQL Server Management Studio or Management Studio Express. For more information, see the *Installation and Administration Guide*.

The Backup File List: When you create a new organization from a backup file, the new organization will have the same list of backup files (in **Administration** | **Backups**) as the original database. This can lead to serious confusion if you're still using the original database.

For example, suppose you intend to use **Create New Organization from a Backup** to create a test database using data from a backup of your production database. This is a valid (and sometimes useful) thing to do, but it means that your new test database will have the same list of backup files as your existing production database. If you try to use **Administration** | **Backups** to backup the test database, you may well overwrite one of your production backups. For this reason, when you create a test database, we strongly recommend that you edit the names in **Administration** | **Backups** to refer to new backup files that will *not* be the same as your production backups.

Changing Organization Information

You can change information about an existing organization database by clicking **Edit Organization** in the Maintenance Organization window (see *Your Maintenance Organization List on page 34*). For example, if your organization changes the location of your MainBoss database, you must change the corresponding information in your Maintenance Organization list.

When you click **Edit Organization**, MainBoss opens a window where you can specify database information:

Database Server: The network location of the SQL Server through which you will access the database. This must be the server that now manages the database.

If you click the accompanying "..." button, MainBoss displays a list of database servers that are known to your Windows system. There may be additional servers that you can use but that Windows doesn't currently know about. For more, see *The Database Server List on page 48*.

Database Name: The name of the database, as known to the SQL Server. This must be the name that SQL Server uses to refer to the database.

Organization Name: The name you wish to associate with the maintenance organization database. This is your own private name for the database; you can change "**Organization Name**" any time you like.

Make browsers smaller by not showing details for selected record by default: If you checkmark this box, MainBoss will automatically hide the details panel when displaying tables in this database. For more, see *Hiding the Details for a Selected Record* on page 65. Note that you can still ask MainBoss to display the details panel for a particular table by pressing the button for displaying details.

Default MainBoss mode: The default mode in which this database should be opened. If you do not specify a mode explicitly, the database will be opened in the given mode. For more on modes, see *Your Maintenance Organization List* on page 34.

OK: Makes the changes you have entered.

Cancel: Closes the window without making changes.

The Database Server List

If you click the "..." associated with "**Database Server**" in windows for specifying databases, MainBoss displays a list of SQL Servers that are known to your Windows system. This may not be a complete list of the servers you can actually use; in particular, it's possible for a system to set up its firewall in such a way that it has a SQL Server available for use but other computers aren't told about the server unless they ask. In this situation, your Windows system won't know the server is available, but you can use the server if you explicitly specify its name.

For more on SQL Server, including a number of configuration tips, see the *Installation and Administration Guide*.

The Database Name List

If you click the "..." associated with "**Database Name**" in windows for specifying databases, MainBoss displays a list of MainBoss databases maintained by the SQL Server specified in "**Database Server**". (If you haven't filled in "**Database Server**", MainBoss can't display any databases.)

The window has two columns:

Database column: If you are performing **Restore Organization**, **Add Existing Organization** or **Edit Organization**, the database column shows you the names of MainBoss databases that already exist on the server.

If you are creating a database, the column shows you the names of *all* databases that exist on the server (provided you have permissions to see them); in this case, the list is intended to show you names that are already in use, to let you choose a *different* name.

Organization Name: Displays the default organization names of the databases. For each database, this is the organization name specified at the time the database was created.

If you want to create a new database, you should choose some name that is *not* shown in the list. (Note that the window only shows MainBoss databases. If there are any non-MainBoss databases maintained by the same SQL Server, those databases do not appear in the list.)

Note: The list only shows MainBoss databases for which you have SQL Server permissions.

If you want to add an existing database to your list of known databases, you can click on the appropriate name in the list. Adding a name to your list of known databases doesn't necessarily give you access to that database—you still have to be on the database's list of authorized users (**Administration** | **Users**).

Command Line Options

Command line options let you control how MainBoss begins execution. For example, if you want to start MainBoss in Requests mode without having to go through the Maintenance Organization List, you can specify the mode as an option on the command line. Typically, you would create a desktop shortcut whose command line contains appropriate options, so that you don't have to type them in each time you start the program.

If your site uses ClickOnce deployment, you cannot specify command line options when you invoke MainBoss. For further information on ClickOnce, see the *Installation and Administration Guide*.

The general format of the command line is

```
mainboss option option option...
```

Options begin with a slash (/) character. If an option specifies a value, the format is

```
/option:value
```

as in

```
/DataBaseName:MyDatabase
```

Values that contain space characters should be quoted as in

```
/OrganizationName:"Our Organization"
```

Abbreviations: Most keywords on the MainBoss command line may be abbreviated. In MainBoss documentation, the letters that *must* be included are shown in upper case; any or all other letters may be omitted. For example, the following are all valid abbreviations for the option `/DataBaseName`

```
/databasename
/databasen
/dbname
/dbn
```

Although the documentation shows some letters in upper case and some in lower, you can type letters in any case you want. For example, `/DBN` is exactly the same as `/dbn` or `/Dbn` on the MainBoss command line.

Options: The following options are recognized:

`/CultureInfo`: The Windows "culture" setting to be used. (A *culture* is a collection of information about language and other locale-based information, e.g. what monetary symbols are used in a particular place.) By default, MainBoss normally takes its culture information from your Windows Regional Settings; it then attempts to operate in the language given by those settings (e.g. MainBoss attempts to run in French if that's what your settings dictate). However, if you specify a `/CultureInfo` argument on the command line, the argument overrides the Regional Settings. This is particularly useful if you're creating a batch command file or shell script that you want to have work in a specific language, no matter what the user's Regional Settings might be.

The argument of `/CultureInfo` is the official Windows "CultureInfo" string name for the desired culture. For example, if you want generic Spanish, you'd specify `/CultureInfo:es-ES`; for U.S. English, you'd use `/CultureInfo:en-US`. See your Windows documentation for recognized "CultureInfo" string identifiers.

Options on the command line are not affected by `/CultureInfo`. For example, the option `/Mode:Requests` does *not* change if you switch to a language where "requests" is translated to a different word.

> **Note:** If you change the culture information with `/CultureInfo`, MainBoss makes the change *after* the command line arguments have been parsed. This means that if your command line has syntax errors, you may see error messages in the user's original preferred language, not in the language specified by `/CultureInfo`.

`/OrganizationName`: The name of the maintenance organization. If you specify an organization name, MainBoss looks up that name in your organization table and attempts to open the corresponding database with the start mode specified in the organization list. (See below for more on start modes.)

`/DataBaseServer`: The database server where the MainBoss database is hosted.

/DataBaseName: The name of the database containing the MainBoss data on the database server.

If you specify /OrganizationName, you don't have to specify either /DataBaseServer or /DataBaseName. If you don't specify /OrganizationName, you must specify both /DataBaseServer and /DataBaseName.

/Mode: Mode for starting the software. Possible start modes are described in *Your Maintenance Organization List* on page 34.

/Mode:MainBoss

/Mode:"MainBoss Requests"

/Mode:Administration

/Mode:"View Sessions"

/Mode:"Pick Organization"; with this mode, MainBoss starts by displaying your organization list so you can pick which one you want to open

/HelpManualPath: The URL location for MainBoss's documentation.

+CompactBrowsers: Invokes MainBoss in a mode that initially hides the details panel for records selected in table viewers. For more, see *Hiding the Details for a Selected Record* on page 65.

-CompactBrowsers: Tells MainBoss not to hide details panels.

The MBUtility command is another way of performing certain MainBoss operations using a command line interface. For more on MBUtility, see the MainBoss *Installation and Administration Guide*.

International Language Support

When you start MainBoss, it checks the Regional Settings that you have specified for Microsoft Windows. If your preferred language is supported by MainBoss, the software will run in that language. For example, if you prefer to work in French and your version of MainBoss supports French, MainBoss will operate in French for you (although it may operate in English for some other user).

It's important to understand that MainBoss only translates its own labels and messages, not user data. For example, the priority codes assigned to work orders are created by you, not by MainBoss. Therefore, those codes will never be translated. For example, if you create a code called Urgent, this word will never be translated into other languages—it's *your* data, not part of MainBoss itself. The same is true of work categories, item names, work order instructions, and much more.

For this reason, trying to operate in more than one language is usually impractical—if you use multiple languages, everyone working with MainBoss may have to understand all the languages you use.

> **Note:** MainBoss depends on various Microsoft software including SQL Server and the Microsoft Report Viewer. This Microsoft software is independent of MainBoss, including language support. In particular, report-viewing facilities will be in the language of your report viewer, which may or may not be the same language used by MainBoss. Similarly, diagnostic messages generated by SQL Server may or may not be in the same language as MainBoss.

Note that changing Regional Settings may also change the currency symbol (e.g. from "$" for dollars to "£" for pounds). However, MainBoss cannot handle multiple currencies; it assumes that all money values are in the same currency. For example, if you enter 33 in a "**Unit Cost**" field, MainBoss may display the result as $33.00 or £33.00 depending on your Regional Settings...but internally, MainBoss simply record 33.00. Therefore, it is important that all MainBoss users use the same currency for all money values.

Fixed-language information: A certain amount of standard information is stored in the MainBoss database at the time the database is created. For example, the names of work order states (Draft, Open, Closed, Void) are determined at the time the database is created. If possible, these names will be in the preferred language of the person who creates the database. If, for example, the database creator prefers English, the database will record these state names in English. All other users will see the names in English, regardless of each user's preferred language. This will be true for:

☐ State names for work orders, requests and purchase orders

☐ The names of the actions which change from one state to another (e.g. Reopen which changes a closed work order back into an open one)

☐ Descriptions and comments for security roles

> Because these names are determined at the time the database is created, whoever creates the database should make sure that his or her regional settings are set to the language that will be most acceptable to the organization as a whole.

Upgrading Maintenance Organizations

If you have created a maintenance organization with an earlier version of MainBoss Advanced, you can upgrade it to the current version.

> The following information applies to upgrading data from an earlier version of MainBoss Advanced. For importing data from MainBoss Basic, see the *Installation and Administration Guide*.

Before you upgrade your database, create a backup copy using the standard back-up procedures of SQL Server. This protects your data in the event of a power failure or some other problem.

To upgrade your maintenance organization, click **Upgrade** (as described in *Your Maintenance Organization List* on page 34). This opens a window that provides information on your maintenance organization and your current version of MainBoss. The window also contains the following buttons:

Upgrade: Click this to go ahead with the upgrade process.

Close: Closes the window (whether or not you've upgraded the database).

Viewing MainBoss Sessions

If you open your maintenance organization in **Sessions** mode, MainBoss displays a list of users who are currently connected with your organization's database.

For information on connecting to MainBoss in **Sessions** mode, see *Your Maintenance Organization List* on page 34.

Quitting MainBoss

To quit MainBoss, simply close all open MainBoss windows (by clicking the X in the upper right hand corner). Alternatively, you can select **Session** → **Exit** from the menu.

Exiting the control-panel window does *not* close any other MainBoss windows you have open. They must each be closed individually.

MainBoss Solo Setup

When you first start using MainBoss Solo, you see the *setup* window. This window contains a number of buttons that perform very basic MainBoss operations.

Start: Starts a MainBoss Solo session.

Create: Creates a MainBoss database. The database is always created in the file `Documents\MainBoss\MainBossSolo.mdf`. (If you have an older version of Windows, Solo uses `"My Documents"` instead of `"Documents"`.)

If you already have a database in the given file, the **Create** button is disabled—you cannot create a new database if you already have one.

Delete: Deletes your current MainBoss database file. All data in the database file will be erased. Obviously, you should never use **Delete** if your database contains anything you want to keep; however, you might use **Delete** if you have simply

been experimenting with Solo and want to start over from scratch. You might also use **Delete** if you intend to **Restore** your database from a backup.

Restore: Overwrites the current contents of your database (if any) with data stored in a backup file. All current contents of the database will be lost.

In order to use **Restore**, you must have an existing backup file made using MainBoss's backup facilities. For more information, see *Backups* on page 527.

Update License: Opens a window where you can enter a new license key for your software. Licenses for Solo typically last a year. As you approach the expiry date, Solo warns you that your license will soon expire; after the expiry date, you cannot **Start** Solo until you obtain a new license.

Upgrade: Upgrades your database after you have installed a new version of Solo.

Installing new software usually happens automatically—whenever you start Solo, the startup software checks to see if a new version is available, and if so, the startup software automatically installs the new version. Sometimes, a new version will introduce features that necessitate changes in the database file; if so, Solo will tell you that you need to **Upgrade** your database. At any other time, the **Upgrade** button will be disabled. This indicates that upgrading isn't needed.

Copy Shortcut: Creates a shortcut icon for Solo on your Windows desktop. Under normal conditions, this is only necessary once. However, if a new version of Solo is installed, you may need to create a new shortcut that refers to the new version.

If you are already using Solo and want to return to the setup window, you can do so by going to the **Session** menu and clicking **Setup**.

The MainBoss Status Display

When you start MainBoss (after you've chosen a maintenance organization, if necessary), you'll see the *MainBoss Status* display. This gives you a quick snapshot of the most important aspects of your current work: work requests that are new or in progress, work orders that are overdue, and so on. In this way, you can see anything that might demand immediate attention.

The **Refresh** button in this window updates the numbers to reflect any recent changes made by other people.

Keyboard Shortcuts

MainBoss allows standard Windows keyboard shortcuts such as **<Ctrl+C>** for copy and **<Ctrl+V>** for paste. You can also use **<Tab>** to move to the next field in a window; if you're filling out a form, you can just tab from one field to another rather than using the mouse. **<Shift+Tab>** moves backward to the previous field.

MainBoss buttons often allow keyboard shortcuts. To see the shortcuts in a window, press the **<Alt>** key. One letter of each button will be underlined, as in **S̲ave**. Pressing **<Alt>** plus the underlined letter is equivalent to clicking the button, so that **<Alt+S>** is equivalent to clicking the **S̲ave** button.

View Menu

The **View** menu has the following options:

Zoom in on View: If you click this menu item, MainBoss will hide the control panel in this window. If you were looking at a table viewer, you will see an enlarged version of the **View** section (without the **Defaults** section, even if you were just looking at that section). If you were looking at a report window, you will see all sections of the window.

When you are zoomed in like this, **Zoom in on View** will be marked with a checkmark in the **View** menu. To zoom out again, click **Zoom in on View** again. This returns to the window's usual appearance.

Open in New Window: If you click this menu item, MainBoss opens a duplicate of the current window.

Change Active Filter: This item lets you change the definition of "active" requests, work orders and purchase orders. For example, you can specify that these records should only be considered active if their most recent history record is less than a year old. For more information, see *The Active Filter* on page 55.

Show compact browsers: If this is checkmarked, table viewers will not show details from the currently selected record. This makes it possible to show many more records in the table viewer window. If the entry is not checkmarked, table viewers will have an area showing the contents of the currectly selected record; this reduces the number of records that the window can show at any one time.

The Active Filter

The *active filter* determines what counts as `Active` in the request, work order and purchase order tables. In other words, it determines what a table will display when the word `Active` appears in the table's bottom right-hand corner.

Requests, work orders, and purchase orders are always considered active until they are closed or voided. For example, if a work order is open, its age doesn't matter—it will be active until you close it.

To set your active filter, go to the **View** menu and click **Change Active Filter**. This opens a window that contains the following:

Show only records less than this many days old: You can set this field's value to a number. If you do, requests, work orders and purchase orders will only be considered `Active` if their most recent history record is less than the given number of days old. For example, if you set the value to 400, the only active requests, work orders and purchase orders will be ones whose histories have changed in the past 400 days. Typically, this means you won't see any requests, work orders and purchase orders that were closed more than 400 days ago.

Show only records since: You can set this field's value to a date. If you do, requests, work orders and purchase orders will only be considered `Active` if their most recent history record was created after the specified date. For example, if you set the value to `January 1, 2009`, the only active requests, work orders and purchase orders will be ones which have had some activity since that date.

The options you set through the **View** menu only affect your own MainBoss sessions. For example, if you only want to see very recent records, you might set "**Show only records less than this many days old**" to 30. MainBoss would only show you requests, work orders and purchase orders less than 30 days old. You can change this number at any time.

The more information that your active filter excludes, the faster MainBoss can operate—it takes less time to obtain records from the database and to format that information. Furthermore, your windows will contain less old information and therefore less "clutter". On the other hand, you don't want to exclude too much or you might miss out on important requests/work orders/purchase orders that are older than you expect.

> Your MainBoss administrator can use **Administration** | **Company Information** to set active filter defaults for everyone who uses the MainBoss database. For more, see *Company Information* on page 509.

The Actions Menu

The contents of the **Actions** menu depend on what you've currently selected in the control panel. For example, if you've currently selected **Units** in the control panel, the **Actions** menu will have entries for creating a new unit, editing an existing one, deleting a unit, and so on. **Actions** entries usually correspond to buttons in the same window (e.g. **New Unit** corresponds to the **New Unit** button and has the same effect).

Obtaining Online Help

There are several ways to obtain online help while using MainBoss:

☐ Clicking the Help button at the bottom of the window displays information about the window currently on the screen.

☐ Pressing the **<F1>** function key provides the same information as the Help button.

☐ The MainBoss **Help** menu provides access to MainBoss's help files.

> ☐ **Help → Contents** gives you the table of contents for the help files.
>
> ☐ **Help → Help Index** gives you an index of important terms.

Important: In order for you to access online help, you must have a web browser configured to open HTML files. Most users will already have their computers configured appropriately (probably using Microsoft Internet Explorer or Mozilla Firefox). If you don't have a browser configured, open Windows Explorer and double-click on any HTML file (for example, any of the `.htm` files in the `manual` subdirectory of the directory where MainBoss is installed). Windows will ask you to specify a program with which to open the file; specify the browser on your system. If your system does not have a browser, you can obtain one free from Microsoft, Mozilla, or several other software companies. Ask your computer dealer for more information.

The About Screen

The About window displays information about MainBoss. To see the window, select **Help → About** from the menu. The window includes the following:

☐ What version of MainBoss you're using

☐ What database you're using and the SQL Server that allows you access to the database

☐ Copyright information

☐ An **Ok** button; click this to close the window

Tooltips

A tooltip is a small message that may appear if you point the cursor to something on your monitor screen. MainBoss uses tooltips to explain any situations that may be confusing.

For example, if you don't have appropriate security permissions, you may not be allowed to fill in certain information fields or to click certain buttons. In this case,

pointing the cursor to the field or the button will produce a tooltip message explaining the situation (and telling what security roles you'd need in order to use the field or button).

Similarly, if you've filled in a field with an unacceptable value, MainBoss will display an error marker. Pointing the cursor to the error marker will display a tooltip explaining why the value is unacceptable. (For example, MainBoss may expect the field to contain a date rather than what you've typed in.)

> If you're ever confused about MainBoss's behavior, use the cursor to obtain tooltips. These should help you figure out what's happening.

MainBoss Diagnostic Messages

MainBoss displays messages in a variety of situations. For example, if you attempt to save a record before you've filled in all the required fields, MainBoss opens a message window to explain the situation.

Tables

Table Viewers and Editors

Much of your work with MainBoss is done using table viewers and editors:

☐ A table viewer is a window that shows you a list of things. For example, the Work Order table viewer shows your work orders.

  ☐ A table viewer window has buttons that let you add new entries to the list, and modify or delete existing entries. For example, the Work Order viewer lets you create new work orders or edit existing ones.

  ☐ Table viewers also let you search for items. For example, suppose you want to record some information about a piece of equipment. You would open the Units viewer and use it to search your unit list until you found the appropriate piece of equipment. You could then use the table viewer to tell MainBoss that you wanted to edit the information for that piece of equipment.

  ☐ Table viewers let you print information about items in the list. For example, if you want to print out one or more work orders, you open the Work Order viewer, then click the **Print** button.

  ☐ Table viewers may let you perform additional actions which are specific to the type of information displayed by the viewer. For example, the Requests viewer lets you create a work order from a selected request.

☐ An editor is a window that shows you information about a single thing. For example, the Work Order editor shows information about a particular work order.

  ☐ MainBoss opens an editor window when you want to create a new record or edit an old one. For example, when you want to create a new work order, MainBoss opens the Work Order editor window. When the window first appears, all its data fields will be blank or set to default values. You can then specify the information you want.

  ☐ Later on, if you want to change some of the information in the same work order, you open the Work Order editor again. This time, the editor shows you all the information that you entered when you originally created the work order.

The Basic Principle: A table viewer shows a list of records. An editor shows a single record.

Active and All in Table Viewers

In the bottom right hand corner of most table viewers and editor windows, you'll see either `Active` or `All`:

☐ If the word is `Active`, lists of records displayed in the window only include *active* records. This means that the window only shows records that haven't been deleted. For requests, work orders, and purchase orders, it also means that it only shows records that are "recent". By default, a record is "recent" if it's less than 500 days old; your MainBoss administrator may use **Administration** | **Company Information** to change what counts as "recent."
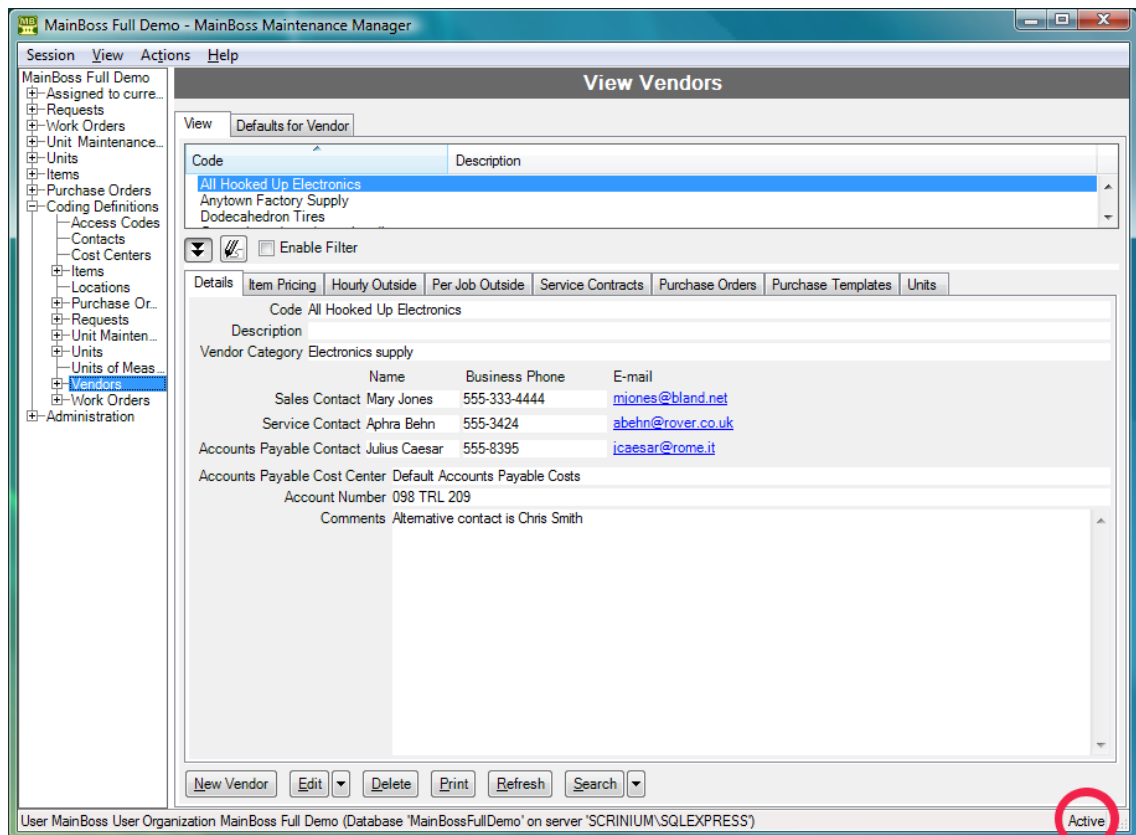
☐ If the word is `All`, the viewer is showing *all* records, no matter how old, including those that have been deleted. Deleted records are marked with a red X on the left. (Note that if you have many old records, MainBoss may take a considerable time to obtain them all from the database.)
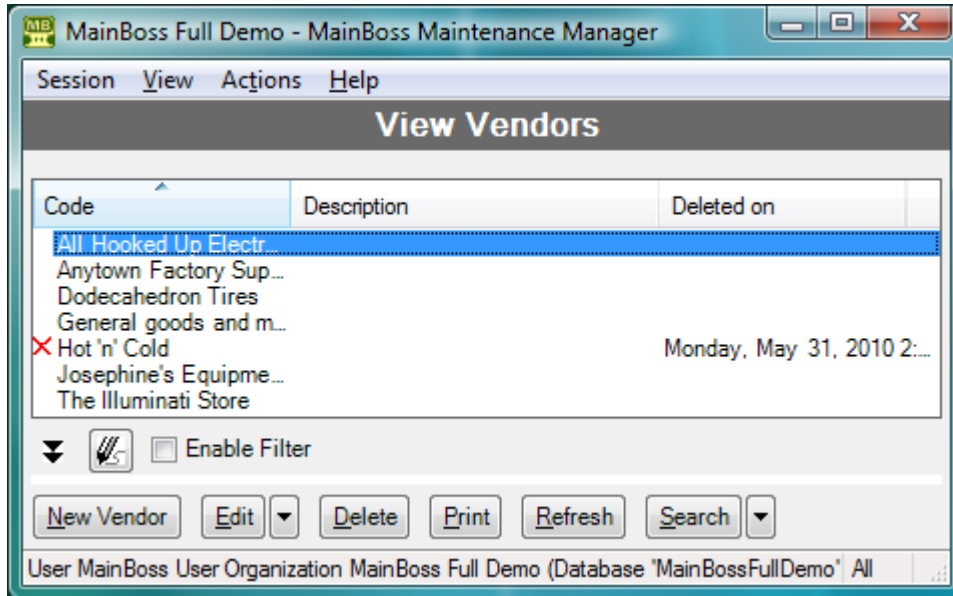
MainBoss never completely erases deleted records. This makes it possible to maintain a complete audit trail of everything you do.

Retaining old records can also be helpful to your operations. For example, six months after you decide not to keep a particular item in inventory, you might change your mind and decide to stock it again...in which case the old record is still available. As another example, you might be reviewing old work orders and find a reference to the item you no longer keep in stock. You can find out more about that item because its record is still available in the deleted list.

MainBoss also retains deleted records to avoid database errors. For example, suppose you delete the record for an item but that item is still used in some planned maintenance task. If the item record completely disappeared, the task description would be referring to a record that wasn't really there. Keeping deleted records avoids such problems.

To switch from `Active` to `All` or vice versa, *double-click* the word. You'll see deleted records appear or disappear.

The **Restore** button lets you bring back a selected record. MainBoss opens a window where you can examine the record to be restored and make changes, if necessary. When you save the record and close the window (typically by using **Save & Close**), the record will be restored to the active list.

Records That Refer to Deleted Information: When you delete a record, it's possible that other records still refer to it. For example, suppose a worker leaves your organization so you delete that person from your **Employees** list. That worker's name will still appear in old records (e.g. work orders that the person worked on).

MainBoss indicates that a record has been deleted by ~~striking out~~ information from the record. For example, if you delete Joe Smith's employee record, all work orders that refer to that person will show the name as ~~Joe Smith~~. This shows that the associated employee record has been deleted (and will reduce your confusion when you can't find Joe Smith's name in your list of `Active` employees).

Using Table Viewers

The picture below shows a typical MainBoss table viewer:
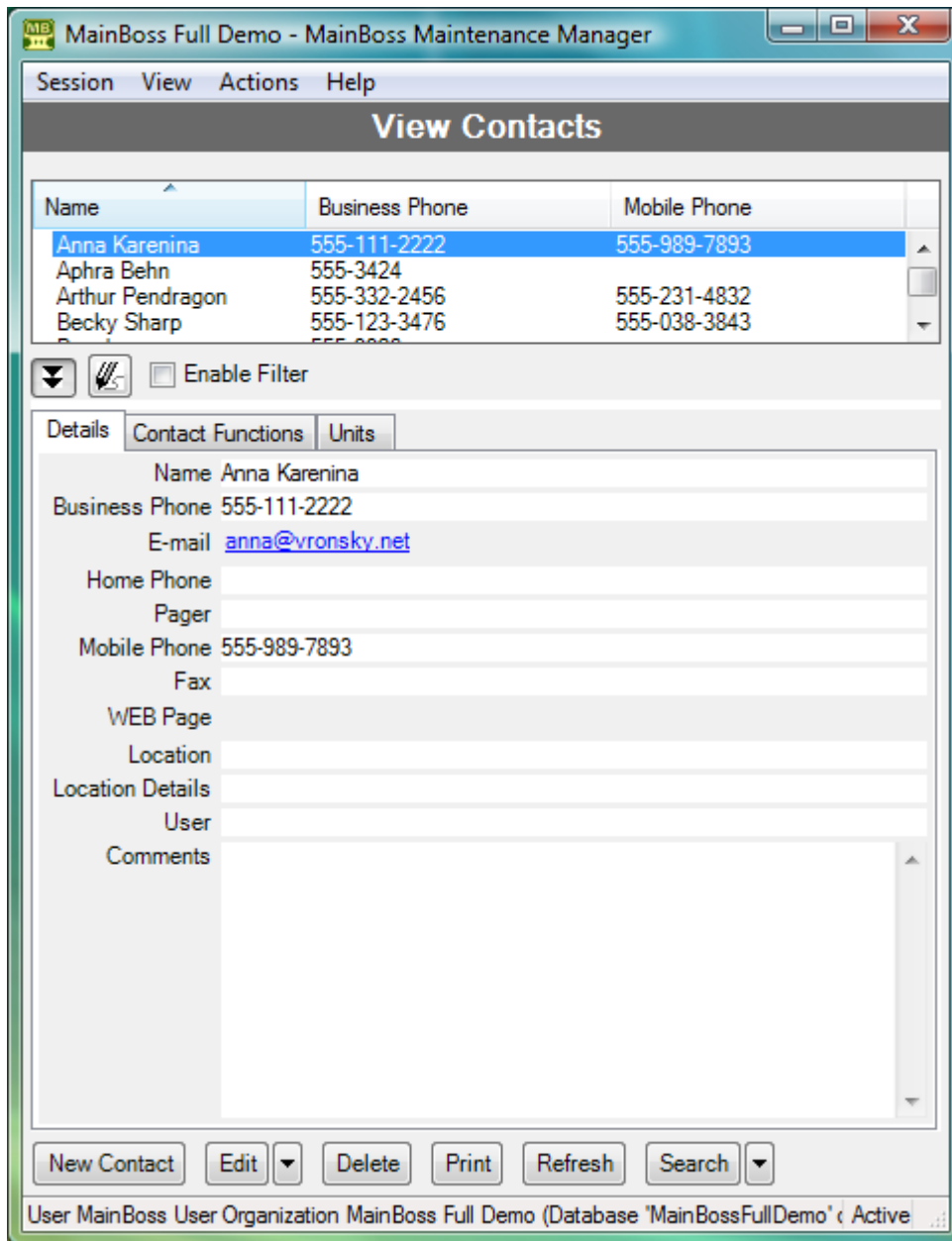
This window contains a lot of elements. The following list explains what those elements are and how you can use them:

The **View** list: The **View** section in a table viewer shows you a list of records. The list has several headings; in the above example, the headings are **Name** and **Business Phone**. Different table viewers may have different headings.

Clicking on a heading sorts the list according to that heading. For example, if you click on **Name**, the list is sorted in alphabetical order according to the values in the **Name** column. If a list is already sorted according to the heading, clicking on the heading reverses the order from ascending to descending or vice versa. For example, if the list is already sorted in ascending order by **Name**, clicking **Name** again sorts the list in *descending* order by **Name**. The heading that is currently being used for sorting has a small arrow at the top pointing upward if the list is sorted in ascending order, and downward for descending order.

Note: Double-clicking any entry in a table list opens a window that lets you edit that entry. For more about editor windows, see *Using Editors* on page 71.

Data displays: In addition to the list of records, a table viewer shows information on the record that's currently selected. This information is usually displayed below the main list. However, you can tell MainBoss not to show this information, if you want to have more room for the record list. For more information, see *Hiding the Details for a Selected Record* on page 65.

Defaults: The **Defaults** section lets you set default values to be used when creating a new record. For example, you might use this section to set a default priority for every new work order you create. When using MainBoss, you can set a particular work order to a higher or lower priority, but by specifying a default priority, you can save yourself the trouble of filling in the priority field for work orders that have no special priority.

Buttons: The bottom of a table viewer has a row of bottoms. Different table viewers have different buttons, but the following are found in most viewers.

New: Lets you create a new record. Click **New**, and MainBoss will open an editor window where you can enter information for the new entry.

Edit/**View**/**Restore**: This drop-down button offers several possible actions. Some of these may not be allowed by your security permissions; if so, the action will be grayed out and disabled. For example, your security permissions may let you **View** the contents of the record but not **Edit** them. For more on security permissions, see *Security Roles* on page 517.

The actions available through this drop-down button are:

Edit: Lets you change the information in an existing record. In the table list, click the record you want to change, then click **Edit**. MainBoss opens an editor window where you can change the existing information.

View: Lets you examine the contents of an existing record. In the table list, click the record you want to examine, then click **View**. MainBoss opens an editor window where you can examine the record. You will not be allowed to make changes in the record.

Restore: Restores a deleted record. This button is only active if the viewer is in `All` mode and if you've selected a deleted record. When you click **Restore**, MainBoss will open a window that lets you examine the contents of the deleted record. If you save the record and close the window, the record will be restored to the `Active` list.

For more on deleting and restoring records, see *Active and* All in Table Viewers on page 60.

Delete: Deletes a record from the list. Click the record you want to delete, then click **Delete**. MainBoss may ask if you really want to delete the record; if you say yes, the record is deleted.

Print: Opens a window that lets you print one or more records from the list. This print window lets you specify options for selecting and organizing what you want to print.

Search: Lets you search through the list of records for a particular record. For more information, see *Searching for a Particular Record* on page 66. The **Search** button has an accompanying drop-down list containing the following:

Find Next: Uses the same search condition(s) as your most recent search and finds the next record in the table that matches the condition(s). If the search reaches the end of the table without finding a matching record, it goes to the start of the table and continues the search.

Find Previous: Same as **Find Next** except that it goes backward in the table. If the search reaches the start of the table without finding a matching record, it goes to the end of the table and continues the search.

Refresh: Updates the list to show any recent changes. For example, suppose you keep a copy of the **Requests** viewer open most of the time. When you start work in the morning, you can click **Refresh**. MainBoss will check the database to see if any new requests have come in overnight, and will show those new requests in the viewer list.

Many operations automatically refresh what the viewer shows. In general, you only need to **Refresh** the viewer display if the window has been inactive for a while.

Drop-down buttons: Some windows (both table viewers and editor windows) have drop-down buttons. This is a button followed by a drop-down arrow:
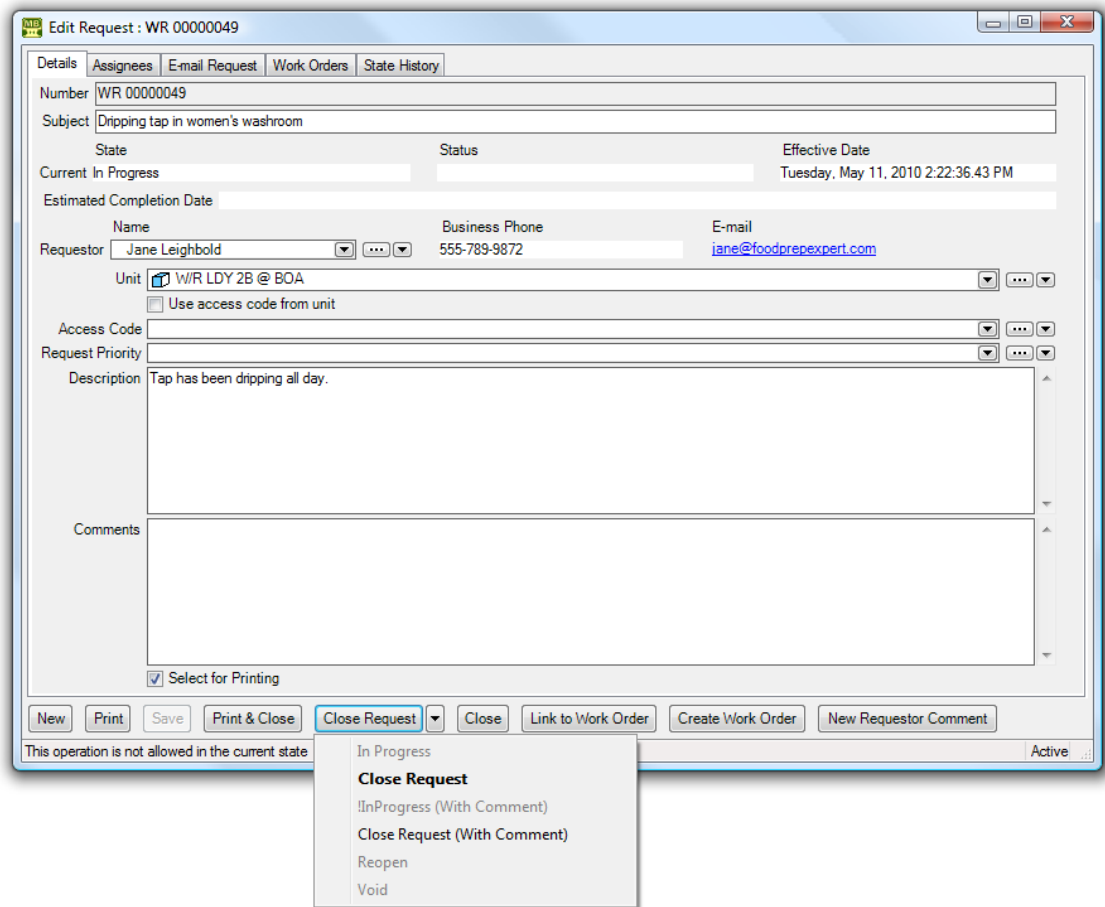
The label on the button will be the first enabled option in the drop-down menu. This may change in different contexts. (MainBoss documentation always lists the drop-down options in the order they appear in the menu, which may or may not match the order you'll see them in a particular context.)

> Buttons and drop-down buttons may be grayed out; this means that they're disabled. A button may be disabled because it is inappropriate in the current context; for example, the button for closing a work order is disabled if the work order is already closed. A button may also be disabled if you do not have appropriate security permissions to use it.

Hiding the Details for a Selected Record

By default, when you select a record in a table, the table viewer displays information from that record. Typically, this is shown in a *details panel* beneath the list of records in the table.

If your computer has a small monitor screen, you may decide that the details panel takes up too much room on the screen. If so, you can tell MainBoss not to display the details panel; you do this by clicking the following button:

When you click this button, the details panel disappears. The list of records can then use the space that was previously occupied by the panel.

If you want to see the details panel again, click the same button.

We recommend hiding record details in this way if you have a monitor screen whose resolution is less than 1280 by 1024.

Searching for a Particular Record

When you click the **Search** button in a table viewer, MainBoss opens a window where you can specify information about the record you want to find. This window contains the following:

Field: Specifies the field whose values you want to search. Different tables allow you to look at different fields. For any particular table, look at the drop-down list to see what fields can be searched.

Search condition: Once you specify a field, MainBoss lets you choose conditions for the search. The available conditions depend on the type of value that the field contains. For example, if you select a field that contains a date, MainBoss displays conditions related to dates; if you select a field that contains text information, MainBoss displays conditions related to text strings. Possible conditions are:

Equals: If you select this option, MainBoss will only find fields whose entire value is equal to the given value. For example, if you set the initial field to "**Code**" and the value to `abc`, MainBoss searches for records whose code is `abc`.

Starts with: If you select this option, MainBoss will only find fields that start with the given value. For example, if you set the initial field to "**Code**" and the value to `abc`, MainBoss searches for records whose code begins with `abc`.

Contains: If you select this option, MainBoss finds fields that contain the given value anywhere. For example, if you set the initial field to "**Code**" and the value to `abc`, MainBoss searches for records whose code contains `abc` anywhere in the code's text.

Matches pattern: If you select this option, MainBoss treats the contents the given value as a *regular expression* as defined in the Microsoft .NET

environment. Regular expressions are primarily intended for technically sophisticated users; for an introduction, see

`http://www.codeproject.com/KB/dotnet/regextutorial.aspx`

Is null: If you select this option, MainBoss looks for records where the specified field is blank. For example, suppose you are searching through work orders; if you set the initial field to "**Closing Code**" and specify **Is null**, MainBoss will only find work orders that don't have a closing code.

Is not null: MainBoss will find the next record where the field's value is not blank.

Is on or after: Used when searching by dates. (You can specify a date but not a time.) MainBoss will find the next record where the field's value is on or after the given date.

Is on or before: Used when searching by dates. (You can specify a date but not a time.) MainBoss will find the next record where the field's value is on or after the given date.

Is in the range: Used when searching by dates. (You can specify a date but not a time.) MainBoss will find the next record where the field's value is between the given dates. The starting and ending dates are considered in the range. For example, if you specify "**Is in the range**" with June 1 and June 4, MainBoss will find the next record where the field's value is June 1, June 2, June 3, or June 4.

Is less than: Used when searching for numeric values. MainBoss will find the next record where the field's value is less than the given number.

Is less than or equal to: Used when searching for numeric values. MainBoss will find the next record where the field's value is less than or equal to the given number.

Is greater than: Used when searching for numeric values. MainBoss will find the next record where the field's value is greater than the given number.

Is greater or equal to: Used when searching for numeric values. MainBoss will find the next record where the field's value is greater than or equal to the given number.

Is not equal to: Used when searching for numeric values. MainBoss will find the next record where the field's value is not equal to the given number.

Is between: Used when searching for numeric values. MainBoss will find the next record where the field's value is between the given numbers.

Add: If you click this button, the search window expands to allow another condition to be added to the search. You can click this button several times to get multiple search conditions (up to a total of six).

If you specify multiple conditions, the search finds records that satisfy *all* the specified conditions. For example, suppose you're searching the **Items** table. You specify one condition to search `Item Category` for `Electrical Supplies`. You specify a second condition to search `On Order` for quantities greater than zero. Then MainBoss will find items whose category is `Electrical Supplies` *and* whose on-order number is greater than zero. In other words, this search finds electrical supplies which are on order.

Find Next: Searches the list. The search starts immediately at the selected record and finds the matching next record. If the search reaches the bottom of the list, it will wrap around to the top of the list and continue searching.

Find Previous: Is similar to **Find Next** except that the search goes backward instead of forward. If the search reaches the top of the list, it will wrap around to the bottom and continue searching.

If you try a search and MainBoss finds no matching records, the **Find Next** and **Find Previous** buttons are disabled—MainBoss can't find the next or previous matching record if there are no matching records at all.

Drop: Removes the search condition beside the button. For example, if you have three search conditions (created by clicking **Add** twice), clicking any of the **Drop** buttons removes the associated search condition, leaving only two conditions in the search.

Close: Closes the window. The table viewer will be positioned at the record found by the most recent successful search.

Note: If the search window happens to be covering up the record that's just been found, you can use the mouse to drag the search window to a different place on the screen.

Notes: In any table viewer, the shortcut sequence **<Ctrl+F>** opens the search window. The search will be applied to whatever list of records you clicked most recently. For example, if you most recently clicked a list of unit records, **<Ctrl+F>** will let you search through units; however, if you were looking at a unit record and your most recent click was on the unit's list of service contracts, then **<Ctrl+F>** would search through service contracts. (**<Ctrl+F>** will not work if your most recent click was on the MainBoss control panel—it only works if your most recent click was in some sort of table viewer.)

If the search window is not open, the **<F3>** function key has the effect of **Find Next**, searching for whatever you searched for most recently. This means that pressing **<F3>** repeatedly will perform the same search over and over. Note that your most recent search may not be valid for the current table; for example, if you search the **Items** table for an item category, then switch to the **Units** table, searching for item category doesn't make sense. In this case, **<F3>** just opens the search window.

Table Filters

A *table filter* tells MainBoss to display a subset of all the records that are in a particular table. In this way, it "filters out" records that you don't want to see.

For example, suppose you want to see which jobs are scheduled to begin today. You could set up a filter on the **Work Orders** table saying that you only want to see work orders whose "**Work Start Date**" is today. MainBoss would then filter out any work orders that started on some other day, so that the table viewer only displays work orders starting today.

As another example, suppose you only want to see information on units in your HVAC system. You could set up a filter on the **Units** table saying that you only want to see work orders whose "**System**" is HVAC. MainBoss would then filter out non-HVAC unit records, so that the table viewer only displays HVAC units.

You can specify a filter in any table viewer. To do so, click the filter set-up button beneath the table's list of records:

This opens a window similar to the one used to search for individual records. (See *Searching for a Particular Record* on page 66.) Use this window to specify which records you want to see. For example, suppose you're in the **Items** window and you specify
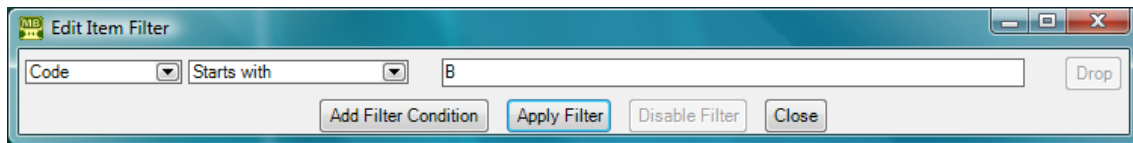
This indicates that you only want MainBoss to display item records whose "**Code**" field starts with the letter B. Once you enter this information, click the **Apply Filter** button. You'll see that the table viewer changes so that it only shows records that match what you've specified. If you **Close** the filter window, the table remains filtered. To return to the table's usual state, blank out the checkbox labeled **Apply Filter**.

The filter set-up window contains the following:

> Fields, filter conditions, values: Select the records to be displayed. You specify your selections in the same way that you specifying search conditions when searching for a particular record (see *Searching for a Particular Record* on page 66).

> **Add Filter Condition**: If you click this button, the window expands to allow another condition to be added to the filter. You can click this button several times to get multiple filter conditions (up to a total of six).

> If you specify multiple conditions, MainBoss only shows records that satisfy *all* the specified conditions. For example, suppose you're filtering the **Requests**

table. One condition specifies that you only want to see requests where the "**Requestor**" is `John Smith`. A second condition specifies that you only want to see requests where "**Request Priority**" is `Urgent`. Then MainBoss displays all urgent requests from John Smith.

Apply Filter: If you click this button, MainBoss immediately filters the table using the given criteria. Note that the table does not get filtered until you click this button.

Disable Filter: If you click this button, MainBoss stops filtering the table—you see all the records you normally would.

Close: Closes the filter window. If you have not clicked **Apply Filter**, MainBoss will *not* filter the table. Furthermore, MainBoss will not record any filter conditions you've specified—the next time you open the filter window, you'll start from scratch again.

On every table viewer, there is a checkbox labeled **Apply Filter**. If this box is blank, the table is unfiltered—you see everything you'd usually see. If you checkmark the box, the table will be filtered using the filter that is currently defined. By blanking or checkmarking the box, you can switch back and forth between filtered and unfiltered displays.

Request, work order and purchase order tables are also affected by the *active filter*. For more, see *The Active Filter* on page 55.

Selecting Multiple Table Entries

A table viewer lets you select multiple records from the table. To do this, you use the standard Windows conventions:

☐ If you hold down the **<Shift>** key, click on one record, then click on another, you will select both records and all the records in between.

☐ If you hold down the **<Ctrl>** key and click on a record, you select that record. If you hold down **<Ctrl>** and click a different record, you select that record and the first record stays selected. In this way, you can use **<Ctrl+Click>** to select any number of separate records.

After you select multiple records, you can perform the following operations:

Delete: Deletes the selected records. A window will open to ask if you really want to delete those records.

Edit: Opens the first selected record in an editor window. This window offers you all the features available in a normal editor window for this type of record. In addition, it has a **Next** button; if you click **Next**, MainBoss closes the current window and opens one where you can edit the next record that you selected from the table viewer. By repeatedly clicking **Next**, you can move through the

records that you selected, editing each one as you wish.

If you use the editor window to change the contents of a record, the **Next** button disappears until you click **Save** (to save your changes) or **Cancel** (to cancel the changes). You will not be able to go to the next record until you save or cancel your changes.

Next is a drop-down button with the following entries:

Previous: Closes the current window and opens an editor window to edit the previous record from the list of selected records. By using **Next** and **Previous**, you can go forward and backward through the list of selected records.

Close: Closes the current window and goes back to the table viewer. This says that you are finished using **Next** and **Previous** to edit the selected records.

Cancel: Works like the usual **Cancel** button, canceling any changes you have made.

View: Works exactly like **Edit** except that you can only look at the contents of the selected records, not make changes. You can use **Next** and **Previous** buttons to go forward and backward through the list of selected records.

Restore: Is only enabled if the records you have selected are all currently deleted. If so, MainBoss opens an editor window that works exactly like **Edit**. If you **Save** the current record, it will be restored. You can use **Next** and **Previous** to move forward and backward through the list of selected records.

Using Editors

An editor window shows the contents of a single record. For example, here is the editor window for describing a unit (e.g. a piece of equipment):
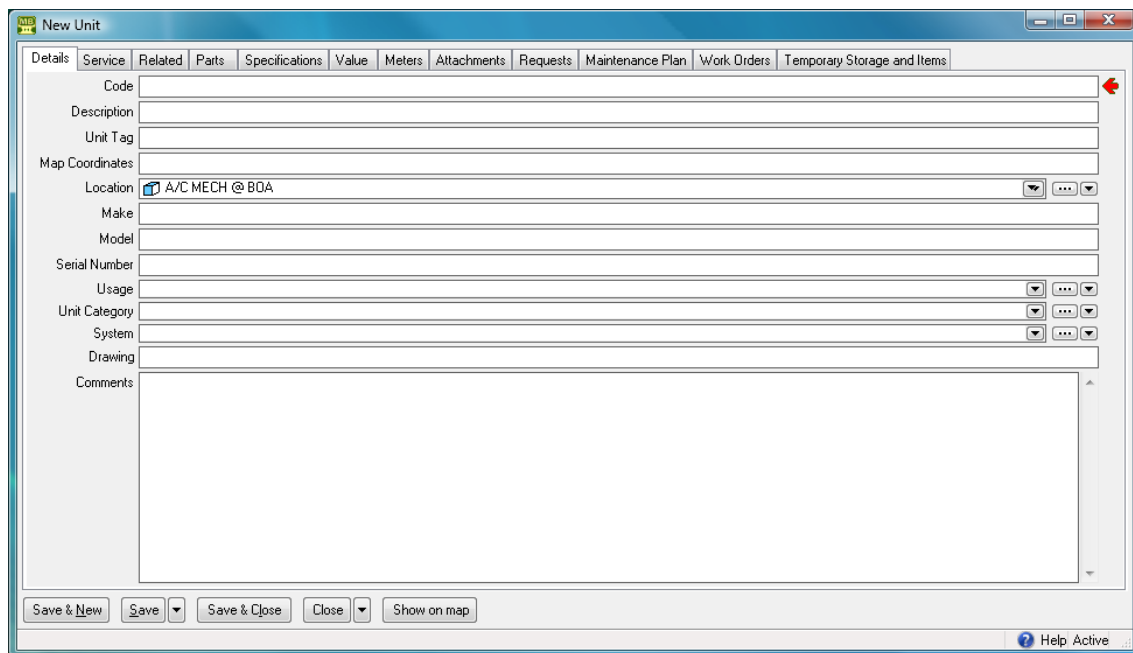
The window consists of a number of information fields. For example, the "**Location**" field lets you specify where the unit is.

In the editor window, you can often move the cursor from one field to the next by pressing the **<Tab>** key. For example, if you have just filled in the "**Make**" field, pressing **<Tab>** moves the cursor to "**Model**". In this way, you can **<Tab>** from one field to the next without having to use the mouse. Of course, you can still use the mouse if you wish.

<Shift+**Tab>** goes backwards to the previous field. This is useful if you type something, **<Tab>** out, then notice a typing mistake in the previous field.

<Ctrl+**Tab>** moves from one section to another in windows that have sections.

Mandatory Fields: Many records have fields that must be filled in before the record can be saved. These *mandatory fields* are indicated with a red arrow. In the preceding picture, "**Code**" is a mandatory field, marked with the red arrow.

Once you enter a value for the field, the arrow disappears. When all the red arrows are gone, the record can be saved. If you try to save the record before filling in all the mandatory fields, MainBoss gives you an error message.

Blank Fields: You must fill in the mandatory fields. Other fields may be left blank if you wish. In fact, leaving a field blank is often the best choice—it's better to leave a field blank than to fill it with inappropriate or unnecessary data. As an example, every work request has a "**Priority**" field that lets you indicate how urgent the work is. However, we suggest that you leave this field blank unless there's good reason to give the request some special priority. Don't feel as if you need to fill in every field.

Types of Fields: There are several types of information fields. The following explains the most common types of fields, using the Unit editor window as an example.

Text fields: Text fields are simplest type of field. In the window above, "**Make**", "**Model**" and "**Serial Number**" are all text fields. To fill these in, just click on the field, then type appropriate values (in this case, the make, model, and serial number of a piece of equipment).

Text fields let you use the usual Windows editing features. For example, you can make corrections using **<Backspace>** or the **<Delete>** key. You can copy the current selection with **<Ctrl+C>**, cut the current selection with **<Ctrl+X>**, and paste in the contents of the clipboard using **<Ctrl+V>**. You can also use other standard editing features; for more information, see the documentation on your Windows system.

Comments: Most records have one or more "**Comments**" fields. This is a catch-all field where you can enter any type of information not covered by other fields.

Read-only fields: A read-only field shows information but the information cannot be changed. For example, suppose you're creating a work request. When you specify the requestor (the person who submitted the request), MainBoss automatically obtains the requestor's phone number and e-mail address from the **Contacts** table (MainBoss's table of contact information). The phone number and e-mail address are displayed in case you want to contact the requestor, but they're for information only—the request editor won't let you change them.

Read-only fields are easy to distinguish from fields whose contents can be changed. If a field can be changed, its borders are thin black lines. If a field is read-only, it has no borders. In the example below, **Requestor** can be changed, while **Phone** is read-only.

Date/time fields: A date/time field lets you record a calendar date and/or time of day. For example, when you write up a work order, you can record information like the date you want the job to start, the date you expect it to end, the date you created the work order, and so on.

Many date/time fields end in a drop-down arrow. Clicking this arrow opens a calendar where you can select the date. This calendar also has a space where you can enter a time on the chosen date.

Drop-down fields: Drop-down fields end in three buttons:

The left-most button (the first arrow) drops down a list of values. This means that MainBoss displays all existing values that can be entered into the field. For example, using this arrow for a "**Location**" field displays your currently defined

locations. You fill in the field by selecting a location from the display.

Alternatively, you can click the middle button (with "..." on it). This opens up a table viewer showing all existing values that can be entered into the field. For example, with a "**Location**" field, "..." opens a "**Location**" table viewer. Click the appropriate entry in the table list, then click the **Select** button. MainBoss will use the chosen record as the value of the original drop-down field. For more about table viewers, see *Using Table Viewers* on page 62.

Alternatively, the right-most button (the second arrow) displays a list of possible actions that you can use to fill in the value of the drop-down field. Typically, the action list includes viewing a list of existing values (which means opening an appropriate table viewer) or creating a new value of an appropriate type. For example, you might see:
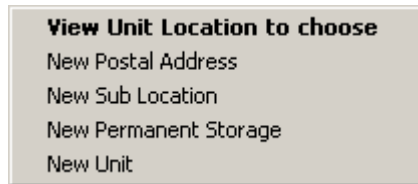
The first action opens the "**Locations**" table viewer. The other actions let you create new location records of various kinds. If you click one of the options for creating a new record, MainBoss opens a window where you can create that record. Once you save and close this window, the new location you've create will be used as the value of the original drop-down field.

Multi-select drop-down fields: A multi-select drop-down field is similar to a regular drop-down field, but it lets you select more than one value. For example, the window that lets you assign security roles to users lets you specify multiple roles for the user, rather than having to assign one role at a time. A multi-select drop-down field looks like this:

The three buttons work in the same way as in a regular drop-down field. However, when MainBoss offers you a window to choose field values, you can choose multiple values instead of just one. You can specify the values using normal Windows techniques, e.g. dragging the cursor across the values you want, or holding down the **<Ctrl>** key and then clicking each value separately. Right-clicking in the list of values offers a menu of actions that can help you choose the selections you want.

Option buttons: There are two types of option buttons. The following window shows round options, also known as radio options:
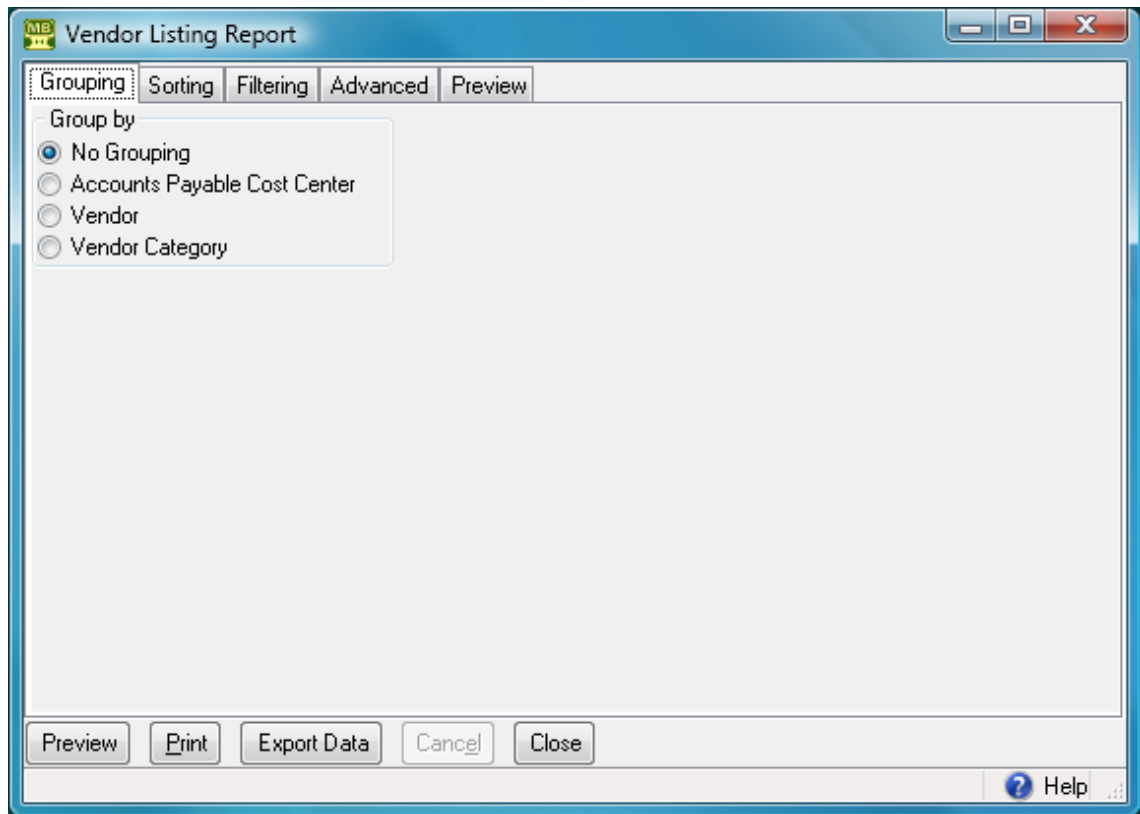
Round option buttons are always arranged in groups. They are used for options that are mutually exclusive—if you select one of the options in the group, it automatically turns off all the other options in the group.

The next picture shows *square* option buttons, also known as checkboxes:
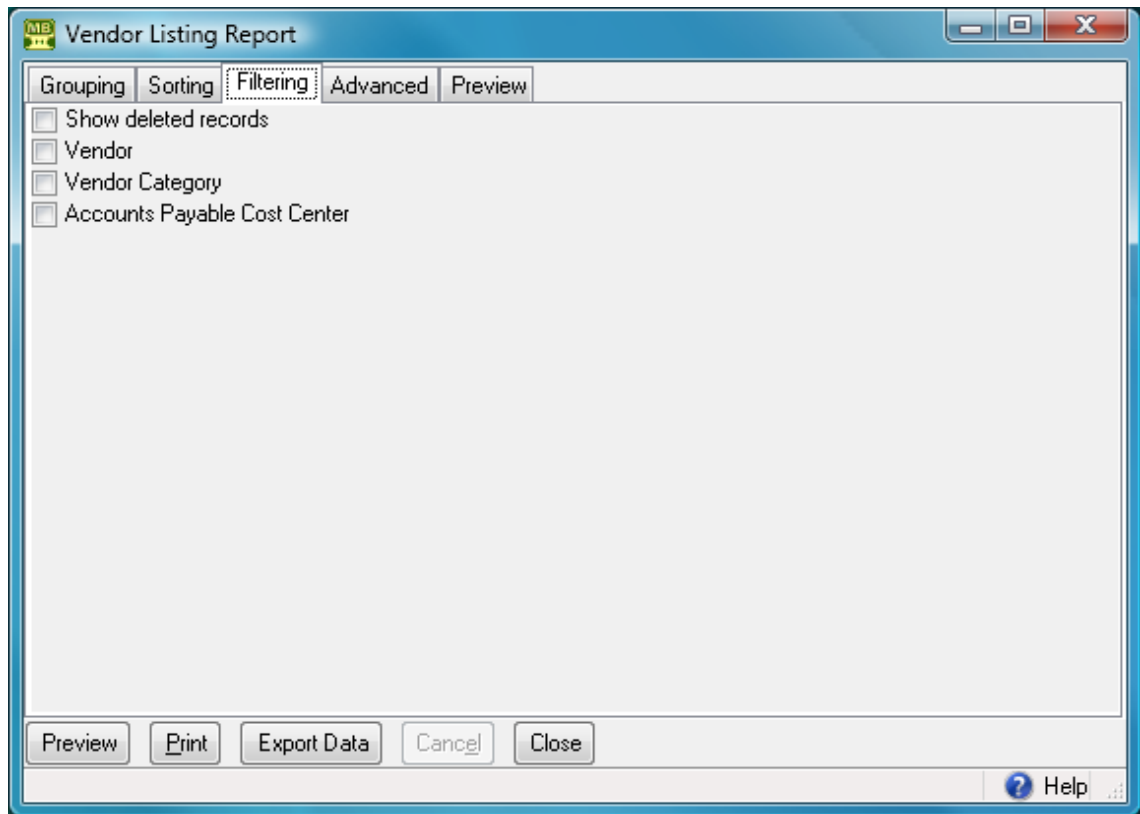
Square option buttons may or may not be arranged in groups. They are used for options that are independent of other options in the window. Checkmarking one of these options does not affect any other options.

Editor buttons: Editor windows may have many different types of buttons, but almost every editor has the following:

Save: Saves the current record. The editor window stays open so you can make more changes to the same record.

Save & New: Saves the current record and sets up the window for you to enter a new record. Fields in the new record will be blank or set to default values.

Save & Close: Saves the current record and closes the editor window.

Cancel: Closes the window without saving any changes you've made to the record since the last time you saved. When you **Save** the record, the **Cancel** button changes to **Close**, indicating that you can safely close the window without losing any changes.

Close: Closes the window. This button only appears after you've saved changes with **Save** or before you've entered any data at all. Otherwise, the button is labeled **Cancel**.

List Sections: Many editor windows have sections that contain lists. For example, the window for editing unit record has a section that lists spare parts which are used by the unit.

These lists may have buttons of their own. For example, you might see a **New** button for adding a new entry to the list or **Delete** for deleting an entry that's already there. In fact, these lists are like small-scale table viewers: they show records taken from a table and have buttons that let you create, delete, or modify entries in the list.

When an editor window contains this kind of list, the window will have the word `Active` or `All` in the lower right hand corner. For more on the meaning of `Active` and `All`, see *Active and* All in Table Viewers .

Fields that can't be changed: Some fields can only be edited at certain times. For example, some fields on a purchase order can't be changed once the purchase order is issued—issuing the purchase order implies that the purchase order is ready to be sent to the supplier, at which point, some information is considered "unchangeable". (Actually, some of this information *can* be changed, but you have to withdraw the purchase order before you're allowed to make the change.)

MainBoss also prevents you from changing information that has already generated accounting records—for the sake of security, accounting records can't be changed or deleted. For example, when you record the use of materials in connection with a work order, MainBoss generates accounting records indicating the cost of those materials. You can't directly edit this information once the accounting records have been written; if necessary, you must create a *correction*, which will generate a *new* accounting record to correct any mistakes in an old one.

Concurrency Errors

In the rare case that two people try to edit the same record at the same time, MainBoss will report a *concurrency error*.

For example, suppose you start editing a **Units** table record and before you're done, someone else tries to edit the same record. The first person to save the record will succeed. The second person to save the record will receive an error message indicating that the record has changed while you were making your changes:
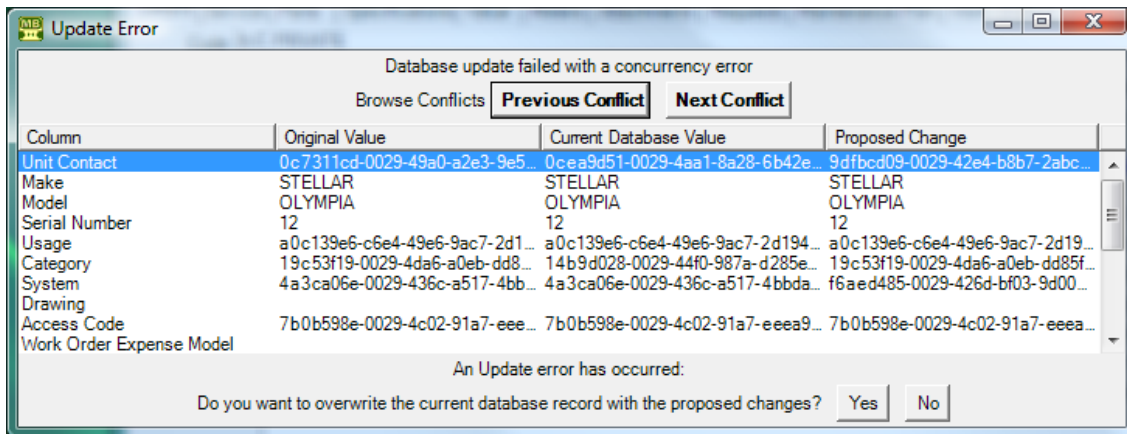
MainBoss is asking you to resolve conflicts between the changes that were just made. The error message lists the fields in the record. For each field, there are three columns:

☐ The first column shows the field's value at the time you began editing

☐ The second shows what the value is now (saved by the other person)

☐ The third shows the new value you've specified yourself

Where the values are different, you can see fields where your values differed from the other persons. The **Next Conflict** and **Previous Conflict** buttons jump to fields where the values conflict.

As shown in the picture, some field values will look like nonsense strings of characters. These strings are actually links to other tables. For example, the "**Category**" field refers to an entry in the **Unit Categories** list. The field's value is a meaningless string that serves as a pointer. You can see if two pointers have the same value, but you can't tell anything about the record they point to.

In case of a conflict, you have two choices:

Yes: Means you want the value you just typed in to overwrite the value from the other person.

No: Means you want to keep the value that's already in the database (the one saved by the other person).

You must choose **Yes** or **No** for every field where values conflict.

When conflicts occur, it's best to click the **No** button on every conflict; this basically says, "Ignore what I just did.") Then just go back and start editing the record again. This time you'll see the values that the other person put in. You can then decide which of these you want to change.

Reports

Reports can display and analyze your maintenance information. Many sections in the control panel have subsections that offer reports; for example, **Work Orders** | **Reports** offers you a number of reports dealing with work orders.

When you choose the control panel entry for a report, you get a window that lets you specify options for the report:
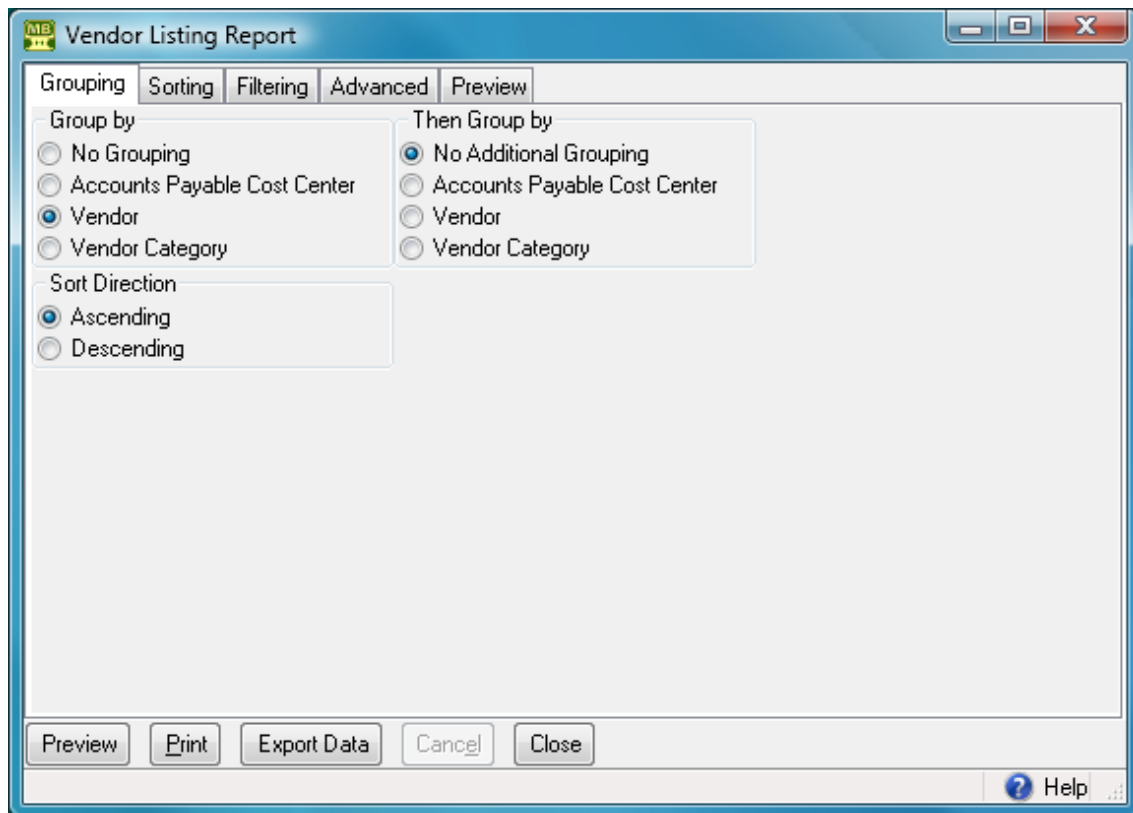
Report Sections

The window associated with a report organizes options into sections. Different reports have different sections, but here are the most common:

> **Grouping**, **Sorting** or **Grouping and Sorting**: Lets you control how the report is organized. For example, suppose you're printing information on work orders. The report will be divided into sections, with each section containing work orders that have something in common. For example, each section might refer to a different location (which gives you a location-by-location breakdown of the work you do). As another example, you might group your information by unit,

so that you get a unit-by-unit breakdown of your work orders.

Within each section, you can *sort* by other criteria. With work orders, for example, you can sort by "**Start Date**" (the date each job began), by "**End Date**" (the date each job ended), by work order number, and so on.

If you choose a grouping option, MainBoss offers you more options so that you can create sub-groups within groups. Similarly, if you choose a sorting option, MainBoss offers you more options so that you can refine the sorting process.

Grouping options break a report into sections; each section has headings to indicate the start of the section, and may have footers as well. (If a section has more than five entries, the total number of entries will be shown in parentheses after the group heading.) *Sorting* options sort information within each section; they do not result in headings.

If a particular group has no elements, that group will not appear in the report. For example, suppose you're printing information about inventory items, grouped by item category. If a particular category has no items in it, that category will be omitted from the report.

Filtering: A *report filter* lets you select which records you do and don't want in the report. For example, you might want to restrict a report on units to units in a particular category or range of unit IDs. Filter sections let you specify such restrictions. For more on how report filters work, see *Report Filters* on page 84.

Advanced: Lets you specify a title for the report when it is printed, the fonts to be used, and (usually) the types of data that the report contains.

In some reports, **Advanced** options let you obtain *summaries*. A summary typically gives totals and sub-totals of monetary amounts for the groups and sub-groups of the report. In some cases, the summary may also give you averages (e.g. the average lifespan of a particular kind of equipment). If you do not specify **Grouping** section options, summaries may not give you much information.

Show checkboxes: In most reports, the **Advanced** section contains a number of checkboxes that let you specify what information the report should contain. For example, in the window for printing work reports, you can use the checkboxes to say which information from a work report should be shown in the report.

When you specify that a particular piece of information should appear in a report, it will generally appear in a labeled column or else it will be labeled within a row. If you are grouping by a particular field, that field will be used as a group heading, so it won't also appear in a labeled column.

The columns in a report are made wider or narrower, depending on how many pieces of information you've asked for. Asking for many different data fields will shrink the width of each column and may make the report difficult to read. Printing a report in landscape format rather than portrait may improve readability. Another option is to export the report to Microsoft Excel; if you do that, you can avoid the problems that arise from trying to cram a lot of information onto a limited piece of paper.

Preview: Displays a preview of the report—a version of what you'd see if you actually printed the report on paper. Preparing such a preview may take some time, since MainBoss may have to process a lot of data; therefore, you might have to wait while MainBoss creates the preview.

The **Preview** section has buttons that let you specify which printer you want to use, the size of page margins, and other printing details. Another button lets you export data from the report (e.g. to Microsoft Excel). Finally, the **Preview** section has a button that will actually print the report.

Depending on the contents of your database, certain combinations of options in **Grouping**, **Sorting**, **Filtering**, and **Advanced** may result in a report with little or no useful information. You are encouraged to experiment with the options to find combinations that are particularly helpful to your work.

For more details on any of the standard buttons in a print window, see *Report Buttons on page 81*.

Report Buttons

Every window for printing a report contains a number of buttons at the bottom:

Preview: Goes to the **Preview** section of the window and creates a preview of the report. Preparing such a preview may take some time.

Print: Immediately prints the report, using whatever sorting and filtering options you have specified. You can use this button if you don't want to preview it first. You can cancel printing with the **Cancel** button.

Refresh: Updates the window to reflect any recent changes in data. For example, suppose you're looking at a preview of a report about work requests; meanwhile, somebody else at your company creates a new request. The new request isn't automatically added to the report you're looking at—you have to click **Refresh** first.

Export Data: Exports the report's data in XML format. The result is primarily intended to serve as input for user-written programs which process the data in some way. This contrasts with the **Preview** export facilities (discussed below), which are most useful for embedding in Microsoft Word documents and other "unprocessed" contexts.

Clear Select for Printing: If you click this button, MainBoss removes the checkmark from all **Select for Printing** boxes on all requests. Typically, you do this after printing requests that have been marked **Select for Printing**. For more, see *Select For Printing* on page 85.

Cancel: Cancels the preparation and printing of a report. This button is enabled only when MainBoss is preparing a report, i.e. gathering the data and formatting it. Once the report is ready to print, MainBoss hands off the result to the Microsoft Windows printing facilities; after the report has been handed off to Windows, MainBoss has no more control over the print-out and the **Cancel** button won't work. (If you want to cancel the print-out after that, you must use the standard Windows printer control facilities.)

Depending on the configuration of Windows and the Microsoft Report Viewer, canceling a report may result in a diagnostic message. Typically, you can just ignore this message.
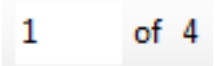
Close: Closes the window. (This button is only present if you opened a separate window to print the report.)

The **Preview** section of a print window contains a control bar:

| ◄◄ ◄ 1   of 46 ► ►◄ | ← ⊗ | 🖨 ▤ 📖 💾▼ | 100%   ▼ | Find | Next |

This bar contains the following (from left to right):

> If you click an entry in the document map, the preview changes to show you that entry.

◄◄ First Page button: Goes to the start of the document.

◄ Previous Page button: Goes to the previous page of the document.

`1       of 4`   Gives the page number that is currently being displayed and the total number of pages in the report. You can go to a specific page by typing the appropriate page number into the box.

▶ Next Page button: Goes to the next page of the document.

►◄ Last Page button: Goes to the last page of the document.

← Parent Report button: Only applies when a report contains sub-reports, and this feature is not currently used.

⊗ Stop button: Stops MainBoss processing the report. You might click this if MainBoss is preparing a lengthy report and you decide you don't want to see the report after all.

🖨 Print button: This is the button that actually prints the report.

Print Layout button: Switches the display between *document map* format and *layout* format.

In document map format, the left side of the display contains an index of the information in the report. Clicking an entry in the index will move to the corresponding information. The mouse wheel can move forward or backward through the report but it doesn't necessarily move backward or forward by a whole number of pages.

In layout format, you see a scaled-down version of the page as it will actually print. The mouse wheel will move from one page to the next.

Page Setup button: Opens a window where you can specify paper size, margin size, and other printing information.

Export button: Exports information from the report into a file. If you click the down-arrow associated with this button, you'll see a list of available export formats. The formats currently supported include Microsoft Excel and Acrobat PDF.

Once you specify what type of output you want, MainBoss will open a window asking you to specify a file where the exported data should be stored. Loosely speaking, MainBoss exports the data in a format similar to what's displayed in the preview. For example, if you export data in Excel format, the result can be read into Excel (or embedded in a Microsoft Word document) to produce something that looks very much like the original report. If, on the other hand, you want to export data for processing by some user-written program, it's probably better to use the **Export Data** button (discussed previously).

Note: When you export data in PDF format, MainBoss uses the margin sizes and paper size as specified in the report's current **Page Setup** settings.

100% ▼ Scale: Controls the scale of information displayed in the preview window. For example, if you set the scale to 200%, you'll see the information at twice its normal size. If you set the scale to 50%, you'll see it at half its normal size.

Find | Next Searching: To search for information in the report, type the text you want to find in the box, then click "Find". For example, if you're looking at a full Units report and want information on a particular unit, type the unit name in the box and click "Find". Clicking the associated "Next" button goes to the next occurrence of the same text.

Report Filters

The **Filtering** section of a report window lets you restrict the report to a subset of the items it might contain. If you click on an entry in the filter list, MainBoss opens a window where you can specify more information.

For example, the window for printing work orders lets you specify filters which restrict the print-out to a subset of the existing work orders. If you click **WO Number**, MainBoss opens a window where you can specify the numbers of the work orders you want to print:
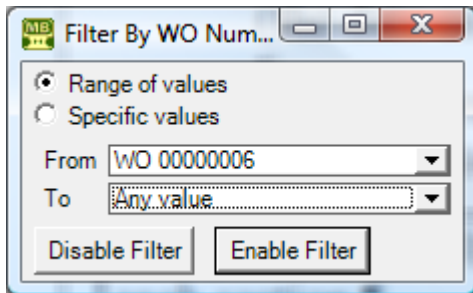
In this example, we've specified that we want to print work orders beginning at WO 00000006 and going up from there. MainBoss will print all work orders whose numbers fall into that range. As an alternative, we could choose the option **Specific values**:
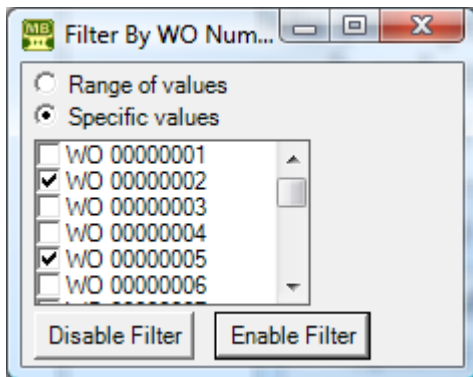
As shown, MainBoss presents you with a list of all possible values. You can then checkmark the work orders that you want to include in the report.

The final stage in using a filter is to click the **Enable Filter** button. MainBoss will close the window and use the specified information when preparing the report. (The **Disable Filter** button cancels the filter: it tells MainBoss not to use the filter after all.)

Note: In ranges (and lists in general), MainBoss only sorts information in numeric order if all the information is numeric. If the information can contain both letters and numbers, then MainBoss sorts all of the information in textual order. This means, for example, that the value 011 sorts *before* 10—anything that starts with 0 sorts before anything that starts with 1.

Filtering on Locations and Units: Various reports let you filter by locations and/or units. In general, if you use a filter to select one or more locations, the report does *not* cover sublocations (unless you select the sublocations too). Similarly, if you use a filter to select one or more units, the report does *not* cover sub-units (unless you select the sub-units too).

However, when you filter on locations, the filter window offers you the option **Location and all sublocations**. If you select this option, MainBoss lets you specify a single location; the associated report will cover that location and all sublocations within the location. Similarly, when you filter on units, the filter window offers you the option **Unit and all subunits**. If you select this option, MainBoss lets you specify a single unit; the associated report will cover that unit and all subunits within the unit.

Select For Printing

Work orders, requests, and purchase orders have a checkbox labeled **Select for Printing**. The purpose of this is to simplify the task of printing a number of newly created records in a single print run.

For example, suppose you create a number of new work orders (possibly through the use of **Unit Maintenance Plans** | **Generate Planned Maintenance**). By default, **Select for Printing** is checkmarked in every new work order. To print all the work orders you just created, go to **Work Orders** | **Print**, go to the **Filtering** section, and checkmark **Select for Printing** in the "**Work Order Filters**" options. (Click **Enable Filter** in the resulting window.)

This tells MainBoss that you want to print all work orders where **Select for Printing** is checkmarked. Once you've printed all those work orders, you can click the **Clear Select for Printing** button (in the window for printing work orders). This removes the checkmark from **Select for Printing** in *all* work orders. The next time you ask to print **Select for Printing** work orders, you'll only print work orders created *after* you clicked **Clear Select for Printing**.

A maintenance department might decide to print off work orders at the end of each day. During the day, work orders are created with **Select for Printing** checkmarked. At the end of the day, you print all work orders with **Select for Printing** checkmarked, then **Clear Select for Printing** on all work orders. In this way, you only have to make one work order print-run per day.

The same principle applies to requests and purchase orders. When a new one is created, **Select for Printing** is checkmarked. Once you've printed requests or purchase orders, you can use **Clear Select for Printing** to remove the checkmarks and start over again with no records waiting to be printed.

Note: Suppose you use **Work Orders** | **Print** to prepare a report of all work orders that have **Select for Printing** turned on. Then suppose that you spend some time previewing the report before you print it out. Finally, you click **Clear Select for Printing**. This turns off **Select for Printing** on *all* work orders, including any that were created while you were previewing the report. The report won't include those new work orders (because they were created after the report was prepared), but you'll turn off **Select for Printing** anyway.

This demonstrates that you shouldn't leave a long gap between the time you create a "select for printing" report and the time you **Clear Select for Printing**. The same principle applies for requests and purchase orders.

Paper Size and Margins

When you start MainBoss, it sets the margin sizes for any report to default values, and sets the paper size to the default size associated with your default printer. You can change both the margins and the paper size by clicking the **Page Setup** button in the **Preview** section of any window that prints reports.

> **Note:** Any change in margin size or paper size only affects the current printing window. Different reports will still have the default margin size and paper size. Also, if you close a report window then open it again, the margin size and paper size for that report will be set back to the defaults.

When you export data in PDF format, MainBoss uses the margin sizes and paper size associated with your current **Page Setup**. This means that you might use **Page Setup** to specify a paper size and/or margin sizes that your printer can't actually handle, if you intend to export the report in PDF format.

Formatting in Columns

Many reports have a **Show Report in Columns** option in the **Advanced** section. This organizes a report so that there is a single "line" for each record in the report, with the fields of each line broken up into separate columns. This format can be useful if you only want to see a few pieces of information from each record (as dictated by the **Show** checkboxes). However, it becomes unreadable if you try to cram too many pieces of information on a single line.

Note that if you print out the report in *landscape* format rather than *portrait*, you can put more on a line without losing readability. To change the format, use the "Page Setup" button near the top of the **Preview** section.

The column format is particularly useful if you intend to export the report's data to Microsoft Excel. In this case, it doesn't matter if the columns don't fit well on a piece of paper—in Excel, you can expand the columns so that they're readable on your computer screen.

Bar Code Support

MainBoss Advanced can add bar codes to various printed reports including requests, work orders, purchase orders, unit records, and storeroom assignment records. This provides a level of support for the use of bar codes in your operations.

To print bar codes on a report, go to the **Advanced** section of the report. On the line labeled **Bar Code Symbology**, choose the type of bar coding you wish to use. (There are numerous systems for representing data as bar codes, so you have to tell MainBoss which one you use.) Once you have specified a format, MainBoss will include a suitable bar code for each record in the print-out.

The bar code represents different information depending on the type of records being printed:

☐ For requests, the bar code represents the request's number (e.g. `WR 00000001`)

☐ For work orders, the bar code represents the work order's number (e.g. `WO 00000001`)

☐ For purchase orders, the bar code represents the purchase order's number (e.g. `PO 00000001`)

☐ For unit, the bar code represents the value of the record's "**Unit Tag**" field; this field appears in the **Details** section of the associated record

☐ For storeroom and storeroom assignment records, the bar code represents the value of the record's "**External Tag**" field; this field appears in the **Details** section of the associated record

When you read a bar code into MainBoss, MainBoss will open an editor for the entity associated with that bar code. For example, suppose you want information about a unit. If you read the bar code on the unit, MainBoss will immediately open the appropriate unit record in an editor window; this lets you obtain all the usual information from the unit record.

> **Important:** Make sure that a window containing MainBoss's control panel is the active window at the time you read the bar code. If any other type of window is active (e.g. a window for editing a record or for printing a report), reading the bar code will not have an effect.

In order to use a bar code reader, you must have appropriate Windows software to deliver bar code information from the reader to Windows programs.

Default Bar Code Encoding: You can set your organization's default bar coding by going to **Administration** | **Company Information** and clicking **Edit**. This opens a window where you can specify which type of bar coding is most often used by your organization. From this point on, that type of bar coding will always be set as the default in any report that can print out bar codes.

As with all default values, you can specify a different value in any specific situation. For example, if you don't want a particular report to include bar codes, you can set **Bar Code Symbology** to `None` when you print that particular report.

Drawbacks to Bar Codes: Many would-be bar code users think they can simply use the standard "universal" UPS bar codes that appear on most products (such as the codes that appear on grocery items in the supermarket). However, these usually aren't satisfactory.

For example, consider standard D cell batteries. To most maintenance departments, these are all the same. However, each brand of battery comes with a different UPS code; also different packages from the same manufacturer have different codes, so a two-battery package is different from a four-battery package. You might like a single "D cell" code for all such batteries, but you can't use the standard UPS code for that purpose.

A second problem is that manufacturers recycle UPS codes. Rubbermaid is well-known for this practice. When they discontinue a product, they re-use the old code for something new. They also use the same code for products with minor differences, e.g. similar products with different colors. This may or may not make a difference to your operations.

Similar problems apply if you use anyone else's bar codes, e.g. bar codes linked to a particular supplier's catalog numbers. If you use bar codes that come from anyone else, you may be caught by surprise changes or inconsistencies. For reasons like this, you will probably have to create your own bar codes for anything you want to identify. This can take a great deal of work, and must be planned carefully.

Note: MainBoss Advanced includes Barcode software developed by Neodynamic SRL (http://www.neodynamic.com/). All rights reserved.

Coding Definitions

In the control panel, the entries under **Coding Definitions** let you describe basic aspects of your maintenance operations. For example, you can define units of measure used by your department (e.g. pounds and feet or kilograms and meters).

Categories: Many coding definitions let you *categorize* your maintenance activities and assets. For example, work categories let you classify the type of work done in work orders; you might use categories like electrical, plumbing, housekeeping, vehicle repair, and so on. These categories can then be used to organize reports—you can find out how much time and resources you spend on each work category, helping you to analyze your costs and make informed decisions.

Categories can also make it easier to find information. For example, you can categorize your vendors (suppliers) by the type of materials you purchase from them. Then you can ask MainBoss to list information on just the electrical suppliers or just your outside contractors.

Different organizations will set up different categories—it all depends on how you want to analyze and categorize various aspects of your operations.

Access Codes

For some maintenance jobs, you may only be permitted to do the work at a particular time of day, or when you have obtained permission from a particular person. MainBoss records this information in the form of *access codes*. An access code states any conditions that may apply to particular work orders.

Access codes are usually associated with units, indicating when the units can be serviced. Here are some example access codes:

```
Only 9-5
Only after 5:00 pm
Anytime
Get permission first
```

Viewing Access Codes

You view access codes with **Coding Definitions** | **Access Codes**. The window contains the following:

View section: Shows the list of current access codes.

Code: Click this heading to sort the list by code. Click again to reverse the order (from ascending to descending or vice versa).

Description: Click this heading to sort the list by description. Click again to reverse the order.

Details section: Shows details from the selected record.

Requests section: Shows requests that use the selected access code. For more about requests, see *Requests* on page 284.

Units section: Shows units that have the selected access code. For more about units, see *Units* on page 422.

Work Orders section: Shows work orders that use the selected access code. For more about work orders, see *Work Orders* on page 309.

Tasks section: Shows planned maintenance tasks that use the selected access code. For more about tasks, see *Tasks* on page 184.

Defaults for Access Code section: Shows any defaults to be used when creating new access codes.

Editing Access Codes

You create or modify access codes using the access code editor. The usual way to open the editor is to click **New Access Code** or **Edit** in the **View** section of **Coding Definitions** | **Access Codes**.

The access code editor window contains the following:

Details section: Shows basic information for the record.

Code: A brief code to identify this record. No two records may have the same code.

Description: A longer description of the access code.

Comments: Any comments you want to associate with the access code.

Requests section: Shows any current work requests that use this access code. For more on work requests, see *Requests* on page 284.

Units section: Shows any units that have this access code. For more on units, see *Units* on page 422.

Work Orders section: Shows any work orders that use this access code. For more on work orders, see *Work Orders* on page 309.

Tasks section: Shows any tasks that use this access code. For more on tasks, see *Tasks* on page 184.

Printing Access Codes

You can print your current access codes by clicking **Print** in **Coding Definitions** | **Access Codes**. This opens a window that contains the following:

Sorting section: Options controlling how the report is organized.

Sort by list: These options determine how items are sorted.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick a **Sort by** option where sort direction is relevant.

Filtering section: Options controlling which access codes will be included in the report.

Show deleted records: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Contacts

The **Contacts** table lets you record information about people you may need to contact for your maintenance work. This includes vendors, employees, clients, and anyone else whose contact information may be useful.

A contact record contains such information as phone numbers, e-mail addresses, and web addresses. To specify a street address, you create a location record (for more information, see *Locations* on page 126). You can create the location record first and then the contact record, or vice versa.

Viewing Contacts

You view contacts with **Coding Definitions** | **Contacts**. The window contains the following:

> **View** section: Shows the list of current contacts.
>
>> **Name**: Click this heading to sort the list by name. Click again to reverse the order (from ascending to descending or vice versa).
>>
>> **Business Phone**: Click this heading to sort the list by business phone number. Click again to reverse the order.
>>
>> **Mobile Phone**: Click this heading to sort the list by mobile phone number. Click again to reverse the order.
>
> **Details** section: Shows details from the selected record.
>
> **Contact Functions** section: Lists other tables where the selected contact person appears. For example, if the person is a requestor, the **Contact Functions** section will indicate that the person appears in the **Requestors** table.
>
>> If a contact record has no listed contact functions, it refers to a contact in a vendor record (e.g. sales contact or accounts payable contact). For more on vendors, see *Vendors* on page 230.
>
> **Related** section: Shows any relationship connections which this contact person has. For more on relationship connections, see *Relationships* on page 143.
>
> **Defaults for Contact** section: Shows any defaults to be used when creating new contacts.

Editing Contacts

You create or modify contacts using the contact editor. The usual way to open the editor is to click **New Contact** or **Edit** in the **View** section of **Coding Definitions** | **Contacts**.

The contact editor window contains the following:

> **Details** section: Shows basic information for the record.
>
>> **Name**: The name of the contact person.
>>
>> **Business Phone**: The person's business phone number.
>>
>> **E-mail**: The person's e-mail address.

The **Contacts** record should contain the person's e-mail address *in the format that is used when that person sends out e-mail*. (In some organizations, a person might have multiple aliases that all go to the same mailbox. Mail sent from that box is always sent from a specific e-mail address; that's the address which should go into the **Contacts** table.) This is particularly important when contact records are associated with requestors.

Home Phone: The person's home phone number.

Pager: The person's pager number.

Mobile Phone: The person's cell phone number.

Fax: The person's fax number.

WEB Page: The person's web page address.

Location: The person's location. You give this address by specifying a record in the location table. For more on locations, see *Locations* on page 126.

User: A read-only field giving the Windows user name associated with this person, if any. For more on user records, see *Users* on page 512.

Comments: Any comments you want to record about this person.

Contact Functions section: Lists other tables where the selected contact person appears. For example, if the person is a requestor, the **Contact Functions** section will indicate that the person appears in the **Requestors** table.

The buttons in the **Contact Functions** section let you assign new functions to a person. For example, if you click **New Requestor**, a window opens so that you can add this person to the **Requestors** list.

If a contact record has no listed contact functions, it refers to a contact in a vendor record (e.g. sales contact or accounts payable contact). For more on vendors, see *Vendors* on page 230.

Related section: Shows any relationship connections which this contact person has. For more on relationship connections, see *Relationships* on page 143.

New Unit Related Contact: Creates a new relationship between this person and a unit. For more information, see *Unit-to-Contact Relationships* on page 93.

Unit-to-Contact Relationships

You create unit-to-contact relationships by clicking **New Unit Related Contact** in the **Related** section of a unit or contact record. The editor window contains the following:

Relationship: The relationship between the unit and the contact person. This must be a relationship record; for more on relationships, see *Relationships* on page 143.

Once you specify a relationship, the blank field between "**Contact**" and "**Unit**" will be filled in with the appropriate phrase from the relationship record. For example, if the relationship states that the contact leases the unit, the blank field will be filled in with `Leases`.

Unit: The unit that takes part in this relationship. For more on units, see *Units* on page 422.

> If you got to this window by clicking the **New Unit Related Contact** button in a unit record, the "**Unit**" field will already be filled in with the name of the unit. This cannot be changed.

> Otherwise, if you got to this window by clicking **New Unit Related Contact** in a contact record, the "**Unit**" field will be blank. You can use the multi-select dropdown box to select one or more units that have the chosen relationship with the original contact.

Contact: The contact person who takes part in this relationship. For more on contacts, see *Contacts* on page 91.

> If you got to this window by clicking the **New Unit Related Contact** button in a contact record, the "**Contact**" field will already be filled in with the name of the contact. This cannot be changed.

> Otherwise, if you got to this window by clicking **New Unit Related Contact** in a unit record, the "**Contact**" field will be blank. You can use the multi-select dropdown box to select one or more contacts who have the chosen relationship with the original unit.

Printing Contacts

You can print your current contacts by clicking the **Print** button in **Contacts** or **Coding Definitions** | **Contacts**. This opens a window that contains the following:

Grouping section: Options controlling how the report is organized.

> **Group by** list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

> **Sort Direction**: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

Sort by list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling what contact information will be included in the report. You can select contacts by **Name** or by their **Location**.

Show deleted records: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Cost Centers

MainBoss lets you track maintenance costs by cost center. A cost center could be a Department or a General Ledger Account Number.

Cost Centers are only visible if your database has an **Accounting** license key.

Cost centers are related to *expense models*. An expense model is a set of related cost centers, used as a shortcut when creating a work order or purchase order. For example, consider a property management company that has a set of General Ledge Accounts for each tenant. When you do work for Tenant X, you specify that the work order should use the expense model associated with Tenant X. MainBoss will charge materials to the ledger account associated with Tenant X materials, it will charge labor to the account associated with Tenant X labor, it will charge outside contractor costs to the account associated with Tenant X outside labor, and so on. In other words, you can specify a single expense model, and MainBoss will distribute costs appropriately to the various cost centers of that model. (For more about MainBoss accounting, see *Accounting Facilities* on page 21.)

Cost Centers and Inventory: Every storeroom assignment has an associated cost center. (For more about storage assignments, see *Storeroom Assignments* on page 113.) The storeroom assignment's cost center is used whenever a quantity of the associated item is added or subtracted from the storeroom:

☐ When an item is received from a vendor and placed into a storeroom, two accounting records are created: one for accounts payable to the vendor, and one increasing the value of the storeroom assignment by the same amount. (Note that the accounting records are written when an item is received, not when it is ordered.)

☐ When an item is issued to a work order, two accounting records are created: one that decreases the value of the storeroom assignment by the cost of the item, and one that charges the cost of the item to the work order (in accordance with the work order's expense model).

The same principle applies when you issue an item for some other purpose. In this case, the issue code specifies the cost center that gets charged. (See **Coding Definitions** | **Items** | **Issue Codes**.)

☐ When an item is transferred from one storeroom to another, two accounting records are created: one that decreases the value of the storeroom assignment in the first storeroom, and one that increases the value of the storeroom assignment in the second storeroom.

Viewing Cost Centers

You open the Cost Center table viewer with **Coding Definitions** | **Cost Centers**. The window contains the following:

View section: Shows the list of current cost centers.

> **Code**: Click this heading to sort the list by code. Click again to reverse the order (from ascending to descending or vice versa).

> **Description**: Click this heading to sort the list by description. Click again to reverse the order.

Billable Requestors section: Shows any billable requestors associated with the selected cost center. For more on billable requestors, see *Billable Requestors* on page 240.

Chargeback Categories section: Shows any chargeback categories associated with the selected cost center. For more on chargeback categories, see *Chargeback Categories* on page 243.

Adjustment Codes section: Shows any item adjustment codes associated with the selected cost center. For more on adjustment codes, see *Item Adjustment Codes* on page 100.

Issue Codes section: Shows any item issue codes associated with the selected cost center. For more on issue codes, see *Issue Codes* on page 108.

Miscellaneous Items section: Shows any miscellaneous purchase order charges associated with the selected cost center. For more on such charges, see *Purchase Order Miscellaneous* on page 134.

Hourly Inside section: Shows any hourly inside records associated with the selected cost center. For more on hourly inside records, see *Hourly Inside* on page 257.

Expense Models section: Shows any expense models that contain the selected cost center. For more on expense models, see *Expense Models* on page 250.

Expense Mappings section: Shows any expense mappings that use the selected cost center. For more on expense mappings, see *Expense Mappings* on page 254.

Vendors section: Shows any vendors associated with the selected cost center. For more on vendors, see *Vendors* on page 230.

> **Print**: Opens a window to let you print cost center information. For more, see *Printing Cost Centers* on page 99.

Defaults for Cost Center section: Shows any defaults to be used when creating new cost centers.

> **Edit Defaults**: Opens a window to let you change the displayed default values.

> **Refresh**: Updates the list to reflect any recent changes.

Editing Cost Centers

You create or modify cost centers using the cost center editor. The usual way to open the editor is to click **New Cost Center** or **Edit** in the **View** section of **Coding Definitions** | **Cost Centers**.

The cost center editor window contains the following:

Code: A brief code to identify this record. No two records may have the same code.

Description: A longer description of the cost center.

General Ledger Account: The general ledger account to be associated with this cost center.

Comments: Any comments you want to associate with the cost center.

Billable Requestors section: Shows any billable requestors associated with this cost center. For more on billable requestors, see *Billable Requestors* on page 240.

Chargeback Categories section: Shows any chargeback categories associated with this cost center. For more on chargeback categories, see *Chargeback Categories* on page 243.

Adjustment Codes section: Shows any item adjustment codes associated with this cost center. For more on adjustment codes, see *Item Adjustment Codes* on page 100.

Issue Codes section: Shows any item issue codes associated with this cost center. For more on issue codes, see *Issue Codes* on page 108.

Storage Assignments section: Shows any storage assignments associated with this cost center. For more on storage assignments, see *Storeroom Assignments* on page 113.

Miscellaneous Items section: Shows any miscellaneous purchase order charges associated with this cost center. For more on such charges, see *Purchase Order Miscellaneous* on page 134.

Hourly Inside section: Shows any hourly inside records associated with this cost center. For more on hourly inside records, see *Hourly Inside* on page 257.

Expense Models section: Shows any expense models that contain this cost center. For more on expense models, see *Expense Models* on page 250.

Expense Mappings section: Shows any expense mappings that use this cost center. For more on expense mappings, see *Expense Mappings* on page 254.

Vendors section: Shows any vendors associated with this cost center. For more on vendors, see *Vendors* on page 230.

Printing Cost Centers

You can print your current cost centers by clicking the **Print** button in **Coding Definitions** | **Cost Centers**. This opens a window that contains the following:

Sorting section: Options controlling how the report is organized.

>**Sort by** list: These options determine how items are sorted.

>**Sort Direction**: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick a **Sort by** option where sort direction is relevant.

Filtering section: Options controlling what information will be included in the report. You can only select by **Code**.

>**Show deleted records**: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Advanced section: Miscellaneous options.

>**Suppress Costs**: Omits any money information that might otherwise be displayed in the report.

>**Format Report in Columns**: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

>**Title**: The title to be printed at the beginning of the report.

>**Font Size**: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

>**Main Font**: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

>**Fixed-width Font**: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Item Adjustment Codes

From time to time, you may find it necessary to adjust MainBoss's inventory records. For example, when you take a physical inventory, you may need to change MainBoss's counts of how much stock you have on hand for some items. As another example, when you move items from one storeroom to another, you should record the transfer so that MainBoss's records continue to be an accurate reflection of what each storeroom contains. Your organization may have a number of other common situations where inventory levels need to be adjusted.

Some types of adjustments (such as changing the value of inventory items) have specific entries in the MainBoss menu; other types must be handled as a *miscellaneous* adjustment. With these miscellaneous types of adjustments, MainBoss asks you to specify an *adjustment code* that tells why the adjustment was required. Here are some sample adjustment codes:

```
Breakage
Theft
Transferred to other department
Physical count adjustment
```

By assigning adjustment codes to adjustments, you can track special adjustments and calculate their cost to your organization.

Viewing Adjustment Codes

You open the Adjustment Code table viewer with **Coding Definitions** | **Items** | **Adjustment Codes**. The window contains the following:

View section: Shows the list of current adjustment codes.

> **Code**: Click this heading to sort the list by code. Click again to reverse the order (from ascending to descending or vice versa).

> **Description**: Click this heading to sort the list by description. Click again to reverse the order.

> **Details** section: Shows details from the selected record.

> **Adjustments** section: Shows adjustment transactions that actually use the selected adjustment code. For more information, see *Making Item Adjustments* on page 101.

> **Physical Counts** section: Shows physical counts that use the selected adjustment code. For more information, see *Recording Physical Counts* on page 102.

Defaults for Item Adjustment Code section: Shows any defaults to be used when creating new adjustment codes.

Editing Adjustment Codes

You create or modify adjustment codes using the adjustment code editor. The usual way to open the editor is to click **New Item Adjustment Code** or **Edit** in the **View** section of **Coding Definitions** | **Items** | **Adjustment Codes**.

The adjustment code editor window contains the following:

Details section: Shows basic information for the record.

> **Code**: A brief code to identify this record. No two records may have the same code.

> **Description**: A longer description of the adjustment code.

> **Cost Center**: The cost center to be used when adjustments use this code. For more on cost centers, see *Cost Centers* on page 96.

> **Comments**: Any comments you want to associate with the adjustment code.

Adjustments section: Shows any adjustments that use this adjustment code. For more information, see *Making Item Adjustments* on page 101.

Physical Counts section: Shows any physical counts that use this adjustment code. For more information, see *Recording Physical Counts* on page 102.

Making Item Adjustments

Inventory adjustments are necessary when you need to record a change in your inventory that isn't handled by standard operations. For example, if you accidentally break an item, you should record the loss with an inventory adjustment. This ensures that your inventory records remain up to date.

> You do *not* have to record inventory adjustments for standard operations like using items during the course of a work order.

To record an adjustment, go to **Items** | **Storeroom Assignments** or **Coding Definitions** | **Items** | **Storeroom Assignments** and select the record for the item and the storeroom where you want to make an adjustment. Click **Edit** to open the storeroom assignment record. Then, in the record's **Activity** section, drop the arrow on **New Physical Count** and click **New Item Adjustment**. This opens a window where you can record information about the adjustment.

> There are other ways to get to the same window. For example, you can start from an adjustment code record and click **New Item Adjustment** in the **Adjustments** section.

The window contains the following:

> **Entry Date**: A read-only field giving the date that this record was created.

Effective Date: The effective date when the adjustment took place. By default, this is set to the current date and time, but you can set it to some other date/time.

Creator: A read-only field giving your user name. This will appear in MainBoss's accounting history to show who made the adjustment.

Storage Assignment: A storeroom assignment record indicating the item and storeroom where the count should be changed. For more on storeroom assignment records, see *Storeroom Assignments* on page 113.

Adjustment Code: The adjustment code used for this adjustment. For more on adjustment codes, see *Item Adjustment Codes* on page 100.

Quantity: The new quantity on hand in the storeroom. (Remember that quantity on hand is the quantity actually present in the storeroom.)

On Hand: Read-only fields giving the quantity of the item on hand in the given storeroom, plus the unit cost and total cost.

Calculated On Hand Cost: A read-only field giving the cost of changing from the old quantity to the new "**Quantity**", based on MainBoss's existing pricing information for the item. For example, if you are decreasing the quantity by one because you broke an item, "**Calculated On Hand Cost**" is the expected cost of the broken item.

Use calculated On Hand cost: If this box is checkmarked, MainBoss will use "**Calculated On Hand Cost**" as the actual cost of the adjustment. If you want to use some other cost, leave the box blank and fill in "**Cost**".

Cost: The cost involved in the adjustment. For example, if the adjustment is necessary because you broke an item, this is the cost of the broken item. You can fill in the "**Unit Cost**" column (the cost of a single unit of the item) or the "**Total Cost**" (the total cost of the adjustment). Whichever column you fill in, MainBoss automatically fills in the other column. If you checkmark **Use calculated On Hand cost**, MainBoss automatically fills in both columns.

From Cost Center, **To Cost Center**: Read-only fields telling the cost centers involved in this operation. MainBoss creates accounting records indicating the transfer of money from the first cost center to the second. These fields are only visible if your database has an **Accounting** license key. For more, see *Accounting Facilities* on page 21.

Recording Physical Counts

Most organizations occasionally take inventory, to make sure that computer records match what's actually in each storeroom. If there's a difference between the expected quantity of an item and the actual quantity on hand, you use a *physical count* record to state the actual quantity.

To record a physical count, go to **Items** | **Storeroom Assignments** or **Coding Definitions** | **Items** | **Storeroom Assignments** and click on the record for the storeroom and item whose count you want to record. Click **Edit** to open the code's record. Then, in the record's **Activity** section, click **New Physical Count**. This opens a window where you can record the results of your physical count. The window contains the following:

Entry Date: A read-only field giving the date that this record was created.

Effective Date: The effective date when the physical count took place. By default, this is set to the current date and time, but you can set it to some other date/time.

Creator: A read-only field giving your user name. This will appear in MainBoss's accounting history to show who recorded the physical count.

Storeroom Assignment: A storeroom assignment record indicating the item and storeroom where the count was taken. For more on storeroom assignment records, see *Storeroom Assignments* on page 113.

Adjustment Code: A read-only field identifying the adjustment code used for this physical count. For more on adjustment codes, see *Item Adjustment Codes* on page 100.

Voided on: A read-only field giving the date on which this physical count was voided, if applicable.

Void Code: A read-only field giving the void code used to void this physical count record, if applicable.

Quantity: The new quantity on hand in the storeroom, as determined by the physical count.

Item Pricing and Purchasing History: This area lets you specify a pricing record for the item you want to purchase. Pricing records may be price quotes or actual prices paid in the past. (For more on price quotes, see *Item Pricing* on page 448.)

At the bottom of this area is a drop-down list which will display storage assignments based on the options specified in the "**Storage Assignment**" area. By choosing appropriate options, you can reduce the entries that are shown in the drop-down list, making it quicker and easier to choose the one you want. The possible options are:

Do not include Purchasing History: If you checkmark this box, the drop-down list will only contain price quotes. If you leave the checkbox blank, the drop-down list will also contain actual prices paid to vendors in the past.

Drop-down list: The drop-down list at the end of the "**Item Pricing and Purchasing History**" area shows pricing records that satisfy the options you have specified.

On Hand: Read-only fields giving the quantity expected in the given storeroom and the price for that quantity.

Pricing Basis: Read-only fields giving pricing information from the record selected in "**Item Pricing and Purchase History**".

Calculated Item Price Cost: A read-only field giving the unit cost and total cost of new quantity on hand, as calculated from existing MainBoss pricing information.

Use calculated item price cost: If this box is checkmarked, MainBoss will use "**Calculated Cost**" as the actual cost of the given "**Quantity**". If you want to use some other cost, leave the box blank and fill in "**Cost**".

Cost: The cost of the given "**Quantity**". You can fill in the "**Unit Cost**" column (the cost of a single unit of the item) or the "**Total Cost**" (the total cost of the adjustment). Whichever column you fill in, MainBoss automatically fills in the other column. If you checkmark **Use calculated item price cost**, MainBoss automatically fills in both columns.

From Cost Center, **To Cost Center**: Read-only fields telling the cost centers involved in this operation. MainBoss creates accounting records indicating the transfer of money from the first cost center to the second. These fields are only visible if your database has an **Accounting** license key. For more, see *Accounting Facilities* on page 21.

Voiding Physical Counts

If you click **Correct** on a physical count record, MainBoss opens a window where you can delete the physical count. The physical count is deleted and MainBoss's count returns to what it was before you made the physical count adjustment.

The window for voiding a physical count contains:

Voided Physical Count: Information taken from the physical count record being voided.

Void Code: A code that explains why this physical count was voided. For more on void codes, see *Void Codes* on page 124.

From Cost Center, **To Cost Center**: Read-only fields telling the cost centers involved in this operation. MainBoss creates accounting records indicating the transfer of money from the first cost center to the second. These fields are only visible if your database has an **Accounting** license key. For more, see *Accounting Facilities* on page 21.

Printing Adjustment Codes

You can print your current adjustment codes by clicking the **Print** button in **Coding Definitions** | **Items** | **Adjustment Codes**. This opens a window that contains the following:

Grouping section: Options controlling how the report is organized.

Group by list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

Sort Direction: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

Sort by list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling which codes will be included in the report.

Show deleted records: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Item Categories

The Item Categories table lets you group inventory items together by type or function. Here are some examples of item categories:

```
Filters
Belts
Lubricants
Plumbing supplies
```

While it is not necessary to create any such categories, most MainBoss users find that such classes are a helpful method of organization. In particular, you can sort inventory reports by item category to see how much you spend on each category. This may help you make informed decisions about managing your maintenance inventory.

> **Note:** Item categories are used when entering information about inventory items. For further information on inventory items, see *Inventory Item Records* on page 445.

Viewing Item Categories

You view item categories with **Coding Definitions** | **Items** | **Categories**. The window contains the following:

View section: Shows the list of current item categories.

Code: Click this heading to sort the list by code. Click again to reverse the order (from ascending to descending or vice versa).

Description: Click this heading to sort the list by description. Click again to reverse the order.

Details section: Shows details from the selected record.

Items section: Shows items that belong to the selected item category.

Defaults for Item Category section: Shows any defaults to be used when creating new item categories.

Editing Item Categories

You create or modify item categories using the item category editor. The usual way to open the editor is to click **New Item Category** or **Edit** in the **View** section of **Coding Definitions** | **Items** | **Categories**.

The item category editor window contains the following:

Details section: Shows basic information for the record.

Code: A brief code to identify this record. No two records may have the same code.

Description: A longer description of the item category.

Comments: Any comments you want to associate with the item category.

Items section: Shows any items that use this item category. For more on items, see *Inventory Item Records* on page 445.

Printing Item Categories

You can print your current item categories by clicking the **Print** button in **Coding Definitions** | **Items** | **Categories**. This opens a window that contains the following:

Sorting section: Options controlling how the report is organized.

Sort by list: These options determine how items are sorted.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick a **Sort by** option where sort direction is relevant.

Filtering section: Options controlling which categories will be included in the report.

Show deleted records: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Issue Codes

Issue Codes specify reasons for issuing items from your inventory. The most common case, of course, is when an item is issued for use on a work order. However, there are other situations in which you may issue materials from your inventory. For example, a rental management company might issue inventory items directly to tenants for simple jobs that the tenants can do on their own (e.g. changing light bulbs). You might also remove materials from inventory in this way if they are being given to another department.

Here are some sample issue codes:

```
Purchased by tenant
Transferred to other department
```

In order to use issue codes, you must create an issue record. For more, see *Issuing Items on page 111*.

Adjustment Codes vs. Issue Codes: There's no clear dividing line between item issues and item adjustments—it's up to you when to describe something as an issue and when to describe it as an adjustment. However, we suggest the following principle: call it an issue when you expect that the item will actually be used (perhaps by a tenant or another department), and otherwise call it an adjustment. For example, if you give a tenant some spare light bulbs to use when needed, that's an issue; if you break a light bulb, write it up with an adjustment.

(Note that adjustments can either add or subtract from the stock on hand, while issues always subtract.)

Viewing Issue Codes

You view issue codes with **Coding Definitions** | **Items** | **Issue Codes**. The window contains the following:

View section: Shows the list of current issue codes.

Code: Click this heading to sort the list by code. Click again to reverse the order (from ascending to descending or vice versa).

Description: Click this heading to sort the list by description. Click again to reverse the order.

Details section: Shows details from the selected record.

Issues section: Shows issue transactions that actually use the selected issue code.

Defaults for Item Issue Code section: Shows any defaults to be used when creating new issue codes.

Editing Issue Codes

You create or modify issue codes using the issue code editor. The usual way to open the editor is to click **New Item Issue Code** or **Edit** in the **View** section of **Coding Definitions** | **Items** | **Issue Codes**.

The issue code editor window contains the following:

Details section: Shows basic information for the record.

Code: A brief code to identify this record. No two records may have the same code.

Description: A longer description of the issue code.

Cost Center: The cost center to be used when item issues use this code. For more on cost centers, see *Cost Centers* on page 96.

Comments: Any comments you want to associate with the issue code.

Issues section: Shows any issues that use this issue code. You can use the **New Item Issue** button in this section to create a new issue. For more, see *Issuing Items* on page 111.

Printing Issue Codes

You can print your current issue codes by clicking the **Print** button in **Coding Definitions** | **Items** | **Issue Codes**. This opens a window that contains the following:

Grouping section: Options controlling how the report is organized.

Group by list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

Sort Direction: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

Sort by list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling which codes will be included in the report.

Show deleted records: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information

will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Issuing Items

Inventory items are usually used in the course of a work order. However, you might occasionally use items for other purposes, as described in *Issue Codes* on page 108. To record such a usage, you must create an *issue* record.

You can create an issue record by going to **Items** | **Storeroom Assignments** or **Coding Definitions** | **Items** | **Storeroom Assignments** or by using **New Item Issue** in the **Resources** section of a work order. Select the storeroom assignment corresponding to the item and the storeroom where the issue took place. Click **Edit** to open the storeroom assignment record and then click **New Item Issue**; MainBoss will open a window where you can record information about the issue action. The window contains the following:

Entry Date: A read-only field giving the date that this record was created.

Effective Date: The date when the issue took place. By default, this is set to the current date and time.

Creator: A read-only field giving your user name. This will appear in MainBoss's accounting history to show who recorded the issue.

Storage Assignment: A storeroom assignment record indicating the item issued and storeroom from which it was taken. For more on storeroom assignment records, see *Storeroom Assignments* on page 113.

Issue Code: The code to be used for this issue. For more on issue codes, see *Issue Codes* on page 108.

Issue To: The person to whom the item was issued. This should be someone from your **Employees** table. For more, see *Employees* on page 254.

Quantity: The quantity being issued.

On Hand: Read-only fields giving the quantity that will remain in the storeroom after the issue takes place, plus the cost of that quantity.

Calculated On Hand Cost: Read-only fields giving the expected cost of "**Quantity**" as calculated from existing price information.

Use calculated On Hand cost: If you checkmark this box, MainBoss will fill in the "**This Entry**" line with figures calculated from the costs given in the "**On Hand**" line. Otherwise, you must fill in "**This Entry**" yourself.

This Entry: The cost of the given "**Quantity**". You can fill in the "**Unit Cost**" column (the cost of a single unit of the item) or the "**Total Cost**" (the total cost of the adjustment). Whichever column you fill in, MainBoss automatically fills in the other column. If you checkmark **Use calculated On Hand cost**, MainBoss automatically fills in both columns.

As Corrected: If there has been a correction for this record, this line will have read-only fields giving the corrected values.

From Cost Center, **To Cost Center**: Read-only fields telling the cost centers involved in this operation. MainBoss creates accounting records indicating the transfer of money from the first cost center to the second. These fields are only visible if your database has an **Accounting** license key. For more, see *Accounting Facilities* on page 21.

Correcting Item Issues

To correct an Item Issue, you select the issue record where it appears, e.g. in the **Activity** section of a storeroom assignment record. (For more, see *Storeroom Assignments* on page 113.) Then click **Correct**. This opens a window where you can correct the record:

Entry Date: A read-only field giving the date that this record was created.

Effective Date: The date/time when the item was issued.

Creator: A read-only field giving your user name. This will appear in MainBoss's accounting history to show who made the correction.

Storage Assignment: A read-only field giving information from the original item issue record.

Issue Code: A read-only field giving the issue code from the original item issue record.

Issue To: A read-only field giving the person to whom the item was issued (in the original item issue record).

Quantity: Corrects the quantity actually issued. Typically, you fill in the "**As Corrected**" field with the correct quantity issued, as opposed to the quantity you originally recorded. The alternative is to fill in "**This Entry**" with the difference between the quantity you originally entered and the true quantity issued.

For example, suppose you really issued 3 but you accidentally typed 1 in the original record. You could fill in "**As Corrected**" with 3 (the correct number) or fill in "**This Entry**" with 2 (the difference between what you originally typed

and the true quantity). "**This Entry**" may be a negative number if you originally typed in too much.

If you fill in "**As Corrected**", MainBoss automatically sets "**This Entry**" and vice versa.

On Hand: Read-only fields giving the quantity that will remain in the storeroom after the issue takes place, plus the cost of that quantity.

Calculated On Hand Cost: Read-only fields giving the expected cost of "**Quantity**" as calculated from existing price information.

<u>Use calculated On Hand cost</u>: If you checkmark this box, MainBoss will fill in "**This Entry**" and "**As Corrected**" with the values obtained from "**Calculated On Hand Cost**". If you don't want to use these calculations, leave the checkbox blank and fill in "**This Entry**" or "**As Corrected**".

This Entry, **As Corrected**: Corrects the actual cost (if necessary). Typically, you fill in "**As Corrected**" with the correct cost of the correct quantity. The alternative is to fill in "**This Entry**" with the difference between the cost you originally entered and the true cost.

If you fill in "**As Corrected**", MainBoss automatically sets "**This Entry**" and vice versa.

From Cost Center, **To Cost Center**: Read-only fields telling the cost centers involved in this operation. MainBoss creates accounting records indicating the transfer of money from the first cost center to the second. These fields are only visible if your database has an **Accounting** license key. For more, see *Accounting Facilities* on page 21.

Storeroom Assignments

Storeroom assignment records specify where specific items may be stored. In addition, these records specify control information for the storage locations.

For example, a storeroom assignment record might refer to a storage location like "Bin 3 in Storeroom 1". The record specifies which item is stored there, as well as other information such as the maximum quantity that should be stored in that location and the minimum amount you always want to keep on hand. In other words, a storeroom assignment record specifies:

☐ A type of item (for more on inventory items, see *Inventory Item Records* on page 445)

☐ One location where that item is stored; this location must be a storeroom or a sublocation within a storeroom (for more on storerooms, see *Storerooms* on page 120)

☐ An item pricing record giving price information about the item (see *Item Pricing* on page 448)

☐ Information about the quantity that can be or should be stored in that location

If the same type of item is stored in several locations, you must have a storeroom assignment for each place.

When you reserve materials for use in a job, you specify a storeroom assignment record, not just the item itself. In other words, you don't just reserve any item of the required type, you reserve specific items in specific locations. This ensures that you know where to get the materials you need, and that someone else doesn't use them first.

> **Note:** A storeroom assignment record does not specify the actual quantity of an item that's currently in a particular location. It simply states where items of a particular type are allowed to be stored. For example, a storeroom assignment could say "Item X may be stored in Bin Y." The assignment does *not* state the current quantity. However, you can use a *physical count* to record information about the quantity in a particular location. For more, see *Recording Physical Counts* on page 102.

Permanent vs. Temporary Storage Locations: Storeroom assignments deal with *permanent* storage locations, as opposed to *temporary* storage locations. Temporary storage locations are used in the short term to store materials before and during a specific job; permanent storage locations are used in the long term to store materials that might be used in *any* job. For more on temporary storage locations, see *Temporary Storage Locations* on page 374.

Viewing Storeroom Assignments

You view storeroom assignments with **Items** | **Storeroom Assignments** or **Coding Definitions** | **Items** | **Storeroom Assignments**. The window contains the following:

View section: Shows the list of current storeroom assignments.

   Code: Depicts the location of items using a location map. The picture only shows locations that contain storerooms, the storerooms themselves, sublocations within the storerooms, and items at such sublocations. For more on storerooms, see *Storerooms* on page 120.

   Description: A description of the item, as given in the item record.

   Available: The current quantity of the item that's available in the given storeroom.

   Details section: Shows basic information from the selected record.

   Activity section: Shows inventory activity for the selected item in the specified storeroom.

Defaults for Storeroom Assignment section: Shows any defaults to be used when creating new storeroom assignments.

Editing Storeroom Assignments

You create or modify storeroom assignments using the storeroom assignment editor. The usual way to open the editor is to click **New Storeroom Assignment** or **Edit** in the **View** section of **Items** | **Storeroom Assignments** or **Coding Definitions** | **Items** | **Storeroom Assignments**.

The storeroom assignment editor window contains the following:

Details section: Shows basic information for the record.

Item: The inventory item whose location you're recording. For more on inventory items, see *Inventory Item Records* on page 445.

UOM: A read-only field giving the unit of measure associated with this item. For more information, see *Units of Measure* on page 228.

External Tag: A short string of characters which can be turned into a bar code associated with this storeroom assignment. For more information, see *Bar Code Support* on page 87.

Location: A storeroom where the item may be stored. For more on storerooms, see *Storerooms* on page 120.

Preferred Pricing: A price or price quote on the item. Typically, this is used to indicate the vendor from whom you prefer to purchase the item. For more on item pricing, see *Item Pricing* on page 448.

Minimum: The minimum quantity of this item that you want to keep on hand in this location.

Maximum: The maximum quantity of this item that you want to keep on hand in this location.

Read-only fields: Show current information on the items actually stored in the given storeroom, including quantities on hand, on order, on reserve, and pricing information.

Cost Center: The cost center to be used for holding costs associated with this item and storeroom. For more on cost centers, see *Cost Centers* on page 96.

You can only change the cost center of a storeroom assignment if the value of the storeroom assignment is zero.

Activity section: Shows any changes to items in the given location (e.g. items issued for use in work orders, or received from incoming shipments). This section also lets you record various activities for the items.

New Physical Count: Opens a window where you can record the quantity of the item that is actually present in the storeroom. For more on recording physical counts, see *Recording Physical Counts on page 102*. The button also has the following on its drop-down arrow:

> **New Item Adjustment**: Opens a window where you can record an adjustment to the quantity that is present in the storeroom. For example, if you accidentally break an item, you can use this to record the breakage. For more on item adjustments, see *Making Item Adjustments on page 101*.

Correct: Opens a window where you can make a correction to an existing activity record.

New Item Issue: Opens a window where you can record the issue of an item, i.e. using an item for some purpose that *isn't* on a work order. For more on item issues, see *Issuing Items on page 111*. The button also has the following on its drop-down arrow:

> **New Item Transfer To**: Transfers a quantity of this item from the current storeroom to another storeroom. For more information, see *Transferring Items from One Storeroom to Another on page 116*.

> **New Item Transfer From**: Transfers a quantity of this item from another storeroom to this one.

> **Receive (with PO)**: Records the receipt of an item that appears on a purchase order. For more information, see *Receiving Purchase Order Items on page 493*.

> **Receive**: Records the receipt of an item. For more information, see *Receiving Items on page 369*.

Refresh: Updates the list to reflect any recent changes.

Transferring Items from One Storeroom to Another

You record the transfer of items from one storeroom to another with an item transfer record. To create such a record, you start with a storeroom assignment record (see *Editing Storeroom Assignments on page 115*). In the **Activity** section, drop the arrow on **New Item Issue** and click either **New Item Transfer To** or **New Item Transfer From**. MainBoss opens a window containing the following:

Entry Date: A read-only field giving the date that this record was created.

Effective Date: The date when the transfer took place. By default, this is set to the current date and time.

Creator: A read-only field giving your user name. This will appear in MainBoss's accounting history to show who made the transfer.

From source Storage Assignment: A storeroom assignment record indicating where the item came from. (This is read-only if you opened this window using **New Item Transfer To**.)

To destination Storage Assignment: A storeroom assignment record indicating where the item is going. (This is read-only if you opened this window using **New Item Transfer From**.)

Quantity: The quantity being transferred.

Read-only fields: Give the current quantity of cost of the item in the "from" and "to" storerooms.

Manually Enter Cost: If you select this option, you must enter the cost of the transferred items in "**This Entry**".

Use calculated source Assignment On Hand cost: If you select this option, the cost of the transferred items will be calculated from the unit cost in "**Calculated source Assignment On Hand Cost**".

Use calculated destination Assignment On Hand cost: If you select this option, the cost of the transferred items will be calculated from the unit cost in "**Calculated destination Assignment On Hand Cost**".

This Entry: The cost of the given "**Quantity**". You can fill in the "**Unit Cost**" column (the cost of a single unit of the item) or the "**Total Cost**" (the total cost of the transfer). Whichever column you fill in, MainBoss automatically fills in the other column. If you checkmark **Use calculated source Assignment On Hand cost** or **Use calculated destination Assignment On Hand cost**, MainBoss automatically fills in both columns with the appropriate cost.

As Corrected: If there has been a correction for this record, this line will have read-only fields giving the corrected values.

Corrections of Item Transfers

To correct an Item Transfer, you select the transfer record where it appears, e.g. in the storeroom assignments section of the item record. (For more, see *Editing Item Records* on page 447.) Then click **Correct**. This opens a window where you can correct the record:

Entry Date: A read-only field giving the date that this record was created.

Effective Date: The date/time when the item was transferred.

Creator: A read-only field giving your user name. This will appear in MainBoss's accounting history to show who made the correction.

From source Storage Assignment: A read-only field giving the original location of the items transferred.

To destination Storage Assignment: A read-only field giving the destination of the items transferred.

Quantity: Corrects the quantity actually transferred. Typically, you fill in the "**As Corrected**" field with the actual quantity transferred—the correct quantity, as opposed to the quantity you originally recorded. The alternative is to fill in "**This Entry**" with the difference between the quantity you originally entered and the true quantity.

For example, suppose you really transferred 3 but you accidentally typed 1 in the original record. You could fill in "**As Corrected**" with 3 (the correct number) or fill in "**This Entry**" with 2 (the difference between what you originally typed and the true quantity). "**This Entry**" may be a negative number if you originally typed in too much.

If you fill in "**As Corrected**", MainBoss automatically sets "**This Entry**" and vice versa.

Read-only fields: Give the current quantity of cost of the item in the "from" and "to" storerooms.

Manually Enter Cost: If you select this option, you must enter the cost of the transferred items in "**This Entry**".

Use calculated source Assignment On Hand cost: If you select this option, the cost of the transferred items will be calculated from the unit cost in "**Calculated source Assignment On Hand Cost**".

Use calculated destination Assignment On Hand cost: If you select this option, the cost of the transferred items will be calculated from the unit cost in "**Calculated destination Assignment On Hand Cost**".

This Entry, **As Corrected**: Corrects the actual cost (if necessary). You only need to fill in these fields if you selected the **Manually Enter Cost** option.

Typically, you fill in "**As Corrected**" with the correct cost of the correct quantity. The alternative is to fill in "**This Entry**" with the difference between the cost you originally entered and the true cost.

If you fill in "**As Corrected**", MainBoss automatically sets "**This Entry**" and vice versa.

Printing Storeroom Assignments

You can print your current storeroom assignments by clicking the **Print** button in **Items** | **Storeroom Assignments** or **Coding Definitions** | **Items** | **Storeroom Assignments**. This opens a window that contains the following:

Grouping section: Options controlling how the report is organized.

Group by list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

Sort Direction: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

Sort by list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling which storeroom assignment records will be included in the report.

Show deleted records: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Bar Code Symbology: Specifies a format to be used for printing bar codes in this report. If you choose **None**, no bar codes will be printed; otherwise, a

bar code containing the "**External Tag**" for each storeroom assignment will be printed for every work order in the report. For more information, see *Bar Code Support* on page 87.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Storerooms

A storeroom is any location where you keep inventory materials. If you have more than one storeroom, it's obviously important to know which storeroom contains which items so that workers can find the materials they need.

Before you create a storeroom record, you should create a unit or location record for the room. Here's an example:

1. Create a **Units** record for Room 101.

2. Create a **Storerooms** record specifying that Room 101 is an inventory storeroom.

A storeroom can contain subunits or sublocations. For example, if you number the bins or shelves within a storeroom, each bin or shelf can be a subunit of the storeroom itself. If you specify that a particular unit is a storeroom, all the subunits are considered valid possibilities for *storeroom assignments*. For more, see *Storeroom Assignments* on page 113.

Permanent vs. Temporary Storage: Storerooms are considered *permanent* storage facilities. MainBoss also has the concept of *temporary* storage facilities—places where items are stored for short periods of time in preparation for being used on a job. For more information, see *Temporary Storage Locations* on page 374.

Physical Count Sheet Sort Order: A *physical count sheet* is a print-out designed to help you perform a physical inventory count. Each storeroom record may have a *sort order* number that determines where the storeroom will appear in a physical count sheet. For example, a storeroom numbered 1 would appear first on the count sheet; a storeroom numbered 2 would appear second, and so on. (More precisely, the storerooms are sorted from lowest sort order number to highest, even if the lowest number isn't 1 and if some of the numbers aren't consecutive.)

Viewing Storeroom Records

You view storeroom records with **Coding Definitions** | **Items** | **Storerooms**. The window contains the following:

View section: Shows a location map that lists current storerooms.

Code: Click this heading to sort the map by code. Click again to reverse the order (from ascending to descending or vice versa).

Description: Click this heading to sort the list by description. Click again to reverse the order.

Details section: Shows information from the selected record.

Storeroom Assignments section: Shows storeroom assignments associated with the selected storeroom. For more, see *Storeroom Assignments* on page 113.

Temporary Storage and Items section: Shows temporary storage and temporary assignments associated with the selected storeroom. For more, see *Temporary Storage Locations* on page 374 and *Temporary Storage Assignments* on page 376.

Show on Map: If the currently selected storeroom has map coordinates, MainBoss attempts to open Google Maps to a map showing the storeroom's geographic location. If the current storeroom doesn't have map coordinates, MainBoss checks the unit and/or location record that contains the storeroom, then the container of the container, and so on, until MainBoss either finds a record that has map coordinates or else reaches a record with no container.

If MainBoss finds no record with map coordinates, but does find a postal address record containing postal information, MainBoss passes the postal information to Google Maps.

In order to see the geographic location in Google Maps, you must have an active Internet connection and a suitable web browser.

Defaults for Storeroom section: Shows any defaults to be used when creating new storerooms.

Editing Storeroom Records

You create or modify storerooms using the storeroom editor. The usual way to open the editor is to click **New Storeroom** or **Edit** in the **View** section of **Coding Definitions** | **Items** | **Storerooms**.

The storeroom editor window contains the following:

Details section: Shows basic information for the record.

Code: A brief code to identify this record. No two records may have the same code.

Description: A longer description of the storeroom.

External Tag: A short string of characters which can be turned into a bar code associated with this storeroom. For more information, see *Bar Code Support on page 87*.

Map Coordinates: The geographic position of this storeroom. Coordinates are specified in longitude and latitude.

> As a special feature, MainBoss makes it easy for you to use Google Maps to specify "**Map Coordinates**". First, use Google Maps to find the location's geographic position. Then, right-click on the location in the Google Maps display and click **Center map here** in the resulting menu. Next, click the button in the left-hand panel with the link icon on it (a section of chain). Finally, copy the given URL (beginning with http:) and paste it into the "**Map Coordinates**" field in MainBoss. MainBoss will extract the longitude and latitude from the Google Maps URL.

Location: The actual location of the storeroom. This can be either a location from the **Locations** table or a unit from the **Units** table. For more, see *Locations on page 126* and *Units on page 422*.

Physical Count Sheet Sort Order: A number indicating where this storeroom should appear in the physical count sheet print-out. Storerooms are printed in ascending order by sort order number. (For more information, see *Storerooms on page 120*.)

Comments: Any comments you want to associate with the storeroom.

Storeroom Assignments section: Shows storeroom assignments associated with the storeroom. For more, see *Storeroom Assignments on page 113*.

Temporary Storage and Items section: Shows temporary storage and temporary assignments associated with the storeroom. For more, see *Temporary Storage Locations on page 374* and *Temporary Storage Assignments on page 376*.

Show on Map: If this storeroom has map coordinates, MainBoss attempts to open Google Maps to a map showing the storeroom's geographic location. If the storeroom doesn't have map coordinates, MainBoss checks the unit and/or location record that contains the storeroom, then the container of the container, and so on, until MainBoss either finds a record that has map coordinates or else reaches a record with no container.

If MainBoss finds no record with map coordinates, but does find a postal address record containing postal information, MainBoss passes the postal information to Google Maps.

In order to see the geographic location in Google Maps, you must have an active Internet connection and a suitable web browser.

Printing Storeroom Records

You can print your current storeroom records by clicking the **Print** button in **Coding Definitions** | **Items** | **Storerooms**. This opens a window that contains the following:

Sorting section: Options controlling how the report is organized.

Sort by list: These options determine how items are sorted.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick a **Sort by** option where sort direction is relevant.

Filtering section: Options controlling which storeroom records will be included in the report.

Show deleted records: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Void Codes

If you make a mistake when recording a physical count, MainBoss lets you void (cancel) the physical count record. In this situation, you are asked to specify a *void code*. This code explains why you decided to void the physical count. Here are some sample void codes:

```
Mistake in counting
Mistake in number entry
```

Viewing Void Codes

You open the Void Code table viewer with **Coding Definitions** | **Items** | **Void Codes**. The window contains the following:

View section: Shows the list of current void codes.

Code: Click this heading to sort the list by code. Click again to reverse the order (from ascending to descending or vice versa).

Description: Click this heading to sort the list by description. Click again to reverse the order.

Details section: Shows information from the selected record.

Defaults for Void Code section: Shows any defaults to be used when creating new void codes.

Editing Void Codes

You create or modify void codes using the void code editor. The usual way to open the editor is to click **New Void Code** or **Edit** in the **View** section of **Coding Definitions** | **Items** | **Void Codes**.

The void code editor window contains the following:

Details section: Shows basic information for the record.

Code: A brief code to identify this record. No two records may have the same code.

Description: A longer description of the void code.

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Comments: Any comments you want to associate with the void code.

Printing Void Codes

You can print your current void codes by clicking the **Print** button in **Coding Definitions** | **Items** | **Void Codes**. This opens a window that contains the following:

Sorting section: Options controlling how the report is organized.

Sort by list: These options determine how items are sorted.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick a **Sort by** option where sort direction is relevant.

Filtering section: Options controlling which codes will be included in the report.

Show deleted records: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Locations

The **Locations** table stores information on all locations used in your work. This includes buildings, storerooms, addresses of vendors, and even the locations of the units you maintain.

The simplest type of location is a *postal address*. A record for a postal address stores all the usual address information—street address, city, country, etc.

A *sublocation* is a location inside another location. For example, suppose you have a postal address record representing an office building. You might create sublocation records for each floor inside that building. You might then create more sublocations for office suites on each floor; these records are *inside* the individual floor records. You could also create records for each room inside each office suite, and so on.

This set-up is similar to the way that folders under Windows can contain subfolders, which can contain other subfolders, which can contain individual files. When MainBoss displays the Locations table, you'll see a picture of what contains what in the same way that Windows Explorer shows the structure of your folders and files. This is called a *location map*.

In practice, you set up one or more postal address records first, then define locations within each postal address.

Location records are used extensively throughout MainBoss Advanced. Here are some examples:

☐ A contact record can have an associated location record giving that contact's address information. The same goes for personnel records.

☐ A unit record has a location record telling where the unit is.

☐ An item record can have multiple locations associated with it, indicating places where the item is stored (i.e. what MainBoss Basic called storerooms).

In addition to the types of locations already discussed, MainBoss allows a number of other location types:

☐ Units may be considered locations. For example, you can talk about the location of a piece of equipment; for more, see *Units* on page 422.

☐ *Temporary storage locations* are places where spare parts and other materials may be stored before and during a specific job. For more, see *Temporary Storage Locations* on page 374.

☐ *Temporary storage locations for tasks* are places where spare parts and other materials may be stored every time you do a planned maintenance task. For more, see *Editing Task Temporary Storage Assignments* on page 193.

☐ *Storerooms* are locations where spare parts and other materials may be stored in the long term (as opposed to just for a single job). For more, see *Storerooms* on page 120.

Viewing Locations

You view the locations with **Coding Definitions** | **Locations**. (Both control panel entries have the same information.) The display contains the following:

View section: Shows current locations using a location map. The main entries are postal addresses. Each postal address may contain sublocations which can contain more sublocations, to any level necessary.

Code: Click this heading to sort the list by code (i.e. the names associated with postal addresses). Click again to reverse the order.

Description: Click this heading to sort the list by description. Click again to reverse the order.

Details section: Shows information from the selected record.

Contacts section: Shows contact people at the selected location. For more, see *Contacts* on page 91.

Units section: Shows units at the selected location. For more, see *Units* on page 422.

Storerooms section: Shows storerooms at the selected location. For more, see *Storerooms* on page 120.

Temporary Storage and Items section: Shows temporary storage and temporary storage assignments at the selected location. For more, see *Temporary Storage Locations* on page 374 and *Temporary Storage Assignments* on page 376.

New Postal Address: Opens a window to create a new postal address record. Fields in the new record will either be blank or assigned default values (as specified in the **Defaults for Postal Address** section).

New Sub Location: Opens a window to create a new sublocation under the currently selected location. Fields in the new record will either be blank or assigned default values (as specified in the **Defaults for Sub Location** section).

Show on Map: If the currently selected location record has map coordinates, MainBoss attempts to open Google Maps to a map showing the location's geographic position. If the current location record doesn't have map coordinates, MainBoss checks the location record that contains the current location, then the container of the container, and so on, until MainBoss either finds a record that has map coordinates or else reaches a record with

no container.

If MainBoss finds no record with map coordinates, but does find a postal address record containing postal information, MainBoss passes the postal information to Google Maps.

In order to see the geographic position in Google Maps, you must have an active Internet connection and a suitable web browser.

Defaults for Postal Address section: Shows any defaults to be used when creating new postal addresses.

Defaults for Sub Location section: Shows any defaults to be used when creating new sublocation records.

Viewing Non-Temporary Locations

In some situations, you will be asked to specify a non-temporary location. In particular, if you are trying to define temporary storage for a work order, you'll be asked to specify a location that can be used for temporary storage. In this case, MainBoss can display a list of all your non-temporary locations (i.e. all locations that aren't in your temporary location list).

The Non-Temporary Location viewer is exactly like the normal Locations viewer, except that it doesn't display temporary locations. For more on the locations viewer, see *Viewing Locations* . For more on temporary storage, see *Temporary Storage Locations* .

Editing Postal Addresses

You create or modify postal addresses using the postal address editor. The usual way to open the editor is to click **New Postal Address** or **Edit** in the **View** section of **Coding Definitions** | **Locations**.

The postal address editor contains the following:

Details section: Shows basic information for the record.

Code: A brief code to identify this record. No two records may have the same code.

Description: A longer description of the postal address.

Address Line 1, **Address Line 2**: The street address and any related information (e.g. unit number).

City: The city containing the address.

Territory: The state or province containing the address.

Country: The country or region containing the address.

Postal Code: The zip code or postal code for the address.

Map Coordinates: The geographic position of this location. Coordinates are specified in longitude and latitude.

> As a special feature, MainBoss makes it easy for you to use Google Maps to specify "**Map Coordinates**". First, use Google Maps to find the location's geographic position. Then, right-click on the location in the Google Maps display and click **Center map here** in the resulting menu. Next, click the button in the left-hand panel with the link icon on it (a section of chain). Finally, copy the given URL (beginning with `http:`) and paste it into the "**Map Coordinates**" field in MainBoss. MainBoss will extract the longitude and latitude from the Google Maps URL.

Comments: Any comments you want to associate with the postal address.

Contacts section: Shows any contacts at this address. You can also create contacts using this section, but you can only do so once you **Save** the postal address record. For more on contacts, see *Contacts* on page 91.

Units section: Shows units at this location. For more, see *Units* on page 422.

Storerooms section: Shows storerooms at this location. For more, see *Storerooms* on page 120.

Temporary Storage and Items section: Shows temporary storage and temporary storage assignments at this location. For more, see *Temporary Storage Locations* on page 374 and *Temporary Storage Assignments* on page 376.

Show on Map: If this postal address record has map coordinates, MainBoss attempts to open Google Maps to a map showing the location's geographic position. If this postal address doesn't have map coordinates but does contain postal information, MainBoss passes the postal information to Google Maps.

In order to see the geographic position in Google Maps, you must have an active Internet connection and a suitable web browser.

Editing Sublocations

You create or modify sublocations using the sublocation editor. The usual way to open the editor is to click **New Sub Location** or **Edit** in the **View** section of **Coding Definitions** | **Locations**.

The sublocation editor contains the following:

Details section: Shows basic information for the record.

Code: A brief code to identify this record. No two records may have the same code.

Description: A longer description of the sublocation.

Map Coordinates: The geographic position of this sub location. Coordinates are specified in longitude and latitude.

As a special feature, MainBoss makes it easy for you to use Google Maps to specify "**Map Coordinates**". First, use Google Maps to find the location's geographic position. Then, right-click on the location in the Google Maps display and click **Center map here** in the resulting menu. Next, click the button in the left-hand panel with the link icon on it (a section of chain). Finally, copy the given URL (beginning with `http:`) and paste it into the "**Map Coordinates**" field in MainBoss. MainBoss will extract the longitude and latitude from the Google Maps URL.

Contained Within: The location that contains this sublocation. This may be a postal address or another sublocation.

Comments: Any comments you want to associate with the sublocation.

Contacts section: Shows any contacts at this sublocation. You can also create contacts using this section, but you can only do so once you **Save** the sublocation record. For more on contacts, see *Contacts* on page 91.

Units section: Shows units at this location. For more, see *Units* on page 422.

Storerooms section: Shows storerooms at this location. For more, see *Storerooms* on page 120.

Temporary Storage and Items section: Shows temporary storage and temporary storage assignments at this location. For more, see *Temporary Storage Locations* on page 374 and *Temporary Storage Assignments* on page 376.

Show on Map: If this sub location record has map coordinates, MainBoss attempts to open Google Maps to a map showing the sub location's geographic location. If the record doesn't have map coordinates, MainBoss checks the location record that contains the sub location, then the container of the container, and so on, until MainBoss either finds a record that has map coordinates or else reaches a record with no container.

If MainBoss finds no record with map coordinates, but does find a postal address record containing postal information, MainBoss passes the postal information to Google Maps.

In order to see the geographic position in Google Maps, you must have an active Internet connection and a suitable web browser.

Printing Location Information

You can print your current locations by clicking the **Print** button in **Coding Definitions | Locations**. This opens a window that contains the following:

Filtering section: Options controlling which location records will be included in the report.

Show deleted records: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Purchase Order Assignees

The purchase order assignee list specifies people who can be assigned to purchase orders. Assigning someone to a purchase order means that person has some special interest in the purchase order; for more, see *Assignments* on page 32.

Viewing Purchase Order Assignee Records

You view purchase order assignee records with **Purchase Orders** | **Assignees** or **Coding Definitions** | **Purchase Orders** | **Assignees**. The window contains the following:

View section: Shows the list of current records.

Name: Click this heading to sort the list by assignee name. Click again to reverse the order (from ascending to descending or vice versa).

Business Phone: Click this heading to sort the list by business phone number. Click again to reverse the order.

Mobile Phone: Click this heading to sort the list by mobile phone number. Click again to reverse the order.

Number Draft: Click this heading to sort the list by the number of draft purchase orders associated with the assignees. Click again to reverse the order.

Number Issued: Click this heading to sort the list by the number of issued purchase orders associated with the assignees. Click again to reverse the order.

Defaults for Purchase Order Assignee section: Shows any defaults to be used when creating new purchase order assignee records.

Editing Purchase Order Assignee Records

You create or modify purchase order assignee records by clicking **New Purchase Order Assignee** or **Edit** in the **View** section of **Purchase Orders** | **Assignees** or **Coding Definitions** | **Purchase Orders** | **Assignees**. The editor contains the following:

Details section: Contains basic information about this assignee.

Name: The name of the assignee, selected from the **Contacts** table. For more on contacts, see *Contacts* on page 91.

Business Phone, **Mobile Phone**, **Email**: Information obtained from the **Contacts** table once you've specified a "**Name**".

Receive Notifications: If this is checkmarked, and if your database has the MainBoss Service license key, this assignee will be sent e-mail whenever a history record is created for this purchase order. In particular, the assignee receives an e-mail notification whenever the purchase order changes state (e.g. when it is opened or closed).

In the first notification, assignees will receive the original details of the purchase order. In subsequent notifications, assignees will receive comments from purchase order history records, but not the purchase order contents.

Comments: Any comments you want to associate with this assignee.

Purchase Order Assignments section: Lists any purchase orders to which this person has been assigned.

Printing Purchase Order Assignee Records

To print information from your Purchase Orders Assignees table, use **Purchase Orders** | **Assignees** or **Coding Definitions** | **Purchase Orders** | **Assignees** and click **Print**. MainBoss opens a window that contains the following:

Grouping section: Options controlling how the report is organized.

Group by list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

Sort Direction: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

Sort by list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling which records will be included in the report.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Purchase Order Miscellaneous

Purchase orders may contain miscellaneous line items, such as surcharges for extra delivery or accounting fees. Before you can specify such line items on a purchase order, you must create a "purchase order miscellaneous" record for each such line item. This record describes what the line item is, gives its cost, and tells which cost center should be charged.

> **Note:** There is no connection between purchase order miscellaneous items and work order miscellaneous items. A purchase order miscellaneous item is typically an extra cost associated with the act of purchasing (e.g. sales tax). A work order miscellaneous item is typically an extra cost associated with doing a job (e.g. parking for a worker).

Viewing Purchase Order Miscellaneous Records

You view "purchase order miscellaneous" records with **Coding Definitions** | **Purchase Orders** | **Miscellaneous**. The window contains the following:

View section: Shows the list of current records.

Code: Click this heading to sort the list by code. Click again to reverse the order (from ascending to descending or vice versa).

Description: Click this heading to sort the list by description. Click again to reverse the order.

Unit Cost: Click this heading to sort the list by unit cost. Click again to reverse the order.

Defaults for Miscellaneous Item section: Shows any defaults to be used when creating new miscellaneous item records.

Editing Purchase Order Miscellaneous Records

You create or modify "purchase order miscellaneous" records by clicking **New Miscellaneous Item** or **Edit** in the **View** section of **Coding Definitions** | **Purchase Orders** | **Miscellaneous**. The editor contains the following:

Code: A brief code to identify this record. No two records may have the same code.

Description: A longer description of the miscellaneous item.

Order Line Text: The entry that should appear in a printed purchase order when this item is included.

Cost Center: The cost center to be used for the cost of this item. For more on cost centers, see *Cost Centers* on page 96.

Unit Cost: The cost of one of these items. In many cases, you might leave this blank; you will fill in the cost when you actually use this record in a purchase order.

Comments: Any comments you want to associate with the item.

Printing Purchase Order Miscellaneous Records

To print information from your Purchase Orders Miscellaneous table, use **Coding Definitions** | **Purchase Orders** | **Miscellaneous** and click **Print**. MainBoss opens a window that contains the following:

Grouping section: Options controlling how the report is organized.

Group by list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

Sort Direction: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

Sort by list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling which records will be included in the report.

Show deleted records: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Payment Terms

MainBoss purchase orders can specify payment terms. The Payment Terms table lists all the payment terms that might be used by your organization, so that these terms may appear on purchase orders. Sample payment terms might include

```
            Pay on receipt
            C.O.D.
            Net 30
            Net 60
            Net 90
```

Note: For more on creating purchase orders with MainBoss, see *Purchase Orders* on page 462.)

Viewing Payment Terms

You view the payment terms with **Coding Definitions** | **Purchase Orders** | **Payment Terms**. The window contains the following:

> **View** section: Shows the list of current payment terms.

>> **Code**: Click this heading to sort the list by code. Click again to reverse the order (from ascending to descending or vice versa).

>> **Description**: Click this heading to sort the list by description. Click again to reverse the order.

>> **Details** section: Shows basic information about the selected payment term code.

>> **Purchase Orders** section: Shows purchase orders that use the selected payment term code. For more on purchase orders, see *Purchase Orders* on page 462.

> **Defaults for Payment Term** section: Shows any defaults to be used when creating new payment term records.

Editing Payment Terms

You create or modify payment terms using the payment term editor. The usual way to open the editor is to click **New Payment Term** or **Edit** in the **View** section of **Coding Definitions** | **Purchase Orders** | **Payment Terms**.

The payment term editor contains the following:

> **Code**: A brief code to identify this record. No two records may have the same code.

> **Description**: A longer description of the payment term.

> **Comments**: Any comments you want to associate with the payment term.

> **Purchase Orders** section: Shows any purchase orders that use this payment term. For more on purchase orders, see *Purchase Orders* on page 462.

Printing Payment Terms

You can print your current payment terms by clicking the **Print** button in **Coding Definitions** | **Purchase Orders** | **Payment Terms**. This opens a window that contains the following:

Sorting section: Options controlling how the report is organized.

Sort by list: These options determine how items are sorted.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick a **Sort by** option where sort direction is relevant.

Filtering section: Options controlling which records will be included in the report.

Show deleted records: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Shipping Modes

When you create a purchase order with MainBoss, it is often useful to specify how the goods should be shipped. The Shipping Modes table lists all the shipment methods that your organization might request, making it possible for these terms to appear on purchase orders. Here are some examples:

```
Standard freight
Overnight courier
Pick-up
Regular mail
```

> **Note:** For more on creating purchase orders with MainBoss, see *Purchase Orders* on page 462.)

Viewing Shipping Modes

You view shipping modes with **Coding Definitions** | **Purchase Orders** | **Shipping Modes**. The window contains the following:

View section: Shows the list of current shipping modes.

> **Code**: Click this heading to sort the list by code. Click again to reverse the order (from ascending to descending or vice versa).

> **Description**: Click this heading to sort the list by description. Click again to reverse the order.

> **Details** section: Shows basic information about the selected mode.

> **Purchase Orders** section: Shows purchase orders that use the selected shipping mode. For more on purchase orders, see *Purchase Orders* on page 462.

Defaults for Shipping Mode section: Shows any defaults to be used when creating new shipping mode records.

Editing Shipping Modes

You create or modify shipping modes using the shipping mode editor. The usual way to open the editor is to click **New Shipping Mode** or **Edit** in the **View** section of **Coding Definitions** | **Purchase Orders** | **Shipping Modes**.

The shipping mode editor window contains the following:

Details section: Specifies basic information about the shipping mode.

> **Code**: A brief code to identify this record. No two records may have the same code.

> **Description**: A longer description of the shipping mode.

Comments: Any comments you want to associate with the shipping mode.

Purchase Orders section: Shows any purchase orders that use this shipping mode. For more on purchase orders, see *Purchase Orders* on page 462.

Printing Shipping Modes

You can print your current shipping modes by clicking the **Print** button in **Coding Definitions** | **Purchase Orders** | **Shipping modes**. This opens a window that contains the following:

Sorting section: Options controlling how the report is organized.

Sort by list: These options determine how items are sorted.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick a **Sort by** option where sort direction is relevant.

Filtering section: Options controlling which records will be included in the report.

Show deleted records: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Purchase Order Status Codes

Purchase order status codes give you a way to indicate when a purchase order needs someone's attention. For example, you might create a status `Waiting for approval` to mark a purchase order which has been written up but not approved by management.

As another example, you might create a status `Items broken during shipment`. A receiving clerk could use this status to mark a purchase order with breakage problems. The status would alert other people in the maintenance department that someone should contact the vendor and deal with the situation.

> While it is possible to use status codes for any purpose, we recommend that you only use them for purchase orders that are notable in some way. "Normal" purchase orders should have their "**Status**" field blank.

Note that status codes can be a useful form of communication between users. For example, suppose that a worker has the `PurchaseOrderReceive` security role (meaning that the worker can record the receipt of purchase order line items) but does not have the `PurchaseOrderClose` security role (which is needed to close a purchase order). The worker could give the purchase order a status like `Ready to Close`, indicating that all appropriate information has been recorded. A supervisor with `PurchaseOrderClose` permission could regularly check all open purchase orders to see if any are `Ready to Close`; if so, the supervisor can review those purchase orders and close them as appropriate (removing the status code in the process).

> Remember that a status code is intended to bring a purchase order to someone's attention. You can therefore use status codes as signals for other users.

The status codes for purchase orders may be different from the status codes used for work orders and requests.

Viewing Purchase Order Status Codes

You view purchase order status codes with **Coding Definitions** | **Purchase Orders** | **Status**. The window contains the following:

View section: Shows the list of current purchase order status codes.

Code: Click this heading to sort the list by code. Click again to reverse the order (from ascending to descending or vice versa).

Description: Click this heading to sort the list by description. Click again to reverse the order.

Details section: Shows information from the selected record.

Purchase Orders section: Shows purchase orders that use the selected purchase order status.

Defaults for Purchase Order Status section: Shows any defaults to be used when creating new purchase order status codes.

Editing Purchase Order Status Codes

You create or modify purchase order status codes using the purchase order status editor. The usual way to open the editor is to click **New Purchase Order Status** or **Edit** in the **View** section of **Coding Definitions** | **Purchase Orders** | **Status**.

The purchase order status editor window contains the following:

Details section: Shows basic information for the record.

Code: A brief code to identify this record. No two records may have the same code.

Description: A longer description of the purchase order status.

Comments: Any comments you want to associate with the purchase order status.

Purchase Orders section: Shows any purchase orders that use this status. For more on purchase orders, see *Purchase Orders* on page 462.

Printing Purchase Order Status Codes

You can print your current purchase order status codes by clicking the **Print** button in **Coding Definitions** | **Purchase Orders** | **Status**. This opens a window that contains the following:

Sorting section: Options controlling how the report is organized.

Sort by list: These options determine how items are sorted.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick a **Sort by** option where sort direction is relevant.

Filtering section: Options controlling which status codes will be included in the report.

Show deleted records: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Relationships

Relationships specify connections between pairs of units or between a unit and a contact person. Here are some examples:

☐ Unit X is a piece of equipment whose operator is Contact A

☐ Unit X is a piece of equipment leased from Contact B

☐ Unit X is an office suite leased by Contact C

☐ Unit X is an office suite cleaned by Contact D

☐ Unit X is a water heater that supplies hot water for Units A, B, C...

☐ Unit X is the HVAC unit for Units A, B, C... (all of which are offices)

☐ Unit X is a washroom shared by occupants of Units A, B, C...

When you create a relationship record, you specify two English phrases for what the relationship means. For example, a relationship between a unit and a contact person might say that:

☐ The unit **is leased by** the contact person

☐ The contact person **leases** the unit

You define relationships in **Coding Definitions** | **Relationships**. For example, you might set up a relationship record with the phrases `is leased by` and `leases`, and give that relationship record the identification code `Unit Leasing`. With any particular unit, you could then state that the unit has the defined relationship with one or more contact people.

The relationships of a unit are listed in the **Related** section of the unit's record. Similarly, the relationships of a person are listed in the **Related** section of the contact record. Each unit and each contact person may be related to any number of units. They may have the same relationship with multiple units, and they may have different relationships with the same unit.

There are currently the following types of relationships:

☐ Unit-to-unit relationships. For more, see *Unit-to-Unit Relationships* on page 431.

☐ Unit-to-contact relationships. For more, see *Unit-to-Contact Relationships* on page 93.

Viewing Relationship Records

You view relationship records with **Coding Definitions** | **Relationships**. The window contains the following:

View section: Shows the list of current records.

Code: Click this heading to sort the list by identification code. Click again to reverse the order (from ascending to descending or vice versa).

Description: Click this heading to sort the list by description. Click again to reverse the order.

Details section: Information about the selected relationship.

Relations section: Units and contacts that use the currently selected relationship.

New Unit Unit Relationship: Opens a window to create a new relationship that can be used to link units. For more information, see *Editing Unit-to-Unit Relationship Records* on page 145.

New Unit Contact Relationship: Opens a window to create a new relationship that can be used to link a unit and a contact person. For more information, see *Editing Unit-to-Contact Relationship Records* on page 146.

Defaults for Relationship section: Shows any defaults to be used when creating new relationship records.

Editing Unit-to-Unit Relationship Records

You create or modify unit-to-unit relationship records by clicking **New Unit Unit Relationship** or **Edit** in the **View** section of **Coding Definitions** | **Relationships**.

When you create a relationship record, you specify two English phrases for what the relationship means. For example, here is a relationship that can be used between a room (the first unit) and a heater (the second unit).

☐ The room **is heated by** the heater

☐ The heater **heats** the room

When you create a relationship, we strongly recommend that you test it out immediately to make sure you have the two phrases in the right order.

The editor for creating unit-to-unit relationship records contains the following:

Details section: Basic information about the relationship.

Code: An identification code for this relationship.

Description: A more detailed description of the relationship.

Second Unit's relationship to first Unit: A phrase describing the second unit's connection with the first. In our example above, this would be `heats`.

First Unit's relationship to second Unit: A phrase describing the first unit's connection with the second. In our example above, this would be `is heated by`.

Comments: Any comments you want to associate with this relationship.

Relations section: Lists units that make use of this relationship.

First Unit: This column lists the "first units" that use this relationship.

Second Unit: This column lists the second units that correspond to the first units.

New Unit Related Unit: Opens a window that lets you specify a relationship between two units. For more information, see *Unit-to-Unit Relationships* on page 431.

Editing Unit-to-Contact Relationship Records

You create or modify unit-to-contact relationship records by clicking **New Unit Contact Relationship** or **Edit** in the **View** section of **Coding Definitions** | **Relationships**.

When you create a relationship record, you specify two English phrases for what the relationship means. For example, here is a relationship that can be used between an office suite (the unit) and the person who leases the suite (the contact).

☐ The suite **is leased by** the person

☐ The person **leases** the suite

The editor for creating unit-to-unit relationship records contains the following:

> **Details** section: Basic information about the relationship.
>
>> **Code**: An identification code for this relationship.
>>
>> **Description**: A more detailed description of the relationship.
>>
>> **Contact's relationship to Unit**: A phrase describing the second unit's connection with the first. In our example above, this would be `leases`.
>>
>> **Unit's relationship to Contact**: A phrase describing the first unit's connection with the second. In our example above, this would be `is leased by`.
>>
>> **Comments**: Any comments you want to associate with this relationship.
>
> **Relations** section: Lists units and contacts that make use of this relationship.
>
>> **Unit**: This column lists the units that use this relationship.
>>
>> **Contact**: This column lists the contacts that correspond to the units.
>>
>> **New Unit Related Contact**: Opens a window that lets you specify a relationship between two units. For more information, see *Unit-to-Contact Relationships on page 93*.

Printing Relationship Records

To print information from your **Relationships** table, go to **Coding Definitions** | **Relationships** and click **Print**. MainBoss opens a window that contains the following:

> **Sorting** section: Options controlling how the report is organized.
>
>> **Sort by** list: These options determine how items are sorted.
>>
>> **Sort Direction**: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick a **Sort by** option where sort direction is relevant.

Filtering section: Options controlling which records will be included in the report.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Request Assignees

The request assignee list specifies people who can be assigned to requests. Assigning someone to a request means that person has some special interest in the request; for more, see *Assignments* on page 32.

Viewing Request Assignee Records

You view request assignee records with **Requests** | **Assignees** or **Coding Definitions** | **Requests** | **Assignees**. The window contains the following:

View section: Shows the list of current records.

Name: Click this heading to sort the list by assignee name. Click again to reverse the order (from ascending to descending or vice versa).

Business Phone: Click this heading to sort the list by business phone number. Click again to reverse the order.

Mobile Phone: Click this heading to sort the list by mobile phone number. Click again to reverse the order.

Number New: Click this heading to sort the list by the number of new requests associated with the assignees. Click again to reverse the order.

Number In Progress: Click this heading to sort the list by the number of in-progress requests associated with the assignees. Click again to reverse the order.

Details section: Information about the selected assignee.

Request Assignments section: Requests to which the selected assignee has been assigned.

Defaults for Request Assignee section: Shows any defaults to be used when creating new request assignee records.

Editing Request Assignee Records

You create or modify request assignee records by clicking **New Request Assignee** or **Edit** in the **View** section of **Requests** | **Assignees** or **Coding Definitions** | **Requests** | **Assignees**. The editor contains the following:

Details section: Contains basic information about this assignee.

Name: The name of the assignee, selected from the **Contacts** table. For more on contacts, see *Contacts* on page 91.

Business Phone, **Mobile Phone**, **Email**: Information obtained from the **Contacts** table once you've specified a "**Name**".

Receive Notifications: If this is checkmarked, and if your database has the MainBoss Service license key, this assignee will be sent e-mail whenever a history record is created for this request. In particular, the assignee receives an e-mail notification whenever the request changes state (e.g. when it is marked "In Progress" or "Closed").

In the first notification, assignees will receive the original "**Description**" of the request. In subsequent notifications, assignees will receive comments from request history records, but not the "**Description**".

Comments: Any comments you want to associate with this assignee.

Request Assignments section: Lists any requests to which this person has been assigned.

Printing Request Assignee Records

To print information from your Requests Assignees table, use **Requests** | **Assignees** or **Coding Definitions** | **Requests** | **Assignees** and click **Print**. MainBoss opens a window that contains the following:

> **Grouping** section: Options controlling how the report is organized.
>
>> **Group by** list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.
>>
>> **Sort Direction**: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.
>
> **Sorting** section: Options controlling how the contents of groups are sorted.
>
>> **Sort by** list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.
>>
>> **Sort Direction**: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.
>
> **Filtering** section: Options controlling which records will be included in the report.
>
> **Advanced** section: Miscellaneous options.
>
>> **Suppress Costs**: Omits any money information that might otherwise be displayed in the report.
>>
>> **Format Report in Columns**: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.
>>
>> **Title**: The title to be printed at the beginning of the report.
>>
>> **Font Size**: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).
>>
>> **Main Font**: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Request Priorities

When you create a work request with MainBoss, it is often useful to specify how urgent the job is. The Request Priorities table lists priorities that may be assigned to the request. Here are some examples:

```
Immediately
Within 8 hours
Within 24 hours
When time permits
```

Note: For more on work requests with MainBoss, see *Requests* on page 284.)

Every request priority may have a rank. A rank is a number used to sort priorities by urgency. Give the most urgent priority the lowest number. For example, you might give the most urgent priority a rank of 1, the next most urgent a rank of 2, and so on. However, the rank numbers do *not* have to start at 1 and they do not have to be consecutive; you might give the most urgent priority a rank of 10, the next most urgent a rank of 20, and so on. This leaves room so that you can add new priorities between existing priorities, in future.

Requests with explicit priorities are considered more urgent than requests where the priority field is blank. Therefore, if you sort your requests by priority, those with no explicit priority will come last.

The priorities available for work requests may be different from the priorities used for work orders. For more on work order priorities, see *Work Order Priorities* on page 273.

Viewing Request Priorities

You view request priorities with **Coding Definitions** | **Requests** | **Priorities**. The window contains the following:

View section: Shows the list of current request priorities.

Code: Click this heading to sort the list by code. Click again to reverse the order (from ascending to descending or vice versa).

Description: Click this heading to sort the list by description. Click again to reverse the order.

Rank: Click this heading to sort the list by rank. Click again to reverse the order.

Details section: Shows information from the selected record.

Requests section: Shows work requests that use the selected request priority.

Defaults for Request Priority section: Shows any defaults to be used when creating new request priorities.

Editing Request Priorities

You create or modify request priorities using the request priority editor. The usual way to open the editor is to click **New Request Priority** or **Edit** in the **View** section of **Coding Definitions** | **Requests** | **Priorities**.

Requests with explicit priorities are considered more urgent than requests where the priority field is blank. Therefore, if you sort your requests by priority, those with no explicit priority will come last.

The request priority editor window contains the following:

Details section: Shows basic information for the record.

Code: A brief code to identify this record. No two records may have the same code.

Description: A longer description of the request priority.

Rank: A rank number to associate with this record. The most urgent priority should have the lowest number and less urgent priorities should have increasingly higher numbers. Ranks do not have to start at 1 or be consecutive.

Comments: Any comments you want to associate with the request priority.

Requests section: Shows any requests that use this priority. For more on requests, see *Requests* on page 284.

Printing Request Priorities

You can print your current request priorities by clicking the **Print** button in **Coding Definitions** | **Requests** | **Priorities**. This opens a window that contains the following:

Sorting section: Options controlling how the report is organized.

Sort by list: These options determine how items are sorted.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick a **Sort by** option where sort direction is relevant.

Filtering section: Options controlling which priorities will be included in the report.

Show deleted records: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Requestors

A *requestor* is someone who is authorized to submit work requests directly to the maintenance department. This may be someone in another department of your organization or a customer served by your organization.

Before adding someone to the requestor list, you should create a record for that person in the **Contacts** list—you record the person's contact information first, then specify that the person is an authorized requestor. For more on contacts, see *Contacts* on page 91.

Licensing Requestors: Your **MainBoss Requests Service** license will specify the maximum number of entries allowed to receive acknowledgements in the **Requestors** list.

Some companies choose to reduce licensing costs by not tracking individual requestors. For example, your **Requestors** list could contain a few specific people and an entry for Other that you use for requests from anyone else. By writing up requests from Other, you save money on your license, but you lose the ability to track requests by requestors. Even if you record the actual requestor's name in the request's "**Comments**" field, you lose a lot of convenience—you can't sort/print/analyze your requests by requestor name, and it becomes difficult to search for a request from a specific requestor.

Viewing Requestor Records

You view requestors with **Coding Definitions** | **Requests** | **Requestors**. The window contains the following:

View section: Shows the list of current requestors.

Name: Click this heading to sort the list by name. Click again to reverse the order (from ascending to descending or vice versa).

Business Phone: Click this heading to sort the list by business phone number. Click again to reverse the order.

Mobile Phone: Click this heading to sort the list by mobile phone number. Click again to reverse the order.

Details section: Shows information from the selected record.

Requests section: Shows work requests submitted by the selected requestor.

Work Orders section: Shows work orders resulting from the selected requestor's requests.

Defaults for Requestor section: Shows any defaults to be used when creating new requestors.

Editing Requestor Records

You create or modify requestor records using the requestor editor. The usual way to open the editor is to click **New Requestor** or **Edit** in the **View** section of **Coding Definitions** | **Requests** | **Requestors**.

The requestor editor window contains the following:

Details section: Shows basic information for the record.

Requestor Contact: An entry in the **Contacts** table that refers to this requestor. This **Contacts** record must give the person's e-mail address. For more on contacts, see *Contacts* on page 91.

Business Phone, **E-mail**: Read-only fields giving the person's business phone number and e-mail address. This information is obtained from the requestor's record in the **Contacts** table.

Receive Acknowledgements: This box is only active if you have the MainBoss Service module. If you checkmark the box, the requestor will automatically be sent acknowledgements whenever his/her submitted requests change state (e.g. when they are marked as in progress). For more on request states, see *Requests* on page 284.

Comments: Any comments you want to associated with this requestor.

Requests section: Shows work requests submitted by this requestor.

Work Orders section: Shows work orders resulting from this requestor's requests.

Printing Requestor Records

You can print your current requestors by clicking the **Print** button in **Coding Definitions** | **Requests** | **Requestors**. Note that the report will contain comments both from the **Requestors** records and from the associated **Contacts** table record.

Grouping section: Options controlling how the report is organized.

Group by list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

Sort Direction: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

Sort by list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling which requestors will be included in the report. You can select requestors by **Name** or by their **Location**.

Show deleted records: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Request Status Codes

Request status codes give you a way to indicate when a request needs someone's attention. For example, some maintenance departments have a policy of verifying certain types of problem reports before actually doing something about them. You might create a status `Waiting for confirmation` to mark a request which has been received from a client but which has not been verified by maintenance personnel. As another example, you might use requests to keep track of "wish-list" jobs: work you might do someday, but not in the immediate future. In this case, you might create a status `Long-Term` to mark requests that you want to remember but that you won't deal with anytime soon.

> While it is possible to use status codes for any purpose, we recommend that you only use them for requests that are notable in some way. "Normal" requests should have their "**Status**" field blank.

You assign a status code to a request by clicking the **New Requestor Comment** button, or some other button that lets you create a request history record. The request state history window lets you set or change the status of a request.

The status codes for work requests may be different from the status codes used for work orders and purchase orders.

Viewing Request Status Codes

You view request status codes with **Coding Definitions** | **Requests** | **Status**. The window contains the following:

View section: Shows the list of current request status codes.

Code: Click this heading to sort the list by code. Click again to reverse the order (from ascending to descending or vice versa).

Description: Click this heading to sort the list by description. Click again to reverse the order.

Details section: Shows information from the selected record.

Requests section: Shows work requests that use the selected request status.

Defaults for Request Status section: Shows any defaults to be used when creating new request status codes.

Editing Request Status Codes

You create or modify request status codes using the request status editor. The usual way to open the editor is to click **New Request Status** or **Edit** in the **View** section of **Coding Definitions** | **Requests** | **Status**.

The request status editor window contains the following:

Details section: Shows basic information for the record.

Code: A brief code to identify this record. No two records may have the same code.

Description: A longer description of the request status.

Comments: Any comments you want to associate with the request status.

Requests section: Shows any requests that use this status. For more on requests, see *Requests* on page 284.

Printing Request Status Codes

You can print your current request status codes by clicking the **Print** button in **Coding Definitions** | **Requests** | **Status**. This opens a window that contains the following:

Sorting section: Options controlling how the report is organized.

Sort by list: These options determine how items are sorted.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick a **Sort by** option where sort direction is relevant.

Filtering section: Options controlling which status codes will be included in the report.

Show deleted records: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Unit Maintenance Plans

In order to use MainBoss's facility for generating planned maintenance work orders, you must connect three things:

☐ Tasks: what work should be done (see *Tasks* on page 184)

☐ Timing: when the work should be done (see *Maintenance Timing* on page 168)

☐ Units: where the work should be done (see *Units* on page 422)

Unit maintenance plans put it all together. Once you've created a unit maintenance plan, MainBoss can create planned maintenance work orders for all the appropriate units. The work orders are created using information from the task record, and according to the schedule given by the timing record.

Timing Basis: The *timing basis* for a unit maintenance plan helps to determine when PM jobs should be scheduled. For example, suppose you do a particular job several days later than it was actually scheduled. The next time you do the same job, should it be scheduled relative to when the job was *supposed* to be done or when it was *actually* done?

As an example, suppose a particular job takes several days. If the job is supposed to be done every 90 days, does that mean 90 days after the job starts or 90 days after the job ends?

To answer such questions, a unit maintenance plan offers you several options for how you reschedule the next job. These options are called the *timing basis*. Possibilities are:

Work Start: The next job is scheduled relative to the actual "**Work Start**" date of the previously scheduled job.

Work End: The next job is scheduled relative to the actual "**Work End**" date of the previously scheduled job.

Schedule Date: The next job is scheduled relative to when the previous job was *supposed* to take place, whether or not the job was actually done on that date. Note that the other two possibilities (**Work Start** and **Work End)** use the actual start and end dates, which may not be the same as the dates originally scheduled.

Selecting the Scheduling Basis: When you first set up a unit maintenance plan, you must select the scheduling basis. This tells MainBoss when to start the clock ticking for future tasks.

For example, suppose you're setting up MainBoss and you specify that a particular vehicle needs an oil change every three months. During set-up, you have to tell MainBoss the last time the vehicle had an oil change; then MainBoss can correctly schedule oil changes in future.

Similarly, when you buy new equipment that needs planned maintenance, you must specify when to start the clock for future maintenance. Usually, you start the clock on the day you start using the equipment.

For tasks that are scheduled by meter readings rather than date, the scheduling basis is the meter reading on which to base future planned maintenance. For example, if a vehicle gets an oil change every 3000 miles, the scheduling basis is the odometer reading for the most recent time the oil was changed.

You may choose to change the scheduling basis after your maintenance plan has begun. For example, suppose you're repairing a vehicle and you decide to do an oil change at the same time, even though the oil change isn't due yet. You would specify the scheduling basis as the current date, so that the next oil change will take place at the proper time.

Scheduling Examples: Suppose you want a particular job to be scheduled on the second Tuesday of every month. You can do this using a month schedule (see *Editing Monthly Periods* on page 173) with the following settings:

☐ Create a maintenance timing record with a period of one month (i.e., one month between jobs).

☐ In the **Exceptions** section of the timing record, turn off every day of the week except **Tuesday**.

☐ In the unit maintenance plan record, set "**Timing Basis**" to **Scheduled Date**. This ensures that the next job is based on when the previous job was supposed to be done, as opposed to when it was actually done.

☐ Lastly, click **Select Scheduling Basis**. This opens a window where you can set the scheduling basis to the second Tuesday of the past month. (For example, if it's now October 1, set the scheduling basis to the second Tuesday in September.) This starts

the clock ticking on the second Tuesday in September, so the next job will be scheduled for the second Tuesday in October.

You can use a similar procedure for schedules like "the first Friday of the month" or "the fourth Monday of the month". Unfortunately, there's no good way to do "the last Monday of the month" since some months have four Mondays while others have five Mondays. For most organizations, however, "the fourth Monday of the month" is probably an acceptable compromise for "the last Monday of the month".

Deferrals and Inhibits: If there are days that a particular job can't be done, what do you do if the job comes due on such a day? For example, what if a job can only be done on weekends but it comes due in the middle of the week? MainBoss offers you two choices:

☐ You can *defer* the job. This means delaying the job until the first day it can actually be done. For example, if a job can only be done on weekends but it comes due on Wednesday, you can *defer* the job until Saturday.

☐ Alternatively, you can *inhibit* the job. This means skipping the job entirely. You don't do the job until the next time it comes due.

In most cases, you'll defer jobs rather than inhibit them. However, consider a job like "Sweep all sidewalks." You might do this job every day you're open for business; however, on days when you're not open, you can safely skip the job.

Unscheduled Maintenance Plans: You can use unit maintenance plans to create immediate work orders. For example, suppose a car isn't due for an oil change but for some reason you want to do an oil change anyway. The **Create unplanned Maintenance Work Order** button (found in **Unit Maintenance Plans**) can create a corresponding work order immediately, without going through the usual scheduling process.

This same facility can be used to create standardized work orders for jobs which aren't typically done on any schedule. For example, consider the job of changing a car's muffler. While this is a common sort of job, it's done as needed rather than following a schedule.

You can still create a unit maintenance plan for this sort of job. As usual, this unit maintenance plan will have a task (describing what should be done in the muffler change) and a unit (specifying which car should have its muffler changed). However, for the maintenance timing record, you can specify one that has no associated periods. Such a timing record indicates that the job never comes due on its own; the job will only be done when you explicitly click **Create unplanned Maintenance Work Order**.

Using this approach, you can associate any number of standardized unscheduled jobs with a unit. For example, you can write up standardized task descriptions for all standard maintenance jobs on cars and create unit maintenance plans for those jobs on

every car you maintain. In each case, the unit maintenance plan will have a maintenance timing record that has no periods, so the job will never come due on its own. Instead, you can just use **Create unplanned Maintenance Work Order** whenever you want to do the job on the car. You only have to write up the job description once (when you create the task record); from that point on, you can create immediate work orders from the unit maintenance plan.

Viewing Unit Maintenance Plans

You view unit maintenance with **Unit Maintenance Plans** or **Coding Definitions** | **Unit Maintenance Plans**. The window contains the following:

View section: Lists unit maintenance plans, using a task map.

Task: Click this heading to sort the list by task name. Click again to reverse the order (from ascending to descending or vice versa).

Unit: Click this heading to sort the list by unit. Click again to reverse the order.

Timing: Click this heading to sort the list by timing schedule. Click again to reverse the order.

Next Available Date: Click this heading to sort the list by the next available date (i.e. the next possible date on which the task might be scheduled, typically the day after any work order that's already been scheduled). Click again to reverse the order.

Details section: Shows information from the selected record.

Scheduling History section: Lists batch generation records that include work orders associated with the selected unit maintenance plan.

Work Orders section: Lists work orders generated from the selected unit maintenance plan.

Errors section: Lists any errors associated with generating work orders from the selected unit maintenance plan.

New Unit Maintenance Plan: Opens a window to set up a maintenance plan for a specific unit. Fields in the new record will either be blank or assigned default values (as specified in the **Defaults for Unit Maintenance Plan** section).

Create unplanned Maintenance Work Order: Uses the selected unit maintenance plan to make a work order immediately. For example, suppose the plan specifies an oil change on a particular vehicle. Clicking this button immediately creates an oil change work order for the vehicle. For more information, see *Creating an Unplanned Maintenance Work Order* on page 166.

Correct Missing Schedule Basis: This is similar to **Select Scheduling Basis** (see below) but lets you specify a scheduling basis for several unit maintenance plans at once. For more information, see *Changing the Scheduling Basis for Multiple Unit Maintenance Plans* on page 166.

Select Scheduling Basis: Opens a window to let you set the scheduling basis for an existing unit maintenance plan. The scheduling basis is when the clock starts ticking for future planned maintenance jobs—typically the date or meter reading for the most recent such job done on the unit. For more, see *Selecting a Scheduling Basis* on page 165.

Defaults for Unit Maintenance Plan section: Shows any defaults to be used when creating new unit maintenance plans.

Editing Unit Maintenance Plans

You create or modify unit maintenance plans using the unit maintenance plan editor. The usual way to open the editor is to click **New Unit Maintenance Plan** or **Edit** in the **View** section of **Coding Definitions** | **Unit Maintenance Plans**.

The unit maintenance plan record includes the following information:

☐ What planned maintenance work should be done (the task)

☐ When the work should be done (the schedule)

☐ What location or piece of equipment should receive the work (the unit)

The unit maintenance plan record also has to specify a *timing basis*. Roughly speaking, this means when the clock starts ticking for rescheduling the same work again. For examples of how the timing basis works, see *Unit Maintenance Plans* on page 158.

The unit maintenance plan editor contains the following:

Details section: Shows basic information for the record.

Task: The task to be scheduled. For more about tasks, see *Tasks* on page 184.

Unit: The unit on which the task should be scheduled. For more on units, see *Units* on page 422.

Inhibit entire Unit Maintenance Plan: If this box is checkmarked, this unit maintenance plan record will be ignored whenever MainBoss generates planned maintenance work orders. This is an easy way to suspend a particular plan indefinitely, without actually deleting the record. For example, suppose that a piece of equipment is temporarily taken out of service and you don't know when it will be reactivated. You can suspend planned maintenance on that equipment by checkmarking **Inhibit entire Unit Maintenance Plan**. When the equipment comes back into service, remove the checkmark and MainBoss will resume the usual schedule. In this

way, you don't have to delete the unit maintenance plan records, then re-create them again later.

Maintenance Timing: A timing record telling when the task should be scheduled. For more about schedules, see *Maintenance Timing* on page 168.

Timing Basis: Options that control when the task will be rescheduled again. For the sake of clarity, we'll use Job X to refer to a job that has just been completed and Job Y to be the next time the same job should be performed on the same unit. Possible rescheduling options are:

Work Start: Job Y should be rescheduled relative to when Job X actually began. For example, if the schedule says "every 30 days", Job Y will be scheduled to begin 30 days after Job X began.

Work End: Job Y should be rescheduled relative to when Job X ended. For example, if the schedule says "every 3000 miles", Job Y will be scheduled for 3000 miles past the meter reading when Job X ended.

Scheduled Date: Job Y should be rescheduled relative to when Job X was scheduled, whether or not Job X was actually done at that time. For example, if the schedule says "every 3 months", Job Y will be scheduled for 3 months after Job X was supposed to be done, even if Job X was delayed or not done at all.

Read-only fields: If this unit maintenance plan has been used to create a work order in the past, the read-only fields in the **Details** section provide information about the most recent such work order.

Scheduling History section: Lists batch generation records that created work orders associated with this unit maintenance plan.

Work Orders section: Lists work orders generated from this unit maintenance plans.

View Work Order: Displays the contents of a work order selected in the **Work Orders** list. Note that the list often contains entries that do not correspond with work orders; the **View Work Order** button will only be enabled when you select an entry that *does* have an associated work order.

Errors section: Lists any errors that were encountered when generating work orders from this unit maintenance plan.

Select Scheduling Basis: Opens a window to set the scheduling basis for this unit maintenance plan. The scheduling basis is when the clock starts ticking for future planned maintenance jobs—typically the date or meter reading for the most recent such job done on the unit. For more, see *Selecting a Scheduling Basis* on page 165.

Printing Unit Maintenance Plans

You can print your current unit maintenance plans by clicking the **Print** button in
Coding Definitions | **Unit Maintenance Plans**. MainBoss will open a window that
contains the following:

Grouping section: Options controlling how the report is organized.

> **Group by** list: These options determine how the report is broken into sections.
> Each section will start with a heading, and may have a footer as well. If you
> select a **Group by** option, one or more **Then group by** lists may appear to
> let you break sections into subsections.

> **Sort Direction**: Determines whether grouping will go from lowest to highest
> (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only
> appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

> **Sort by** list: These options determine how records are sorted within each group.
> If you select a **Sort by** option, one or more **Then sort by** lists may appear to
> let you refine the sorting process.

> **Sort Direction**: Determines whether sorting will go from lowest to highest
> (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only
> appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling what kind of unit maintenance plans will be
included in the report. For example, if you filter by **Unit Location**, you can
restrict the print-out to unit maintenance plans on a particular unit or in a
particular location.

> **Show deleted records**: If this box is checkmarked, the report will include
> deleted records. Otherwise, deleted records are omitted from the report.

Advanced section: Miscellaneous options.

> **Suppress Costs**: Omits any money information that might otherwise be
> displayed in the report.

> **Title**: The title to be printed at the beginning of the report.

> **Font Size**: The font size to be used for all standard characters in the print-out
> (i.e. anything that isn't a heading).

> **Main Font**: The font that will be used for most of the characters in the report.
> This should be a font that is supported by both your Windows system and
> your printer.

> **Fixed-width Font**: The font that will be used for information that is printed with
> fixed-width characters (mostly unit specifications). This should be a font that
> is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Selecting a Scheduling Basis

The *scheduling basis* for a unit maintenance plan is when MainBoss should start the clock ticking for scheduling future tasks. For example, suppose you're setting up MainBoss and you specify that a particular vehicle needs an oil change every three months. During set-up, you have to tell MainBoss the last time that vehicle had an oil change; then MainBoss can correctly schedule oil changes in future.

Similarly, when you buy new equipment that needs planned maintenance, you must specify when to start the clock for future maintenance. Usually, the scheduling basis will be the day you start using the equipment.

For tasks that are scheduled by meter readings rather than date, the scheduling basis is the meter reading on which to base future planned maintenance. For example, if a vehicle gets an oil change every 3000 miles, the scheduling basis is the odometer reading for the most recent time the oil was changed.

To set the scheduling basis for a unit maintenance plan, go to the unit maintenance plan viewer (**Coding Definitions** | **Unit Maintenance Plans**). Select the task whose basis you want to set, then click **Select Scheduling Basis**. MainBoss opens a window that contains the following:

Unit Maintenance Plan: A read-only field giving the unit maintenance plan record for which you're specifying a basis.

New Scheduling Basis: The date or meter reading that should serve as the basis for future task scheduling.

Comments: Any comments you want to record (e.g. an explanation of why a particular date was chosen as the scheduling basis).

Changing the Scheduling Basis for Multiple Unit Maintenance Plans

The *scheduling basis* for a unit maintenance plan is when MainBoss should start the clock ticking for scheduling future tasks. For more details, see *Selecting a Scheduling Basis* on page 165.

You can set the scheduling basis for multiple unit maintenance plans by clicking **Correct Missing Schedule Basis** in any window that displays multiple unit maintenance plans.This button opens a window that contains the following:

> **Unit Maintenance Plan**: A multi-select window that lets you specify the maintenance plans whose basis you want to set.

> **New Scheduling Basis**: The date or meter reading that should serve as the basis for future task scheduling.

> **Comments**: Any comments you want to record (e.g. an explanation of why a particular date was chosen as the scheduling basis).

> **Save Scheduling Basis**: Assigns the specified scheduling basis to all the selected unit maintenence plans.

Creating an Unplanned Maintenance Work Order

You can use a unit maintenance plan record to create a work order immediately, rather than following the specified timing. For example, suppose you have a unit maintenance plan that describes an oil change on a particular vehicle. You can use this record to create an immediate oil change work order, even if the usual oil change hasn't come due.

Creating this kind of work order automatically updates the schedule of maintenance on the associated unit. In other words, MainBoss sets the clock back to zero when calculating future service. For example, suppose that a job is supposed to be done every 30 days. However, after 10 days, you create an unplanned work order for the job immediately. MainBoss sets the clock back to zero; the next time the job will be scheduled is 30 days after the work order you just created.

To create this kind of work order, you go to **Coding Definitions** | **Unit Maintenance Plans**, select the plan you want to use, then click **Create unplanned Maintenance Work Order**. This opens a window that contains the following:

> **Unit Maintenance Plan**: The plan that you want to use as a basis for the work order.

> **Purchase Order Creation State override**: This field may be useful if "**Unit Maintenance Plan**" has an associated template for creating purchase orders. The unit maintenance plan will specify the state of a purchase order created from such a template: `Draft`, `Issued`, `Closed`, `Voided`. When you create a

work order "by hand," you may decide that a different state is more appropriate. Therefore, you can use "**Purchase Order Creation State override**" to specify the state of any purchase order that's created. (For more on purchase order templates, see *Purchase Order Templates* on page 174.)

Work Order Creation State override: Similar to "**Purchase Order Creation State override**". By default, each generated work order is created in the draft state. However, you may wish to put generated work orders into some other state instead—most likely the open state, indicating that the work order is ready to be printed. (Remember though that if a work order is open, some of its information is locked down and can't be changed unless you first **Suspend** the work order.)

For Access Code options: Let you specify what to do when the access code for a unit is different than the access code for the plan's task description:

Prefer value from Task: If both the task and the unit record specify an access code, MainBoss assigns generated work orders the access code from the task. However, if the task record doesn't have an access code, MainBoss uses the code from the unit.

Prefer value from Unit: If both the task record and the unit record specify an access code, MainBoss assigns generated work orders the access code from the unit. However, if the unit record doesn't have an access code, MainBoss uses the code from the task.

Only use value from Task: MainBoss always uses the access code from the task record. (If the task record doesn't have an access code, generated work orders won't have an access code either.)

Only use value from Unit: MainBoss always uses the access code from the unit record. (If the unit record doesn't have an access code, generated work orders won't have an access code either.)

For Expense Model options: Let you specify what to do when the expense model in the unit record is different from the one in the task record. The options work the same way as the options in **For Access Code**.

Comments: Any comments you want to record about what you're doing.

Commit: Clicking this button creates the work order. The work order will be recorded in the **Scheduling History** section of the unit maintenance plan record.

Close: Closes the window.

Maintenance Timing

Maintenance timing records are used when scheduling planned maintenance jobs. A timing record represents information like "every three months" or "every second Tuesday" or "every 5000 kilometers".

Most timing records are simple. However, some maintenance organizations have complicated scheduling needs ("every ten days, but weekends don't count and never schedule the job on Mondays because Joe doesn't work that day"). MainBoss can accommodate such complexities, but setting up such a schedule requires more work.

Periods: A single timing record can contain several conditions under which a job be done. For example, vehicle oil changes are often required every three months or 3000 miles, whichever comes first. Therefore, MainBoss lets you create a single timing record with two conditions: one for "every three months" and another for "every 3000 miles". (These conditions are called *periods*.) A job with such timing will be done when either condition comes true.

Enabled Days: In many organizations, some or all of the personnel only work on weekdays. Therefore, planned maintenance jobs shouldn't be scheduled on weekends. In other situations, however, certain types of jobs should *only* be scheduled on weekends, to avoid interfering with normal weekday operations.

To accommodate such considerations, MainBoss lets you specify which days of the week are acceptable for a particular job. For example, suppose a timing record has checkmarks for Monday through Friday, but not for Saturday or Sunday. This says that any jobs using this timing should only be performed on weekdays, not on weekends. Therefore, MainBoss will never schedule such jobs for Saturday or Sunday.

As another example, if you only checkmark Wednesday (with all other days blank), MainBoss will only schedule corresponding jobs on Wednesdays. You might do this if you want to schedule a job for the first Wednesday in every month.

Seasons: MainBoss lets you specify timing based on seasons. For example, you might perform planned maintenance on air-conditioners in summer but not in winter; you might perform planned maintenance on heaters in winter but not in summer. Therefore, every timing record lets you set "**Season Start**" and "**Season End**" values if you wish. For example, if you set "**Season Start**" to May 1 and "**Season End**" to October 31, corresponding maintenance jobs will only be scheduled between those two dates.

Seasons are often related to "cold weather/hot weather" distinctions, but they don't have to be. For example, the maintenance department in a shopping mall might try to avoid scheduling work during the busy Christmas shopping season. Similarly, the maintenance department for a school might try to schedule certain types of jobs for holiday periods when there will be no students around.

Deferrals and Inhibits: If you tell MainBoss not to schedule jobs for certain days of the week or for certain times of year, what should MainBoss do if a job comes due on a date that's not allowed?

For example, suppose you say that a job should be scheduled every 30 days. What happens if the next job should be scheduled for a Saturday, but Saturdays aren't permitted?

Normally, you want MainBoss to schedule the job for the next permissible day. For example, if the job should be scheduled on Saturday but you've ruled out weekends, you probably want MainBoss to schedule the job for the first acceptable day (Monday). In some cases, however, it may be more appropriate to skip the job completely. This is particularly true of seasonal jobs; if you want to skip certain jobs in summer, you probably don't want them all to be scheduled for the first day after summer ends.

Therefore, MainBoss gives you the option of saying, "Schedule as soon as possible after the date" or "Just skip the job and catch it the next time". This applies in three different situations:

Overdue work orders: A work order is *overdue* when the job comes due before the date when you generate planned maintenance work orders. For example, you generate new work orders on June 4, but there was a job you should have done on June 1. Your options are:

Defer overdue work orders to the date maintenance is generated: In our example, this means scheduling the job for June 4, the day you generate the work orders.

Inhibit generation of overdue work orders: This means skipping the work entirely—you missed the June 1 date, so you'll do the job the next time it comes around on the schedule.

Seasonal exceptions: This applies when a particular job is seasonal (for example, you only inspect air-conditioners during summer months). You state the start and end dates of the season when the job can be scheduled, then you specify one of the following options:

Defer work orders triggered outside the season until the start of the season: In our air-conditioner example, this means scheduling the next inspection for the starting day of the summer months.

Inhibit generation of work orders outside the season: This means skipping the work entirely—if a job comes due outside the season, just ignore it. You only do jobs that come due within the season.

Weekday exceptions: This applies when a particular job can only be done on certain days of the week. You specify which days are allowed, then you specify one of the following options:

Defer work orders triggered on disabled weekdays until the next enabled weekday: For example, if a job can only be done on Saturdays and it comes due on a Thursday, you schedule the job for the Saturday as soon after the Thursday as possible.

Inhibit generation of work orders on disabled weekdays: This means skipping the work entirely—if a Saturday job comes due on a Thursday, you just don't do it. You keep skipping the job until it actually comes due on a Saturday.

These options are set on a record-by-record basis. You can specify which jobs should be skipped and which should be scheduled as soon as possible after they come due.

Scheduling Jobs: The process of scheduling jobs goes like this:

1. Create a task record that describes the job. (For details, see *Tasks* on page 184.)

2. Create a maintenance timing record that describes the schedule, e.g. every 3 months.

3. Create a unit maintenance plan record that assigns timing to a task, and specifies which units should be scheduled for such tasks. For details, see *Unit Maintenance Plans* on page 158; that section also contains a number of scheduling examples.

Viewing Maintenance Timing Records

You view maintenance timing records with **Coding Definitions** | **Unit Maintenance Plans** | **Maintenance Timing**. The window contains the following:

View section: Shows the list of current timing records.

Code: Click this heading to sort the list by code. Click again to reverse the order (from ascending to descending or vice versa).

Description: Click this heading to sort the list by description. Click again to reverse the order.

Details section: Shows information from the selected record.

Periods section: Lists all the conditions associated with the selected timing record.

Exceptions section: Lists exceptions to the periods (e.g. seasons or weekday exceptions).

Unit Maintenance Plans section: Shows all the unit maintenance plans that use the selected timing.

Defaults for Maintenance Timing section: Shows defaults to be used when creating new timing records.

Editing Maintenance Timing Records

You create maintenance timing records using the timing editor. The usual way to open the editor is to click **New Maintenance Timing** or **Edit** in the **View** section of **Coding Definitions** | **Unit Maintenance Plans** | **Maintenance Timing**.

The timing editor window contains the following:

Details section: Shows basic information for the record.

Code: A brief code to identify this record. No two records may have the same code.

Description: A longer description of the timing record.

Comments: Any comments you want to associate with the timing.

Periods section: Lists conditions under which this timing record is fulfilled. For example, an oil change might have two periods: one for "every three months" and one for "every 3000 miles".

New Daily Period: Opens a window to create a new period measured in days (e.g. "every 30 days"). For more, see *Editing Daily Periods* on page 173.

New Monthly Period: Opens a window to create a new period measured in months (e.g. "every three months"). For more, see *Editing Monthly Periods* on page 173.

New Meter Period: Opens a window to create a new period based on meter readings (e.g. "every 3000 miles"). For more, see *Editing Meter Periods* on page 173.

Exceptions section: Lets you adjust the timing to deal with any special conditions. For more information on any of these exceptions, see *Maintenance Timing* on page 168.

Defer overdue work orders to the date maintenance is generated: Applies when work is already overdue on the date you generate work orders. For example, you might generate work orders on June 2 but a job came due on June 1. If you choose this option, MainBoss will schedule the job for the date you generate the work orders (in this example, June 2).

Inhibit generation of overdue work orders: Is the alternative to the previous option: if a job is already overdue on the date you generate work orders, MainBoss simply skips the job. It won't be scheduled until the next time it comes due.

Season, **Start** and **End**: Used when timing only applies to part of the year. For example, if you set "**Start**" to May 1 and "**End**" to October 31, jobs will only be scheduled in the period from May 1 to October 31. On the other

hand, if you set "**Start**" to October 31 and "**End**" to May 1, jobs will only be scheduled in the period from October 31 to May 1.

Example for the fourth of May: Shows the format that should be used when entering dates into "**Start**" and "**End**". If either "**Start**" or "**End**" has an incorrect format, both will have error markers displayed beside them.

Your Windows settings determine what format is required for dates in the "**Start**" and "**End**" fields—different people will have different formats. Therefore, you should check "**Example for the fourth of May**" to make sure you're using the right format.

Defer work orders triggered outside the season until the start of the season: Applies when a job comes due outside the allowed season. For example, suppose the allowed season is from May 1 to October 31, but a job comes due in January. If you choose this option, MainBoss will schedule the job for the first date in the allowed season (in this example, May 1).

Inhibit generation of work orders outside the season: Is the alternative to the previous option: if a job comes due in the off-season, MainBoss simply skips the job. It won't be scheduled again until it comes due in the allowed season.

Weekday exceptions: Used when a job can only be done on certain days of the week. In the "**Enabled weekdays**" list, you specify which days are allowed.

Defer work orders triggered on disabled weekdays until the next enabled weekday: Applies when a job comes due on a weekday that is not allowed. For example, a job that can only be done on Saturdays comes due on a Thursday. If you choose this option, MainBoss will schedule the job for the next allowable weekday (in this example, the Saturday immediately following the Thursday when the job comes due).

Inhibit generation of work orders on disabled weekdays: Is the alternative to the previous option: if a job comes due on a weekday that is not allowed, MainBoss simply skips the job. It won't be scheduled again until it comes due on a day that's allowed.

Unit Maintenance Plans: Lists unit maintenance plans that use this timing record.

New Unit Maintenance Plan: Lets you create a unit maintenance plan using the current timing record. For more, see *Editing Unit Maintenance Plans* on page 162.

Create unplanned Maintenance Work Order: Uses the selected unit maintenance plan to make a work order immediately. For example, suppose the plan specifies an oil change on a particular vehicle. Clicking this button immediately creates an oil change work order for the vehicle. For more information, see *Creating an Unplanned Maintenance Work Order* on page 166.

Correct Missing Schedule Basis: This is similar to **Select Scheduling Basis** (see below) but lets you specify a scheduling basis for several unit maintenance plans at once. For more information, see *Changing the Scheduling Basis for Multiple Unit Maintenance Plans* on page 166.

Select Scheduling Basis: Lets you specify the starting point for a plan's schedule. For example, if a job is to be done every 30 days, the scheduling basis should state the last time the job was done; using this information, MainBoss can then calculate when the job should be done next. Without a scheduling basis to use as a starting point, MainBoss can't schedule maintenance jobs. For more on setting a scheduling basis, see *Selecting a Scheduling Basis* on page 165.

Editing Daily Periods

You create daily periods for maintenance timing records using the daily period editor. The usual way to open the editor is to start in the **Periods** section of a maintenance timing record, then click **New Daily Period**.

The daily period editor window contains the following:

Days: The number of days in the period. For example, if you enter 30, the work should be done every 30 days.

Editing Monthly Periods

You create monthly periods for maintenance timing records using the monthly period editor. The usual way to open the editor is to start in the **Periods** section of a maintenance timing record, then click **New Monthly Period**.

The monthly period editor window contains the following:

Months: The number of months in the period. For example, if you enter 3, the work should be done every three months.

Editing Meter Periods

You create meter-based periods for maintenance timing records using the meter period editor. The usual way to open the editor is to start in the **Periods** section of a timing record, then click **New Meter Period**.

The meter period editor window contains the following:

Interval: The meter measurement for the period. For example, if you enter 3000 for a meter that measures miles, the work should be done every 3000 miles.

Meter Class: The class of the meter that will be used in taking measurements. For more on meter classes, see *Meter Classes* on page 204.

UOM: A read-only field giving the units of measurement used by the specified class of meter.

Purchase Order Templates

Suppose that a preventive maintenance task requires help from an outside contractor. Every time you generate a work order from the task, you also want to generate a purchase order that pays for the contractor's work.

In this situation, you can associate a "model" purchase order with the task. This is called a *purchase order template*. It's not a real purchase order; instead, it's a collection of information that can be used to create a real purchase order whenever a work order is generated. By associating the purchase order with the task, you can get MainBoss to create a correct purchase order automatically—you don't have to remember to write up the purchase order yourself.

As another example, suppose that a task requires that you replace a particular spare part in a piece of equipment. Every time you perform the task, you want to reorder the part immediately, so that you always have the part on hand. You could link the task to a purchase order template for the required part; every time MainBoss creates a work order from the task, it also creates a purchase order for the part.

In order to create such a purchase order:

1. You begin with **Coding Definitions** | **Unit Maintenance Plans** | **Purchase Orders Templates**. This lets you create and edit purchase order templates that can be associated with tasks.

2. Once you've created a template, you must *link* it to the task(s) that will use the purchase order. To do this, go to the **Tasks** section of the purchase order template and click **New Task to Purchase Order Template Linkage**. MainBoss will open a window where you can specify a task to be associated with the purchase order.

   Alternatively, you can go to the **Purchase Orders** section of a task record. Clicking **New Task to Purchase Order Template Linkage** opens a window where you can specify a purchase order template to be associated with the task.

Viewing Purchase Order Templates

You view purchase order templates with **Coding Definitions** | **Unit Maintenance Plans** | **Purchase Order Templates**. The window contains the following:

View section: Shows the list of current purchase order templates.

Code: Click this heading to sort the list by code. Click again to reverse the order (from ascending to descending or vice versa).

Description: Click this heading to sort the list by purchase order's description. Click again to reverse the order.

Details section: Shows information from the selected record.

Line Items section: Lists the items that should be purchased with the corresponding purchase order.

Tasks section: Lists tasks that use the selected purchase order template.

Defaults for Purchase Order Template section: Shows any defaults to be used when creating new purchase order templates.

Editing Purchase Order Templates

You create or modify purchase order templates using the appropriate editor. The usual way to open the editor is to click **New Purchase Order Template** or **Edit** in the **View** section of **Coding Definitions** | **Unit Maintenance Plans** | **Purchase Order Templates**.

The editor window contains the following:

Details section: Shows basic information for the record.

Code: A brief code to identify this record. No two records may have the same code.

Description: A longer description of the purchase order template.

Summary: A line summarizing what the purchase order template covers.

Initial State: Whenever MainBoss creates a work order from a task record, it automatically creates purchase orders from any templates associated with the task. "**Initial State**" specifies the state for such newly created purchase orders. The initial state can be Closed, Issued, Open, or Voided. For example, if you set "**Initial State**" to Issued, any purchase order created from this record will be put into the Issued state as soon as it's created.

Required By Date: A number used to determine the date by which the goods and/or services are required. This number signifies a number of days after the effective date of the generated work order. For example, suppose that when a work order is generated from a task, the work order's effective date is June 1. Also supposed that the template's "**Required By Date**" is 3. Then the "**Required By Date**" on the purchase order generated from the template will be June 4.

Vendor: The outside contractor or supplier who will satisfy the generated purchase order. The vendor should be in your **Vendors** table. (For more on vendors, see *Vendors* on page 230.)

Payment Terms: How the purchase order should be paid. For more, see *Payment Terms* on page 136.

Shipping Mode: How the goods should be shipped. For more, see *Shipping Modes* on page 139.

Deliver to Location: Where the goods should be delivered. This should be a location from your **Locations** table. For more on locations, see *Locations* on page 126.

Comments to Vendor: Comments that should be printed on the purchase order.

Comments: Internal comments for maintenance personnel. These will *not* be printed on the purchase order but will be recorded in MainBoss's files.

Select for Printing: If this box is checkmarked, purchase orders generated from this template will be marked **Select for Printing**. This makes it simpler to print the purchase orders after they have been generated. For more on the use of **Select for Printing**, see *Select For Printing* on page 85.

Line Items section: Lists the items and labor that should be included in this purchase order. These are created with the following:

New Purchase Template Item: Specifies an item that should appear on purchase orders generated from this template. For more details, see *Task Purchase Template Items* on page 178.

New Purchase Template Hourly Outside: Specifies contractor work, paid by the hour, that should appear on purchase orders generated from this template. For more details, see *Purchase Template Hourly Outside* on page 180.

New Purchase Template Per Job Outside: Specifies contractor work, paid by the job, that should appear on purchase orders generated from this template. For more details, see *Purchase Template Per Job Outside* on page 181.

New Purchase Template Miscellaneous Item: Specifies miscellaneous charges that should appear on purchase orders generated from this template. For more details, see *Task Purchase Template Miscellaneous Item* on page 183.

Delete: Deletes the selected entry.

Tasks section: Lists any tasks associated with this template.

Delete: Deletes the selected entry.

Refresh: Updates the list to reflect any recent changes.

Printing Purchase Order Templates

You can print your current purchase order templates by clicking the **Print** button in **Coding Definitions** | **Unit Maintenance Plans** | **Purchase Order Templates**. This opens a window that contains the following:

Grouping and Sorting section: Options controlling how the report is organized.

Group by list: These options determine how the report is broken into sections. For example, if you select **Vendor Category**, the report will have a separate section for each category.

Then group by list: These options determine how the report is broken into subsections.

Sort Direction: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling which records will be included in the report.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* .

Linking Purchase Order Templates to Tasks

. In order to use a purchase order template, it must be linked to one or more tasks. Whenever a work order is generated from one of the tasks, a purchase order will be generated from the associated template.

There are two ways to link a purchase order template to a task:

☐ From a task record (**Unit Maintenance Plans** | **Tasks** or **Coding Definitions** | **Unit Maintenance Plans** | **Tasks**): go to the **Purchase Templates** section of the task record and click **New Task to Purchase Order Template Linkage**. This lets you associate an existing purchase order template with the task.

☐ From a purchase order template record (**Coding Definitions** | **Unit Maintenance Plans** | **Purchase Order Templates**): go to the **Tasks** section of the purchase order template record and click **New Task to Purchase Order Template Linkage**. This lets you associate an existing task record with the current template.

In both cases, the window that opens contains the following:

Task: The task that should be linked to the purchase order. For more on tasks, see *Tasks* on page 184.

Purchase Order Template: The purchase order template that should be linked to the task. For more, see *Purchase Order Templates* on page 174.

Task Purchase Template Items

Clicking **New Purchase Template Item** in the **Line Items** section of a purchase order template opens a window that lets you add an item to the template. When a purchase order is generated from the template, the item will be included in the purchase order.

The editor window contains the following:

Item Number Rank: A number indicating where this item should be placed on generated purchase orders. This is useful when a task has multiple purchase templates associated with it, and line items from the different templates must be merged to make a single purchase order.

Line items on the generated purchase order will be sorted from lowest rank number to highest (so an item numbered 1 will come before one numbered 2). Ranks do not have to be completely sequential (so that you might have ranks, 1, 4, 5, 10, with gaps between the numbers). If multiple items have the same rank, MainBoss will randomly choose which one goes first.

Purchase Order Template: A read-only field identifying the purchase order template where this item will appear.

Storage Assignment: This area lets you specify a storage assignment that states what item you want to purchase and where you want to store it. At the bottom of

this area is a drop-down list which will display storage assignments based on the options specified in the "**Storage Assignment**" area. By choosing appropriate options, you can reduce the entries that are shown in the drop-down list, making it quicker and easier to choose the one you want. The possible options are:

Only include Storage Assignments which have a preferred Price Quote associated with them: A storage assignment record may or may not specify a *preferred price* for an item. If you select this option, the "**Storage Assignment**" drop-down list will only show storage assignments that have such a price.

Only include Storage Assignments for items which have a Price Quote associated with them: If you select this option, the "**Storage Assignment**" drop-down list will only show storage assignments for items whose records give a price quote.

Only include Storage Assignments for items which have previously been received: If you select this option, the "**Storage Assignment**" drop-down list will only show storage assignments for items which have been previously purchased (i.e. that show up in MainBoss's purchasing history). Typically, this option is combined with **Use Pricing or Purchasing history only for the Purchase Order Template's vendor**, in which case the drop-down list only shows items you've purchased from the same vendor.

Do not filter Storage Assignments based on Pricing or Purchasing History: If you select this option, the "**Storage Assignment**" drop-down list will not be affected by any of the preceding options.

Use Pricing or Purchasing history only for the Purchase Order Template's vendor: If you checkmark this box, the "**Storage Assignment**" drop-down list only shows storage assignment records with price quotes or purchases from the same vendor as the purchase order.

Drop-down list: The drop-down list at the end of the "**Storage Assignment**" area shows storage assignments that satisfy the options you have specified. For more on storeroom assignments, see *Storeroom Assignments* on page 113.

Quantity: Read-only fields telling current quantities of the item in the storeroom specified by "**Storage Assignment**".

Using order line text: Read-only field giving the text for this item as given in "**Storage Assignment**" (if any).

Use minimum quantity: If you checkmark this box, MainBoss will fill in "**Order Quantity**" with the "**Minimum**" value given in the read-only "**Quantity**" line. If you leave the box blank, you must fill in "**Order Quantity**" yourself.

Order Quantity: The quantity of the item that you want to order.

UOM: A read-only field giving the unit of measurement for this item (taken from the item record).

Purchase Template Hourly Outside

If you select an hourly outside demand in the **Resources** section of task record and then click **New Purchase Template Hourly Outside**, MainBoss opens a window where you can add an appropriate item to a purchase template. When a purchase order is generated from the template, the resulting purchase order will contain the hourly outside expenditure as a line item.

The editor window contains the following:

Item Number Rank: A number indicating where this labor expense should be placed on generated purchase orders. This is useful when a task has multiple purchase templates associated with it, and line items from the different templates must be merged to make a single purchase order.

Line items on the generated purchase order will be sorted from lowest rank number to highest (so an item numbered 1 will come before one numbered 2). Ranks do not have to be completely sequential (so that you might have ranks, 1, 4, 5, 10, with gaps between the numbers). If multiple items have the same rank, MainBoss will randomly choose which one goes first.

Purchase Order Template: A read-only field identifying the purchase order template where this labor expense will appear.

Hourly Outside Demand area: This area ends with a drop-down list where you can specify an hourly outside demand record. The options preceding this list dictate what you see when you drop down the list. By choosing appropriate options, you can reduce the entries that are shown in the drop-down list, making it quicker and easier to choose the one you want. The possible options are:

Only include Demand Templates for work specifically from this Purchase Order Template's Vendor: If you select this option, the drop-down list only shows hourly outside demand records that specifically mention the specified "**Vendor**".

Only include Demand Templates for work that this Purchase Order Template's Vendor could perform: If you select this option, the drop-down list shows hourly outside demand records that have the specified "**Vendor**" or whose "**Vendor**" field is blank.

Do not filter Demand Templates based on the Vendor associated with the work: If you select this option, the drop-down list will not be restricted by vendor or trade.

Only include demands for work previously performed by this vendor: If you checkmark this box, the drop-down list only shows hourly outside demands that have been used in previous purchase orders to this vendor.

Only include demands where quantity demanded exceeds quantity currently ordered: If you checkmark this box, the drop-down list will only show hourly outside demands where the demand is greater than the quantity of hourly outside work currently on order.

Drop-down list: The drop-down list at the end of the "**Hourly Outside Demand**" area shows hourly outside demand records that satisfy the options you have specified.

Hours: Read-only fields giving information about the work you've specified. This information is taken from the hourly outside demand record and from other tables in MainBoss.

Demanded: The total amount of time contained in the labor demand.

Already Ordered: The amount of time (if any) that has already been "received" on this purchase order. For example, suppose a job is expected to take several days. At the end of each day, you might use the purchase order to record how much labor you received on that day.

Remaining Demand: Equals "**Demanded**" minus "**Already Ordered**".

Hourly Rate: The hourly rate paid to the contractor.

Using order line text: Read-only field giving the text for this item as given in "**Hourly Outside Demand**" (if any).

Use remaining demand as quantity to order: If you checkmark this box, MainBoss will set "**Order Time**" to the "**Remaining Demand**" value. If you leave the box blank, you must fill in "**Order Time**" yourself.

Order Time: The amount of the contractor's time that you want covered by this entry. This may not be the full time expected. For example, if a job takes several days, you may decide to record each day's time separately.

Purchase Template Per Job Outside

If you select a per job outside demand in the **Resources** section of task record and then click **New Purchase Template Per Job Outside**, MainBoss opens a window where you can add an appropriate item to a purchase template. When a purchase order is generated from the template, the resulting purchase order will contain the per job outside expenditure as a line item.

The editor window contains the following:

Item Number Rank: A number indicating where this labor expense should be placed on generated purchase orders. This is useful when a task has multiple

purchase templates associated with it, and line items from the different templates must be merged to make a single purchase order.

Line items on the generated purchase order will be sorted from lowest rank number to highest (so an item numbered 1 will come before one numbered 2). Ranks do not have to be completely sequential (so that you might have ranks, 1, 4, 5, 10, with gaps between the numbers). If multiple items have the same rank, MainBoss will randomly choose which one goes first.

Purchase Order Template: A read-only field identifying the purchase order template where this labor expense will appear.

Per Job Outside Demand area: This area ends with a drop-down list where you can specify a per job outside demand record. The options preceding this list dictate what you see when you drop down the list. By choosing appropriate options, you can reduce the entries that are shown in the drop-down list, making it quicker and easier to choose the one you want. The possible options are:

Only include Demand Templates for work specifically from this Purchase Order Template's Vendor: If you select this option, the drop-down list only shows per job outside demand records that specifically mention the specified "**Vendor**".

Only include Demand Templates for work that this Purchase Order Template's Vendor could perform: If you select this option, the drop-down list shows per job demand records that have the specified "**Vendor**" or whose "**Vendor**" field is blank.

Do not filter Demand Templates based on the Vendor associated with the work: If you select this option, the drop-down list will not be restricted by vendor or trade.

Only include demands for work previously performed by this vendor: If you checkmark this box, the drop-down list only shows per job outside demands that have been used in previous purchase orders to this vendor.

Only include demands where quantity demanded exceeds quantity currently ordered: If you checkmark this box, the drop-down list will only show per job outside demands where the demand is greater than the quantity of per job outside work currently on order.

Drop-down list: The drop-down list at the end of the "**Per Job Outside Demand**" area shows per job outside demand records that satisfy the options you have specified.

Quantity: Read-only fields giving information about the work you've specified. This information is taken from the per job outside demand record and from other tables in MainBoss.

Demanded: The total amount of time contained in the labor demand.

Already Ordered: The amount of time (if any) that has already been "received" on this purchase order. For example, suppose a job is expected to take several days. At the end of each day, you might use the purchase order to record how much labor you received on that day.

Remaining Demand: Equals "**Demanded**" minus "**Already Ordered**".

Per Job Rate: The per job rate paid to the contractor.

Using order line text: Read-only field giving the text for this item as given in "**Per Job Outside Demand**" (if any).

Use remaining demand as quantity to order: If you checkmark this box, MainBoss will set "**Order Quantity**" to the "**Remaining Demand**" value. If you leave the box blank, you must fill in "**Order Quantity**" yourself.

Order Quantity: The amount of work that you want covered by this entry. This may not be the full quantity expected. For example, if a job takes several days, you may decide to record each day's time separately.

Task Purchase Template Miscellaneous Item

Clicking **New Purchase Template Miscellaneous Item** in the **Line Items** section of a purchase order template opens a window that lets you add a miscellaneous item to the template. This window contains the following:

Item Number Rank: A number indicating where this item should be placed on generated purchase orders. This is useful when a task has multiple purchase templates associated with it, and line items from the different templates must be merged to make a single purchase order.

Line items on the generated purchase order will be sorted from lowest rank number to highest (so an item numbered 1 will come before one numbered 2). Ranks do not have to be completely sequential (so that you might have ranks, 1, 4, 5, 10, with gaps between the numbers). If multiple items have the same rank, MainBoss will randomly choose which one goes first.

Purchase Order Template: A read-only field identifying the purchase order template where this miscellaneous item will appear.

Miscellaneous Item area: This area ends with a drop-down list where you can specify a miscellaneous item.

Only include Miscellaneous items previously provided by this vendor: If you checkmark this box, the drop-down list on the next line only shows miscellaneous items that have been used in previous purchase orders to this vendor.

Drop-down list: The drop-down list at the end of the "**Miscellaneous Item**" area shows miscellaneous items that satisfy any option you have specified.

Unit Cost: A read-only field giving the unit cost from the specified "**Miscellaneous Item**".

Using order line text: A read-only field giving the text from "**Miscellaneous Item**" that will appear on any generated purchase orders.

Order Quantity: The quantity of the miscellaneous item that you want to order.

Tasks

Tasks are lists of instructions needed to carry out planned maintenance. For example, you might create a task describing everything that should be done for monthly maintenance on a forklift truck. This task might include such details as:

☐ The personnel who are usually assigned to the job

☐ The expected time to perform the job

☐ The materials that are usually required

☐ Estimates for labor and materials costs

☐ The tools that will be needed

☐ Templates for purchases that might be associated with the task

☐ Any extra lead-time that might be needed in order to prepare for the job

☐ Step-by-step instructions for the job or a checklist of things that should be done

Often the same task can be applied to several units. For example, if your organization has several forklift trucks of the same model, the task describing monthly maintenance can be applied to each of the trucks. Similarly, a task describing yearly inspections on heating ducts might be appropriate for every space in each of your buildings.

MainBoss uses the information in task descriptions to create work orders. For example, MainBoss can automatically create work orders calling for monthly maintenance on each of the company's forklift trucks, using the personnel, materials, and other information from the task description. The work orders generated in this way can be edited afterwards, if necessary; for example, if one of the people normally assigned to a task will be on vacation the next time that task is scheduled, you can edit the work order to assign the job to someone else (or perhaps to reschedule the job to a date when the regular worker will be back from holiday).

Important: Tasks can also be used as standard (boilerplate) work orders. For example, you might create a task defining everything that should be done when changing the muffler on a vehicle. MainBoss makes it easy to create a work order directly from such a task, saving you the trouble of typing up such a work order yourself. For more, see *Work Orders Created from Tasks* on page 191.

Task Specializations

A *task specialization* is a specialized version of another task. For example, suppose you have a standard `Oil Change` task which describes a standard oil change. However, the oil change for a particular vehicle might require a different type of oil, extra inspection operations, or other differences from the standard. In this case, you can create a task specialization based on the original `Oil Change` task. The specialization states ways in which the special job differs from the original. The following rules control what happens when a work order is generated from a task specialization:

☐ Information in the specialization is *added* to the original whenever possible. For example, the task description in a generated work order will consist of the description in the original task *plus* any description in the specialization. Similarly, the work order will contain all resources from the original *plus* all resources from the specialization.

☐ Information in the specialization *replaces* information from the original when the two can't coexist. For example, a work order can only have a single priority. Therefore, if the original task description has one priority and the specialization has a different one, the work order will take its priority setting from the specialization.

A task specialization can be used wherever a task can. For example, you can schedule a specialized task in the same way that you schedule a basic task. Similarly, you can create a specialization of a specialization.

In the **Tasks** viewer and other viewers, tasks and specializations are shown using a map similar to a location map. Specializations are shown under and indented from their base tasks.

Viewing Tasks

You view task records with **Unit Maintenance Plans** | **Tasks** or **Coding Definitions** | **Unit Maintenance Plans** | **Tasks**. The window contains the following:

View section: Shows a map of current tasks and specializations.

Code: Click this heading to sort the list by code. Click again to reverse the order (from ascending to descending or vice versa).

Description: Click this heading to sort the list by description. Click again to reverse the order.

Details section: Shows information from the selected record.

Resources section: Shows demands from the selected task.

Task Temporary Storage section: Shows any temporary storage locations associated with the task.

Purchase Templates: Shows any purchase order templates associated with the task. For more, see *Purchase Order Templates* on page 174.

Unit Maintenance Plans section: Shows any unit maintenance plans that use the selected task.

New Task: Opens a window to create a new task record. Fields in the new record will either be blank or assigned default values (as specified in the **Defaults for Task** section).

New Task Specialization: Opens a window to create a new specialization for this task. For more, see *Editing Task Specializations* on page 190.

New Work Order From Task: Opens a window where you can create a new work order that uses this task as a template (often called boilerplate work orders). For example, suppose you have a task that describes what should be done when changing a muffler. When the time comes to change the muffler on a particular car, you can use **New Work Order From Task**. For more, see *Work Orders Created from Tasks* on page 191.

Defaults for Task section: Shows any defaults to be used when creating new task records.

Editing Tasks

You create or modify task records using the task editor. The usual way to open the editor is to click **New Task** or **Edit** in the **View** section of **Unit Maintenance Plans** | **Tasks** or **Coding Definitions** | **Unit Maintenance Plans** | **Tasks**.

The task editor window contains the following:

Details section: Shows basic information for the record.

Code: A brief code to identify this task. No two tasks may have the same code.

Description: A longer description of the task.

Subject: A subject line to be used for work orders generated from this task. For more on work orders, see *Work Orders* on page 309.

> **Note:** The "**Subject**" field is not mandatory in a task record, but it *is* required in work orders. Therefore, we recommend that all your tasks have "**Subject**" lines.

Specialized Work Duration: If this task is a specialization of another task, "**Specialized Work Duration**" is a read-only field giving the work duration for the original task.

Specialized Maximum Generate Lead Time: If this task is a specialization of another task, "**Specialized Maximum Generate Lead Time**" is a read-only field giving the maximum value of the "**Generate Lead Time**" field in any related task or task specialization. (This is *not* the sum of the lead times; it is

the maximum lead time needed by any single related task or task specialization.)

Specialization of: Used when this task should be a specialization of another task. If so, set the field to the name of the containing task. For more on task specializations, see *Task Specializations* on page 185.

Work Duration: The number of days that the task is expected to take.

Generate Lead Time: Is specified as a number of days. If you enter a number in this field, work orders using this task will be generated the given number of days earlier than they would be otherwise. For example, if the value is 7, work orders using this task will be generated a week earlier than normal. (The "**Work Start Date**" in the generated work order will tell when the job should actually start.)

By specifying a lead time, you create a delay between the time a work order is created and the time the job actually begins. This allows you time to make preparations. A lead time is particularly useful if you need to buy parts especially for a job. When MainBoss generates a work order, it immediately creates demands for all items required for the job; if some of these items aren't in stock, they'll show up on the **Restocking** report. In this way, you'll see ahead of time that you need to order the parts. If you set enough lead time, the parts will be in by the time you actually have to do the work.

Work Category: The type of work involved in this task. For more on work categories, see *Work Categories* on page 281.

Access Code: An access code to be associated with work orders generated from this task. For more on access codes, see *Access Codes* on page 89.

Work Order Priority: A priority to be associated with work orders generated from this task. For more on such priorities, see *Work Order Priorities* on page 273.+

Expense Model: The expense model to be associated with work orders generated from this task. For more on expense models, see *Expense Models* on page 250.

Project: A project to be associated with this task (if any). For more on projects, see *Projects* on page 276.

Work Description: A description of the work to be done in this task. You should enter step-by-step instructions or a checklist of things to be done during this planned maintenance job. You should also enter any other information that workers might find useful, e.g. the tools that will be needed or tips on dealing with special problems.

Downtime: A default downtime—how long the unit is expected to be down during the maintenance.

Closing Code: A default closing code to be assigned to work orders generated from this task. For more on closing codes, see *Closing Codes on page 245*.

Work Order Comments: Any comments that should be filled into the **Comments** section of generated work orders.

Comments: Comments about this task record. These comments will *not* appear on generated work orders.

Select for Printing: If this box is checkmarked, work orders generated from this task will be marked **Select for Printing**. This makes it simpler to print the work orders after they have been generated. For more on the use of **Select for Printing**, see *Select For Printing on page 85*.

Resources section: May specify materials that should be reserved for the task. This section may also assign inside workers or outside contractors to the task. Note that these are *default* assignments to be used when work orders are generated from the task description. Such assignments may be changed on the actual generated work order. (For example, if a job is usually done by worker X but that person is on vacation, you can edit a generated work order to assign the job to someone else.)

Number of Demands: A read-only field giving the total number of demands current specified for the task.

Items section: Specifies items to be demanded by the task. The list shows current demands; the buttons let you add new demands and temporary storage assignments.

New Task Demand Item: Reserves an item for the task. See *Task Demand Item on page 194*.

Inside section: Specifies inside labor that should be assigned to the task.

New Task Demand Hourly Inside: Assigns inside personnel to the task, charging on an hourly basis; see *Task Demand Hourly Inside on page 195*.

New Task Demand Per Job Inside: Assigns inside personnel to the task, charging on a per job basis. See *Task Demand Per Job Inside on page 196*.

Outside section: Specifies outside contractors who should be assigned to the task.

New Task Demand Hourly Outside: Assigns an outside contractor to the task, charging on an hourly basis. See *Task Demand Hourly Outside on page 197*.

New Task Demand Per Job Outside: Assigns an outside contractor to the task, charging on a per job basis. See *Task Demand Per Job Outside on page 198*.

Miscellaneous section: Specifies miscellaneous costs that should be associated with the task.

> **New Task Demand Miscellaneous Cost**: Assigns a new miscellaneous cost to the task. See *Task Demand Miscellaneous Cost* on page 199.

Task Temporary Storage section: Specifies temporary storage locations and assignments for this task.

> **New Task Temporary Storage**: Specifies a temporary storage location for this task. For more information, see *Editing Task Temporary Storage Locations* on page 193.

> **New Task Temporary Storage Assignment**: Specifies a temporary storage assignment for this task. For more information, see *Editing Task Temporary Storage Assignments* on page 193.

Purchase Templates section: Lists any purchase order templates associated with this task. If a task has an associated purchase order template, a purchase order is generated from the template any time a work order is generated from the task. For more on purchase order templates, see *Purchase Order Templates* on page 174.

> **Code**: Lists purchase order templates associated with the task

> **Description**: The description field from each template.

> **New Task to Purchase Order Template Linkage**: Opens a window to link a new purchase order template to this task. For more information on this window, see *Linking Purchase Order Templates to Tasks* on page 178.

Unit Maintenance Plans section: Lists any unit maintenance plan records that use this task. A unit maintenance plan includes a task, a timing record (e.g. every three months) and a unit to be serviced according to the timing and the task. For more on unit maintenance plans, see *Unit Maintenance Plans* on page 158.

> **Unit**: Lists units to receive planned maintenance using this task. For more on units, see *Units* on page 422.

> **Timing**: Lists the timing for the plan. For more on maintenance timing, see *Maintenance Timing* on page 168.

> **Next Available Date**: The next date on which the job could possibly be performed. If there's already an open work order for this job, this will be the day after the open work order is scheduled to finish. If there isn't such an open work order, this is typically the day after the last time you generated PM work orders.

> **New Unit Maintenance Plan**: Opens a window to set up a unit maintenance plan using this task.

Create unplanned Maintenance Work Order: Uses the selected unit maintenance plan to make a work order immediately. For example, suppose the plan specifies an oil change on a particular vehicle. Clicking this button immediately creates an oil change work order for the vehicle. For more information, see *Creating an Unplanned Maintenance Work Order* on page 166.

Correct Missing Schedule Basis: This is similar to **Select Scheduling Basis** (see below) but lets you specify a scheduling basis for several unit maintenance plans at once. For more information, see *Changing the Scheduling Basis for Multiple Unit Maintenance Plans* on page 166.

Select Scheduling Basis: Opens a window to let you set the scheduling basis for an existing unit maintenance plan. The scheduling basis is when the clock starts ticking for future planned maintenance jobs—typically the date or meter reading for the most recent such job done on the unit. For more, see *Selecting a Scheduling Basis* on page 165.

Editing Task Specializations

A task specialization is a specialized version of another task. (For more, see *Task Specializations* on page 185.)

To create a task specialization, you use **New Task Specialization** from **Unit Maintenance Plans** | **Tasks** or from **Coding Definitions** | **Unit Maintenance Plans** | **Tasks**.

The contents of a specialized task are similar to a normal task. Therefore, editing a specialized task is the same as editing a normal task, with all the information fields having the same meaning. For more on editing tasks, see *Editing Tasks* on page 186.

Printing Tasks

You can print your current tasks by clicking the **Print** button in **Unit Maintenance Plans** | **Tasks** or **Coding Definitions** | **Unit Maintenance Plans** | **Tasks**. This opens a window that contains the following:

Grouping section: Options controlling how the report is organized.

Group by list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

Sort Direction: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

Sort by list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling what contact information will be included in the report.

Show deleted records: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Work Orders Created from Tasks

Tasks provide a description of work to be done in planned maintenance. However, you may also want to perform the work as an unscheduled job. For example, you may want to perform an oil change on a car even though the car isn't due for an oil change yet.

In this case, you can create a one-off work order based on the information in a task record. This lets you create a work order very quickly—all you have to do is fill in the name of the unit, and a few other fields.

To create a work order from a task, select the task in the **Tasks** viewer, then click **New Work Order From Task**. This opens a window that contains the following:

Task: Specifies the task record to use as the basis for the new work order.

For Access Code options: Let you specify what to do when the access code for a task is different from the access code for the unit:

Prefer value from Task: If both the task and the unit record specify an access code, MainBoss uses the access code from the task. However, if the task record doesn't have an access code, MainBoss uses the code from the unit.

Prefer value from Unit: If both the task record and the unit record specify an access code, MainBoss uses the access code from the unit. However, if the unit record doesn't have an access code, MainBoss uses the code from the task.

Only use value from Task: MainBoss always uses the access code from the task record. (If the task record doesn't have an access code, the generated work order won't have an access code either.)

Only use value from Unit: MainBoss always uses the access code from the unit record. (If the unit record doesn't have an access code, the generated work order won't have an access code either.)

For Expense Model options: Let you specify what to do when the expense model for a task is different from the one for the unit. The options work the same way as the options in **For Access Code**.

Purchase Order initial State override: Lets you specify an initial state for any purchase orders generated in connection with this task.

Purchase orders will be generated from any purchase order templates associated with the task. Each template may have a default initial state associated with it: `Closed`, `Issued`, `Open`, or `Voided`. By default, generated purchase orders are put into the specified state; however, you can override the default by specifying a different state in this field.

Work Order initial State override: Similar to "**Purchase Order initial State override**". By default, each generated work order is created in the draft state. However, you may wish to put generated work orders into some other state instead—most likely the open state, indicating that the work order is ready to be printed. (Remember though that if a work order is open, some of its information is locked down and can't be changed unless you first **Suspend** the work order.)

Work Order Number: Identifies the new work order. MainBoss automatically generates a new work order number.

Unit: The unit on which you want the work to be done.

Start Date: The date on which the work should begin.

Subject: A read-only field giving the subject line to be used for the work order.

Access Code: A read-only field giving the access code to be used for the work order (determined by the "**For Access Code**" options).

Expense Model: A read-only field giving the expense model to be used for the work order (determined by the "**For Expense Model**" options).

Editing Task Temporary Storage Locations

A task temporary storage location is a location that can be used to store items during the course of a job. When a task specifies a temporary storage location, any work orders generated from that task will specify the same temporary storage location.

To specify a task temporary storage location, you click **New Task Temporary Storage** in the **Task Temporary Storage** section of a task record. This opens a window that contains the following:

Task: A read-only field specifying the task that will use this temporary storage location.

Containing Location: The location that you want to use for temporary storage.

Editing Task Temporary Storage Assignments

Task temporary storage assignments specify an item and a temporary storage location that might be used to hold that item during planned maintenance tasks. For example, you might specify that every time you do a 3000-mile check-up on a vehicle, various materials (like engine oil, air filters, etc.) should be put out on a particular work bench so they'll be available if needed. The work bench is the temporary storage that can be used in such tasks.

For more on temporary storage assignments during work orders, see *Temporary Storage Locations* on page 374. For more on task temporary storage locations, see *Editing Task Temporary Storage Locations* on page 193.

Before you can create a task temporary storage assignment, you must first associate a temporary storage location with the task. Then you click **New Task Temporary Storage Assignment** in the **Task Temporary Storage** section of the task record. This opens a window that contains the following:

Item: The inventory item whose location you're recording. For more on inventory items, see *Inventory Item Records* on page 445.

Location: A temporary storage location. This must already be a temporary storage location associated with the task.

Preferred Pricing: A price or price quote on the item. Typically, this is used to indicate the vendor from whom you prefer to purchase the item. For more on item pricing, see *Item Pricing* on page 448.

Task Demand Item

In the **Items** subsection of the **Resources** section of a task record, **New Task Demand Item** lets you state that an item should be reserved for use in the associated task. Whenever a work order is generated from the task, the work order will contain a **Demand Item** for the associated item. (For more on demand items, see *Demand Item* on page 334.)

When you click **New Task Demand Item** in a task record, MainBoss opens a window that contains the following:

Task: The task that contains this demand.

Storage Assignment area: Lets you specify the type of item you want to reserve and the storage location where you intend to get the item. The area contains two drop-down lists:

Show Storage Assignments for: A drop-down list showing all items. Select the item you wish to add to this task's resource list.

Unlabeled drop-down list: Once you've selected an item in "**Show Storage Assignments for**", the unlabeled drop-down list shows all storage assignments for the selected item. If you leave "**Show Storage Assignments for**" blank, the unlabeled drop-down list shows all storage assignments.

For more on storage assignments, see *Storeroom Assignments* on page 113.

Leave estimated total demand cost blank when work order is created: If you choose this option, generated work orders will not include cost estimates for this entry. You can supply an estimate after a work order is generated, or simply enter the actual cost once the job is finished.

Estimate total demand cost when work order is created: If you choose this option, generated work orders will have cost estimates for this entry.

Estimated Quantity: The quantity of the item that you want to reserve for this task.

Actual default: Specifies the default method for calculating costs when someone creates an "actual item" in response to this demand. If the person who records "actual item" information has sufficient security permissions, he or she can specify item costs in a different way. However, if the person who records the "actual item" information does not have permission to specify costs, what you

specify on this demand determines which costs MainBoss will use. The possible options are:

Manual entry: If you choose this option, you expect the person recording "actual item" information to have appropriate security permissions to specify the actual cost of the items.

Current value calculation: If you choose this option, the default is to calculate "actual item" costs from MainBoss's existing inventory price information.

Demand estimate: If you choose this option, the default is to use the estimated cost in the demand as a basis for the "actual item" cost.

Expense Category: The expense category to which this expense belongs. For more on expense categories, see *Expense Categories* on page 248.

Task Demand Hourly Inside

In the **Inside** subsection of the **Resources** section of a task record, **New Task Demand Hourly Inside** lets you assign inside personnel to the associated task. Whenever a work order is generated from the task, the work order will contain a **Demand Hourly Inside** for the specified worker. (For more on demand hourly inside records, see *Demand Hourly Inside* on page 336.)

When you click **New Task Demand Hourly Inside** in a task record, MainBoss opens a window that contains the following:

Task: The task that contains this demand.

Hourly Inside: An hourly inside record specifying the person you want to assign to the job and the hourly price paid for the worker's services. For more on hourly inside records, see *Hourly Inside* on page 257.

Leave estimated total demand cost blank when work order is created: If you choose this option, generated work orders will not include cost estimates for this entry. You can supply an estimate after a work order is generated, or simply enter the actual cost once the job is finished.

Estimate total demand cost when work order is created: If you choose this option, generated work orders will have cost estimates for this entry.

Estimated Hours: The time you expect the worker will spend on the task.

Actual default: Specifies the default method for calculating costs when someone creates an "actual hourly inside" in response to this demand. If the person who records the actual cost has sufficient security permissions, he or she can specify the cost in a different way. However, if the person who records the actual cost does not have permission to specify costs, what you specify on this demand determines the cost that MainBoss will use. Possible options are:

Manual entry: If you choose this option, you expect the person who actualizes this demand to have appropriate security permissions to specify the actual cost of the work.

Current value calculation: If you choose this option, the default is to calculate actual costs from the original hourly inside record.

Demand estimate: If you choose this option, the default is to use the estimated cost in the demand as a basis for the actual cost.

Expense Category: The expense category to which this expense belongs. For more on expense categories, see *Expense Categories* on page 248.

Task Demand Per Job Inside

In the **Inside** subsection of the **Resources** section of a task record, **New Task Demand Per Job Inside** lets you assign inside personnel to the associated task, paid on a per job basis. Whenever a work order is generated from the task, the work order will contain a **Demand Per Job Inside** record for the specified worker. (For more on demand per job inside records, see *Demand Per Job Inside* on page 339.)

When you click **New Task Demand Per Job Inside** in a task record, MainBoss opens a window that contains the following:

Task: The task that contains this demand.

Per Job Inside: A per job inside record specifying the person you want to assign to the job and the price paid for the worker's services. For more on per job inside records, see *Per Job Inside* on page 263.

Estimate costs when work order created: If you checkmark this, MainBoss will automatically create a cost estimate for this labor whenever a work order is generated from this task. If you leave it blank, MainBoss will not create such a cost estimate.

Leave estimated total demand cost blank when work order is created: If you choose this option, generated work orders will not include cost estimates for this entry. You can supply an estimate after a work order is generated, or simply enter the actual cost once the job is finished.

Estimate total demand cost when work order is created: If you choose this option, generated work orders will have cost estimates for this entry.

Estimated Quantity: The quantity of work expected. This is usually 1 (i.e. you expect the job to be done as described in the per job inside record.)

Actual default: Specifies the default method for calculating costs when someone creates an "actual per job inside" in response to this demand. If the person who records the actual cost has sufficient security permissions, he or she can specify the cost in a different way. However, if the person who records the actual cost

does not have permission to specify costs, what you specify on this demand determines the cost that MainBoss will use. Possible options are:

Manual entry: If you choose this option, you expect the person who actualizes this demand to have appropriate security permissions to specify the actual cost of the work.

Current value calculation: If you choose this option, the default is to calculate actual costs from the original per job inside record.

Demand estimate: If you choose this option, the default is to use the estimated cost in the demand as a basis for the actual cost.

Expense Category: The expense category to which this expense belongs. For more on expense categories, see *Expense Categories* on page 248.

Task Demand Hourly Outside

In the **Outside** subsection of the **Resources** section of a task record, **New Task Demand Hourly Outside** lets you state that an outside contractor should be hired for the associated task. Whenever a work order is generated from the task, the work order will contain a **Demand Hourly Outside** for the contractor. (For more on demand hourly outside records, see *Demand Hourly Outside* on page 341.)

When you click **New Task Demand Hourly Outside** in a task record, MainBoss opens a window that contains the following:

Task: The task that contains this demand.

Hourly Outside: An hourly outside record specifying the contractor you want to hire for the job and the hourly price paid for the contractor's services. For more on hourly outside records, see *Hourly Outside* on page 260.

Estimate costs when work order created: If you checkmark this, MainBoss will automatically create a cost estimate for this labor whenever a work order is generated from this task. If you leave it blank, MainBoss will not create such a cost estimate.

Leave estimated total demand cost blank when work order is created: If you choose this option, generated work orders will not include cost estimates for this entry. You can supply an estimate after a work order is generated, or simply enter the actual cost once the job is finished.

Estimate total demand cost when work order is created: If you choose this option, generated work orders will have cost estimates for this entry.

Estimated Hours: The time you expect the contractor will spend on the task.

Actual default: Specifies the default method for calculating costs when someone creates an "actual hourly outside" in response to this demand. If the person who

records the actual cost has sufficient security permissions, he or she can specify the cost in a different way. However, if the person who records the actual cost does not have permission to specify costs, what you specify on this demand determines the cost that MainBoss will use. Possible options are:

Manual entry: If you choose this option, you expect the person who actualizes this demand to have appropriate security permissions to specify the actual cost of the work.

Current value calculation: If you choose this option, the default is to calculate actual costs from the original hourly outside record.

Demand estimate: If you choose this option, the default is to use the estimated cost in the demand as a basis for the actual cost.

Expense Category: The expense category to which this expense belongs. For more on expense categories, see *Expense Categories* on page 248.

Task Demand Per Job Outside

In the **Outside** subsection of the **Resources** section of a task record, **New Task Demand Per Job Outside** lets you assign outside contractors to the associated task, paid on a per job basis. Whenever a work order is generated from the task, the work order will contain a **Demand Per Job Outside** record for the specified contractor. (For more on demand per job outside records, see *Demand Per Job Outside* on page 343.)

When you click **New Task Demand Per Job Outside** in a task record, MainBoss opens a window that contains the following:

Task: The task that contains this demand.

Per Job Outside: A per job outside record specifying the contractor you want to assign to the job and the price paid for the contractor's services. For more on per job outside records, see *Per Job Outside* on page 265.

Estimate costs when work order created: If you checkmark this, MainBoss will automatically create a cost estimate for this labor whenever a work order is generated from this task. If you leave it blank, MainBoss will not create such a cost estimate.

Leave estimated total demand cost blank when work order is created: If you choose this option, generated work orders will not include cost estimates for this entry. You can supply an estimate after a work order is generated, or simply enter the actual cost once the job is finished.

Estimate total demand cost when work order is created: If you choose this option, generated work orders will have cost estimates for this entry.

Estimated Quantity: The quantity of work expected. This is usually 1 (i.e. you expect the job to be done as described in the per job outside record.)

Actual default: Specifies the default method for calculating costs when someone creates an "actual per job outside" in response to this demand. If the person who records the actual cost has sufficient security permissions, he or she can specify the cost in a different way. However, if the person who records the actual cost does not have permission to specify costs, what you specify on this demand determines the cost that MainBoss will use. Possible options are:

Manual entry: If you choose this option, you expect the person who actualizes this demand to have appropriate security permissions to specify the actual cost of the work.

Current value calculation: If you choose this option, the default is to calculate actual costs from the original per job outside record.

Demand estimate: If you choose this option, the default is to use the estimated cost in the demand as a basis for the actual cost.

Expense Category: The expense category to which this expense belongs. For more on expense categories, see *Expense Categories* on page 248.

Task Demand Miscellaneous Cost

In the **Miscellaneous** subsection of the **Resources** section of a task record, **New Task Demand Miscellaneous Cost** lets you add a miscellaneous cost to the associated task. Whenever a work order is generated from the task, the work order will contain a "Demand Miscellaneous Cost" record for the cost. (For more on demand miscellaneous records, see *Demand Miscellaneous* on page 345.) The window for creating a miscellaneous cost for tasks contains the following:

Task: The task that contains this demand.

Miscellaneous Cost: A miscellaneous cost record describing the cost. For more on miscellaneous cost records, see *Work Order Miscellaneous* on page 271.

Leave estimated total demand cost blank when work order is created: If you choose this option, generated work orders will not include cost estimates for this entry. You can supply an estimate after a work order is generated, or simply enter the actual cost once the job is finished.

Estimate total demand cost when work order is created: If you choose this option, generated work orders will have cost estimates for this entry.

Actual default: Specifies the default method for calculating costs when someone creates an "actual miscellaneous cost" in response to this demand. If the person who records the actual cost has sufficient security permissions, he or she can specify the cost in a different way. However, if the person who records the actual cost does not have permission to specify costs, what you specify on this demand determines the cost that MainBoss will use. Possible options are:

Manual entry: If you choose this option, you expect the person who actualizes this demand to have appropriate security permissions to specify the actual cost of the work.

Current value calculation: If you choose this option, the default is to calculate actual costs from the original miscellaneous cost record.

Demand estimate: If you choose this option, the default is to use the estimated cost in the demand as a basis for the actual cost.

Expense Category: The expense category to which this expense belongs. For more on expense categories, see *Expense Categories* on page 248.

Asset Codes

The Asset Codes table lets you record any fixed asset balance sheet account numbers that are used to capitalize equipment in your organization's general ledger. This makes it possible to cross-reference your equipment assets with your general accounts.

Viewing Asset Codes

You view asset codes with **Coding Definitions** | **Units** | **Asset Codes**. The window contains the following:

View section: Shows the list of current asset codes.

Code: Click this heading to sort the list by code. Click again to reverse the order (from ascending to descending or vice versa).

Description: Click this heading to sort the list by description. Click again to reverse the order.

Details section: Shows information from the selected record.

Units section: Shows units that use the selected asset code.

Defaults for Asset Code section: Shows any defaults to be used when creating new asset codes.

Editing Asset Codes

You create or modify asset codes using the asset code editor. The usual way to open the editor is to click **New Asset Code** or **Edit** in the **View** section of **Coding Definitions** | **Units** | **Asset Codes**.

The asset code editor window contains the following:

Details section: Shows basic information for the record.

Code: A brief code to identify this record. No two records may have the same code.

Description: A longer description of the asset code.

Comments: Any comments you want to associate with the asset code.

Units section: Shows any units that use this code. For more on units, see *Units* on page 422.

Printing Asset Codes

You can print your current asset codes by clicking the **Print** button in **Coding Definitions** | **Units** | **Asset Codes**. This opens a window that contains the following:

Sorting section: Options controlling how the report is organized.

Sort by list: These options determine how items are sorted.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick a **Sort by** option where sort direction is relevant.

Filtering section: Options controlling which asset codes will be included in the report.

Show deleted records: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Unit Categories

The Unit Categories table makes it possible to group units into classes. Here are some typical unit categories:

```
Pumps
Manufacturing equipment
Vehicles
Office space
Washrooms
Elevators
```

While you don't have to create any unit categories at all, they are useful for organizing reports and for getting detailed breakdowns on time and expenses. (How much do we actually spend to maintain our vehicles? What's our current investment in different types of manufacturing machines?)

Viewing Unit Categories

You view unit categories with **Coding Definitions** | **Units** | **Categories**. The window contains the following:

View section: Shows the list of current unit categories.

Code: Click this heading to sort the list by code. Click again to reverse the order (from ascending to descending or vice versa).

Description: Click this heading to sort the list by description. Click again to reverse the order.

Details section: Shows information from the selected record.

Units section: Shows units that belong to the selected category.

Defaults for Unit Category section: Shows any defaults to be used when creating new unit categories.

Editing Unit Categories

You create or modify unit categories using the unit category editor. The usual way to open the editor is to click **New Unit Category** or **Edit** in the **View** section of **Coding Definitions** | **Units** | **Categories**.

The unit category editor window contains the following:

Details section: Shows basic information for the record.

Code: A brief code to identify this record. No two records may have the same code.

Description: A longer description of the unit category.

Comments: Any comments you want to associate with the unit category.

Units section: Shows any units that belong to this category. For more on units, see *Units* on page 422.

Printing Unit Categories

You can print your current unit categories by clicking the **Print** button in **Coding Definitions** | **Units** | **Categories**. This opens a window that contains the following:

Sorting section: Options controlling how the report is organized.

Sort by list: These options determine how items are sorted.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick a **Sort by** option where sort direction is relevant.

Filtering section: Options controlling which categories will be included in the report.

Show deleted records: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Meter Classes

The Meter Classes table lets you define types of meters such as:

```
Odometer (miles)
Odometer (kilometers)
Kilowatt-hours
Hours of operation
```

Meter classes define the various types of meters relevant to your maintenance operations. You must create an appropriate meter class before you can define a meter. For example, you must create an appropriate odometer type before you can define any odometers used by your equipment.

Viewing Meter Classes

You view meter classes with **Coding Definitions** | **Units** | **Meter Classes**. The window contains the following:

View section: Shows the list of current meter classes.

Code: Click this heading to sort the list by code. Click again to reverse the order (from ascending to descending or vice versa).

Description: Click this heading to sort the list by description. Click again to reverse the order.

Details section: Shows information from the selected record.

Meters section: Shows meters that belong to the selected class. For more, see *Meters* on page 207.

Maintenance Timings section: Shows maintenance timing records associated with the selected class. For more, see *Maintenance Timing* on page 168.

Defaults for Meter Class section: Shows any defaults to be used when creating new meter classes.

Editing Meter Classes

You create or modify meter classes using the meter class editor. The usual way to open the editor is to click **New Meter Class** or **Edit** in the **View** section of **Coding Definitions** | **Units** | **Meter Classes**.

The meter class editor window contains the following:

Details section: Shows basic information for the record.

Code: A brief code to identify this record. No two records may have the same code.

Description: A longer description of the meter class.

UOM: The units of measure used by this type of meter.

Comments: Any comments you want to associate with the meter class.

Meters section: Shows any meters that belong to this class. For more on meters, see *Meters* on page 207.

Maintenance Timings section: Shows any maintenance timing records associated with this class. For more, see *Maintenance Timing* on page 168.

Printing Meter Classes

You can print your current meter classes by clicking the **Print** button in **Coding Definitions** | **Units** | **Meter Classes**. This opens a window that contains the following:

Grouping section: Options controlling how the report is organized.

Group by list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

Sort Direction: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

Sort by list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling which meter classes will be included in the report. You can select classes by **Code** or by **UOM** (unit of measurement).

Show deleted records: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Meters

Pieces of equipment and other units may have meters measuring hours of use, power consumption, mileage, and so on. MainBoss lets you schedule planned maintenance work by meter readings (for example, every 500 hours of use); therefore, it is useful to set up a regular schedule for recording meter readings in MainBoss's database.

Before you create a record for a specific meter, you must define a corresponding *meter class*. For example, before you can create a record for the odometer of a specific vehicle, you must create a meter class record for such odometers. For more on meter classes, see *Meter Classes* on page 204.

When you define a meter record, you must specify its meter class and the unit with which the meter is associated. You may record the current meter reading at the same time that you create the meter record.

MainBoss retains a list of all meter readings made on a particular meter. You can examine these readings to see the pattern of use over time. When scheduling planned maintenance, MainBoss uses past meter readings to estimate future ones. For example, if a car is scheduled for an oil change every 3000 miles, MainBoss can use past odometer readings to estimate when the car will be due for its next oil change. The more readings you record, the more accurate MainBoss's estimates are likely to be. By recording readings regularly, you can also ensure that MainBoss has frequent updates on each meter's value.

Effective vs. Actual Readings: In order for MainBoss to schedule planned maintenance based on meter readings, the reading values must keep increasing—they should never go backwards. In practice, however, meters sometimes go down instead of up. This can happen, for example, if an old meter is replaced by a new meter, or if an existing meter rolls over back to zero.

To deal with such situations, MainBoss lets you specify a *meter offset* for each meter. The offset is a number that MainBoss adds to the actual meter reading in order to calculate the *effective* (true) reading for the meter.

For example, suppose a meter only shows four digits so that values run from 0000 to 9999. When the meter rolls over after 9999, you would set the meter offset to 10000. After that, when a worker enters a meter reading like 0100, MainBoss adds the offset to determine that the effective meter reading is now 10100. This is what the meter would read if it could display more digits. The next time the meter rolls over, you set the meter offset to 20000, and so on. In this way, MainBoss can determine true measurements (as opposed to what the meter actually says).

As another example, suppose that a meter breaks and has to be replaced. The old meter broke at the 5273 mark, but the new meter starts at zero. In this case, you would set the meter offset to 5273. MainBoss can then make appropriate corrections so that it keeps track of how long equipment has actually been in use, no matter what the meter says.

Viewing Meter Records

You view meters with **Coding Definitions** | **Units** | **Meters**. The window contains the following:

View section: Shows the list of current meters.

Meter Class: Click this heading to sort the list by meter class. Click again to reverse the order (from ascending to descending or vice versa).

Unit: Click this heading to sort the list by unit. Click again to reverse the order.

Last Reading Date: Click this heading to sort the list by date of last reading. Click again to reverse the order.

Last Effective Reading: Click this heading to sort by the effective value of the most recent reading.

Details section: Shows information from the selected record.

Readings section: Lists readings for the selected meter.

New Meter Reading: Lets you record a new reading for the meter currently selected. For more information, see *Editing Meter Readings* on page 433.

Defaults for Meter section: Shows any defaults to be used when creating new meter records.

Editing Meter Records

You create or modify meters using the meter editor. The usual way to open the editor is to click **New Meter** or **Edit** in the **View** section of **Coding Definitions** | **Units** | **Meters** .

The meter editor window contains the following:

Details section: Shows basic information for the record.

Meter Class: Indicates what type of meter this is. For more information, see *Meter Classes* on page 204.

Unit: The unit (e.g. piece of equipment) with which this meter is associated. For more on units, see *Units* on page 422.

UOM: A read-only field giving the units of measure used by this type of meter. This information is obtained from the chosen **Meter Class** record.

Offset: The current meter offset. For more about meter offsets, see *Meters* on page 207.

Last Reading Date: A read-only field giving the most recent date on which a reading was taken.

Last Effective Reading: A read-only field giving the value of the last effective reading. (Effective reading is the value actually shown on the meter plus the meter offset.)

Comments: Any comments you want to associate with the meter.

Readings section: Shows all readings recorded for this meter.

New Meter Reading: Opens a window where you can record a new reading for this meter. For more on recording meter readings, see *Editing Meter Readings* on page 433.

Ownerships

There are many situations in which units may be owned by individuals or groups, either in different departments of your organization or by third parties. Here are some typical ownerships:

```
Department A
Tenant B
Chris Smith
```

While you don't have to create any ownerships at all, they are useful for organizing reports and for getting detailed breakdowns on time and expenses.

Viewing Ownerships

You view ownerships with **Coding Definitions** | **Units** | **Ownerships**. The window contains the following:

View section: Shows the list of current ownerships.

Code: Click this heading to sort the list by code. Click again to reverse the order (from ascending to descending or vice versa).

Description: Click this heading to sort the list by description. Click again to reverse the order.

Details section: Shows information from the selected record.

Units section: Shows units with the selected ownership.

Defaults for Ownership section: Shows any defaults to be used when creating new ownerships.

Editing Ownerships

You create or modify ownerships using the ownership editor. The usual way to open the editor is to click **New Ownership** or **Edit** in the **View** section of **Coding Definitions** | **Units** | **Ownerships**.

The ownership editor window contains the following:

Details section: Shows basic information for the record.

Code: A brief code to identify this record. No two records may have the same code.

Description: A longer description of the ownership.

Comments: Any comments you want to associate with the ownership.

Units section: Shows any units that have this ownership. For more on units, see *Units* on page 422.

Printing Ownerships

You can print your current ownerships by clicking the **Print** button in **Coding Definitions** | **Units** | **Ownerships**. This opens a window that contains the following:

Sorting section: Options controlling how the report is organized.

Sort by list: These options determine how items are sorted.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick a **Sort by** option where sort direction is relevant.

Filtering section: Options controlling which ownerships will be included in the report.

Show deleted records: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Spare Parts

A *spare part* is an inventory item that has been designated as spare parts for one of more units. Identifying spare parts is useful for any workers sent to do work on the unit—they can check to see what they might need before they head out to the job site.

For example, suppose you get a report that a fluorescent light is out in a particular room. You can check in advance to see what kind of bulb is used in that room, so that you don't have to make two trips.

You don't have to record every part used by every unit. However, the more information you do record, the better prepared your workers can be when going out to a job.

Before you can record that a unit uses a particular spare part, you must have a record for the unit in your **Units** table and a record for the spare part in your **Items** table. (For more, see *Units* on page 422 and *Inventory Item Records* on page 445.) There are several ways to record the parts information:

☐ In the **Parts** section of the unit record, click **New Part**.

☐ In the **Usage** section of the item record, click **New Part**.

☐ In **Coding Definitions** | **Units** | **Parts**, click **New Part**.

Viewing Spare Parts

You view spare parts with **Coding Definitions** | **Units** | **Parts**. The window contains the following:

Unit: Click this heading to sort the list by unit name. Click again to reverse the order (from ascending to descending or vice versa).

Item: Click this heading to sort the list by item (i.e. the ID code of the spare part). Click again to reverse the order.

Quantity: Click the heading to sort the list by the number of spare parts used in the item. Click again to reverse the order.

UOM: Click the heading to sort the list by units of measurement. Click again to reverse the order.

Unit area: Shows information about the unit from the selected record.

Item area: Shows information about the item (the spare part) from the selected record.

Editing Spare Parts Information

The Spare Parts editor records information about an item that is used as a spare part for a unit.

Unit: Identifies the unit. (This field is read-only if you started from a unit record.)

Description: A read-only field giving the "**Description**" field of the unit record.

Make, **Model**, and **Serial Number**: Read-only fields giving more information about the specified unit.

Item: Identifies a spare part used by the unit. (This field is read-only if you started from an item record.)

On Hand: A read-only field giving the quantity of the item that you have on hand (the total in all your storerooms).

Description: A read-only field giving the "**Description**" field of the item record.

Quantity: The maximum quantity of the item that can be used by the unit. For example, if "**Unit**" is a room and "**Item**" is a light bulb used in that room, "**Quantity**" should be the maximum number of bulbs that might be needed in the room.

UOM: A read-only field giving the units of measure for the item.

Comments: Any comments you want to record about how the unit uses this spare part.

Printing Spare Parts

You can print information about your current spare parts by clicking the **Print** button in **Coding Definitions** | **Units** | **Parts**. This opens a window that contains the following:

Grouping section: Options controlling how the report is organized.

> **Group by** list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

> **Sort Direction**: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

> **Sort by** list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

> **Sort Direction**: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling what kind of units and spare parts will be included in the report. The window allows several types of selection:

> **Show deleted records**: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

> **Unit Filters**: Make selections based on basic unit information. For example, if you filter by **Unit Location**, you can restrict the print-out to units at a particular location (e.g. all units in a specific building).

> **Unit Value Filters**: Make selections based on other properties of the unit. For example, if you filter by **Purchase Vendor**, you can restrict the print-out to units purchased from a particular vendor.

> **Item Filters**: Make selections based on properties of the items. For example, if you filter by **Item Category**, you can restrict the print-out to items in a particular set of categories.

Advanced section: Miscellaneous options.

> **Suppress Costs**: Omits any money information that might otherwise be displayed in the report.

> **Format Report in Columns**: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

> **Title**: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Service Contracts

MainBoss can keep track of any service contracts on your equipment and spaces. Before you can create a service contract record, you must create a Vendor record for the contractor and Unit records for all the units covered by the contract.

Warranties: In order to record warranty information, just treat it like a service contract from the manufacturer. For example, if a unit has a two-year warranty, create a two-year service contract from the manufacturer and link it to the unit record. You can use the "**Comments**" field of the service contract record to note that this is warranty.

Preferred Service Providers: Service contracts may also be used to record *preferred service providers*. For example, consider a situation where a head office manages maintenance at many branches in different cities. If the branch in City X needs a plumber, who should head office call? This kind of question can be answered easily if every unit in every branch has an associated "service contract" record specifying the local contractor to call if something goes wrong. The "**Comments**" field of the record can note that this isn't a *true* service contract—it simply states a preference for whom to call if the unit needs servicing.

In other words, you use the service contract to specify a preference rather than a true service contract. This makes it easy to know who to call if something goes wrong. You can add additional service contracts to the unit record if you want to specify alternative contractors to call if your first choice isn't available.

Viewing Service Contracts

You view service contracts with **Coding Definitions** | **Units** | **Service Contracts**. The window contains the following:

> **View** section: Shows the list of current service contracts.
>
>> **Code**: Click this heading to sort the list by code. Click again to reverse the order (from ascending to descending or vice versa).
>>
>> **Description**: Click this heading to sort the list by description. Click again to reverse the order.
>>
>> **Vendor**: Click this heading to sort the list by vendor. Click again to reverse the order.
>>
>> **Contract Number**: Click this heading to sort the list by contract number. Click again to reverse the order.
>>
>> **Details** section: Shows details from the selected record.
>>
>> **Units** section: Shows units covered by the selected service contract. For more about units, see *Units* on page 422.
>
> **Defaults for Service Contract** section: Shows any defaults to be used when creating new service contracts.

Editing Service Contracts

You create or modify service contracts using the service contract editor. The usual way to open the editor is to click **New Service Contract** or **Edit** in the **View** section of **Coding Definitions** | **Units** | **Service Contracts**.

The service contract editor window contains the following:

> **Code**: A brief code to identify this record. No two records may have the same code.
>
> **Description**: A longer description of the service contract.
>
> **Vendor**: The contract who provides the service. You must have an entry for this vendor in your vendor list. For more on vendors, see *Vendors* on page 230.
>
> **Service Phone**: A read-only field giving the vendor's business phone number. This comes from the chosen vendor record.
>
> **Contract Number**: Any identification number associated with the service contract.
>
> **Start Date**: The start date for the contract.
>
> **End Date**: The ending date for the contract.
>
> **Parts**: Checkmark this box if the service contract covers parts; blank out the box if not.

Labor: Checkmark this box if the service contract covers labor; blank out the box if not.

Total Cost: The cost of the service contract.

Comments: Any comments you want to associate with the service contract.

Units section: Shows any units covered by this service contract. For more on units, see *Units* on page 422.

Associating Units with Service Contracts

When creating a unit record, you can use the **Service** section of the record to specify that the unit is covered by a service contract. By the same token, when creating a service contract record, you can use the **Units** section of the record to list the units that are covered by the contract. In both cases, if you click **New Unit Service Contract** or **Edit**, MainBoss will open a window that contains the following:

Unit: Specifies a unit that is covered by the service contract.

Description, **Make**, **Model**, **Serial Number**: Read-only fields giving information taken from the record for the specified unit.

Service Contract: The service contract that covers the unit.

Read-only fields: Provide information from the record for the specified service contract.

Printing Service Contracts

You can print your current service contracts by clicking the **Print** button in **Coding Definitions** | **Units** | **Service Contracts**. This opens a window that contains the following:

Grouping section: Options controlling how the report is organized.

Group by list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

Sort Direction: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

Sort by list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling what employee information will be included in the report.

Show deleted records: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Specification Forms

It's useful to include specific information about units in your MainBoss records. For example, for a forklift truck, it's useful to record facts like engine type, lifting capacity,

height, width, and so on. For a space like a hotel suite, you might want to record room layout, the number of chairs and beds, and special characteristics (e.g. smoking vs. non-smoking).

Specification forms let you record any type of information. You create your own specification forms by stating what fields you want to appear in the form. For a hotel room, for example, you might create a form with blanks to fill in for number of beds, number of chairs, number of lamps, and any other information that you keep track of.

Although specifications are most commonly used to record nameplate information about equipment, they can also be used to create forms for storing information about other types of units. For example, you might record room dimensions, the type of bulbs used in light fixtures, the location of fuse boxes and so on.

Specification forms are made up of *fields*. Each field contains the following:

☐ A *label name* identifying what kind of information the field contains.

☐ A *field name* standing for the actual value of the field.

☐ A *field size* giving the maximum number of characters in the field.

☐ An optional *field order*. This is a number used to determine the order in which fields should be listed. Fields are arranged from lowest to highest (e.g. from 1 up).

Here is a typical list of fields describing a motor.

```
Label               Field name        Size          Order

Manufacturer          Mfr               30            1
Model #               Mod               20            2
Horsepower            HP                 5            3
RPM                   RPM                7            4
Voltage               V                  7            5
```

This specification definition leads to a form that looks like this:

Note that when you use the form, MainBoss automatically adds fields for "**Code**", "**Description**" and "**Comments**" in addition to the fields that you specified.

Once you have created a specification form, it can be used in a unit record. A form filled in with information about a particular unit is called a *specification*. A unit may have multiple specifications; for example, a truck might have one specification for its engine and another about its carrying capacity. For more information, see *Specifications on page 432*.

The information from a filled-out specification may be displayed in unit reports. You can control the format in which this information is displayed:

☐ Every specification has a default layout format, where each field is on a separate line and the field's label name is used to label the line.

☐ Alternatively, you can specify a customized layout. In this kind of layout, you use constructs of the form `<FieldName/>` to represent blank areas where values should be filled in.

For example, you might define the following customized layout:

```
Manufacturer: <Mfr/>
Model #: <Mod/>
HP: <HP/> RPM: <RPM/> Volts: <V/>
```

This might lead to displays like

```
Manufacturer: XYZ Inc.
Model #: AG1234
HP: 300  RPM: 3000  Volts: 220
```

Once a specification form is used in connection with a unit, the form cannot be changed (although the actual specification values can be changed).

Viewing Specification Forms

You view specification forms with **Coding Definitions** | **Units** | **Specification Forms**. The window contains the following:

View section: Shows the list of current specification forms.

Code: Click this heading to sort the list by code. Click again to reverse the order (from ascending to descending or vice versa).

Description: Click this heading to sort the list by description. Click again to reverse the order.

Details section: Shows information from the selected record.

Fields section: Lists the fields of the selected specification form.

Default Report Layout section: Shows the default layout for specification information when it appears in a report.

Custom Report Layout section: Shows any custom layout for specification information in a report.

Specifications section: Shows units that use the selected specification form.

Defaults for Specification Form section: Shows any defaults to be used when creating new specification forms.

Editing Specification Forms

You create or modify specification forms using the specification form editor. The usual way to open the editor is to click **New Specification Form** or **Edit** in the **View** section of **Coding Definitions** | **Units** | **Specification Forms**.

The specification form editor window contains the following:

Details section: Shows basic information for the record.

Code: A brief code to identify this record. No two records may have the same code.

Description: A longer description of the specification form.

Comments: Any comments you want to associate with the specification form.

Fields section: Opens a window that lets you specify the fields of the specification form. For more information on how specification fields work, see *Specification Forms* on page 217. For a description of the field editor, see *Editing Specification Form Fields* on page 222.

Default Report Layout section: Shows the default layout for this specification. (This is a read-only field.) The default layout consists of a separate line for every field, where each line has the form

```
Label: Value
```

Custom Report Layout section: Shows the customized layout (if any) for this specification.

You create a customized layout in the "**Custom Report Layout**" area of this section. This area can contain any text. You use a symbol of the form `<FieldName/>` to represent the values of fields. For example, if the report layout contains

```
The horsepower is <HP/>
```

you would see something like "`The horsepower is 400`" when information is displayed about a particular unit (e.g. in a report).

Specifications section: Lists units that use this specification form.

Printing Specification Forms

You can print your current specification forms by clicking the **Print** button in **Coding Definitions** | **Units** | **Specification Forms**. This opens a window that contains the following:

Filtering section: Options controlling which specification forms will be included in the report.

Show deleted records: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Editing Specification Form Fields

You create or modify the fields in a specification form using the specification field editor. The usual way to open the editor is to click **New Specification Form Field** or **Edit** in the **Fields** section of a specification form record. (See *Editing Specification Forms* on page 220.)

If a specification form is being used by a unit record, MainBoss will not let you change the fields in the form.

The specification field editor window contains the following:

Specification Form: A read-only field specifying the form that contains this specification field.

Field Name: A unique name identifying this field. In custom layouts, you can use this field name in a construct that represents the value of the field. For example, if the name of the field is `MyField`, then `<MyField/>` represents the value of the field in a custom layout.

Edit Label: The label that should appear when people are actually filling out the specification form. It's often useful (and less confusing) if "**Field Name**" and "**Edit Label**" are the same. However, see below for exceptions.

Field Size: The maximum number of characters that can be used in the value of the field.

Field Order: A number that is used when determining the order in which fields are displayed. Typically, set "**Field Order**" to 1 for the field you want to appear

first on the form; set "**Field Order**" to 2 for the field you want to appear second; and so on. (In general, fields are arranged by "**Field Order**" from lowest value to highest.)

Field Names and Labels: Field names must be unique; labels do not. As an example, consider a heat pump that can be used as either a heater or an air/conditioner. You might want a specification that looks like this:

```
Heating
    Power consumption: ____
    Volts: ____
    BTU: ____
Cooling
    Power consumption: ____
    Volts: ____
    BTU: ____
```

Notice that several fields have the same labels: two fields labeled `Power consumption`, two labeled `Volts` and two labeled `BTU`. However, every field must have a unique field name. You might use field names like

```
Heating Power
Heating Volts
Heating BTU
Cooling Power
Cooling Volts
Cooling BTU
```

Systems

A system is a set of units that make up a single entity. For example, the various pieces of equipment for heating and air-conditioning might all be considered to belong to a single HVAC system. Here are some other examples:

```
Electrical
Plumbing
Security
```

Defining systems gives you another way to organize reports about your units. You can get detailed cost breakdowns to see how much time and resources you spend maintaining each system.

Systems are most useful for organizing units that are spread across many locations. If you have a number of units that are all in the same location, it's probably better to classify them as sub-units of a larger unit. For example, you might consider an assembly line as a single unit; the machines that make up the line would all be sub-units of the larger unit.

Viewing Systems

You view systems with **Coding Definitions** | **Units** | **Systems**. The window contains the following:

View section: Shows the list of current systems.

Code: Click this heading to sort the list by code. Click again to reverse the order (from ascending to descending or vice versa).

Description: Click this heading to sort the list by description. Click again to reverse the order.

Details section: Shows information from the selected record.

Units section: Shows units that belong to the selected system.

Defaults for System section: Shows any defaults to be used when creating new systems.

Editing Systems

You create or modify systems using the system editor. The usual way to open the editor is to click **New System** or **Edit** in the **View** section of **Coding Definitions** | **Units** | **Systems**.

The system editor window contains the following:

Details section: Shows basic information for the record.

Code: A brief code to identify this record. No two records may have the same code.

Description: A longer description of the system.

Comments: Any comments you want to associate with the system.

Units section: Shows any units that belong to this system. Before you can record any units in this list, you must **Save** the system record. (For more on units, see *Units* on page 422.)

Printing Systems

You can print your current systems by clicking the **Print** button in **Coding Definitions** | **Units** | **Systems**. This opens a window that contains the following:

Sorting section: Options controlling how the report is organized.

Sort by list: These options determine how items are sorted.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick a **Sort by** option where sort direction is relevant.

Filtering section: Options controlling which systems will be included in the report.

Show deleted records: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Usage Classifications

Usage classification codes let you classify units according to their use. This provides yet another way to organize units for the purposes of reports.

Conversion Classifications: Usage classifications serve a special purpose if you convert an old database from MainBoss Basic into the new form of MainBoss Advanced. Usage classifications will tell whether MainBoss Basic considered the unit a

piece of equipment or a space. Usage classifications are also used to mark equipment that was marked obsolete in MainBoss Basic.

Whether or not your database was created by converting a MainBoss Basic database, usage classifications offer one more option for organizing your units.

Viewing Usage Classifications

You view usage classifications with **Coding Definitions** | **Units** | **Usage Classifications**. The window contains the following:

> **View** section: Shows the list of current usage classifications.
>
>> **Code**: Click this heading to sort the list by code. Click again to reverse the order (from ascending to descending or vice versa).
>>
>> **Description**: Click this heading to sort the list by description. Click again to reverse the order.
>>
>> **Details** section: Shows information from the selected record.
>>
>> **Units** section: Shows units that belong to the selected usage classification.
>
> **Defaults for Usage Classification** section: Shows any defaults to be used when creating new usage classifications.

Editing Usage Classifications

You create or modify usage classifications using the usage classification editor. The usual way to open the editor is to click **New Usage Classification** or **Edit** in the **View** section of **Coding Definitions** | **Units** | **Usage Classifications**.

The usage classification editor window contains the following:

> **Details** section: Shows basic information for the record.
>
>> **Code**: A brief code to identify this record. No two records may have the same code.
>>
>> **Description**: A longer description of the usage classification.
>>
>> **Comments**: Any comments you want to associate with the usage classification.
>
> **Units** section: Shows any units that belong to this usage classification. Before you can record any units in this list, you must **Save** the usage classification record. (For more on units, see *Units* on page 422.)

Printing Usage Classifications

You can print your current usage classifications by clicking the **Print** button in **Coding Definitions** | **Units** | **Usage Classifications**. This opens a window that contains the following:

Sorting section: Options controlling how the report is organized.

Sort by list: These options determine how items are sorted.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick a **Sort by** option where sort direction is relevant.

Filtering section: Options controlling which usage classifications will be included in the report.

Show deleted records: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Units of Measure

The Units of Measure table records the various units of measure that are used for meters and for different types of inventory items. The most common unit of measure is "Each", for materials that come as individual items (for example, light bulbs). Other common units of measure might be:

```
Pounds
Kilograms
Gallons
Liters
Yards
Meters
```

Note: MainBoss often abbreviates "Units of Measure" to UOM.

Viewing Units of Measure

You view units of measure with **Coding Definitions** | **Units of Measure**. The window contains the following:

   View section: Shows the list of current units of measure.

   Code: Click this heading to sort the list by code. Click again to reverse the order (from ascending to descending or vice versa).

   Description: Click this heading to sort the list by description. Click again to reverse the order.

   Details section: Shows information from the selected record.

   Items section: Shows inventory items that use the selected unit of measure.

   Meter Classes section: Shows meter classes that use the selected unit of measure.

   Defaults for Unit of Measure section: Shows any defaults to be used when creating new units of measure.

Editing Units of Measure

You create or modify units of measure using the Unit of Measure editor. The usual way to open the editor is to click **New Unit of Measure** or **Edit** in the **View** section of **Coding Definitions** | **Units of Measure**.

The editor window contains the following:

   Details section: Shows basic information for the record.

Code: A brief code to identify this record. No two records may have the same code.

Description: A longer description of the unit of measure.

Comments: Any comments you want to associate with the unit of measure.

Items section: Shows any items that use this unit of measure. Before you can record any items in this list, you must **Save** the unit of measure record. (For more on units, see *Inventory Item Records* on page 445.)

Meter Classes section: Shows any meter classes that use this unit of measure. Before you can record any meter classes in this list, you must **Save** the unit of measure record. (For more on units, see *Meter Classes* on page 204.)

Printing Units of Measure

You can print your current units of measure by clicking the **Print** button in **Coding Definitions** | **Units of Measure**. This opens a window that contains the following:

Sorting section: Options controlling how the report is organized.

Sort by list: These options determine how items are sorted.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick a **Sort by** option where sort direction is relevant.

Filtering section: Options controlling which units of measure will be included in the report.

Show deleted records: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Vendors

You can use the Vendors table to record information about people and companies outside your organization. Vendors typically fall into the following classes:

☐ Suppliers who sell you maintenance materials.

☐ Outside contractors who may be hired from time to time to do specialized work. For example, if you don't have a plumber on staff, you probably want your Vendors table to record contact information for the plumber(s) you call when necessary.

☐ People or organizations who provide you with service contracts.

Viewing Vendor Records

You view vendor records with **Purchase Orders** | **Vendors** or **Coding Definitions** | **Vendors**. The window contains the following:

View section: Shows the list of current vendors .

Code: Click this heading to sort the list by code. Click again to reverse the order (from ascending to descending or vice versa).

Description: Click this heading to sort the list by description. Click again to reverse the order.

Details section: Shows information from the selected record.

Item Pricing section: Lists price quotes from the selected vendor.

Hourly Outside section: Lists hourly outside rates associated with the selected vendor. For more information, see *Hourly Outside* on page 260.

Per Job Outside section: Lists per job outside rates associated with the selected vendor. For more information, see *Per Job Outside* on page 265.

Service Contracts section: Lists service contracts with the selected vendor. For more on service contracts, see *Service Contracts* on page 214.

Purchase Orders section: Lists purchase orders created to purchase goods and services from this vendor. For more on purchase orders, see *Purchase Orders* on page 462.

Purchase Templates section: List purchase order templates created to purchase goods and services from this vendor, in connection with preventive maintenance jobs. For more on purchase order templates, see *Purchase Order Templates* on page 174.

Units section: Lists units purchased from the selected vendor. For more information, see *Units* on page 422.

Defaults for Vendor section: Shows any defaults to be used when creating new vendor records.

Editing Vendor Records

You create or modify vendor records using the vendor editor. The usual way to open the editor is to click **New Vendor** or **Edit** in the **View** section of **Purchase Orders** | **Vendors** or **Coding Definitions** | **Vendors**.

The vendor editor window contains the following:

Details section: Provides general information about the vendor. This section contains the following:

Code: A brief code to identify this record. No two records may have the same code

Description: A longer description (usually the full name of the vendor).

Vendor Category: A vendor category for this vendor. (For more on vendor categories, see *Vendor Categories* on page 236.)

Sales Contact: The person to contact for matters relating to sales. This should refer to an entry in your **Contacts** table. For more about contacts, see *Contacts* on page 91.

Once you choose a "**Sales Contact**", the person's phone number and e-mail address are displayed in read-only fields. This information is taken from the **Contacts** table.

Service Contact: The person to contact for matters relating to service. This should refer to an entry in your Contacts table. Once you choose a "**Service Contact**", the person's phone number and e-mail address are displayed in read-only fields.

Accounts Payable Contact: The person to contact for matters relating to accounts payable. This should refer to an entry in your Contacts table. Once you choose an "**Accounts Payable Contact**", the person's phone number and e-mail address are displayed in read-only fields.

Accounts Payable Cost Center: The cost center to be associated with bills paid to this vendor. For more on cost centers, see *Cost Centers* on page 96.

Account Number: Your account number with this vendor.

Payment Terms: Default payment terms on anything bought from this vendor. When creating a purchase order addressed to this vendor, you can accept the default or set different payment terms. For more on payment terms, see *Payment Terms* on page 136.

Comments: Any comments you want to record.

Item Pricing section: Displays information about price quotes from this vendor. Before you can use this section to record information, you must **Save** the record first. Then you can add records to the item list.

Item: Click this heading to sort the list by item code. Click again to reverse the order.

Order Line Text: Click this heading to sort by the text that should be placed on any purchase order for this item from this vendor. Click again to reverse the order.

Quantity: Click this heading to sort by quantity. Click again to reverse the order.

Unit Cost: Click this heading to sort by unit cost. Click again to reverse the order.

Total Cost: Click this heading to sort by total cost. Click again to reverse the order.

Hourly Outside section: Lists hourly outside rates associated with the selected vendor. Before you can use this section to record information, you must **Save** the record first. Then you can add records to the list. (For more on hourly outside records, see *Hourly Outside* on page 260.)

Code: Click this heading to sort the list by code. Click again to reverse the order.

Description: Click this heading to sort by description. Click again to reverse the order.

Trade: Click this heading to sort by vendor trade. Click again to reverse the order.

Hourly Rate: Click this heading to sort by hourly rate. Click again to reverse the order.

Per Job Outside section: Similar to the **Hourly Outside** section but deals with Per Job Outside records. For more, see *Per Job Outside* on page 265.

Service Contracts section: Displays information about any service contracts you have with from this vendor. Before you can use this section to record information, you must **Save** the record first. Then you can add records to the list.

> **Code**: Click this heading to sort the list by code. Click again to reverse the order.

> **Description**: Click this heading to sort by description. Click again to reverse the order.

> **Contract Number**: Click this heading to sort by contract number. Click again to reverse the order.

Purchase Orders section: Lists purchase orders created to purchase goods and services from this vendor. For more on purchase orders, see *Purchase Orders* on page 462.

> **Number**: Click this heading to sort the list by purchase order number. Click again to reverse the order.

> **Summary**: Click this heading to sort by summary. Click again to reverse the order.

> **Issue**: Issues the selected purchase order.

> **Close Purchase Order**: Closes the selected purchase order. When you click the button, MainBoss opens a window where you can record a comment and other information.

> **Close Purchase Order (No Comment)**: Same as **Close Purchase Order**, except that MainBoss doesn't open a window for you to record additional information.

> **Withdraw Purchase Order**: Withdraws a purchase order that has already been issued. This puts the purchase order back into the Open (unissued) state.

> **ReActivate Purchase Order**: Reopens a closed purchase order.

> **Void**: Cancels the selected purchase order.

> **Draft Purchase Order**: Turns a voided purchase order back into an open one.

Purchase Templates section: List purchase order templates created to purchase goods and services from this vendor, in connection with preventive maintenance jobs. For more on purchase order templates, see *Purchase Order Templates* on page 174.

> **Code**: Click this heading to sort the list by code. Click again to reverse the order.

Description: Click this heading to sort by description. Click again to reverse the order.

Print: Prints purchase order templates. For more, see *Printing Purchase Order Templates* on page 177.

Units section: Displays units purchased from this vendor. Before you can use this section to record information, you must **Save** the record first. Then you can add records to the list.

Code: Click this heading to sort the list by code. Click again to reverse the order.

Description: Click this heading to sort the list by description. Click again to reverse the order.

Show on Map: If the currently selected unit record has map coordinates, MainBoss attempts to open Google Maps to a map showing the unit's geographic location. If the current unit record doesn't have map coordinates, MainBoss checks the unit and/or location record that contains the current unit, then the container of the container, and so on, until MainBoss either finds a record that has map coordinates or else reaches a record with no container.

If MainBoss finds no record with map coordinates, but does find a postal address record containing postal information, MainBoss passes the postal information to Google Maps.

In order to see the geographic location in Google Maps, you must have an active Internet connection and a suitable web browser.

Printing Vendor Records

You can print information about your current vendors by clicking the **Print** button in **Purchase Orders** | **Vendors** or **Coding Definitions** | **Vendors**. This opens a window that contains the following:

Grouping section: Options controlling how the report is organized.

Group by list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

Sort Direction: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

Sort by list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling which vendors will be included in the report. You can select by vendor name or vendor category.

Show deleted records: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Vendor Categories

The Vendor Categories table makes it possible to group vendors into classes. Here are some typical vendor categories:

```
Electrical contractor
Plumbing contractor
Stationery stores
Equipment vendor
```

While you don't have to create any vendor categories at all, they are useful for organizing reports and for getting detailed breakdowns on time and expenses.

Viewing Vendor Categories

You view vendor categories with **Coding Definitions** | **Vendors** | **Categories**. The window contains the following:

View section: Shows the list of current vendor categories.

Code: Click this heading to sort the list by code. Click again to reverse the order (from ascending to descending or vice versa).

Description: Click this heading to sort the list by description. Click again to reverse the order.

Details section: Shows information from the selected record.

Vendors section: Shows vendors that belong to the selected category.

Defaults for Vendor Category section: Shows any defaults to be used when creating new vendor categories.

Editing Vendor Categories

You create or modify vendor categories using the vendor category editor. The usual way to open the editor is to click **New Vendor Category** or **Edit** in the **View** section of **Coding Definitions** | **Vendors** | **Categories**.

The vendor category editor window contains the following:

Details section: Shows basic information for the record.

Code: A brief code to identify this record. No two records may have the same code.

Description: A longer description of the vendor category.

Comments: Any comments you want to associate with the vendor category.

Vendors section: Shows any vendors that belong to this category. For more on vendors, see *Vendors* on page 230.

Printing Vendor Categories

You can print your current vendor categories by clicking the **Print** button in **Coding Definitions** | **Vendors** | **Categories**. This opens a window that contains the following:

Sorting section: Options controlling how the report is organized.

Sort by list: These options determine how items are sorted.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick a **Sort by** option where sort direction is relevant.

Filtering section: Options controlling which categories will be included in the report.

Show deleted records: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview

and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Work Order Assignees

The work order assignee list specifies people who can be assigned to work orders. Assigning someone to a work order means that person has some special interest in the work order; for more, see *Assignments* on page 32.

Any worker who appears in a labor demand (inside or outside, hourly or per job) is automatically assumed to be an assignee for the associated work order, provided that the worker is on the Work Order Assignee list. The worker's name will therefore appear in the work order **Assignees** section.

Viewing Work Order Assignee Records

You view work order assignee records with **Work Orders** | **Assignees** or **Coding Definitions** | **Work Orders** | **Assignees**. The window contains the following:

View section: Shows the list of current records.

Name: Click this heading to sort the list by assignee name. Click again to reverse the order (from ascending to descending or vice versa).

Business Phone: Click this heading to sort the list by business phone number. Click again to reverse the order.

Mobile Phone: Click this heading to sort the list by mobile phone number. Click again to reverse the order.

Number Draft: Click this heading to sort the list by the number of draft work orders associated with the assignees. Click again to reverse the order.

Number Open: Click this heading to sort the list by the number of open work orders associated with the assignees. Click again to reverse the order.

Defaults for Work Order Assignee section: Shows any defaults to be used when creating new work order assignee records.

Editing Work Order Assignee Records

You create or modify work order assignee records by clicking **New Work Order Assignee** or **Edit** in the **View** section of **Work Orders** | **Assignees** or **Coding Definitions** | **Work Orders** | **Assignees**. The editor contains the following:

Details section: Contains basic information about this assignee.

Name: The name of the assignee, selected from the **Contacts** table. For more on contacts, see *Contacts* on page 91.

Business Phone, **Mobile Phone**, **Email**: Information obtained from the **Contacts** table once you've specified a "**Name**".

Receive Notifications: If this is checkmarked, and if your database has the MainBoss Service license key, this assignee will be sent e-mail whenever a history record is created for this work order. In particular, the assignee receives an e-mail notification whenever someone adds a comment to the work order.

In the first notification, assignees will receive the original "**Work Description**" of the work order. In subsequent notifications, assignees will receive comments from work order history records, but not the "**Work Description**".

Comments: Any comments you want to associate with this assignee.

Work Order Assignments section: Lists any work orders to which this person has been assigned.

Printing Work Order Assignee Records

To print information from your Work Orders Assignees table, use **Work Orders** | **Assignees** or **Coding Definitions** | **Work Orders** | **Assignees** and click **Print**. MainBoss opens a window that contains the following:

Grouping section: Options controlling how the report is organized.

Group by list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

Sort Direction: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

Sort by list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling which records will be included in the report.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Billable Requestors

A billable requestor is a person who can request work and be billed for the job. For example, a property management company might bill tenants for certain types of requested work.

Before you create a billable requestor record for someone, you should create a record for that person in the contacts table.

Viewing Billable Requestor Records

You view billable requestors with **Coding Definitions** | **Work Orders** | **Billable Requestors**. The window contains the following:

View section: Shows the list of current billable requestors.

> **Name**: Click this heading to sort the list by name. Click again to reverse the order (from ascending to descending or vice versa).
>
> **Business Phone**: Click this heading to sort the list by business phone number. Click again to reverse the order.
>
> **Mobile Phone**: Click this head to sort the list by mobile phone number. Click again to reverse the order.
>
> **Details** section: Shows information from the selected record.
>
> **Chargebacks** section: Shows chargebacks associated with the selected billable requestor.

Defaults for Billable Requestor section: Shows any defaults to be used when creating new billable requestors.

Editing Billable Requestor Records

You create or modify billable requestor records using the billable requestor editor. The usual way to open the editor is to click **New Billable Requestor** or **Edit** in the **View** section of **Coding Definitions** | **Work Orders** | **Billable Requestors**.

The billable requestor editor window contains the following:

Details section: Shows basic information for the record.

> **Billable Requestor Contact**: The name of the billable requestor. This refers to an entry in the **Contacts** table. For more information, see *Contacts* on page 91. (Once you specify the billable requestor's name, MainBoss fills in the read-only fields that follow. These fields give the person's phone number and e-mail address.)
>
> **Accounts Receivable Cost Center**: The cost center to be used for any accounts receivable associated with this requestor. For more on cost centers, see *Cost Centers* on page 96.
>
> **Comments**: Any comments you want to associate with the billable requestor.

Chargebacks section: Shows any chargebacks associated with this billable requestor. Before you can record any chargebacks in this list, you must **Save** the billable requestor record. (For more on chargebacks, see *Chargebacks* on page 379.)

Printing Billable Requestor Records

You can print your current billable requestors by clicking the **Print** button in **Coding Definitions** | **Work Orders** | **Billable Requestors**. This opens a window that contains the following:

Grouping section: Options controlling how the report is organized.

Group by list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

Sort Direction: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

Sort by list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling which requestors will be included in the report.

Show deleted records: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Chargeback Categories

The Chargeback Categories table makes it possible to group chargebacks into classes. Here are some typical chargeback categories:

```
Repair
Renovation
Leasehold improvement
```

While you don't have to create any chargeback categories at all, they are useful for organizing reports and for getting detailed breakdowns on time and expenses. If you have licensed the **Accounting** package, chargeback categories are also important for associating expenses with the correct ledger account.

For more on chargebacks, see *Chargebacks* on page 379.

Viewing Chargeback Categories

You view chargeback categories with **Coding Definitions** | **Work Orders** | **Chargeback Categories**. The window contains the following:

View section: Shows the list of current chargeback categories.

Code: Click this heading to sort the list by code. Click again to reverse the order (from ascending to descending or vice versa).

Description: Click this heading to sort the list by description. Click again to reverse the order.

Defaults for Chargeback Category section: Shows any defaults to be used when creating new chargeback categories.

Editing Chargeback Categories

You create or modify chargeback categories using the chargeback category editor. The usual way to open the editor is to click **New Chargeback Category** or **Edit** in the **View** section of **Coding Definitions** | **Work Orders** | **Chargeback Categories**.

The chargeback category editor window contains the following:

Code: A brief code to identify this record. No two records may have the same code.

Description: A longer description of the chargeback category.

Cost Center (only visible if your database has an **Accounting** license key): The cost center to be used for any chargebacks made to this category. For more on cost centers, see *Cost Centers* on page 96.

Comments: Any comments you want to associate with the chargeback category.

Printing Chargeback Categories

You can print your current chargeback categories by clicking the **Print** button in **Coding Definitions** | **Work Orders** | **Chargeback Categories**. This opens a window containing the following:

Grouping section: Options controlling how the report is organized.

Group by list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

Sort Direction: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

Sort by list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling which categories will be included in the report.

Show deleted records: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Closing Codes

Closing codes are assigned to work orders when the work orders are closed. Many organizations use closing codes to indicate the underlying cause of the problem; this leads to codes like:

```
Operator error
Accidental breakage
Poor lubrication
Normal wear
```

```
          Vandalism
```

Such closing codes provide valuable information for analyzing the overall condition of your operations. You can obtain reports organized by closing code, letting you determine how time and resources you spend on various types of problems. This is often useful in answering questions from upper management. (How much does vandalism cost us each year?)

Viewing Closing Codes

You view closing codes with **Coding Definitions** | **Work Orders** | **Closing Codes**. The window contains the following:

> **View** section: Shows the list of current closing codes.
>
>> **Code**: Click this heading to sort the list by code. Click again to reverse the order (from ascending to descending or vice versa).
>>
>> **Description**: Click this heading to sort the list by description. Click again to reverse the order.
>
> **Details** section: Shows information from the selected record.
>
> **Work Orders** section: Shows work orders that use the given closing code.
>
> **Tasks** section: Shows tasks that use the given closing code.
>
> **Defaults for Closing Code** section: Shows any defaults to be used when creating new closing codes.

Editing Closing Codes

You create or modify closing codes using the closing code editor. The usual way to open the editor is to click **New Closing Code** or **Edit** in the **View** section of **Coding Definitions** | **Work Orders** | **Closing Codes**.

The closing code editor window contains the following:

> **Details** section: Shows basic information for the record.
>
>> **Code**: The closing code. No two records may have the same code.
>>
>> **Description**: A longer description of the closing code.
>>
>> **Comments**: Any comments you want to associate with the closing code.
>
> **Work Orders** section: Shows any work orders that use this closing code. For more on work orders, see *Work Orders* on page 309.
>
> **Tasks** section: Shows any tasks that use this closing code. For more on tasks, see *Tasks* on page 184.

Printing Closing Codes

You can print your current closing codes by clicking the **Print** button in **Coding Definitions** | **Work Orders** | **Closing Codes**. This opens a window that contains the following:

Sorting section: Options controlling how the report is organized.

   Sort by list: These options determine how items are sorted.

   Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick a **Sort by** option where sort direction is relevant.

Filtering section: Options controlling which codes will be included in the report.

   Show deleted records: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Advanced section: Miscellaneous options.

   Suppress Costs: Omits any money information that might otherwise be displayed in the report.

   Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

   Title: The title to be printed at the beginning of the report.

   Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

   Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

   Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Expense Categories

An *expense category* is associated with a type of expense that may appear on work orders. For example, you might have the following expense categories:

```
Spare parts
Equipment rental
Work materials
Outside labor
```

Whenever you place an item on a work order (whether a demand or an actual use), you specify what category it belongs in.

For more information on expense categories and how they fit into MainBoss's accounting facilities, see *Accounting Facilities* on page 21.

> You must specify a category for every item on a work order. However, if you are not using MainBoss's accounting facilities, you can simply specify the built-in `Default Work Order Expense Category`. This is a catch-all category that you can use if you don't want to define your own categories.

Expense categories may be restricted to certain uses. For example, you might specify that an expense category can be used for labor expenses but not for inventory items or for miscellaneous expenses. This prevents expense categories being used for inappropriate entries.

Viewing Expense Categories

You view expense categories with **Coding Definitions** | **Work Orders** | **Expense Categories**. For an overview of expense categories and MainBoss accounting in general, see *Accounting Facilities* on page 21.

The expense category table viewer contains the following:

View section: Shows the list of current records.

> **Code**: Click this heading to sort the list by code. Click again to reverse the order (from ascending to descending or vice versa).

> **Description**: Click this heading to sort the list by description. Click again to reverse the order.

Defaults for Expense Category section: Shows any defaults to be used when creating new expense categories.

Editing Expense Categories

You create or modify expense categories by clicking **New Expense Category** or **Edit** in the **View** section of **Coding Definitions** | **Work Orders** | **Expense Categories**. For an overview of expense categories and MainBoss accounting in general, see *Accounting Facilities* on page 21.

The expense category editor contains the following:

Code: A brief code to identify this record. No two records may have the same code.

Description: A longer description of the expense category.

Comments: Any comments you want to associate with the category.

Item Expense Class: If this box is checkmarked, this expense category may be used for entries in the **Items** subsection of a work order's **Resources** section. If the box is blank, the expense category may not be used for items.

Labor Expense Class: If this box is checkmarked, this expense category may be used for entries in the **Inside** and **Outside** subsections of a work order's **Resources** section. If the box is blank, the expense category may not be used for such labor expenses.

Miscellaneous Expense Class: If this box is checkmarked, this expense category may be used for entries in the **Miscellaneous** subsection of a work order's **Resources** section. If the box is blank, the expense category may not be used for miscellaneous expenses.

Expense Mappings section: Lists any expense models that allow this expense category. For more on expense mappings, see *Expense Mappings* on page 254.

Printing Expense Categories

You can print your current expense categories by clicking the **Print** button in **Coding Definitions** | **Work Orders** | **Expense Categories**. This opens a window that contains the following:

Sorting section: Options controlling how the report is organized.

Sort by list: These options determine how items are sorted.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick a **Sort by** option where sort direction is relevant.

Filtering section: Options controlling which categories will be included in the report.

Show deleted records: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Expense Models

An expense model tells what expense categories are allowed on a particular type of work order. For example, you might have a separate expense model for each tenant or client your maintenance department serves. For more about expense models, see *Accounting Facilities* on page 21.

When you create a work order, you must specify the expense model to be used. If, for example, you have an expense model for each tenant, you can say, "We're doing work for Tenant X, so I just specify the Tenant X expense model."

When creating an expense model, we strongly recommend doing so in the following order:

1. Create the expense categories first (using **Coding Definitions** | **Work Orders** | **Expense Categories**). For more, see *Expense Categories* on page 248.

2. Create the expense model record and save it.

3. Go to the expense model record's **Expense Mappings** section and create the expense mappings. For more, see *Expense Mappings* on page 254.

4. Save the expense model record again (if necessary), then set the default expense categories in the **Details** section of the expense model record.

Viewing Expense Models

You view expense models with **Coding Definitions** | **Work Orders** | **Expense Models**. For an overview of expense models and MainBoss accounting in general, see *Accounting Facilities* on page 21.

The expense model table viewer contains the following:

> **View** section: Shows the list of current records.
>
> > **Code**: Click this heading to sort the list by code. Click again to reverse the order (from ascending to descending or vice versa).
> >
> > **Description**: Click this heading to sort the list by description. Click again to reverse the order.
> >
> > **Details** section: Shows information from the selected record.
> >
> > **Expense Mappings** section: Lists the expense categories associated with the selected expense model. For more on expense mappings, see *Expense Mappings* on page 254.
> >
> > **Units** section: Lists the units associated with the selected expense model. If a unit is associated with a specific expense model, that model is used as the default for any work orders on the unit. For more about units, see *Units* on page 422.
> >
> > **Work Orders** section: Lists work orders that use the selected expense model. For more on work orders, see *Work Orders* on page 309.
> >
> > **Tasks** section: Lists tasks that use the selected expense model. For more on tasks, see *Tasks* on page 184.
>
> **Defaults for Expense Model** section: Shows any defaults to be used when creating new expense models.

Editing Expense Models

You create or modify expense models by clicking **New Expense Model** or **Edit** in the **View** section of **Coding Definitions** | **Work Orders** | **Expense Models**. For an overview of expense models and MainBoss accounting in general, see *Accounting Facilities* on page 21.

The expense model editor contains the following:

Details section: Shows basic information for the record.

Code: A brief code to identify this record. No two records may have the same code.

Description: A longer description of the expense model.

Comments: Any comments you want to associate with the model.

Default Item Expense: The expense category to be used by default whenever a new item is demanded on the work order. For more on expense categories, see *Expense Categories* on page 248. For more on item demands, see *Demand Item* on page 334.

Default Hourly Inside Expense: The expense category to be used by default whenever hourly inside work is demanded on the work order. For more on hourly inside demands, see *Demand Hourly Inside* on page 336.

Default Hourly Outside Expense: The expense category to be used by default whenever hourly outside work is demanded on the work order. For more on hourly outside demands, see *Demand Hourly Outside* on page 341.

Default Per Job Inside Expense: The expense category to be used by default whenever per job inside work is demanded on the work order. For more on per job inside demands, see *Demand Per Job Inside* on page 339.

Default Per Job Outside Expense: The expense category to be used by default whenever per job outside work is demanded on the work order. For more on per job outside demands, see *Demand Per Job Outside* on page 343.

Default Miscellaneous Expense: The expense category to be used by default whenever a miscellaneous expense is demanded on the work order. For more on miscellaneous expenses, see *Demand Miscellaneous* on page 345.

Receive Item to Temporary Holding Cost Center: The expense category associated with receiving an item from a vendor and putting it into a temporary storage location. For more on receiving items, see *Receiving Items* on page 369.

Expense Mappings section: Lists the expense categories associated with this expense model. For more on expense mappings, see *Expense Mappings* on page 254.

Units section: Lists the units associated with this expense model. If a unit is associated with an expense model, the model is used as the default for any work orders on the unit. For more about units, see *Units* on page 422.

Work Orders section: Lists work orders that use this expense model. For more on work orders, see *Work Orders* on page 309.

Tasks section: Lists tasks that use this expense model. For more on tasks, see *Tasks* on page 184.

Printing Expense Models

You can print your current expense models by clicking the **Print** button in **Coding Definitions** | **Work Orders** | **Expense Models**. This opens a window that contains the following:

Sorting section: Options controlling how the report is organized.

> **Sort by** list: These options determine how items are sorted.

> **Sort Direction**: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick a **Sort by** option where sort direction is relevant.

Filtering section: Options controlling which models will be included in the report.

> **Show deleted records**: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Advanced section: Miscellaneous options.

> **Suppress Costs**: Omits any money information that might otherwise be displayed in the report.

> **Format Report in Columns**: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

> **Title**: The title to be printed at the beginning of the report.

> **Font Size**: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

> **Main Font**: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

> **Fixed-width Font**: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

> The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Expense Mappings

An expense model mapping says that a particular expense category is allowed within the expense model. For more on expense models and expense categories, see *Accounting Facilities* on page 21.

There are several ways to create a new mapping. For example, you can click **New Expense Mapping** in the **Expense Mappings** section of an expense model record. You can also click **New Expense Mapping** in the **Expense Mappings** section of an expense category record. Either way, you get a window that contains the following:

Expense Model: The expense model in which the mapping will be allowed. If you got to this window from an expense model record, this field will be read-only (giving the name of the expense model record). For more on expense models, see *Expense Models* on page 250.

Expense Category: An expense category which will be allowed in the expense model. If you got to this window from an expense category record, this field will be read-only (giving the name of the expense category record). For more on expense categories, see *Expense Categories* on page 248.

Cost Center: The cost center to be associated with this expense category in this expense model. For more on cost centers, see *Cost Centers* on page 96. (The "**Cost Center**" field is only visible if your database has an **Accounting** module license key.)

Item Expense Class, **Labor Expense Class**, **Miscellaneous Expense Class**: These checkboxes indicate what uses are valid for the chosen "**Expense Category**". The checkboxes are read-only; to allow different uses of the expense category, you must edit the expense category record.

Employees

The employees table is a list of your employees. When you want to add someone to your employee list, you must create a contact record for that person first (specifying contact information for the person). Then you create an employee record that refers to the contact record. For more on contacts, see *Contacts* on page 91.

Employee records typically have one or more associated *hourly inside* records. An hourly inside record tells the hourly rate for the employee on a particular type of job. Often, an employee will only have one associated hourly rate record ("Pat is a licensed electrician, and we pay all our licensed electricians $X an hour"). However, some employees may have multiple records ("When Pat works on electrician jobs we pay $X an hour, but for other types of jobs we pay $Y an hour"). For more on hourly inside records, see *Hourly Inside* on page 257.

Viewing Employee Records

You view employee records with **Coding Definitions** | **Work Orders** | **Labor** | **Employees**. The window contains the following:

View section: Shows the list of current employees.

> **Employee Contact**: Click this heading to sort the list by employee name. Click again to reverse the order (from ascending to descending or vice versa).

> **Description**: Click this heading to sort the list by description. Click again to reverse the order.

> **Details** section: Shows information from the selected record.

> **Hourly Inside** section: Shows any hourly inside rates associated with the selected employee. For more on hourly inside rates, see *Hourly Inside* on page 257.

> **Per Job Inside** section: Shows any per job inside rates associated with the selected employee. For more on per job inside rates, see *Per Job Inside* on page 263.

Defaults for Employee section: Shows any defaults to be used when creating new employees.

Editing Employee Records

You create or modify employee records using the employee editor. The usual way to open the editor is to click **New Employee** or **Edit** in the **View** section of **Coding Definitions** | **Work Orders** | **Labor** | **Employees**.

The employee editor window contains the following:

Details section: Shows basic information for the record.

> **Employee Contact**: A record in the contacts table giving contact information for the employee. You must create the contact record before you can create the employee record. For more on contacts, see *Contacts* on page 91. (Once you specify a contact record, MainBoss displays the person's phone number and e-mail address in read-only fields.)

> **Description**: Typically the employee's name.

> **Comments**: Any comments you want to associate with the employee.

Hourly Inside section: Shows any hourly inside rates associated with the selected employee. Before you can record any entries in this list, you must **Save** the employee record. For more on hourly inside records, see *Hourly Inside* on page 257.

Per Job Inside section: Shows any per job inside rates associated with the selected employee. Before you can record any entries in this list, you must **Save** the employee record. For more on per job inside records, see *Per Job Inside* on page 263.

Printing Employee Records

You can print your current employees by clicking the **Print** button in **Coding Definitions** | **Work Orders** | **Labor** | **Employees**. This opens a window that contains the following:

Grouping section: Options controlling how the report is organized.

> **Group by** list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

> **Sort Direction**: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

> **Sort by** list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

> **Sort Direction**: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling what employee information will be included in the report.

> **Show deleted records**: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Advanced section: Miscellaneous options.

> **Suppress Costs**: Omits any money information that might otherwise be displayed in the report.

> **Format Report in Columns**: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

> **Title**: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Hourly Inside

The hourly inside table lists hourly rates for work done by your employees. (For more on employees, see *Employees* on page 254.) Hourly inside records say, "For this type of employee on this type of job, our costs are $X an hour."

For example, suppose you pay the same hourly rate for all your licensed electricians. In this case, you only need to create one hourly inside record specifying this rate; in the employees table, you assign this hourly inside rate to all your electricians. On the other hand, if you have different grades of electricians being paid at different rates (or if each electrician gets paid a distinct rate), you need to create hourly inside records for each possible rate.

You only need to create hourly inside records for the rates that you actually pay. If, for example, you pay the same hourly rate for all employees, you only need one hourly inside record.

> **Note:** If a worker's hourly rate changes, there's a special procedure you should follow to make sure your records stay correct. For more information, see the section titled *Rate Changes* in the MainBoss *Configuration Guide*.

Viewing Hourly Inside Records

You view hourly inside records with **Coding Definitions** | **Work Orders** | **Labor** | **Hourly Inside**. The window contains the following:

> **View** section: Shows the list of current hourly inside records.
>
>> **Code**: Click this heading to sort the list by code. Click again to reverse the order (from ascending to descending or vice versa).
>>
>> **Description**: Click this heading to sort the list by description. Click again to reverse the order.
>>
>> **Employee**: Click this heading to sort the list by employee name. Click again to reverse the order.
>>
>> **Trade**: Click this heading to sort the list by employee trade. Click again to reverse the order.
>>
>> **Hourly Rate**: Click this heading to sort the list by hourly rate. Click again to reverse the order.
>
> **Defaults for Hourly Inside** section: Shows any defaults to be used when creating new hourly inside records.

Editing Hourly Inside Records

You create or modify hourly inside records using the hourly inside editor. The usual way to open the editor is to click **New Hourly Inside** or **Edit** in the **View** section of **Coding Definitions** | **Work Orders** | **Labor** | **Hourly Inside**.

The hourly inside editor window contains the following:

> **Code**: A brief code to identify this record. No two records may have the same code.
>
> **Description**: A longer description of the record (employee and trade).
>
> **Employee**: A record in the employees table specifying an employee to associate with this hourly inside record. You must create the employee record before you can fill in this field. For more on contacts, see *Employees* on page 254.
>
> **Trade**: A trade to associate with this type of work. You must create the trade record before you can fill in this field. For more on trades, see *Trades* on page 268.
>
> **Hourly Rate**: The hourly rate paid for the work.
>
> **Cost Center**: The cost center to be used in connection with this labor expense. For more on cost centers, see *Cost Centers* on page 96.
>
> **Comments**: Any comments you want to associate with the hourly inside rate.

Printing Hourly Inside Records

You can print your current hourly inside records by clicking the **Print** button in **Coding Definitions** | **Work Orders** | **Labor** | **Hourly Inside**. This opens a window that contains the following:

Grouping section: Options controlling how the report is organized.

Group by list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

Sort Direction: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

Sort by list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling which hourly inside records will be included in the report.

Show deleted records: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Hourly Outside

Hourly outside records contain information to be used when an outside contractor is hired to do a job for your organization. Such records are intended to provide background information whenever the contractor is hired, as opposed to specific information for a specific job. This means, for example, that you record the contractor's general hourly rate, but do not record the time spent on any particular work. You only record a specific time when you write up a work order for a specific job done by the contractor.

> **Note:** If a worker's hourly rate changes, there's a special procedure you should follow to make sure your records stay correct. For more information, see the section titled *Rate Changes* in the MainBoss *Configuration Guide*.

Viewing Hourly Outside Records

You view hourly outside records with **Coding Definitions** | **Work Orders** | **Labor** | **Hourly Outside**. The window contains the following:

View section: Shows the list of current hourly outside records.

Code: Click this heading to sort the list by code. Click again to reverse the order (from ascending to descending or vice versa).

Description: Click this heading to sort the list by description. Click again to reverse the order.

Vendor: Click this heading to sort the list by vendor (contractor name). Click again to reverse the order.

Trade: Click this heading to sort the list by contractor trade. Click again to reverse the order.

Hourly Rate: Click this heading to sort the list by the contractor's hourly rate. Click again to reverse the order.

Defaults for Hourly Outside section: Shows any defaults to be used when creating new hourly outside records.

Editing Hourly Outside Records

You create or modify hourly outside records using the hourly outside editor. The usual way to open the editor is to click **New Hourly Outside** or **Edit** in the **View** section of **Coding Definitions** | **Work Orders** | **Labor** | **Hourly Outside**.

The hourly outside editor window contains the following:

Code: A code to identify this record. No two records may have the same code.

Description: A description of what the record covers.

Vendor: The vendor who supplied the labor. This vendor should already exist in your vendors table. For more information, see *Vendors* on page 230.

Trade: A trade classification for the contractor. This trade should already exist in your trades table. For more information, see *Trades* on page 268.

Hourly Rate: The contractor's hourly rate.

Order Line Text: What should be written on a purchase order when ordering hourly work from this contractor.

Cost Center: The cost center to which this labor expense should be charged. For more on cost centers, see *Cost Centers* on page 96.

Comments: Any comments you want to associate with this contractor.

Printing Hourly Outside Records

You can print your current hourly outside records by clicking the **Print** button in **Coding Definitions** | **Work Orders** | **Labor** | **Hourly Outside**. This opens a window that contains the following:

Grouping section: Options controlling how the report is organized.

Group by list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you

select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

Sort Direction: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

Sort by list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling which hourly outside records will be included in the report.

Show deleted records: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Per Job Inside

The Per Job Inside table is used when you attach a fixed rate to a particular type of job, as opposed to charging by the hour. A Per Job Inside record gives the cost of a particular type of job when it is done by your employees. (If work is done on a per job rate by an outside contractor, you use the Per Job Outside table. For more, see *Per Job Outside* on page 265.)

> **Note:** If a worker's hourly rate changes, there's a special procedure you should follow to make sure your records stay correct. For more information, see the section titled *Rate Changes* in the MainBoss *Configuration Guide*.

Viewing Per Job Inside Records

You view per job inside records with **Coding Definitions** | **Work Orders** | **Labor** | **Per Job Inside**. The window contains the following:

View section: Shows the list of current per job inside records.

Code: Click this heading to sort the list by code. Click again to reverse the order (from ascending to descending or vice versa).

Description: Click this heading to sort the list by description. Click again to reverse the order.

Employee: Click this heading to sort the list by employee name. Click again to reverse the order.

Trade: Click this heading to sort the list by employee trade. Click again to reverse the order.

Per Job Cost: Click this heading to sort the list by per job cost. Click again to reverse the order.

Defaults for Per Job Inside section: Shows any defaults to be used when creating new per job inside records.

Editing Per Job Inside Records

You create or modify per job inside records using the per job inside editor. The usual way to open the editor is to click **New Per Job Inside** or **Edit** in the **View** section of **Coding Definitions** | **Work Orders** | **Labor** | **Per Job Inside**.

The per job inside editor window contains the following:

Code: A brief code to identify this record. No two records may have the same code.

Description: A description of the job associated with this record.

Employee: Specifies an employee. The per job inside record says how much this employee will be paid for this type of job. For more on employees, see *Employees* on page 254.

Trade: Specifies a trade. The per job inside record says how much employees in this trade class will be paid for this type of job. For more on trades, see *Trades* on page 268.

Per Job Cost: The cost of this type of job.

Cost Center: The cost center to which this labor expense should be charged. For more on cost centers, see *Cost Centers* on page 96.

Comments: Any comments you want to associate with this record.

Printing Per Job Inside Records

You can print your current per job inside records by clicking the **Print** button in **Coding Definitions** | **Work Orders** | **Labor** | **Per Job Inside**. This opens a window that contains the following:

Grouping section: Options controlling how the report is organized.

Group by list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

Sort Direction: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

Sort by list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling which per job inside records will be included in the report. You can select by identification code or cost.

Show deleted records: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Per Job Outside

The Per Job Outside table is used when you attach a fixed rate to a particular type of job, as opposed to charging by the hour. A Per Job Outside record gives the cost of a

particular type of job when it is done by an outside contractor. (If work is done on a per job rate by your own personnel, you use the Per Job Inside table. For more, see *Per Job Inside* on page 263.)

> **Note:** If a worker's hourly rate changes, there's a special procedure you should follow to make sure your records stay correct. For more information, see the section titled *Rate Changes* in the MainBoss *Configuration Guide*.

Viewing Per Job Outside Records

You view per job outside records with **Coding Definitions** | **Work Orders** | **Labor** | **Per Job Outside**. The window contains the following:

> **View** section: Shows the list of current per job outside records.
>
> > **Code**: Click this heading to sort the list by code. Click again to reverse the order (from ascending to descending or vice versa).
> >
> > **Description**: Click this heading to sort the list by description. Click again to reverse the order.
> >
> > **Vendor**: Click this heading to sort the list by vendor (contractor name). Click again to reverse the order.
> >
> > **Trade**: Click this heading to sort the list by contractor trade. Click again to reverse the order.
> >
> > **Per Job Cost**: Click this heading to sort the list by cost. Click again to reverse the order.
>
> **Defaults for Per Job Outside** section: Shows any defaults to be used when creating new per job outside records.

Editing Per Job Outside Records

You create or modify per job outside records using the per job outside editor. The usual way to open the editor is to click **New Per Job Outside** or **Edit** in the **View** section of **Coding Definitions** | **Work Orders** | **Labor** | **Per Job Outside**.

The per job outside editor window contains the following:

> **Code**: A brief code to identify this record. No two records may have the same code.
>
> **Description**: A description of the job associated with this record.
>
> **Vendor**: The outside contractor you hire to do this job.
>
> **Trade**: A trade classification for the contractor. This trade should already exist in your trades table. For more information, see *Trades* on page 268.

Order Line Text: What should be written on a purchase order when ordering per job work from this contractor.

Per Job Cost: The cost charged by the contractor.

Cost Center: The cost center to which this labor expense should be charged. For more on cost centers, see *Cost Centers* on page 96.

Comments: Any comments you want to associate with this record.

Printing Per Job Outside Records

You can print your current per job outside records by clicking the **Print** button in **Coding Definitions** | **Work Orders** | **Labor** | **Per Job Outside**. This opens a window that contains the following:

Grouping section: Options controlling how the report is organized.

Group by list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

Sort Direction: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

Sort by list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling which records will be included in the report. You can select by per job outside ID code, vendor name and/or vendor category.

Show deleted records: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be

displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Trades

Trades define the skills or crafts of inside maintenance staff. Examples of commonly used trades include:

```
Mechanic
Electrician
Plumber
Cleaner
```

Viewing Trades

You view trade records with **Coding Definitions** | **Work Orders** | **Labor** | **Trades**. The window contains the following:

View section: Shows the list of current trade records.

Code: Click this heading to sort the list by code. Click again to reverse the order (from ascending to descending or vice versa).

Description: Click this heading to sort the list by description. Click again to reverse the order.

Details section: Shows information from the selected record.

Hourly Inside section: Shows hourly inside records that refer to the currently selected trade. For more information, see *Hourly Inside* on page 257.

Per Job Inside section: Shows per job inside records that refer to the currently selected trade. For more information, see *Per Job Inside* on page 263.

Hourly Outside section: Shows hourly outside records that refer to the currently selected trade. For more information, see *Hourly Outside* on page 260.

Per Job Outside section: Shows per job outside records that refer to the currently selected trade. For more information, see *Per Job Outside* on page 265.

Defaults for Trade section: Shows any defaults to be used when creating new trade records.

Editing Trades

You create or modify trade records using the trade editor. The usual way to open the editor is to click **New Trade** or **Edit** in the **View** section of **Coding Definitions** | **Work Orders** | **Labor** | **Trades**.

The trade editor window contains the following:

Details section: Shows basic information for the record.

Code: A brief code to identify this record. No two records may have the same code.

Description: A longer description of the work order priority.

Comments: Any comments you want to associate with the trade.

Hourly Inside section: Shows hourly inside records that refer to this trade. Before you can record any entries in this list, you must **Save** the trade record. For more information, see *Hourly Inside* on page 257.

Per Job Inside section: Shows per job inside records that refer to this trade. Before you can record any entries in this list, you must **Save** the trade record. For more information, see *Per Job Inside* on page 263.

Hourly Outside section: Shows hourly outside records that refer to this currently selected trade. Before you can record any entries in this list, you must **Save** the trade record. For more information, see *Hourly Outside* on page 260.

Per Job Outside section: Shows per job outside records that refer to this trade. Before you can record any entries in this list, you must **Save** the trade record. For more information, see *Per Job Outside* on page 265.

Printing Trades

You can print your current trade records by clicking the **Print** button in **Coding Definitions** | **Work Orders** | **Labor** | **Trades**. This opens a window that contains the following:

Sorting section: Options controlling how the report is organized.

Sort by list: These options determine how items are sorted.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick a **Sort by** option where sort direction is relevant.

Filtering section: Options controlling which trades will be included in the report.

Show deleted records: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Work Order Miscellaneous

Miscellaneous work order costs cover anything besides labor expenses and direct costs of materials. For example, if you have to rent special equipment in order to do a particular job, you may choose to record that as a miscellaneous expense. Similarly, if a worker is sent out on a job and has to pay for parking, the cost could be a miscellaneous expense.

Before you can specify miscellaneous expenses on a work order, you must create a "work order miscellaneous" record for each such expense. This record describes the nature of the expense, the expected cost, and which cost center should be charged.

> **Note:** There is no connection between purchase order miscellaneous items and work order miscellaneous items. A purchase order miscellaneous item is typically an extra cost associated with the act of purchasing (e.g. sales tax). A work order miscellaneous item is typically an extra cost associated with doing a job (e.g. parking for a worker).

Viewing Work Order Miscellaneous Costs

You view work order miscellaneous costs with **Coding Definitions** | **Work Orders** | **Miscellaneous Costs**. The window contains the following:

> **View** section: Shows the list of current work order miscellaneous cost records.
>
> > **Code**: Click this heading to sort the list by code. Click again to reverse the order (from ascending to descending or vice versa).
> >
> > **Description**: Click this heading to sort the list by description. Click again to reverse the order.
> >
> > **Cost**: Click this heading to sort the list by expected cost. Click again to reverse the order.
>
> **Defaults for Miscellaneous Cost** section: Shows any defaults to be used when creating new work order miscellaneous cost records.

Editing Work Order Miscellaneous Costs

You create or modify work order miscellaneous cost records using the miscellaneous cost editor. The usual way to open the editor is to click **New Miscellaneous Cost** or **Edit** in the **View** section of **Coding Definitions** | **Work Orders** | **Miscellaneous Costs**.

The editor window contains the following:

> **Code**: A brief code to identify this record. No two records may have the same code.
>
> **Description**: A longer description of the miscellaneous cost.

Cost: The expected cost of the expense. In many cases, you may leave this blank; you will fill in the real cost when you actually use this record in a work order.

Cost Center: The cost center to be associated with costs of this nature. For more on cost centers, see *Cost Centers* on page 96.

Comments: Any comments you want to associate with the miscellaneous cost.

Printing Work Order Miscellaneous Costs

You can print your current work order miscellaneous records by clicking the **Print** button in **Coding Definitions** | **Work Orders** | **Miscellaneous Costs**. This opens a window that contains the following:

Grouping section: Options controlling how the report is organized.

> **Group by** list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

> **Sort Direction**: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

> **Sort by** list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

> **Sort Direction**: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling which trades will be included in the report.

> **Show deleted records**: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Advanced section: Miscellaneous options.

> **Suppress Costs**: Omits any money information that might otherwise be displayed in the report.

> **Format Report in Columns**: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Work Order Priorities

When you create a work order with MainBoss, it is often useful to specify how urgent the job is. The Work Order Priorities table lists priorities that may be assigned to the work order. Here are some examples:

```
Immediately
Within 8 hours
Within 24 hours
When time permits
```

Note: For more on work orders, see *Work Orders* on page 309.)

Every work order priority may have a rank. A rank is a number used to sort priorities by urgency. Give the most urgent priority the lowest number. For example, you might give the most urgent priority a rank of 1, the next most urgent a rank of 2, and so on. However, the rank numbers do *not* have to start at 1 and they do not have to be consecutive; you might give the most urgent priority a rank of 10, the next most urgent a rank of 20, and so on. This leaves room so that you can add new priorities between existing priorities, in future.

Work orders with explicit priorities are considered more urgent than ones where the priority field is blank. Therefore, if you sort your work orders by priority, those with no explicit priority will come last.

The priorities available for work orders may be different from the priorities used for work requests. For more on work request priorities, see *Request Priorities* on page 150.

Viewing Work Order Priorities

You view work order priorities with **Coding Definitions** | **Work Orders** | **Priorities**. The window contains the following:

View section: Shows the list of current work order priorities.

Code: Click this heading to sort the list by code. Click again to reverse the order (from ascending to descending or vice versa).

Description: Click this heading to sort the list by description. Click again to reverse the order.

Rank: Click this heading to sort the list by rank. Click again to reverse the order.

Details section: Shows information from the selected record.

Work Orders section: Shows work orders that use the selected priority. For more on work orders, see *Work Orders* on page 309.

Tasks section: Shows tasks that use the selected work order priority. For more on tasks, see *Tasks* on page 184.

Defaults for Work Order Priority section: Shows any defaults to be used when creating new work order priorities.

Editing Work Order Priorities

You create or modify work order priorities using the work order priority editor. The usual way to open the editor is to click **New Work Order Priority** or **Edit** in the **View** section of **Coding Definitions** | **Work Orders** | **Priorities**.

Work orders with explicit priorities are considered more urgent than ones where the priority field is blank. Therefore, if you sort your work orders by priority, those with no explicit priority will come last.

The editor window contains the following:

Details section: Shows basic information for the record.

Code: A brief code to identify this record. No two records may have the same code.

Description: A longer description of the work order priority.

Rank: A rank number to associate with this record. The most urgent priority should have the lowest number and less urgent priorities should have increasingly higher numbers. Ranks do not have to start at 1 or be consecutive.

Comments: Any comments you want to associate with the work order priority.

Work Orders section: Shows any work orders that use this priority. For more on work orders, see *Work Orders* on page 309.

Tasks section: Shows any tasks that use this priority. For more on tasks, see *Tasks on page 184*.

Printing Work Order Priorities

You can print your current work order priorities by clicking the **Print** button in **Coding Definitions** | **Work Orders** | **Priorities**. This opens a window that contains the following:

Sorting section: Options controlling how the report is organized.

Sort by list: These options determine how items are sorted.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick a **Sort by** option where sort direction is relevant.

Filtering section: Options controlling which priorities will be included in the report.

Show deleted records: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Projects

Sometimes a number of separate work orders are all related to the same overall project. For example, suppose you're doing a significant renovation on your headquarters; the renovation might result in a large number or work orders for various aspects of the job.

When you create a work order you can specify that it's part of a particular *project*. For example, you can create a project named `HQ Renovation` and mark all work orders that are part of the renovation. This makes it possible for you to obtain reports about each project, thereby tracking the time and resources that the project uses.

Note the distinction between projects and work categories; a project covers a specific set of related jobs, while a work category deals with a general type of job. For example, you might have a work category named `Renovation` which deals with renovations anywhere, as well as a project named `HQ Renovation` which deals with a specific set of renovation jobs in your headquarters.

Viewing Projects

You view projects with **Coding Definitions** | **Work Orders** | **Projects**. The window contains the following:

View section: Shows the list of current projects.

Code: Click this heading to sort the list by code. Click again to reverse the order (from ascending to descending or vice versa).

Description: Click this heading to sort the list by description. Click again to reverse the order.

Details section: Shows information from the selected record.

Work Orders section: Shows any work orders associated with the selected project. For more on work orders, see *Work Orders* on page 309.

Tasks section: Shows any tasks associated with the selected project. For more on tasks, see *Tasks* on page 184.

Defaults for Project section: Shows any defaults to be used when creating new projects.

Editing Projects

You create or modify projects using the project editor. The usual way to open the editor is to click **New Project** or **Edit** in the **View** section of **Coding Definitions** | **Work Orders** | **Projects**.

The project editor window contains the following:

Details section: Shows basic information for the record.

Code: A brief code to identify this record. No two records may have the same code.

Description: A longer description of the project.

Comments: Any comments you want to associate with the project.

Work Orders section: Shows any work orders associated with the selected project. Before you can record any work orders in this list, you must **Save** the project record. For more on work orders, see *Work Orders* on page 309.

Tasks section: Shows any tasks associated with the selected project. Before you can record any tasks in this list, you must **Save** the project record. For more on tasks, see *Tasks* on page 184.

Printing Projects

You can print your current projects by clicking the **Print** button in **Coding Definitions** | **Work Orders** | **Projects**. This opens a window that contains the following:

Sorting section: Options controlling how the report is organized.

Sort by list: These options determine how items are sorted.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick a **Sort by** option where sort direction is relevant.

Filtering section: Options controlling which projects will be included in the report.

Show deleted records: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Work Order Status Codes

Work order status codes give you a way to indicate when a work order needs someone's attention. For example, you might create a status `Waiting for approval` to mark a work order which has been written up but not approved by management. Other possible status codes might include:

```
Waiting for parts
Waiting for tenant sign-off
Waiting for government inspection
Temporarily suspended by customer request
```

> While it is possible to use status codes for any purpose, we recommend that you only use them for work orders that are notable in some way. "Normal" work orders should have their "**Status**" field blank.

Note that status codes can be a useful form of communication between users. For example, suppose that a worker has the `WorkOrderFulfillment` security role (meaning that the worker can record actual labor and material usage) but does not have the `WorkOrderClose` security role (which is needed to close a work order). The worker could give the work order a status like `Ready to Close`, indicating that all

appropriate information has been recorded. A supervisor with `WorkOrderClose` permission could regularly check all open work orders to see if any are `Ready to Close`; if so, the supervisor can review those work orders and close them as appropriate (removing the status code in the process).

> Remember that a status code is intended to bring a work order to someone's attention. You can therefore use status codes as signals for other users.

You assign status codes to work orders by clicking the **Add Work Order Comment** button, or some other button that lets you create a work order history record. The work order state history window lets you set or change the status of a work order.

The status codes for work orders may be different from the status codes used for work orders and requests.

Viewing Work Order Status Codes

You view work order status codes with **Coding Definitions** | **Work Orders** | **Status**. The window contains the following:

View section: Shows the list of current work order status codes.

> **Code**: Click this heading to sort the list by code. Click again to reverse the order (from ascending to descending or vice versa).

> **Description**: Click this heading to sort the list by description. Click again to reverse the order.

> **Details** section: Shows information from the selected record.

> **Work Orders** section: Shows work orders that use the selected work order status.

Defaults for Work Order Status section: Shows any defaults to be used when creating new work order status codes.

Editing Work Order Status Codes

You create or modify work order status codes using the work order status editor. The usual way to open the editor is to click **New Work Order Status** or **Edit** in the **View** section of **Coding Definitions** | **Work Orders** | **Status**.

The work order status editor window contains the following:

Details section: Shows basic information for the record.

> **Code**: A brief code to identify this record. No two records may have the same code.

> **Description**: A longer description of the work order status.

Comments: Any comments you want to associate with the work order status.

Work Orders section: Shows any work orders that use this status. For more on work orders, see *Work Orders* on page 309.

Printing Work Order Status Codes

You can print your current work order status codes by clicking the **Print** button in **Coding Definitions** | **Work Orders** | **Status**. This opens a window that contains the following:

Sorting section: Options controlling how the report is organized.

Sort by list: These options determine how items are sorted.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick a **Sort by** option where sort direction is relevant.

Filtering section: Options controlling which status codes will be included in the report.

Show deleted records: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Work Categories

When work orders are issued they can be assigned a work category. Examples of work categories might be:

```
Mechanical repair
Electrical repair
Safety inspection
Clean-up
Planned maintenance
```

Viewing Work Categories

You view work categories with **Coding Definitions** | **Work Orders** | **Work Categories**. The window contains the following:

View section: Shows the list of current work categories.

Code: Click this heading to sort the list by code. Click again to reverse the order (from ascending to descending or vice versa).

Description: Click this heading to sort the list by description. Click again to reverse the order.

Details section: Shows information from the selected record.

Work Orders section: Shows any work orders that belong to the selected work category. For more on work orders, see *Work Orders* on page 309.

Tasks section: Shows any tasks that belong to the selected work category. For more on tasks, see *Tasks* on page 184.

Defaults for Work Category section: Shows any defaults to be used when creating new work categories.

Editing Work Categories

You create or modify work categories using the work category editor. The usual way to open the editor is to click **New Work Category** or **Edit** in the **View** section of **Coding Definitions** | **Work Orders** | **Work Categories**.

The work category editor window contains the following:

Details section: Shows basic information for the record.

Code: A brief code to identify this record. No two records may have the same code.

Description: A longer description of the work category.

Comments: Any comments you want to associate with the work category.

Work Orders section: Shows any work orders that belong to the selected work category. Before you can record any work orders in this list, you must **Save** the work category record. For more on work orders, see *Work Orders* on page 309.

Tasks section: Shows any tasks associated that belong to the selected work category. Before you can record any tasks in this list, you must **Save** the work category record. For more on tasks, see *Tasks* on page 184.

Printing Work Categories

You can print your current work categories by clicking the **Print** button in **Coding Definitions** | **Work Orders** | **Work Categories**. This opens a window that contains the following:

Sorting section: Options controlling how the report is organized.

Sort by list: These options determine how items are sorted.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick a **Sort by** option where sort direction is relevant.

Filtering section: Options controlling which categories will be included in the report.

Show deleted records: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Requests

Requests (often called work requests, abbreviated to W/R) make it easy for non-specialized staff to capture the essentials of a reported problem originating from outside the maintenance department. The information can even be entered into the computer during a phone call with a complainant.

Basic Principle: A Request is a simple way for someone to write down information about a complaint. Even if the person who takes the complaint doesn't know a lot about your maintenance policies, the Request form guides the person to record information that maintenance personnel will need later on. A maintenance manager can turn a basic Request into a real Work Order, and then finish off the Work Order by adding more information (who's assigned to do the work, when the job should be done, and so on).

Request States: Requests can be described as any of the following:

New: A new request has just been created and has not been processed in any other way.

In Progress: A request is *in progress* when someone has clicked the **In Progress** button for the request. Typically, this is done when someone notices that the request has come in and begins to take action on the request. Clicking **In Progress** basically means, "We've seen this and we've started working on it."

Open: A request is *open* if it's new, in progress, or transferred.

Closed: You *close* a request once the work has been done. You do so by clicking the **Close** button. Requests are also considered closed if they are canceled by clicking **Void**. However, a voided request can never be reopened—once it's canceled, it's canceled permanently.

Viewing Requests

You view requests with **Requests**. The window contains the following:

View section: Shows the list of current requests.

Number: Click this heading to sort the list by request number. Click again to reverse the order (from ascending to descending or vice versa).

Requestor: Click this heading to sort the list by requestor. Click again to reverse the order.

Subject: Click this heading to sort the list by subject. Click again to reverse the order.

Details section: Shows information from the selected record.

Assignees section: Shows people assigned to this request.

E-mail Request section: If this request originated from an e-mail message, this will list the contents of the message. (E-mail requests are only possible if you have licensed the MainBoss Service module.)

Work Orders section: Lists work orders associated with the selected request.

State History section: Contains an entry for each time the selected request changed its state. For example, this section might list when a request was created, when it was marked "in progress", and when it was closed.

Close Request: Closes the currently selected work request. **Close Request** also has the following drop-down choices:

Close Request (With Comment): Closes the selected request, and also opens a window where you can record a comment about what you're doing.

Reopen: Reopens a request that has been closed or voided. MainBoss will also open a window where you may record a comment explaining why you're reopening the request.

In Progress: Marks the request as "in progress".

In Progress (With Comment): Marks the request as "in progress". MainBoss will also open a window where you can record a comment about what you're doing.

Void: Cancels the selected request. MainBoss will also open a window where you can record a comment explaining why you are canceling the request.

As noted above, some of the "state-change" operations open a window where you can record comments about what you're doing. This window also gives you an opportunity to record comments to be sent to the original requestor. If you have the MainBoss Service module, these comments are automatically e-mailed to the requestor. The comments are also recorded in the request's **State History** section. For further information, see *Editing Request State History Records* on page 300.

Link to Work Order: Lets you indicate that this request is associated with an existing work order. This is useful if you get several requests reporting the same problem. The first time someone submits a particular complaint, you can use **Create Work Order** to make a work order to fix the problem. If other people complain about the same thing, you can use **Link to Work Order** to associate their requests with the work order you've already created. This makes it easier to keep track of which requests are associated with which work orders.

Note that it's also possible for a single request to be associated with multiple work orders. For example, you might create one work order for a short-term

work-around fix, and another work order for a more permanent repair. Using **Link to Work Order** lets you associate the request with both work orders.

A request may be linked to any number of work orders and vice versa. When you click **Link to Work Order**, you get the window described in *Requested Work Orders* on page 373.

Create Work Order: Opens a window that lets you create a work order based on the selected request. Information from the request will be copied into the new work order; however, this information can be changed if desired. For more on creating and editing work orders, see *Editing Work Orders* on page 320.

New Requestor Comment: Lets you record a comment for the requestor. If you have the MainBoss Service module, this comment will be automatically e-mailed to the requestor. If not, you will have to convey the comment to the requestor in some other way.

You can click **New Requestor Comment** on a request as often as you like; each time, MainBoss will give you a chance to record a comment about the request. **New Requestor Comment** therefore gives you a good way to keep track of problems, delays, and other special situations that arise during the course of a request, and to keep the requestor informed about these situations.

Each requestor comment is recorded in the request's **State History** section. For more on state histories, see *Editing Request State History Records* on page 300.

Defaults for Request section: Shows any defaults to be used when creating new requests.

The general request viewer shows *all* of your requests. In many cases, you may prefer to use one of the viewers that are restricted to certain types of requests:

☐ New requests (**Requests** | **New**): Requests that have just been created—see *Viewing New Requests* on page 287

☐ In progress requests (**Requests** | **In Progress**): Requests that someone has marked as in progress—see *Viewing In Progress Requests* on page 289

☐ Closed requests (**Requests** | **Closed**): Requests that have been closed, either because the job was finished or because the request was rejected—see *Viewing Closed Requests* on page 291

Viewing New Requests

You view new requests with **Requests** | **New**. A request is new if it has not been marked as in progress, has not been used as the basis of a work order, and has not been closed. The viewer contains the following:

View section: Shows the current list of new requests. New requests are ones that have not yet been marked as in progress.

Number: Click this heading to sort the list by request number. Click again to reverse the order (from ascending to descending or vice versa).

Requestor: Click this heading to sort the list by requestor. Click again to reverse the order.

Subject: Click this heading to sort the list by subject. Click again to reverse the order.

Details section: Shows information from the selected record.

Assignees section: Shows people assigned to this request.

E-mail Request section: If this request originated from an e-mail message, this will list the contents of the message. (E-mail requests are only possible if you have licensed the MainBoss Service module.)

Work Orders section: Lists work orders associated with the selected request.

State History section: Contains an entry for each time the selected request changed its state. For example, this section might list when a request was created, when it was marked "in progress", and when it was closed.

In Progress: Marks the request as in progress. **In Progress** also has the following drop-down choices:

In Progress (With Comment): Marks the request as "in progress". MainBoss will also open a window where you can record a comment about what you're doing.

Void: Cancels the selected request. MainBoss will also open a window where you can record a comment explaining why you are canceling the request.

Close Request, **Close Request (With Comment)**, **Reopen**: Are disabled in this table viewer because they can't be applied to new requests.

As noted above, some of the "state-change" operations open a window where you can record comments about what you're doing. This window also gives you an opportunity to record comments to be sent to the original requestor. If you have the MainBoss Service module, these comments are automatically e-mailed to the requestor. The comments are also recorded in the request's **State History** section. For further information, see *Editing Request State History Records* on page 300.

Link to Work Order: Lets you indicate that this request is associated with an existing work order. This is useful if you get several requests reporting the same problem. The first time someone submits a particular complaint, you can use **Create Work Order** to make a work order to fix the problem. If other people complain about the same thing, you can use **Link to Work Order** to associate their requests with the work order you've already created. This makes it easier to keep track of which requests are associated with which work orders.

Note that it's also possible for a single request to be associated with multiple work orders. For example, you might create one work order for a short-term work-around fix, and another work order for a more permanent repair. Using **Link to Work Order** lets you associate the request with both work orders.

A request may be linked to any number of work orders and vice versa. When you click **Link to Work Order**, you get the window described in *Requested Work Orders* on page 373.

Create Work Order: Opens a window that lets you create a work order based on the selected request. Information from the request will be copied into the new work order; however, this information can be changed if desired. For more on creating and editing work orders, see *Editing Work Orders* on page 320.

New Requestor Comment: Lets you record a comment for the requestor. If you have the MainBoss Service module, this comment will be automatically e-mailed to the requestor. If not, you will have to convey the comment to the requestor in some other way.

You can click **New Requestor Comment** on a request as often as you like; each time, MainBoss will give you a chance to record a comment about the request. **New Requestor Comment** therefore gives you a good way to keep track of problems, delays, and other special situations that arise during the course of a request, and to keep the requestor informed about these situations.

Each requestor comment is recorded in the request's **State History** section. For more on state histories, see *Editing Request State History Records* on page 300.

Defaults for Request section: Shows any defaults to be used when creating new requests.

Viewing In Progress Requests

You view in-progress requests with **Requests** | **In Progress**. A request is in progress if someone has marked it as "in progress" and it has not yet been closed. The viewer contains the following:

Number: Click this heading to sort the list by request number. Click again to reverse the order.

Priority: Click this heading to sort the list by request priority. Click again to reverse the order.

> Requests with explicit priorities are considered more urgent than requests where the priority field is blank. Therefore, if you sort your requests by priority, those with no explicit priority will come last.

Status: Click this heading to sort the list by status code. Click again to reverse the order.

Subject: Click this heading to sort the list by subject. Click again to reverse the order.

Details section: Shows information from the selected record.

Assignees section: Shows people assigned to this request.

E-mail Request section: If this request originated from an e-mail message, this will list the contents of the message. (E-mail requests are only possible if you have licensed the MainBoss Service module.)

Work Orders section: Lists work orders associated with the selected request.

State History section: Contains an entry for each time the selected request changed its state. For example, this section might list when a request was created, when it was marked "in progress", and when it was closed.

Close Request: Closes the currently selected work request. **Close Request** also has the following drop-down choices:

Close Request (With Comment): Closes the selected request, and also opens a window where you can record a comment about what you're doing.

Reopen, **In Progress**, **Void**: Are disabled in this table viewer because they can't be applied to in-progress requests.

As noted above, **Close Request (With Comment)** opens a window where you can record comments about what you're doing. This window also gives you an opportunity to record comments to be sent to the original requestor. If you have the MainBoss Service module, these comments are automatically e-mailed to the requestor. The comments are also recorded in the request's **State History** section. For further information, see *Editing Request State History Records* on page 300.

Link to Work Order: Lets you indicate that this request is associated with an existing work order. This is useful if you get several requests reporting the same problem. The first time someone submits a particular complaint, you can use **Create Work Order** to make a work order to fix the problem. If other people complain about the same thing, you can use **Link to Work Order** to associate their requests with the work order you've already created. This makes it easier to keep track of which requests are associated with which work orders.

Note that it's also possible for a single request to be associated with multiple work orders. For example, you might create one work order for a short-term work-around fix, and another work order for a more permanent repair. Using **Link to Work Order** lets you associate the request with both work orders.

A request may be linked to any number of work orders and vice versa. When you click **Link to Work Order**, you get the window described in *Requested Work Orders* on page 373.

Create Work Order: Opens a window that lets you create a work order based on the selected request. Information from the request will be copied into the new work order; however, this information can be changed if desired. For more on creating and editing work orders, see *Editing Work Orders* on page 320.

New Requestor Comment: Lets you record a comment for the requestor. If you have the MainBoss Service module, this comment will be automatically e-mailed to the requestor. If not, you will have to convey the comment to the requestor in some other way.

You can click **New Requestor Comment** on a request as often as you like; each time, MainBoss will give you a chance to record a comment about the request. **New Requestor Comment** therefore gives you a good way to keep track of problems, delays, and other special situations that arise during the course of a request, and to keep the requestor informed about these situations.

Each requestor comment is recorded in the request's **State History** section. For more on state histories, see *Editing Request State History Records* on page 300.

Viewing In Progress Requests without Work Orders

The control panel entry **Requests** | **In Progress** | **In Progress Requests without Work Orders** lists any requests that are "In Progress" but do not have any work orders linked

to them. Typically, this means that the requests have been accepted by the maintenance department—they have been marked as "In Progress"—but which have not yet led to a work order. By looking at this table, a maintenance dispatcher can easily determine which requests need work orders. (Of course, there's always a possibility that there's an existing work order to deal with this request, especially if several people report the same problem. In this case, you just have to link the request to the existing work order.)

The fields of this table viewer are exactly like the fields of **Requests** | **In Progress**. For more information, see *Viewing In Progress Requests* on page 289.

Viewing In Progress Requests with Work Orders

The control panel entry **Requests** | **In Progress** | **In Progress Requests with Work Orders** lists any requests that are "In Progress" and have at least one work order linked to them. Requests in this table have been processed by the maintenance department, and typically need no further attention until the associated work orders are closed.

The fields of this table viewer are exactly like the fields of **Requests** | **In Progress**. For more information, see *Viewing In Progress Requests* on page 289.

Viewing Closed Requests

You view closed requests with **Requests** | **Closed**. A request is closed if it has been marked as closed (because the job is finished) or because the request was rejected (by clicking **Void**). The viewer contains the following:

Number: Click this heading to sort the list by request number. Click again to reverse the order (from ascending to descending or vice versa).

Requestor: Click this heading to sort the list by requestor. Click again to reverse the order.

Subject: Click this heading to sort the list by subject. Click again to reverse the order.

Details section: Shows information from the selected record.

Assignees section: Shows people assigned to this request.

E-mail Request section: If this request originated from an e-mail message, this will list the contents of the message. (E-mail requests are only possible if you have licensed the MainBoss Service module.)

Work Orders section: Lists work orders associated with the selected request.

State History section: Contains an entry for each time the selected request changed its state. For example, this section might list when a request was created, when it was marked "in progress", and when it was closed.

Reopen: Reopens a request that has been closed or voided. MainBoss will also open a window where you may record a comment explaining why you're reopening the request. **Reopen** also has the following drop-down choices:

> **Close Request**, **Close Request (With Comment)**, **In Progress**, **In Progress (With Comment)**, **Void**: Are disabled in this table viewer because they can't be applied to closed requests.

As noted above, **Reopen** opens a window where you can record comments about what you're doing. This window also gives you an opportunity to record comments to be sent to the original requestor. If you have the MainBoss Service module, these comments are automatically e-mailed to the requestor. The comments are also recorded in the request's **State History** section. For further information, see *Editing Request State History Records* on page 300.

Link to Work Order: Lets you indicate that this request is associated with an existing work order. This is useful if you get several requests reporting the same problem. The first time someone submits a particular complaint, you can use **Create Work Order** to make a work order to fix the problem. If other people complain about the same thing, you can use **Link to Work Order** to associate their requests with the work order you've already created. This makes it easier to keep track of which requests are associated with which work orders.

Note that it's also possible for a single request to be associated with multiple work orders. For example, you might create one work order for a short-term work-around fix, and another work order for a more permanent repair. Using **Link to Work Order** lets you associate the request with both work orders.

A request may be linked to any number of work orders and vice versa. When you click **Link to Work Order**, you get the window described in *Requested Work Orders* on page 373.

Create Work Order: Opens a window that lets you create a work order based on the selected request. Information from the request will be copied into the new work order; however, this information can be changed if desired. For more on creating and editing work orders, see *Editing Work Orders* on page 320.

New Requestor Comment: Lets you record a comment for the requestor. If you have the MainBoss Service module, this comment will be automatically e-mailed to the requestor. If not, you will have to convey the comment to the requestor in some other way.

You can click **New Requestor Comment** on a request as often as you like; each time, MainBoss will give you a chance to record a comment about the request. **New Requestor Comment** therefore gives you a good way to keep track of problems, delays, and other special situations that arise during the course of a request, and to keep the requestor informed about these situations.

Each requestor comment is recorded in the request's **State History** section. For more on state histories, see *Editing Request State History Records* on page 300.

Editing Requests

You create or modify requests using the request editor. The usual way to open the editor is to click **New Request** or **Edit** in the **View** section of **Requests**. However, you can also get to this window by clicking **Edit Defaults** in the **Defaults for Request** section of the **Requests** viewer.

The request editor window contains the following:

Details section: Shows basic information for the record.

> **Number**: A code identifying this work request. No two requests may have the same code.

> **Subject**: A subject line that briefly states the nature of the problem.

> **Number Format** [only appears when editing defaults]: Specifies the format to be used when numbering new requests. The default is `WR {0:D8}`. This means that the numbering format consists of the letters `WR` followed by a space and then eight decimal digits.

> The `0` before the `:` is necessary. The number after the `D` is the minimum number of decimal digits in the resulting number. As an example, suppose you want to include the year in your request numbers. If you set "**Number Format**" to `Req 2007-{0:D6}`, you'll get numbers like `Req 2007-000001`. You can also put text after the closing `}`; for example, you could write `Req {0:D6}-2007` to get numbers like `Req 000001-2007`.

> For more on number formats, see *Number Formats* on page 27.

We recommend that you use enough digits in your numbers to ensure that there is always a leading zero.

> **Number Sequence** [only appears when editing defaults]: Specifies the number to used the next time you create a new request. For example, if you set this to 1000, the next request you create will be given the number 1000.

If you include the year in "**Number Format**", you should change the format at the beginning of each year and reset "**Number Sequence**" to 1.

> **Requests are automatically set In Progress when linked to a work order, and are closed when work order closes** [only appears when editing defaults]: If you checkmark this option, closing a work order automatically closes all linked requests, provided that the requests are only linked to a

single work order. (If a request is linked to multiple work orders, it will never be closed automatically, even if you close all the linked work orders.) In addition, if you create a work order from a request, the request is automatically marked as "in progress".

If you leave this option blank, closing a work order does not affect any linked requests and creating a work order from a new request does not change the request's state.

Comment to requestor for requests that are automatically set In Progress when linked to a work order [only appears when editing defaults]: Lets you specify a generic comment that will be emailed to requestors when you mark a request as In Progress. (This comment is only emailed if you have licensed the **MainBoss Service** module.) If you mark the request as In Progress by clicking the **In Progress (With Comment)** button, then the comment you specify at that time will be used instead of the default one you specify in this window.

Comment to requestor for requests that are automatically closed when their linked work order closes [only appears when editing defaults]: Lets you specify a generic comment that will be emailed to requestors when a request is closed automatically because it's linked to a work order that is also being closed. (This comment is only emailed if you have licensed the **MainBoss Service** module.) If you close a request explicitly (by clicking the **Close Request** button, the default comment in this field is *not* emailed to the requestor.

Current: Read-only fields indicating the request's current status.

State: Whether the request is `New` (recently created), `In Progress` (accepted by the maintenance department), `Void` (rejected by the maintenance department or otherwise cancelled), or `Closed` (marked as complete).

Status: A user-defined status code for this request. Typically, a code means that the request requires someone's attention. For more on request statuses, see *Request Status Codes* on page 156.

Effective Date: The date/time that the request entered its current state.

Estimated Completion Date: A read-only field telling when the job is expected to be completed. This date is taken from information specified when you change the state of the request; for example, when you mark a request as "in progress", you have a chance to specify the estimated completion date. The date shown in this field is taken from the most recent *state history change* record.

Requestor: The person who submitted the work request (and the person's phone number). You specify this person by referring to (or creating) an entry in the **Requestors** table. For more about requestors, see *Requestors* on page 153.

Unit: The unit where the work is needed. For more on units, see *Units* on page 422.

Use access code from unit: If this is checkmarked, MainBoss will fill in "**Access Code**" with the default access code associated with the unit. If this is blank, you can fill in "**Access Code**" with any available code.

Access Code: An access code indicating any restrictions on access to the unit. For more on access codes, see *Access Codes* on page 89.

Request Priority: A code indicating the priority of this job. For more on priorities, see *Request Priorities* on page 150.

Requests with explicit priorities are considered more urgent than requests where the priority field is blank. Therefore, if you sort your requests by priority, those with no explicit priority will come last.

Description: A more detailed description of the problem.

Comments: Any additional comments that may be useful to maintenance personnel.

Select for Printing: If this box is checkmarked, the request will be marked **Select for Printing**. This makes it simpler to print requests after they have been generated. For more on the use of **Select for Printing**, see *Select For Printing* on page 85.

Assignees section: Lists people who have been assigned to this request. For more information on assignments, see *Assignments* on page 32.

New Request Assignment: Opens a window where you can assign someone to this request. For more details, see *Assigning Someone to a Request* on page 297.

E-mail Request section: If this request originated from an e-mail message, this will list the contents of the message. (E-mail requests are only possible if you have licensed the MainBoss Service module.)

Received: Date the e-mail was received.

Sender E-mail: E-mail address that sent the request.

State: Current state of the request.

E-mail message: The text of the e-mail message.

Comments: Any comments that the maintenance department might have about the e-mail. (These comments are not sent to the requestor.)

Work Orders section: Lists information about work orders associated with this request. Note that this section has no **New** button. If you want to associate a new work order with this request, use **Create Work Order** at the bottom of window. If you want to associate an existing work order with the request, use **Link to Work Order**.

Work Order: Click on this heading to sort the list by work order number. Click again to reverse the order.

Unit: Click on this heading to sort the list by unit. Click again to reverse the order.

Subject: Click on this heading to sort the list by subject line. Click again to reverse the order.

State History section: Lists the states that this request has been in and the date/times when the request entered each state.

Effective Date: Shows the effective date/time when the request entered the associated state. Effective date can be set manually by clicking the associated **Edit** button.

Entry Date: Shows the actual date/time when MainBoss put the request into the associated state. The entry date cannot be changed.

Request State: Shows the states through which the request has passed.

Close Request: Closes the currently selected work request. **Close Request** also has the following drop-down choices:

Close Request (With Comment): Closes the selected request, and also opens a window where you can record a comment about what you're doing.

Reopen: Reopens a request that has been closed or voided. MainBoss will also open a window where you may record a comment explaining why you're reopening the request.

In Progress: Marks the request as "in progress".

In Progress (With Comment): Marks the request as "in progress". MainBoss will also open a window where you can record a comment about what you're doing.

Void: Cancels the selected request. MainBoss will also open a window where you can record a comment explaining why you are canceling the request.

> As noted above, some of the "state-change" operations open a window where you can record comments about what you're doing. This window also gives you an opportunity to record comments to be sent to the original requestor. If you have the MainBoss Service module, these comments are automatically e-mailed to the requestor. The comments are also recorded in the request's **State History** section. For further information, see *Editing Request State History Records* on page 300.

Link to Work Order: Lets you indicate that this request is associated with an existing work order. This is useful if you get several requests reporting the same problem. The first time someone submits a particular complaint, you can use **Create Work Order** to make a work order to fix the problem. If other people complain about the same thing, you can use **Link to Work Order** to associate their requests with the work order you've already created. This makes it easier to keep track of which requests are associated with which work orders.

Note that it's also possible for a single request to be associated with multiple work orders. For example, you might create one work order for a short-term work-around fix, and another work order for a more permanent repair. Using **Link to Work Order** lets you associate the request with both work orders.

A request may be linked to any number of work orders and vice versa. When you click **Link to Work Order**, you get the window described in *Requested Work Orders* on page 373.

Create Work Order: Opens a window that lets you create a work order based on this request. Information from the request will be copied into the new work order; however, this information can be changed if desired. For more on creating and editing work orders, see *Editing Work Orders* on page 320.

New Requestor Comment: Lets you record a comment for the requestor. If you have the MainBoss Service module, this comment will be automatically e-mailed to the requestor. If not, you will have to convey the comment to the requestor in some other way.

You can click **New Requestor Comment** on a request as often as you like; each time, MainBoss will give you a chance to record a comment about the request. **New Requestor Comment** therefore gives you a good way to keep track of problems, delays, and other special situations that arise during the course of a request, and to keep the requestor informed about these situations.

Each requestor comment is recorded in the request's **State History** section. For more on state histories, see *Editing Request State History Records* on page 300.

Assigning Someone to a Request

You can assign someone to a request, provided that the person has an entry in the **Requests Assignees** table (**Requests** | **Assignees** or **Coding Definitions** | **Requests** | **Assignees**). When someone is assigned to a request, it indicates that the person has some interest in the request. For further information on assignments, see *Assignments* on page 32.

To assign someone to a request, click the **New Request Assignment** button in the **Assignees** section of a request. This opens a window that contains the following:

Request area: If you started from a request record, this area will contain a read-only field identifying the request.

If you started from a request assignee record, the **Request** area allows you to choose one or more requests to which the person should be assigned. You specify these requests using the multi-select drop-down list at the bottom of the **Request** area. Option buttons in the **Request** area let you shorten the contents of the drop-down list, to make it easier to choose the requests you want. The option buttons include:

Only show New Requests: If you choose this option, the drop-down list will only show requests in the New state.

Only show In Progress Requests: If you choose this option, the drop-down list will only show requests in the In Progress state.

Only show Transferred Requests: If you choose this option, the drop-down list will only show requests that have been used to create work orders.

Only show Closed Requests: If you choose this option, the drop-down list will only show requests in the Closed state.

Show all Requests: If you choose this option, the drop-down list shows all requests.

Drop-down list: A list of all requests that match the criteria specified above.

Request Assignee area: If you started from a request assignee record, this area will contain a read-only field identifying the request assignee.

If you started from a request record, the **Request Assignee** area lets you specify one or more people to whom you are assigning to this request. The bottom of the area contains a multi-select drop-down list where you can specify the assignees. The options in the area let you reduce the number of possibilities shown in the drop-down list.

Show prospects for Request Assignee for this Request: If you click this option, the drop-down list will show people who are in the **Request Assignee** table and who are currently associated with this request in some way. This may include people like the Requestor and person who created the request.

Show all Assignees not currently assigned to this Request: If you click this option, the drop-down list will show everyone in the **Request Assignee** table who isn't already assigned to this request.

Drop-down list: A list of all potential assignees who match the criteria specified above.

Printing Requests

You can print your current requests using **Requests** | **Print** or by clicking the **Print** button in any **Requests** table viewer. MainBoss will open a window that contains the following:

Sorting section: Options controlling how the report is organized.

Sort by list: These options determine how items are sorted. If you choose a **Sort by** option, you will be offered an additional set of **Sort by** options which let you sort requests within the previous sort criteria.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick a **Sort by** option where sort direction is relevant.

Filtering section: Options controlling what kind of requests will be included in the report. The window lets you select requests in several ways:

Show only active records: If this checkbox is checkmarked, the Active filter will automatically be applied when preparing the report; this means that information from old requests will not be included in the report. If this checkbox is blanks, the Active filter is ignored; MainBoss uses information from *all* requests, no matter how old.

For more about the active filter, see *The Active Filter* on page 55.

Request Filters: Make selections based on properties of the request. For example, if you filter by **Requestor**, you can restrict the print-out to requests from a particular set of requestors (e.g. all requests from a specified person).

Unit Filters: Make selections based on the unit involved in the request. For example, if you filter by **Unit Location**, you can restrict the print-out to requests on units at a particular location (e.g. all requests for work in a specific building).

Unit Value Filters: Make selections based on properties of the unit involved in the request. For example, if you filter by **Unit Purchase Vendor**, you can restrict the print-out to requests on units purchased from a particular vendor.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be

displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Clear Select for Printing: If you click this button, MainBoss removes the checkmark from all **Select for Printing** boxes on all requests. Typically, you do this after printing requests that have been marked **Select for Printing**. For more, see *Select For Printing* on page 85.

Editing Request State History Records

Each time a work request changes its state—for example, when the request is marked as "In Progress"—MainBoss creates a request state history record. The state history records associated with a request tell the history of that request.

You can change the effective date/time that's recorded in a request state history record; if so, this will be the date/time that appears on the request (although MainBoss also records the actual date/time of the state change). You can also record comments for the requestor and comments for maintenance personnel.

On the operations **In Progress (With Comment)**, **Close Request (With Comment)**, **Reopen** and **Void**, MainBoss opens a window where you can record comments and other information. The window contains the following:

Number: A read-only field identifying the request.

Current State: A read-only field giving the current state of the request.

Current Status: A read-only field giving the current status of the request. For more on request statuses, see *Request Status Codes* on page 156.

Effective Date: The effective date/time on which the request will enter the new state. Typically, this is the current date/time. However, you may wish to backdate some state changes; for example, if you're closing a request, you might wish to backdate the state change to the date/time when you actually finished work on the request.

Creator: A read-only field identifying the person who created this history record.

Request State: A read-only field giving the state that the request will enter once you save this record.

Request Status: A new status code that you want to assign to this request. Typically, a status code should only be assigned to a request when the request needs attention from someone; otherwise, the status should be blank.

Estimated Completion Date: The date when you expect this request will be completed. If you fill in this field, the information will be displayed in several other records; if this request was created by the MainBoss Service module, the information will also be sent to the requestor.

Comments to Requestor: Comments for the requestor. If you have the MainBoss Service module, these comments will be included in an acknowledgement to the requestor.

Other Comments: Comments for maintenance personnel only. Presumably, these will explain why the history record needed to be changed.

Save & Close: Saves the current record and closes the editor window. This changes the state of the request.

Close: Closes the window *without* changing the state of the request.

You can edit some of the information in an existing state history record; for example, you can add comments. To edit a request's state history records, you start from the **State History** section of the request record. Select the state history record you want to edit, then click **Edit**.

Request Summary Report

The Request Summary report provides a quick summary of your work requests. By default, the report has a line for each request, showing the most important information about the requests. Options in the **Advanced** section let you add more information to the report. (The Request Summary report is actually the same as the Request History report, but with different options selected by default.)

To print a request summary, use **Requests** | **Reports** | **Summary**. This opens a window that contains the following:

Grouping section: Options controlling how the report is organized.

Group by list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

Sort Direction: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

Sort by list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling what kind of requests will be included in the report. The window lets you select requests in several ways:

Show only active records: If this checkbox is checkmarked, the Active filter will automatically be applied when preparing the report; this means that information from old requests will not be included in the report. If this checkbox is blank, the Active filter is ignored; MainBoss uses information from *all* requests, no matter how old.

For more about the active filter, see *The Active Filter* on page 55.

Request Filters: Make selections based on properties of the request. For example, if you filter by **Requestor**, you can restrict the print-out to requests from a particular set of requestors (e.g. all requests from a specified person).

Unit Filters: Make selections based on the unit involved in the request. For example, if you filter by **Unit Location**, you can restrict the print-out to requests on units at a particular location (e.g. all requests for work in a specific building).

Unit Value Filters: Make selections based on properties of the unit involved in the request. For example, if you filter by **Unit Purchase Vendor**, you can restrict the print-out to requests on units purchased from a particular vendor.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Request History Report

The Requests History report provides information about past work requests. For example, you can get a listing of all the requests associated with a particular unit.

To print this kind of report, use **Requests** | **Reports** | **History**. This opens a window that contains the following:

Grouping section: Options controlling how the report is organized.

Group by list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

Sort Direction: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

Sort by list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling what kind of requests will be included in the report. The window lets you select requests in several ways:

Show only active records: If this checkbox is checkmarked, the Active filter will automatically be applied when preparing the report; this means that information from old requests will not be included in the report. If this checkbox is blank, the Active filter is ignored; MainBoss uses information from *all* requests, no matter how old.

For more about the active filter, see *The Active Filter* on page 55.

Request Filters: Make selections based on properties of the request. For example, if you filter by **Requestor**, you can restrict the print-out to requests from a particular set of requestors (e.g. all requests from a specified person).

Unit Filters: Make selections based on the unit involved in the request. For example, if you filter by **Unit Location**, you can restrict the print-out to requests on units at a particular location (e.g. all requests for work in a specific building).

Unit Value Filters: Make selections based on properties of the unit involved in the request. For example, if you filter by **Unit Purchase Vendor**, you can restrict the print-out to requests on units purchased from a particular vendor.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Request State History Report

The Request State History report tells when history records were created for one or more requests. History records are typically created when a request changes its state or status, e.g. when the request is created, marked as in progress, and finally closed.

To print this report, use **Requests** | **Reports** | **State History**. This opens a window that contains the following:

Grouping section: Options controlling how the report is organized.

Group by list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

Sort Direction: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

Sort by list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling what kind of requests will be included in the report. The window lets you select requests in several ways:

Show only active records: If this checkbox is checkmarked, the Active filter will automatically be applied when preparing the report; this means that information from old requests will not be included in the report. If this checkbox is blank, the Active filter is ignored; MainBoss uses information from *all* requests, no matter how old.

For more about the active filter, see *The Active Filter* on page 55.

Request State History Filters: Make selections based on fields in the history records. For example, if you filter by **Creator**, you can restrict the print-out to history records created by a particular person.

Request Filters: Make selections based on properties of the request. For example, if you filter by **Requestor**, you can restrict the print-out to requests from a particular set of requestors (e.g. all requests from a specified person).

Unit Filters: Make selections based on the unit involved in the request. For example, if you filter by **Unit Location**, you can restrict the print-out to requests on units at a particular location (e.g. all requests for work in a specific building).

Unit Value Filters: Make selections based on properties of the unit involved in the request. For example, if you filter by **Unit Purchase Vendor**, you can restrict the print-out to requests on units purchased from a particular vendor.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Request Status Statistics Report

The Request Status Statistics report tells the length of time that requests spent with a particular status code. For more on status codes, see *Request Status Codes* on page 156.

To print this report, use **Requests** | **Reports** | **Status Statistics**. This opens a window that contains the following:

Grouping section: Options controlling how the report is organized.

Group by list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

Sort Direction: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

Sort by list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling what kind of requests will be included in the report. The window lets you select requests in several ways:

Show only active records: If this checkbox is blank, the Active filter will automatically be applied when preparing the report; this means that information from old requests will not be included in the report. If this checkbox is checkmarked, the Active filter is ignored; MainBoss uses information from *all* requests, no matter how old.

For more about the active filter, see *The Active Filter* on page 55.

Request State History Filters: Make selections based on fields in the history records. For example, if you filter by **Status**, you can restrict the print-out to history records one or more specific status codes.

Request Filters: Make selections based on properties of the request. For example, if you filter by **Requestor**, you can restrict the print-out to requests from a particular set of requestors (e.g. all requests requested by a specified person).

Unit Filters: Make selections based on properties of the unit. For example, if you filter by **Unit Location**, you can restrict the print-out to requests related to units at a particular location (e.g. all the units in a particular building).

Unit Value Filters: Make selections based on properties related to a unit's value. For example, if you filter by **Unit Purchase Vendor**, you can restrict the print-out to requests on units bought from a particular vendor.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Work Orders

When you *open* a work order, you create a new work order to deal with corrective maintenance.

☐ Work orders can be based on existing work requests. If so, MainBoss copies information from the work request into the new work order so you don't have to type everything again.

☐ Work orders can also be created on their own, without a previous work request.

While creating a work order, you often estimate the labor and materials that will be required for the job. You also provide information for the people who will do the work: a description of the problem, how to obtain access to the work area, and so on. When all the relevant information has been entered, you typically print off the work order and hand it to the personnel who have been assigned to the job.

Labor and materials are called the *resources* of a work order. Resource estimates made for a job are called *demands*.

When you *close* a work order, you indicate that the work has been finished. Typically, you also fill in details of the job: how much time was actually taken (as opposed to the initial estimates), what materials were actually used, and so on.

Work Order States

A work order can be in one of the following states:

Draft: The work order has been created and saved, but is still considered easy to change. You may be waiting for additional information or some sort of approval before the work order can be finalized.

Open: The work order contains all the information you want and has received any approvals it might need. It's ready to be issued to workers. The work order will remain in the open state until the job is actually finished.

Closed: The job is finished and all information about the work has been recorded. A work order can't be changed when it's closed. However, you can reopen a closed work order, make changes, then close it again.

Void: The work order was created but it was canceled before it became **Open**.

Each of these states has its own table viewer. For example, **Work Orders** | **Open** lists open work orders. In addition, there is a combined **Work Orders** table that lists all work orders in all states. (Since this can be a lengthy list, it's usually easier to find work orders in one of the other work order lists.)

MainBoss has various buttons for changing the state of work orders. These are summarized below:

☐ **Void**: Changes **Draft** to **Void**, and also opens a window where you may record a comment about why you decided to cancel the work order

☐ **Draft Work Order**: Changes **Void** to **Draft**, and also opens a window where you may record a comment about why you decided to reactivate the canceled work

☐ **Open**: Changes **Draft** to **Open**

☐ **Open Work Order (With Comment)**: Changes **Draft** to **Open**, and also opens a window where you may record a comment about what you're doing

☐ **Suspend**: Changes **Open** to **Draft**, and also opens a window where you may record a comment explaining why you suspended the work order

☐ **Close Work Order**: Changes **Open** to **Closed**

☐ **Close Work Order (With Comment)**: Changes **Open** to **Closed**, and also opens a window where you can record a comment about what you're doing

☐ **Reopen**: Changes **Closed** to **Open**, and also opens a window where you can record a comment explaining why you're reopening the work order

An open work order can also be **Overdue**. When you create a work order, you can specify dates for when the work should start and end. A work order is considered overdue if it's still open past its specified end date. **Work Orders** | **Overdue** lists any work orders that are overdue.

Work Order Status Codes: In addition to the standard work order states, you can create your own custom *status codes* to describe the condition of work orders. For example, you might have status codes like

```
Waiting for approval
Waiting for parts
Waiting for government inspection
Waiting for customer sign-off
```

For more on work order status codes, see *Work Order Status Codes* on page 278.

Viewing Work Orders

You view work orders with **Work Orders**. The window contains the following:

View section: Shows all work orders.

   Number: Click this heading to sort the list by work order number. Click again to reverse the order (from ascending to descending or vice versa).

   Priority: Click this heading to sort the list by priority. Click again to reverse the order.

Work orders with explicit priorities are considered more urgent than ones where the priority field is blank. Therefore, if you sort your work orders by priority, those with no explicit priority will come last.

Subject: Click this heading to sort the list by subject. Click again to reverse the order.

Details section: Shows basic information from the selected record.

Assignees section: Shows people assigned to the selected work order.

Service Contracts section: Lists any service contracts associated with the unit in the selected work order. For more on service contracts, see *Service Contracts* on page 214. For more on units, see *Units* on page 422.

Resources section: Lists any labor and materials associated with the selected work order. For more on resources, see *Resources* on page 333.

Temporary Storage section: Lists any temporary storage locations associated with the selected work order, as well as the contents of those locations. For more on temporary storage, see *Temporary Storage Locations* on page 374.

Meters section: Lists any meters in the unit of the selected work order. For more on meters, see *Meters* on page 207.

Purchase Orders section: Lists any purchase orders associated with the selected work order. For more on purchase orders, see *Purchase Orders* on page 462.

Chargebacks section: Lists any chargebacks associated with the selected work order. For more on chargebacks, see *Chargebacks* on page 379.

Requests section: Lists any requests associated with the selected work order. For more on requests, see *Requests* on page 284.

State History section: Lists records that show when the selected work order changed state. For more on work order state history, see *Editing Work Order State History Records* on page 328.

New Work Order From Task: Opens a window where you can create a new work order that uses a task as a template (often called boilerplate work orders). For example, suppose you have a task that describes what should be done when changing a muffler. When the time comes to change the muffler on a particular car, you can use **New Work Order From Task**. For more, see *Work Orders Created from Tasks* on page 191.

State change actions: A drop-down button which offers a list of actions that can be used to change the state of the work order. The current state of the work order determines which actions are enabled; it also determines which action is displayed as the label for the button. The available options are:

Open: Changes a draft work order into an open one. Opening a work order suggests that the work order contains all the information you need before starting the job and is ready to be issued to workers.

Open Work Order (With Comment): Same as **Open**, except that MainBoss will also open a window where you can record a comment about what you're doing.

Close Work Order: Changes an open work order into a closed one. Closing a work order suggests that the job is finished and you have recorded all relevant information about the work.

Close Work Order (With Comment): Same as **Close Work Order**, except that MainBoss will also open a window where you can record a comment about what you're doing.

Reopen: Changes a closed work order back into an open one. You might do this if you need to correct some information on the work order. MainBoss opens a window where you may record a comment explaining why you're reopening the work order.

Suspend: Changes an open work order into a draft one. You might do this if you find that you need to make significant changes to the work order. MainBoss opens a window where you may record a comment explaining why you're suspending the work order.

Void: Changes a draft work order into a void one. This means canceling the job. MainBoss opens a window where you may record a comment explaining why you're canceling the work order.

Draft Work Order: Changes a void work order into a draft one. This means reactivating a canceled job. MainBoss opens a window where you may record a comment explaining why you're reactivating the work order.

Add Work Order Comment: Adds a comment to the selected work order. The comment is recorded in a state history record. For more, see *Editing Work Order State History Records* on page 328.

Defaults for Work Order section: Shows any defaults to be used when creating new work orders.

Details section: Defaults for basic work order information, including the format for work order numbers.

Printed Form section: Defaults to be used when printing a work order. For more on printing work orders, see *Printing Work Orders* on page 329.

Additional Labor/Material Lines: Specifies a number. MainBoss will leave that number of blank lines in the work order, so that workers have space to write in notes about labor and/or materials. For example, workers might use this area to write in a list of materials that weren't

included in the original work order but were unexpectedly needed on the job.

Additional Information: Specifies additional text to be added to each printed work order (in addition to the standard information that MainBoss puts in). For example, this text might include a signature line so that workers can have customers sign off when a job is completed.

Note: Due to limitations in Microsoft software, blank lines at the end of "**Additional Information**" will be deleted whenever work orders are printed. If you want some extra blank space at the end of the "**Additional Information**" area, put a single character at the beginning of one or more lines; for example, a single underscore character (_) will keep the lines from being deleted while still giving you plenty of blank space.

The general work order viewer shows *all* of your work orders. In many cases, you may prefer to use one of the viewers that are restricted to certain types of work orders:

☐ Draft work orders (**Work Orders** | **Draft**): Work orders that have just been created—see *Viewing Draft Work Orders* on page 315

☐ Open work orders (**Work Orders** | **Open**): Work orders that contain all information needed before actually starting the job—see *Viewing Open Work Orders* on page 316

☐ Closed work orders (**Work Orders** | **Closed**): Work orders that have been closed because the job was finished—see *Viewing Closed Work Orders* on page 318

☐ Overdue work orders (**Work Orders** | **Overdue**): Open work orders that are past their "**Work End Date**" but have not yet been closed—see *Viewing Overdue Work Orders* on page 313

☐ Void work orders (**Work orders** | **Void**): Work orders that have cancelled—see *Viewing Void Work Orders* on page 319

Viewing Overdue Work Orders

You view overdue work orders with **Work Orders** | **Overdue**.

A work order is overdue if it is open and its "**Work End Date**" has passed but the work order has not yet been closed.

The overdue work order table viewer contains the following:

Number: Click this heading to sort the list by work order number. Click again to reverse the order (from ascending to descending or vice versa).

Priority: Click this heading to sort the list by priority. Click again to reverse the order.

> Work orders with explicit priorities are considered more urgent than ones where the priority field is blank. Therefore, if you sort your work orders by priority, those with no explicit priority will come last.

Status: Click this heading to sort the list by work order status. Click again to reverse the order.

Subject: Click this heading to sort the list by subject. Click again to reverse the order.

Details section: Shows basic information from the selected record.

Assignees section: Shows people assigned to the selected work order.

Service Contracts section: Lists any service contracts associated with the unit in the selected work order. For more on service contracts, see *Service Contracts* on page 214. For more on units, see *Units* on page 422.

Resources section: Lists any resources associated with the selected work order. For more on resources, see *Resources* on page 333.

Temporary Storage section: Lists any temporary storage locations associated with the selected work order, as well as the contents of those locations. For more on temporary storage, see *Temporary Storage Locations* on page 374.

Meters section: Lists any meters in the unit of the selected work order. For more on meters, see *Meters* on page 207.

Purchase Orders section: Lists any purchase orders associated with the selected work order. For more on purchase orders, see *Purchase Orders* on page 462.

Chargebacks section: Lists any chargebacks associated with the selected work order. For more on chargebacks, see *Chargebacks* on page 379.

Requests section: Lists any requests associated with the selected work order. For more on requests, see *Requests* on page 284.

State History section: Lists records that show when the selected work order changed state. For more on work order state history, see *Editing Work Order State History Records* on page 328.

State change actions: A drop-down button which offers a list of actions that can be used to change the state of the work order. The current state of the work order determines which actions are enabled; it also determines which action is displayed as the label for the button. Since all overdue work orders are in the open state, the only enabled state-change actions are:

Close Work Order: Changes an open work order into a closed one. Closing a work order suggests that the job is finished and you have recorded all relevant information about the work.

Close Work Order (With Comment): Same as **Close Work Order**, except that MainBoss will also open a window where you can record a comment about what you're doing.

Suspend: Changes an open work order into a draft one. You might do this if you find that you need to make significant changes to the work order. MainBoss opens a window where you may record a comment explaining why you're suspending the work order.

Add Work Order Comment: Adds a comment to the selected work order. The comment is recorded in a state history record. For more, see *Editing Work Order State History Records* on page 328.

Viewing Draft Work Orders

A draft work order is in the early stages of preparation. Its information may be incomplete or it may not have received any necessary authorization. You view draft work orders with **Work Orders** | **Draft**. The window contains the following:

View section: Shows all work orders that are currently in the draft state.

Number: Click this heading to sort the list by work order number. Click again to reverse the order (from ascending to descending or vice versa).

Priority: Click this heading to sort the list by priority. Click again to reverse the order.

Work orders with explicit priorities are considered more urgent than ones where the priority field is blank. Therefore, if you sort your work orders by priority, those with no explicit priority will come last.

Subject: Click this heading to sort the list by subject. Click again to reverse the order.

Details section: Shows basic information from the selected record.

Assignees section: Shows people assigned to the selected work order.

Service Contracts section: Lists any service contracts associated with the unit in the selected work order. For more on service contracts, see *Service Contracts* on page 214. For more on units, see *Units* on page 422.

Resources section: Lists any resources associated with the selected work order. For more on resources, see *Resources* on page 333.

Temporary Storage section: Lists any temporary storage locations associated with the selected work order, as well as the contents of those locations. For more on temporary storage, see *Temporary Storage Locations* on page 374.

Meters section: Lists any meters in the unit of the selected work order. For more on meters, see *Meters* on page 207.

Purchase Orders section: Lists any purchase orders associated with the selected work order. For more on purchase orders, see *Purchase Orders* on page 462.

Chargebacks section: Lists any chargebacks associated with the selected work order. For more on chargebacks, see *Chargebacks* on page 379.

Requests section: Lists any requests associated with the selected work order. For more on requests, see *Requests* on page 284.

State History section: Lists records that show when the selected work order changed state. For more on work order state history, see *Editing Work Order State History Records* on page 328.

State change actions: A drop-down button which offers a list of actions that can be used to change the state of the work order. The current state of the work order determines which actions are enabled; it also determines which action is displayed as the label for the button. In the draft work order viewer, the only enabled state-change actions are:

Open: Changes a draft work order into an open one. Opening a work order suggests that the work order contains all the information you need before starting the job and is ready to be issued to workers.

Open Work Order (With Comment): Same as **Open**, except that MainBoss will also open a window where you can record a comment about what you're doing.

Void: Changes a draft work order into a void one. This means canceling the job. MainBoss opens a window where you may record a comment explaining why you're canceling the work order.

Add Work Order Comment: Adds a comment to the selected work order. The comment is recorded in a state history record. For more, see *Editing Work Order State History Records* on page 328.

Viewing Open Work Orders

An open work order contains all the information you need before starting a job. You view open work orders with **Work Orders** | **Open**. The window contains the following:

View section: Shows all work orders that are currently open.

Current History Date: Click this heading to sort the list by current history date (the date of the most recent state history record). Click again to reverse the order (from oldest to newest or vice versa).

Number: Click this heading to sort the list by work order number. Click again to reverse the order.

Priority: Click this heading to sort the list by priority. Click again to reverse the order.

Work orders with explicit priorities are considered more urgent than ones where the priority field is blank. Therefore, if you sort your work orders by priority, those with no explicit priority will come last.

Status: Click this heading to sort the list by work order status. Click again to reverse the order.

Subject: Click this heading to sort the list by subject. Click again to reverse the order.

Details section: Shows basic information from the selected record.

Assignees section: Shows people assigned to the selected work order.

Service Contracts section: Lists any service contracts associated with the unit in the selected work order. For more on service contracts, see *Service Contracts* on page 214. For more on units, see *Units* on page 422.

Resources section: Lists any resources associated with the selected work order. For more on resources, see *Resources* on page 333.

Temporary Storage section: Lists any temporary storage locations associated with the selected work order, as well as the contents of those locations. For more on temporary storage, see *Temporary Storage Locations* on page 374.

Meters section: Lists any meters in the unit of the selected work order. For more on meters, see *Meters* on page 207.

Purchase Orders section: Lists any purchase orders associated with the selected work order. For more on purchase orders, see *Purchase Orders* on page 462.

Chargebacks section: Lists any chargebacks associated with the selected work order. For more on chargebacks, see *Chargebacks* on page 379.

Requests section: Lists any requests associated with the selected work order. For more on requests, see *Requests* on page 284.

State History section: Lists records that show when the selected work order changed state. For more on work order state history, see *Editing Work Order State History Records* on page 328.

State change actions: A drop-down button which offers a list of actions that can be used to change the state of the work order. The current state of the work order determines which actions are enabled; it also determines which action is displayed as the label for the button. In the open work order viewer, the only enabled state-change actions are:

Close Work Order: Changes an open work order into a closed one. Closing a work order suggests that the job is finished and you have recorded all relevant information about the work.

Close Work Order (With Comment): Same as **Close Work Order**, except that MainBoss will also open a window where you can record a comment about what you're doing.

> If you have turned on the **Requests are automatically set In Progress when linked to a work order, and are closed when work order closes** option (for requests), closing a work order automatically closes each linked request, provided that the request only has one linked work order. For more on this option, see *Editing Requests* on page 293.

Suspend: Changes an open work order into a draft one. You might do this if you find that you need to make significant changes to the work order. MainBoss opens a window where you may record a comment explaining why you're suspending the work order.

Add Work Order Comment: Adds a comment to the selected work order. The comment is recorded in a state history record. For more, see *Editing Work Order State History Records* on page 328.

Viewing Closed Work Orders

A closed work order represents a job that has been marked as finished. You view closed work orders with **Work Orders** | **Closed**. The window contains the following:

Number: Click this heading to sort the list by work order number. Click again to reverse the order (from ascending to descending or vice versa).

Closing Code: Click this heading to sort the list by closing code. Click again to reverse the order.

Subject: Click this heading to sort the list by subject. Click again to reverse the order.

Details section: Shows basic information from the selected record.

Assignees section: Shows people assigned to the selected work order.

Service Contracts section: Lists any service contracts associated with the unit in the selected work order. For more on service contracts, see *Service Contracts* on page 214. For more on units, see *Units* on page 422.

Resources section: Lists any resources associated with the selected work order. For more on resources, see *Resources* on page 333.

Temporary Storage section: Lists any temporary storage locations associated with the selected work order, as well as the contents of those locations. For more on temporary storage, see *Temporary Storage Locations* on page 374.

Meters section: Lists any meters in the unit of the selected work order. For more on meters, see *Meters* on page 207.

Chargebacks section: Lists any chargebacks associated with the selected work order. For more on chargebacks, see *Chargebacks* on page 379.

Requests section: Lists any requests associated with the selected work order. For more on requests, see *Requests* on page 284.

State History section: Lists records that show when the selected work order changed state. For more on work order state history, see *Editing Work Order State History Records* on page 328.

State change actions: A drop-down button which offers a list of actions that can be used to change the state of the work order. The current state of the work order determines which actions are enabled; it also determines which action is displayed as the label for the button. In the closed work order viewer, the only enabled state-change action is:

Reopen: Changes a closed work order back into an open one. You might do this if you need to correct some information on the work order. MainBoss opens a window where you may record a comment explaining why you're reopening the work order.

Add Work Order Comment: Adds a comment to the selected work order. The comment is recorded in a state history record. For more, see *Editing Work Order State History Records* on page 328.

Viewing Void Work Orders

A void work order is one that has been canceled before the work was done. You view void work orders with **Work Orders** | **Void**. The window contains the following:

Number: Click this heading to sort the list by work order number. Click again to reverse the order (from ascending to descending or vice versa).

Subject: Click this heading to sort the list by subject. Click again to reverse the order.

Assignees section: Shows people assigned to the selected work order.

Service Contracts section: Lists any service contracts associated with the unit in the selected work order. For more on service contracts, see *Service Contracts* on page 214. For more on units, see *Units* on page 422.

Resources section: Lists any resources associated with the selected work order. For more on resources, see *Resources* on page 333.

Temporary Storage section: Lists any temporary storage locations associated with the selected work order, as well as the contents of those locations. For more on temporary storage, see *Temporary Storage Locations* on page 374.

Meters section: Lists any meters in the unit of the selected work order. For more on meters, see *Meters* on page 207.

Chargebacks section: Lists any chargebacks associated with the selected work order. For more on chargebacks, see *Chargebacks* on page 379.

Requests section: Lists any requests associated with the selected work order. For more on requests, see *Requests* on page 284.

State History section: Lists records that show when the selected work order changed state. For more on work order state history, see *Editing Work Order State History Records* on page 328.

State change actions: A drop-down button which offers a list of actions that can be used to change the state of the work order. The current state of the work order determines which actions are enabled; it also determines which action is displayed as the label for the button. In the void work order viewer, the only enabled state-change action is:

Draft Work Order: Changes a void work order into a draft one. This means reactivating a canceled job. MainBoss opens a window where you may record a comment explaining why you're reactivating the work order.

Add Work Order Comment: Adds a comment to the selected work order. The comment is recorded in a state history record. For more, see *Editing Work Order State History Records* on page 328.

Editing Work Orders

You create or modify work orders using the work order editor. The usual way to open the editor is to click **New Work Order** or **Edit** in the **View** section of **Work Orders**.

The work order editor window contains the following:

Details section: Shows basic information for the work order.

Number: A code identifying this work order. No two work orders may have the same code.

Number Format [only appears when editing defaults]: Specifies the format to be used when numbering new work orders. The default is `WO {0:D8}`. This means that the numbering format consists of the letters `WO` followed by a space and then eight decimal digits.

The `0` before the `:` is necessary. The number after the `D` is the minimum number of decimal digits in the resulting number. As an example, suppose you want to include the year in your work orders numbers. If you set "**Number Format**" to `WO 2007-{0:D6}`, you'll get numbers like `WO 2007-000001`. You can also put text after the closing `}`; for example, you could write `WO {0:D6}-2007` to get numbers like `WO 000001-2007`.

For more on number formats, see *Number Formats* on page 27.

> We recommend that you use enough digits in your numbers to ensure that there is always a leading zero.

Number Sequence [only appears when editing defaults]: Specifies the number to used the next time you create a new work order. For example, if you set this to 1000, the next work order you create will be given the number 1000.

> If you include the year in "**Number Format**", you should change the format at the beginning of each year and reset "**Number Sequence**" to 1.

Subject: A brief description of what the associated work involves.

Current: Read-only fields indicating the work order's current status.

State: Whether the work order is `Draft` (recently created), `Open` (ready to go), `Void` (cancelled), or `Closed` (marked as complete). A new work order's "**State**" is blank until the first time the work order is saved.

Status: A user-defined status code for this work order. Typically, a code means that the work order requires someone's attention. For more on work order status codes, see *Work Order Status Codes* on page 278.

Effective Date: The date/time that the work order entered its current state.

Requestor: The person who originally requested the work. If this work order was derived from a work request, the requestor will be taken from the original request.

Requestors cannot be named in a work order until they have an entry in the **Requestors** table. For more about this table, see *Requestors* on page 153.

Once you specify a requestor, this line will display the person's phone number and e-mail address (as recorded in the **Contacts** table).

Unit: The unit where the work is needed. For more on units, see *Units* on page 422.

Work Start Date: When a work order is first created, this may be filled in with the date/time when the job is expected to begin. When the work order is closed, this should be filled in with the date/time that the job actually began.

Work End Date: When a work order is first created, this may be filled in with the date/time when the job is expected to be finished. When the work order is closed, this should be filled in with the date/time that the job was actually finished.

Duration: The length of the job, measured in days.

Note: If you fill in "**Work Start Date**" and "**Work End Date**", MainBoss automatically calculates the "**Duration**" and fills in the value (rounded to the nearest whole number of days). Similarly, if you fill in "**Start Date**" and "**Duration**", MainBoss automatically calculates the "**End Date**".

Work Category: A code classifying the nature of the work required. For more on work categories, see *Work Categories* on page 281.

Use access code from unit: If you checkmark this box, MainBoss will fill in "**Access Code**" with the unit's default access code. Otherwise, you can set "**Access Code**" manually.

Access Code: An access code indicating any restrictions on access to the unit. For more on access codes, see *Access Codes* on page 89.

Work Order Priority: A code indicating the priority of this job. Note that work orders and work requests have separate priority codes. A good rule of thumb is to leave **Work Order Priority** blank unless there's a good reason for assigning a specific priority. For more on work order priorities, see *Work Order Priorities* on page 273.

Work orders with explicit priorities are considered more urgent than ones where the priority field is blank. Therefore, if you sort your work orders by priority, those with no explicit priority will come last.

Use expense model from unit: If you checkmark this box, MainBoss will fill in "**Expense Model**" with the unit's default expense model. Otherwise, you can set "**Expense Model**" manually.

Expense Model: The expense model to be used for this work order. For more on expense models, see *Expense Models* on page 250.

Project: The project (if any) that this work is associated with. For more, see *Projects* on page 276.

Work Description: Describes the required work in as much detail as necessary. Work descriptions may be simple ("Find out why room is too hot") or they may be more detailed, perhaps giving check-lists of things to do or step-by-step instructions.

Comments: Any comments you wish to record in connection with this work order.

Downtime: The amount of downtime caused by the problem.

Closing Code: Different organizations use the closing code for different purposes. One common purpose is to specify the overall cause of the problem, e.g. normal wear and tear, operator error, accidental breakage, etc. This makes it possible to organize your work orders and their costs according to cause; not only does this give you a picture of the sources of

maintenance trouble, it may help you allocate resources more effectively to reduce future difficulties. For more on closing codes, see *Closing Codes* on page 245.

Select for Printing: If this box is checkmarked, the work order will be marked **Select for Printing**. This makes it simpler to print work orders after they have been generated. For more on the use of **Select for Printing**, see *Select For Printing* on page 85.

Assignees section: Lists people who have been assigned to this work order. For more information on assignments, see *Assignments* on page 32.

New Work Order Assignment: Opens a window where you can assign someone to this work order. For more details, see *Assigning Someone to a Work Order* on page 377.

View Work Order Assignee: Opens the currently selected assignee record (if any). For more on work order assignee records, see *Work Order Assignees* on page 238.

Service Contracts section: Lists any service contracts associated with the specified unit. Double-clicking an entry in this list opens a record showing the details of the service contract. For more on service contracts, see *Service Contracts* on page 214.

Resources section: Lists labor and materials associated with this job. These can be either *demands*, *receipts*, or *actual* resource usages.

A demand is recorded in advance of the work. For labor, a demand specifies one or more workers who have been assigned to the job and the time each worker is expected to be needed. For materials, a demand states that specified items should be reserved for use on this job. (For more about demands, see *Resources* on page 333.

A receipt records when you've purchased materials during the course of a job. For example, if you purchase items with petty cash in order to make a repair, you should record the expenditure with a receipt on the work order.

Actual resource usages are recorded after the job is done. They state the labor and materials that were actually used in the work, as opposed to the preliminary estimates.

Labor expenses are either *inside* and *outside*. Inside labor is performed by your own personnel, while outside labor is performed by outside contractors.

Note: If you make a mistake when actualizing a demand, you correct the mistake by selecting the demand, then clicking the **Edit** button. In the resulting demand window, use the **Correct** button in the **Actuals** section.

Total: Read-only fields giving a running total of demand records and actual records. These totals sum up information from the **Items**, **Inside**, and **Outside** subsections.

Items subsection: Lists demands and actual uses of materials.

> **New Demand Item**: Opens a new window where you can reserve materials before the job begins. For more information, see *Demand Item* on page 334.

> **Actualize**: Opens a new window where you can create an actual resource usage entry from an existing demand entry. You should click the demand first, then click **Actualize**. Typically, actual resource usage records are created *after* a job is completed (when actual resource usage is known). For more about actual item usages, see *Actual Item* on page 347.

> **Edit**: Lets you edit an existing demand in the list.

> **View**: Lets you view an entry in the list (without changing any information in the entry).

> **View Storage Assignment**: Opens the storeroom assignment record associated with the currently selected entry. While you cannot make changes in the storeroom assignment itself, you can use the record's **Activity** section to perform inventory operations such as transferring items to or from the storeroom, and receiving items into the storeroom. For example, if you buy materials for this work order, you can use **View Storage Assignment** to open a storage assignment record for those materials, then go to the record's **Activity** section and use **Receive** or **Receive (with PO)** to record the materials you bought.

> For more on storage assignment records, see *Storeroom Assignments* on page 113.

Inside subsection: Lists demands and actual uses of inside labor.

> **New Demand Hourly Inside**: Opens a window where you can assign your own personnel to this job; expenses will be paid on an hourly basis. For more, see *Demand Hourly Inside* on page 336.

> **New Demand Per Job Inside**: Opens a window where you can assign your own personnel to this job; expenses will be paid on a per job basis. For more, see *Demand Per Job Inside* on page 339.

> **Actualize**: Opens a new window where you can create an actual labor usage entry from an existing demand entry. You should click the demand first, then click **Actualize**. Typically, actual labor usage records are created *after* a job is completed (when actual labor usage is known). For more about actual inside labor usages, see *Actual Hourly Inside* on page 349 and *Actual Per Job Inside* on page 352.

Edit: Lets you edit an existing demand in the list.

View: Lets you view an entry in the list (without changing any information in the entry).

Outside subsection: Lists demands and actual uses of outside contractors.

New Demand Hourly Outside: Opens a window where you can assign outside contractors to this job; expenses will be paid on an hourly basis. For more, see *Demand Hourly Outside* on page 341.

New Demand Per Job Outside: Opens a window where you can assign outside contractors to this job; expenses will be paid on a per job basis. For more, see *Demand Per Job Outside* on page 343.

New PO Line: Is enabled when an hourly outside or per job outside demand is selected in the list of demands. Clicking **New PO Line** adds a line for the selected demand in a purchase order associated with the current work order.

For example, suppose you want to hire an outside plumber for a job. First, create a demand for the plumber's services (e.g. an hourly outside demand). Then select this demand and click **New PO Line**. The resulting window asks you to specify a purchase order; you can either select one that's already associated with this work order, or you can create a new one.

Actualize: Opens a new window where you can create an actual labor usage entry from an existing demand.

If a demand has a purchase order line associated with it, click the purchase order line and then click **Actualize**. Otherwise, click the demand and then click **Actualize**.

Typically, actual labor usage records are created *after* a job is completed (when actual labor usage is known). For more about actual outside labor usages, see *Actual Hourly Outside* on page 355 or *Actual Per Job Outside* on page 361 (if there is no associated purchase order entry) and *Actual Hourly Outside (with PO)* on page 358 or *Actual Per Job Outside (with PO)* on page 364 (if there is an associated purchase order entry).

Edit: Lets you edit an existing demand in the list.

View: Lets you view an entry in the list (without changing any information in the entry).

Miscellaneous subsection: Lists miscellaneous costs to be added to the work order.

New Demand Miscellaneous Cost: Opens a window where you can associated a miscellaneous cost with this job. For more, see *Demand Miscellaneous* on page 345.

Actualize: Opens a new window where you can record the actual cost of an existing miscellaneous demand. You should click the demand first, then click **Actualize**. For more about actual miscellaneous costs, see *Actual Miscellaneous* on page 367.

Edit: Lets you edit an existing demand in the list.

View: Lets you view an entry in the list (without changing any information in the entry).

Temporary Storage section: Lets you associate temporary storage locations with this work order. Temporary storage may be used to hold some or all of the work order's materials. This allows for situations where spare parts and other materials are transferred from their usual storerooms to some more convenient place so they'll be accessible for use on a work order. When you're working on a unit, the best temporary storage location is often the unit itself, indicating that items have been transferred to the unit's location.

New Temporary Storage: Associates a temporary storage location with this work order. For more, see *Temporary Storage Locations* on page 374.

New Temporary Storage Assignment: Specifies an item that should be placed in a temporary storage location. Note that you must specify the temporary storage location (using **New Temporary Storage**) before you can assign items to that location. For more on temporary storage assignments, see *Temporary Storage Assignments* on page 376.

Edit: Opens a window where you can correct the selected entry (either a temporary storage location or a temporary storage assignment).

View: Opens a window where you can look at the selected entry (but not change it).

Meters section: Provides information about any meters associated with the unit covered by the work order. It also lets workers record any meter readings taken during the course of this job. For more about meters, see *Meters* on page 207.

Purchase Orders section: Lets you associate one or more purchase orders with this job. For example, you might create a purchase order to cover the cost of outside labor expenses if the work will be done by an outside contractor.

Chargebacks section: Lets you specify that some or all of the costs of this work order will be charged to some other party (called the *billable requestor*). For example, property management companies may charge tenants some portion of the costs involved in certain types of jobs. For more about chargebacks, see *Chargebacks* on page 379.

Requests section: Shows any requests associated with this work order. For more about requests, see *Requests* on page 284.

Some work orders may have no associated requests, while the rest usually only

have one request. However, it's possible for a single work order to address multiple requests; for example, several people might submit complaints about the same problem. To indicate that a request is related to an existing work order, use the **Link to Work Order** button in the **Requests** viewer.

State History section: Lists the states that this work order has been in and the date/times when it entered each state. For more about work order state history records, see *Editing Work Order State History Records* on page 328.

> **Effective Date**: This column shows the effective date/time when the work order entered the associated state. Effective date can be set manually by clicking the associated **Edit** button.

> **Entry Date**: This column shows the actual date/time when MainBoss put the work order into the associated state. The entry date cannot be changed.

> **Work Order State**: This column shows the states through which the work order has passed.

Printed Form section [only appears when editing defaults]: Specifies information that will be used when printing work orders.

> **Additional Labor/Material Lines**: A number. MainBoss will add this number of blank lines after the labor/material line items. For example, if you specify the number 6, MainBoss will add six blank lines after the labor/material line items, leaving space for people to write in any useful information (e.g. the actual time the job took, and any materials that were used but not specified in the original demands).

> **Additional Information**: Zero or more lines of text that should appear at the end of the work order. For example, you might use this to indicate where an authorization signature goes, as well as other standard information.

State change actions: A drop-down button which offers a list of actions that can be used to change the state of the work order. The current state of the work order determines which actions are enabled; it also determines which action is displayed as the label for the button. The available options are:

> **Open**: Changes a draft work order into an open one. Opening a work order suggests that the work order contains all the information you need before starting the job and is ready to be issued to workers.

> **Open Work Order (With Comment)**: Same as **Open**, except that MainBoss will also open a window where you can record a comment about what you're doing.

> **Close Work Order**: Changes an open work order into a closed one. Closing a work order suggests that the job is finished and you have recorded all relevant information about the work.

Close Work Order (With Comment): Same as **Close Work Order**, except that MainBoss will also open a window where you can record a comment about what you're doing.

Reopen: Changes a closed work order back into an open one. You might do this if you need to correct some information on the work order. MainBoss opens a window where you may record a comment explaining why you're reopening the work order.

Suspend: Changes an open work order into a draft one. You might do this if you find that you need to make significant changes to the work order. MainBoss opens a window where you may record a comment explaining why you're suspending the work order.

Void: Changes a draft work order into a void one. This means canceling the job. MainBoss opens a window where you may record a comment explaining why you're canceling the work order.

Draft Work Order: Changes a void work order into a draft one. This means reactivating a canceled job. MainBoss opens a window where you may record a comment explaining why you're reactivating the work order.

If you have turned on the **Requests are automatically set In Progress when linked to a work order, and are closed when work order closes** option (for requests), closing a work order automatically closes each linked request, provided that the request only has one linked work order. For more on this option, see *Editing Requests* on page 293.

Add Work Order Comment: Adds a comment to the selected work order. The comment is recorded in a state history record. For more, see *Editing Work Order State History Records* on page 328.

Editing Work Order State History Records

Various actions change the state of a work order. For example, **Void** changes a work order from the **Draft** state to the **Void** state. When you change the state of a work order, MainBoss may open a window where you can record comments about what you're doing. This window also lets you specify the effective date of the change; for example, if you close a work order the day after the job actually finishes, you may want to backdate the state change record to indicate when the job was actually finished.

The editor window normally contains the following:

Number: A read-only field identifying the work order whose state is changing.

Current State: A read-only field giving the current state of the work order (the state before the intended change).

Current Status: A read-only field giving the current status of the work order. For more on work order statuses, see *Work Order Status Codes* on page 278.

Effective Date: The date that you want to associate with the change.

Creator: A read-only field identifying the person who created this record.

Work Order State: A read-only field giving the state that the work order will enter once you **Save & Close** this record.

Work Order Status: A new status code that you want to assign to this work order. Typically, a status code should only be assigned to a work order when the work order needs attention from someone; otherwise, the status should be blank.

Comments: Any comments you want to record.

Save & Close: Saves the current record and closes the editor window. This changes the state of the work order.

Close: Closes the window *without* changing the state of the work order.

If you close a work order by clicking **Close Work Order (With Comment)** in a work order table viewer, a number of additional fields are displayed in the window. These let you change a number of fields in the work order *before* it is actually closed. (Once the work order is closed, most fields become read-only.) MainBoss lets you change these fields to show what actually happened on the job, as opposed to estimates made when the work order was first filled out:

Work Start Date: The date that the job actually started.

Work End Date: The date that the job actually ended.

Duration: The length of the job (in days).

Downtime: The actual amount of downtime caused by the problem.

Closing Code: Different organizations use the closing code for different purposes. One common purpose is to specify the overall cause of the problem, e.g. normal wear and tear, operator error, accidental breakage, etc. This makes it possible to organize your work orders and their costs according to cause; not only does this give you a picture of the sources of maintenance trouble, it may help you allocate resources more effectively to reduce future difficulties. For more on closing codes, see *Closing Codes* on page 245.

Note that these fields also appear when you **Void** a draft work order from a work order table viewer.

Printing Work Orders

You can print your current work orders by clicking the **Print** button in **Work Orders** or with **Work Orders** | **Print**. Both methods open a window that contains the following:

Sorting section: Options controlling how the report is organized.

Sort by list: These options determine how items are sorted. If you choose a **Sort by** option, you will be offered a second set of **Sort by** options which let you sort work orders within the initial sort criteria.

Sort Direction options: Determine whether the report is sorted from lowest values to highest or vice versa.

Filtering section: Options controlling what kind of work orders will be included in the report. The window lets you select work orders in several ways:

Show only active records: If this checkbox is checkmarked, the Active filter will automatically be applied when preparing the report; this means that information from old requests will not be included in the report. If this checkbox is blank, the Active filter is ignored; MainBoss uses information from *all* requests, no matter how old.

For more about the active filter, see *The Active Filter* on page 55.

Work Order Filters: Make selections based on properties of the work order. For example, if you filter by **Requestor**, you can restrict the print-out to work orders from a particular set of requestors (e.g. all work orders requested by a specified person).

Unit Filters: Make selections based on the unit involved in the work order. For example, if you filter by **Unit Location**, you can restrict the print-out to work orders on units at a particular location (e.g. all work orders in a specific building).

Unit Value Filters: Make selections based on properties of the unit involved in the work order. For example, if you filter by **Purchase Vendor**, you can restrict the print-out to work orders on units purchased from a particular vendor.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Bar Code Symbology: Specifies a format to be used for printing bar codes in this report. If you choose **None**, no bar codes will be printed; otherwise, a bar code containing the work order number will be printed for every work order in the report. For more information, see *Bar Code Support* on page 87.

Additional Labor/Material Lines: May be filled in with a number. If so, MainBoss will add that number of blank lines in the labor/material section of the work order. Workers can write in this blank area to record labor and/or materials not included in the original work report (e.g. materials you didn't expect to need).

Additional Information: Extra information to be printed in the work order. For example, you can use this area to specify that the work order should contain a signature line where customers can sign off once the job is finished.

You can set the default text for this additional information by using the **Work Orders** table viewer. Go to the **Defaults for Work Order** section and then to **Printed Form**.

Suppress Labor Duration Estimate: By default, the printed work order will show the estimated labor times for anyone assigned to the job. If you checkmark this box, the estimated times will be omitted from the printed work order.

Include Unit Specifications and Attachments: If you checkmark this box, the work order will include any specifications associated with the unit being serviced. It also will include the names of attachment files (though not the file contents). Workers may find this additional information useful. For more, see *Specifications* on page 432 and *Attachments* on page 431.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Clear Select for Printing: If you click this button, MainBoss removes the checkmark from all **Select for Printing** boxes on all work orders. Typically, you do this after printing work orders that have been marked **Select for Printing**. For more, see *Select For Printing* .

Printing Work Order States

You can print work order states by clicking the **Print** button in a window for choosing a work order's state. This opens a window that contains the following:

Sorting section: Options controlling how the report is organized.

Sort by list: These options determine how items are sorted.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick a **Sort by** option where sort direction is relevant.

Filtering section: Options controlling which status codes will be included in the report.

Show deleted records: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information

will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Resources

The **Resources** section of a work order deals with materials and labor. More specifically, it deals with:

☐ *Items*: Spare parts and other materials needed in the job. For more, see *Inventory Item Records* on page 445.

☐ *Hourly inside*: Work done by your own employees and paid by the hour. For more, see *Hourly Inside* on page 257.

☐ *Per job inside*: Work done by your own employees and paid on a per job basis. For more, see *Per Job Inside* on page 263.

☐ *Hourly outside*: Work done by outside contractors and paid by the hour. For more, see *Hourly Outside* on page 260.

☐ *Per job outside*: Work done by outside contractors and paid on a per job basis. For more, see *Per Job Outside* on page 265.

☐ *Miscellaneous:* Miscellaneous expenses, such as service charges or equipment rentals. For more, see *Work Order Miscellaneous* on page 271.

The actions you can perform on these resources are:

☐ *Demand*: For materials, this means reserving the materials for use in this particular job. For people, this means assigning workers to do the job. For miscellaneous costs, this simply means recording that the work order incurred a particular type of expense.

Demands are typically made *before* the job begins, but can be made afterward too.

☐ *Actual*: For materials, this means recording what was actually used on the job. For people, it means recording the actual time or cost of labor. These records indicate *actual* figures for the job, as opposed to preliminary estimates. Actual records are usually written up after the job is finished; however, if a job takes place over many days, it may be better to record actual figures as you go along (e.g. at the end of every workday) rather than leaving everything till the end.

There must be a demand for every actual use of labor and materials.

Sorting the Resource List: In a work order, demands, receipts and actuals are sorted by item or labor record (hourly inside, hourly outside, etc.). When entries have the same item or labor record, they are sorted according to date. More specifically:

☐ Demands are sorted by entry date: the time/date the entry was first saved, according to the clock on the Server computer (the one where SQL Server is running).

☐ Actual and Receipt records are sorted according to effective date. The default effective date is the time/date when you first open the editor window to create the record; this is taken from the clock on the computer where you are *using* MainBoss, as opposed to the computer that holds the database.

Differences in the clocks on different computers can occasionally make it look as if an Actual or Receipt record was created before the Demand.

Demand Item

An item demand requests that an item be held in reserve for a particular work order. Since it's possible that the same type of item is kept in different storage areas, the demand must specify a storage assignment: not just the item you want, but the storage location where you intend to get the item. The storage location may be a storeroom or a temporary storage location. (For more on storeroom assignments, see *Storeroom Assignments* on page 113. For more on temporary storage location assignments, see *Temporary Storage Assignments* on page 376.)

To see the Demand Item editor, click **New Demand Item** in the **Items** subsection of the **Resources** section of a work order. The editor contains the following:

Details area: Provides information about the demand.

Work Order: A read-only field identifying the work order.

Storage Assignment area: Lets you specify the type of item you want to reserve and the storage location where you intend to get the item. The area ends in a drop-down list that lets you choose a storage assignment. Before that are fields that let you shorten the length of the drop-down list:

Only include Items on the Parts list: If you select this option, the "**Show Storage Assignments for**" drop-down list will only show items from the spare parts list of the unit associated with this work order. For more on spare parts, see *Spare Parts* on page 211.

Show all Items: If you select this option, the "**Show Storage Assignments for**" drop-down list will show all of MainBoss's items.

Show Storage Assignments for: A drop-down list showing items. If you selected **Only include Items on the Parts list**, the drop-down list only shows such spare part items. Otherwise, the drop-down list shows all items.

Drop-down list of storage assignments: Shows all storage assignments for the item specified in "**Show Storage Assignments for**". If you leave "**Show Storage Assignments for**" blank, this drop-down list will show all of MainBoss's storage assignments.

Read-only fields: The editor window contains a number of read-only fields giving information from the storage assignment record you've selected. If you have the same item in several different storage locations, changing "**Storage Assignment**" and checking the read-only fields may help you decide on the storage location you want to use for this particular work order.

On hand: The quantity of the item that is actually present in the storage location. This line also gives the cost per unit and total cost of the storage location's stock of the item.

Available: The quantity of the item that is available for use. This takes into account any stock that might be on reserve for use with other work orders.

Via purchase: If there is a price quote for this item associated with the given storage location, then "**Via purchase**" will provide information from the price quote: how much it will cost to purchase a given quantity of the item. (Note that this line is only filled in if there's an appropriate price quote record.)

Demand from on hand: The outstanding quantity demanded from the storage location. This value only takes into account the current demand record, not any other demands in any other work orders.

Demand via purchase: If "**Estimated Demand**" exceeds the quantity on hand in the storage location, "**Demand via purchase**" tells the item quantity you'll have to purchase in order to meet the stated demand. The line also gives the unit cost and total cost of such a purchase.

Already Used: The quantity of such items already used on this work order. This quantity reflects how much of the demand has already been actualized.

Remaining: The difference between "**Estimated Demand**" and "**Already used**".

Estimated Demand: The quantity of the item that you want to reserve.

Calculated Cost: Read-only fields giving the unit cost and total cost of "**Estimated Demand**". These figures are based on the unit cost of items in the selected storage location.

Use calculated cost: If you checkmark this box, MainBoss will fill in "**Estimated Cost**" with the values given in "**Calculated Cost**". If you don't want to use the calculated cost, leave the checkbox blank and enter an appropriate cost in "**Estimated Cost**".

Estimated Cost: Can be filled in with a unit cost or a total cost, if different from the "**Calculated Cost**".

Actual default: Specifies the default method for calculating costs when someone creates an "actual item" in response to this demand. If the person who records "actual item" information has sufficient security permissions, he or she can specify item costs in a different way. However, if the person who records the "actual item" information does not have permission to specify costs, what you specify on this demand determines which costs MainBoss will use. The possible options are:

Manual entry: If you choose this option, you expect the person recording "actual item" information to have appropriate security permissions to specify the actual cost of the items.

Current value calculation: If you choose this option, the default is to calculate "actual item" costs from MainBoss's existing inventory price information.

Demand estimate: If you choose this option, the default is to use the "**Estimated Cost**" in this window as a basis for the "actual item" cost.

Expense Category: The expense category to which this item belongs. For more on expense categories, see *Expense Categories* on page 248.

Actuals section: Records what the work order actually used (as opposed to the preliminary estimates given in the **Details** section). The **Actuals** section also lets you correct any mistakes made in previous "actual" entries.

List: The central part of the window is a list of "actual" entries, specifying actual uses of this item on this work order.

New Actual Item: Lets you record an actual use of this item on this work order. For more information, see *Actual Item* on page 347.

Correct: Lets you correct an existing actual entry. For more, see *Corrections of Actual Items* on page 348.

Edit: Lets you edit an existing actual entry. You will *not* be able to change the cost or quantity specified in the entry; for that, you must use **Correct**.

Demand Hourly Inside

An hourly inside demand assigns one of your workers to do some or all of the work associated with a work order. You specify the worker using an hourly inside record; this gives the worker's name and the hourly rate paid for that worker's services. (For more on hourly inside records, see *Hourly Inside* on page 257.)

Note: MainBoss has two ways of recording labor expenses: with an hourly rate (where the cost depends on how long the worker takes to do the job) or with a per job rate (where all jobs of a particular type cost the same, no matter how long they take). This section covers hourly payment. For more on per job payment, see *Demand Per Job Inside* on page 339.

To see the Demand Hourly Inside editor, click **New Demand Hourly Inside** in the **Inside** subsection of the **Resources** section of a work order. For more on resources, see *Resources* on page 333.

The Demand Hourly Inside editor contains the following:

Details area: Provides information about the demand.

Work Order: A read-only field identifying the work order.

Hourly Inside: An hourly inside record specifying a worker and the worker's hourly rate.

Read-only fields: The editor window contains a number of read-only fields giving information about the hourly inside record you've specified. This information is taken from the hourly inside record and from other tables in MainBoss. The read-only fields provide details about labor and relevant price information.

If you have the choice of several workers who might be assigned to the job, changing "**Hourly Inside**" and checking the read-only fields may help you decide who should be assigned to this work order.

Hourly Rate: The worker's cost per hour, as given by the hourly inside record.

Already used: A read-only field giving the amount of the demanded time that has already been used on this work order. This amount is set by recording that a certain amount of time has already been used. For example, suppose you expect a job to take three days and have created a demand for a particular worker to spend 20 hours on this job over those three days. At the end of each day, you can actualize some of the demanded time to indicate how much was actually used during the day. In this case, "**Already used**" will show how much time has already been used on previous days.

Remaining: A read-only field giving the amount of demanded time that has not yet been used. This is equal to "**Estimated Demand**" minus "**Already used**".

Estimated Demand: The total length of time that the worker is expected to spend on this job.

Calculated Cost: Read-only fields giving the expected cost of the demanded work, based on the worker's hourly rate. The "**Hourly Rate**" column gives the cost per hour and the "**Cost**" column gives the total cost.

Use calculated cost: If you checkmark this box, MainBoss will fill in "**Estimated Cost**" with the values given in "**Calculated Cost**". If you don't want to use the calculated cost, leave the checkbox blank and enter an appropriate cost in "**Estimated Cost**".

Estimated Cost: Can be filled in if you expect the cost to be different than "**Calculated Cost**" (e.g. if you have to pay the worker a higher hourly rate because of overtime). You can enter an hourly rate under "**Hourly Rate**" or the total cost under "**Cost**".

Actual default: Specifies the default method for calculating costs when someone creates an "actual hourly inside" in response to this demand. If the person who records the actual cost has sufficient security permissions, he or she can specify the cost in a different way. However, if the person who records the actual cost does not have permission to specify costs, what you specify on this demand determines the cost that MainBoss will use. Possible options are:

Manual entry: If you choose this option, you expect the person who actualizes this demand to have appropriate security permissions to specify the actual cost of the work.

Current value calculation: If you choose this option, the default is to calculate actual costs from the original hourly inside record.

Demand estimate: If you choose this option, the default is to use the "**Estimated Cost**" in this window as a basis for the actual cost.

Expense Category: The expense category to which this expense belongs. For more on expense categories, see *Expense Categories* on page 248.

Actuals section: Records what the work order actually used (as opposed to the preliminary estimates given in the **Details** section). The **Actuals** section also lets you correct any mistakes made in previous "actual" entries.

List: The central part of the window is a list of "actual" entries, specifying actual hourly inside labor expenses on this work order.

New Actual Hourly Inside: Lets you record an actual labor expense for this work order. For more information, see *Actual Hourly Inside* on page 349.

Correct: Lets you correct an existing actual entry. For more, see *Corrections of Actual Hourly Inside* on page 351.

Edit: Lets you edit an existing actual entry. You will *not* be able to change the cost or quantity specified in the entry; for that, you must use **Correct**.

Demand Per Job Inside

A per job inside demand assigns one of your workers to do some or all of the work associated with a work order. You specify the worker using a per job inside record; this gives the worker's name and the per job rate paid for that worker on this particular type of job. (For more on per job inside records, see *Per Job Inside* on page 263.)

> **Note:** MainBoss has two ways of handling labor expenses: with an hourly rate (where the cost depends on how long the worker takes to do the job) or with a per job rate (where all jobs of a particular type cost the same, no matter how long they take). This section covers per job payments. For more on hourly payment, see *Demand Hourly Inside* on page 336.

To see the Demand Per Job Inside editor, click **New Demand Per Job Inside** in the **Inside** subsection of the **Resources** section of a work order. For more on resources, see *Resources* on page 333.

The Demand Per Job Inside editor contains the following:

Details area: Provides information about the demand.

> **Work Order**: A read-only field identifying the work order.

> **Per Job Inside**: A per job inside record specifying a worker and price paid for the worker on this type of job.

> Read-only fields: The editor window contains a number of read-only fields giving information about the per job inside record you've specified. This information is taken from the per job inside record and from other tables in MainBoss. The read-only fields provide details about labor and relevant price information.

> If you have the choice of several workers who might be assigned to the job, changing "**Per Job Inside**" and checking the read-only fields may help you decide who should be assigned to this work order.

> **Per Job Rate**: The worker's cost for this job, as given by the per job inside record.

> **Already used**: A read-only field giving the quantity of work that has already been used on this work order. This amount is set by recording that a certain amount of work has already been done. For example, suppose that a worker is painting rooms and is paid by the room. If the job requires painting six rooms and the worker finishes three the first day, you can actualize a quantity of three rooms at the end of that day. After you do this, "**Already used**" will show how much work has already been used and actualized.

Remaining: A read-only field giving the amount of demanded work that has not yet been actualized. This is equal to "**Estimated Demand**" minus "**Already used**".

Estimated Demand: The total amount of work the worker is expected to spend on this job.

Calculated Cost: Read-only fields giving the expected cost of the demanded work, based on the worker's per job rate. The "**Unit Cost**" column gives the cost per unit job and the "**Cost**" column gives the total cost.

Use calculated cost: If you checkmark this box, MainBoss will fill in "**Estimated Cost**" with the values given in "**Calculated Cost**". If you don't want to use the calculated cost, leave the checkbox blank and enter an appropriate cost in "**Estimated Cost**".

Estimated Cost: Can be filled in if you expect the cost to be different than "**Calculated Cost**" (e.g. if you have to pay the worker more because of the job is being done on a holiday). You can enter a per job rate under "**Unit Cost**" or the total cost under "**Cost**".

Actual default: Specifies the default method for calculating costs when someone creates an "actual per job inside" in response to this demand. If the person who records the actual cost has sufficient security permissions, he or she can specify the cost in a different way. However, if the person who records the actual cost does not have permission to specify costs, what you specify on this demand determines the cost that MainBoss will use. Possible options are:

Manual entry: If you choose this option, you expect the person who actualizes this demand to have appropriate security permissions to specify the actual cost of the work.

Current value calculation: If you choose this option, the default is to calculate actual costs from the original per job inside record.

Demand estimate: If you choose this option, the default is to use the "**Estimated Cost**" in this window as a basis for the actual cost.

Expense Category: The expense category to which this expense belongs. For more on expense categories, see *Expense Categories* on page 248.

Actuals section: Records what the work order actually used (as opposed to the preliminary estimates given in the **Details** section). The **Actuals** section also lets you correct any mistakes made in previous "actual" entries.

List: The central part of the window is a list of "actual" entries, specifying actual per job inside labor expenses on this work order.

New Actual Per Job Inside: Lets you record an actual labor expense for this work order. For more information, see *Actual Per Job Inside* on page 352.

Correct: Lets you correct an existing actual entry. For more, see *Corrections of Actual Per Job Inside* on page 354.

Edit: Lets you edit an existing actual entry. You will *not* be able to change the cost or quantity specified in the entry; for that, you must use **Correct**.

Demand Hourly Outside

An hourly outside demand assigns one of your workers to do some or all of the work associated with a work order. You specify the worker using an hourly outside record; this gives the worker's name and the hourly rate paid for that worker's services. (For more on hourly outside records, see *Hourly Outside* on page 260.)

Note: MainBoss has two ways of handling labor expenses: with an hourly rate (where the cost depends on how long the worker takes to do the job) or with a per job rate (where all jobs of a particular type cost the same, no matter how long they take). This section covers hourly payments. For more on per job payments, see *Demand Per Job Outside* on page 343.

To see the Demand Hourly Outside editor, click **New Demand Hourly Outside** in the **Outside** subsection of the **Resources** section of a work order. For more on resources, see *Resources* on page 333.

The Demand Hourly Outside editor contains the following:

Details area: Provides information about the demand.

> **Work Order**: A read-only field identifying the work order.

> **Hourly Outside**: An hourly outside record specifying a worker and the worker's hourly rate.

> Read-only fields: The editor window contains a number of read-only fields giving information about the hourly outside record you've specified. This information is taken from the hourly outside record and from other tables in MainBoss. The read-only fields provide details about labor and relevant price information.

> If you have the choice of several workers who might be assigned to the job, changing "**Hourly Outside**" and checking the read-only fields may help you decide who should be assigned to this work order.

> **Hourly Rate**: The worker's cost per hour, as given by the hourly outside record.

> **Already used**: A read-only field giving the amount of the demanded time that has already been used on this work order. This amount is set by recording that a certain amount of time has already been used. For example, suppose you expect a job to take three days and have created a

demand for a particular worker to spend 20 hours on this job over those three days. At the end of each day, you can actualize some of the demanded time to indicate how much was actually used during the day. In this case, "**Already used**" will show how much time has already been used on previous days.

Remaining: A read-only field giving the amount of demanded time that has not yet been used. This is equal to "**Estimated Demand**" minus "**Already used**".

Estimated Demand: The total length of time that the worker is expected to spend on this job.

Calculated Cost: Read-only fields giving the expected cost of the demanded work, based on the worker's hourly rate. The "**Hourly Rate**" column gives the cost per hour and the "**Cost**" column gives the total cost.

Use calculated cost: If you checkmark this box, MainBoss will fill in "**Estimated Cost**" with the values given in "**Calculated Cost**". If you don't want to use the calculated cost, leave the checkbox blank and enter an appropriate cost in "**Estimated Cost**".

Estimated Cost: Can be filled in if you expect the cost to be different than "**Calculated Cost**" (e.g. if you have to pay the worker a higher hourly rate because of overtime). You can enter an hourly rate under "**Hourly Rate**" or the total cost under "**Cost**".

Actual default: Specifies the default method for calculating costs when someone creates an "actual hourly outside" in response to this demand. If the person who records the actual cost has sufficient security permissions, he or she can specify the cost in a different way. However, if the person who records the actual cost does not have permission to specify costs, what you specify on this demand determines the cost that MainBoss will use. Possible options are:

Manual entry: If you choose this option, you expect the person who actualizes this demand to have appropriate security permissions to specify the actual cost of the work.

Current value calculation: If you choose this option, the default is to calculate actual costs from the original hourly outside record.

Demand estimate: If you choose this option, the default is to use the "**Estimated Cost**" in this window as a basis for the actual cost.

Expense Category: The expense category to which this expense belongs. For more on expense categories, see *Expense Categories* on page 248.

Actuals section: Records what the work order actually used (as opposed to the preliminary estimates given in the **Details** section). The **Actuals** section also lets you correct any mistakes made in previous "actual" entries.

List: The central part of the window is a list of "actual" entries, specifying actual hourly outside labor expenses on this work order.

New Actual Hourly Outside: Lets you record an actual labor expense for this work order. For more information, see *Actual Hourly Outside* on page 355.

New Actual Hourly Outside (with PO): Lets you record an actual labor expense that appears on an associated purchase order. For more information, see *Actual Hourly Outside (with PO)* on page 358.

Correct: Lets you correct an existing actual entry. For more, see *Corrections of Actual Hourly Outside* on page 357 and *Corrections of Actual Hourly Outside (with PO)* on page 360.

New Purchase Hourly Outside: Opens a window where you can add this demand to a purchase order. For more, see *Purchase Hourly Outside* on page 479.

Edit: Lets you edit an existing actual entry. You will *not* be able to change the cost or quantity specified in the entry; for that, you must use **Correct**.

Demand Per Job Outside

A per job outside demand assigns an outside contractor to do some or all of the work associated with a work order. You specify the contractor using a per job outside record; this gives the contractor's name and the per job rate paid by that contractor on this particular type of job. (For more on per job outside records, see *Per Job Outside* on page 265.)

> **Note:** MainBoss has two ways of handling labor expenses: with an hourly rate (where the cost depends on how long the worker takes to do the job) or with a per job rate (where all jobs of a particular type cost the same, no matter how long they take). This section covers per job payments. For more on hourly payments, see *Demand Hourly Outside* on page 341.

To see the Demand Per Job Outside editor, click **New Demand Per Job Outside** in the **Outside** subsection of the **Resources** section of a work order. For more on resources, see *Resources* on page 333.

The Demand Per Job Outside editor contains the following:

Details area: Provides information about the demand.

Work Order: A read-only field identifying the work order.

Per Job Outside: A per job outside record specifying a worker and price paid for the worker on this type of job.

Read-only fields: The editor window contains a number of read-only fields giving information about the per job outside record you've specified. This

information is taken from the per job outside record and from other tables in MainBoss. The read-only fields provide details about labor and relevant price information.

If you have the choice of several workers who might be assigned to the job, changing "**Per Job Outside**" and checking the read-only fields may help you decide who should be assigned to this work order.

> **Per Job Rate**: The worker's cost for this job, as given by the per job outside record.

> **Already used**: A read-only field giving the quantity of work that has already been used on this work order. This amount is set by using **Actualize** on the demand, and recording that a certain amount of work has already been done. For example, suppose that a worker is painting rooms and is paid by the room. If the job requires painting six rooms and the worker finishes three the first day, you can **Actualize** a quantity of three rooms at the end of that day. After you do this, "**Already used**" will show how much work has already been used and actualized.

> **Remaining**: A read-only field giving the amount of demanded work that has not yet been actualized. This is equal to "**Estimated Demand**" minus "**Already used**".

Estimated Demand: The total amount of work the worker is expected to spend on this job.

Calculated Cost: Read-only fields giving the expected cost of the demanded work, based on the worker's per job rate. The "**Unit Cost**" column gives the cost per unit job and the "**Cost**" column gives the total cost.

Use calculated cost: If you checkmark this box, MainBoss will fill in "**Estimated Cost**" with the values given in "**Calculated Cost**". If you don't want to use the calculated cost, leave the checkbox blank and enter an appropriate cost in "**Estimated Cost**".

Estimated Cost: Can be filled in if you expect the cost to be different than "**Calculated Cost**" (e.g. if you have to pay the worker more because of the job is being done on a holiday). You can enter a per job rate under "**Unit Cost**" or the total cost under "**Cost**".

Actual default: Specifies the default method for calculating costs when someone creates an "actual per job outside" in response to this demand. If the person who records the actual cost has sufficient security permissions, he or she can specify the cost in a different way. However, if the person who records the actual cost does not have permission to specify costs, what you specify on this demand determines the cost that MainBoss will use. Possible options are:

Manual entry: If you choose this option, you expect the person who actualizes this demand to have appropriate security permissions to specify the actual cost of the work.

Current value calculation: If you choose this option, the default is to calculate actual costs from the original per job outside record.

Demand estimate: If you choose this option, the default is to use the "**Estimated Cost**" in this window as a basis for the actual cost.

Expense Category: The expense category to which this expense belongs. For more on expense categories, see *Expense Categories* on page 248.

Actuals section: Records what the work order actually used (as opposed to the preliminary estimates given in the **Details** section). The **Actuals** section also lets you correct any mistakes made in previous "actual" entries.

List: The central part of the window is a list of "actual" entries, specifying actual per job outside labor expenses on this work order.

New Actual Per Job Outside: Lets you record an actual labor expense for this work order. For more information, see *Actual Per Job Outside* on page 361.

New Actual Per Job Outside (with PO): Lets you record an actual labor expense that appears on an associated purchase order. For more information, see *Actual Per Job Outside (with PO)* on page 364.

Correct: Lets you correct an existing actual entry. For more, see *Corrections of Actual Per Job Outside* on page 363 and *Corrections of Actual Per Job Outside (with PO)* on page 366.

New Purchase Per Job Outside: Opens a window where you can add this demand to a purchase order. For more, see *Purchase Per Job Outside* on page 482.

Edit: Lets you edit an existing actual entry. You will *not* be able to change the cost or quantity specified in the entry; for that, you must use **Correct**.

Demand Miscellaneous

A miscellaneous demand specifies a cost that is neither for labor or for directly used materials. For example, it may deal with equipment rentals or with expenses paid out of the worker's pocket (e.g. parking). For more on miscellaneous costs, see *Work Order Miscellaneous* on page 271.

Note: There is no connection between purchase order miscellaneous items and work order miscellaneous items. A purchase order miscellaneous item is typically an extra cost associated with the act of purchasing (e.g. sales tax). A work order miscellaneous item is typically an extra cost associated with doing a job (e.g. parking for a worker).

To see the Demand Miscellaneous editor, click **New Demand Miscellaneous Cost** in the **Miscellaneous** subsection of the **Resources** section of a work order. For more on resources, see *Resources* on page 333.

The Demand Miscellaneous editor contains the following:

Details area: Provides information about the demand.

Work Order: A read-only field identifying the work order.

Miscellaneous Cost: A miscellaneous cost record specifying the nature of the expense, the cost center, and the expected cost.

Suggested cost: A read-only field giving the cost from the miscellaneous cost record.

Use suggested cost: If you checkmark this box, MainBoss will fill in "**Estimated Cost**" with the value given in "**Suggested cost**". If you don't want to use the suggested cost, leave the checkbox blank and enter an appropriate cost in "**Estimated Cost**".

Estimated Cost: Can be filled in if you expect the cost to be different than "**Suggested Cost**". (In many cases, the miscellaneous cost record won't specify a suggested cost, because miscellaneous costs tend to vary from job to job.)

Actual default: Specifies the default method for calculating costs when someone creates an "actual miscellaneous cost" record in response to this demand. If the person who records the actual cost has sufficient security permissions, he or she can specify the cost in a different way. However, if the person who records the actual cost does not have permission to specify costs, what you specify on this demand determines the cost that MainBoss will use. Possible options are:

Manual entry: If you choose this option, you expect the person who actualizes this demand to have appropriate security permissions to specify the actual cost of the work.

Current value calculation: If you choose this option, the default is to calculate actual costs from the original miscellaneous cost record.

Demand estimate: If you choose this option, the default is to use the "**Estimated Cost**" in this window as a basis for the actual cost.

Expense Category: The expense category to which this expense belongs. For more on expense categories, see *Expense Categories* on page 248.

Actuals section: Records what the work order actually used (as opposed to the preliminary estimates given in the **Details** section). The **Actuals** section also lets you correct any mistakes made in previous "actual" entries.

List: The central part of the window is a list of "actual" entries, specifying actual miscellaneous costs on this work order.

New Actual Miscellaneous Cost: Lets you record an actual labor expense for this work order. For more information, see *Actual Miscellaneous* on page 367.

Correct: Lets you correct an existing actual entry. For more, see *Corrections of Actual Miscellaneous* on page 368.

Edit: Lets you edit an existing actual entry. You will *not* be able to change the cost or quantity specified in the entry; for that, you must use **Correct**.

Actual Item

To record the use of materials in connection with a work order, you use the **Items** subsection of the **Resources** section of the work order. First, you create a demand for each item you expect to use (for more, see *Demand Item* on page 334). Then when you actually use an item, select the corresponding Demand Item from the list of resources and click **Actualize**. This opens a window where you can record the item use:

Entry Date: A read-only field giving the date that this record was created.

Effective Date: The date/time when you want to say the item was used. By default, this is set to the current date/time.

Creator: A read-only field giving your user name. This will appear in MainBoss's accounting history to show who did the actualization.

Read-only fields: Provide information from the original demand and from storeroom assignment records.

Use all remaining demand: If you checkmark this box, MainBoss completes the record to indicate that you used the quantity listed under "**Remaining Demand**". If you leave the box blank, you will have to fill in "**Quantity**" yourself.

Quantity: The quantity of the item that you actually used.

On Hand, **Calculated On Hand Cost**: The quantity of the item present in the specified location and the costs associated with that quantity.

Demand Estimated, **Demand Estimated Cost**: The estimated quantity and cost stated in the original demand.

Manually Enter Cost: If you select this option, you must enter the actual cost of the item(s) used in "**This Entry**".

Use calculated On Hand cost: If you select this option, "**This Entry**" will be set to the cost of the item(s) as taken from inventory records.

Use demand estimated cost: If you select this option, "**This Entry**" will be set to the cost of the item(s) as given in the original estimated demand.

This Entry: The actual cost of the quantity used. This will be read-only unless you selected **Manually Enter Cost**.

As Corrected: Will be the same as "**This Entry**" unless you have made a correction to this record after it was originally created.

From Cost Center, **To Cost Center**: Read-only fields telling the cost centers involved in this operation. MainBoss creates accounting records indicating the transfer of money from the first cost center to the second. These fields are only visible if your database has an **Accounting** license key. For more, see *Accounting Facilities* on page 21.

When you don't have permissions to see item costs: Your security roles may permit you to record actual item usage but not to view the costs of items. In this case, MainBoss automatically assigns costs to the items used.

☐ If MainBoss intends to use the cost given in the original demand, MainBoss marks the **Use demand estimated cost** option.

☐ If MainBoss intends to use the cost specified in the item record, MainBoss marks the **Use calculated On Hand cost** option.

Corrections of Actual Items

To correct an Actual Item record, you start in the **Items** subsection of the **Resources** section of the work order. Select the demand corresponding to the Actual Item you want to correct. Click **Edit** to open the Demand Item record. Go to the **Actuals** section of that record, click on the Actual Item entry you want to correct, then click **Correct**. This opens a window where you can correct the record:

Entry Date: A read-only field giving the date that this record was created.

Effective Date: The date/time when the item was used.

Creator: A read-only field giving your user name. This will appear in MainBoss's accounting history to show who made the correction.

Read-only fields: Provide information from the original demand and from storeroom assignment records.

Use all remaining demand: If you checkmark this box, MainBoss completes the record to indicate that you used the quantity listed under "**Remaining Demand**". If you leave the box blank, you will have to fill in "**Quantity**" yourself.

Quantity: Corrects the quantity actually used. Typically, you fill in the "**As Corrected**" field with the actual quantity used—the correct quantity, as opposed

to the quantity you originally recorded. The alternative is to fill in "**This Entry**" with the difference between the quantity you originally entered and the true quantity.

For example, suppose you really used 3 but you accidentally typed 1 in the original record. You could fill in "**As Corrected**" with 3 (the correct number) or fill in "**This Entry**" with 2 (the difference between what you originally typed and the true quantity). Note that "**This Entry**" may be a negative number if you originally typed in too much.

If you fill in "**As Corrected**", MainBoss automatically sets "**This Entry**" and vice versa. (Note that the "**As Corrected**" quantity may be the same as the original quantity, if you're correcting the cost, not the quantity.)

On Hand, **Calculated On Hand Cost**: The quantity of the item present in the specified location and the costs associated with that quantity.

Demand Estimated, **Demand Estimated Cost**: The estimated quantity and cost stated in the original demand.

Manually Enter Cost: If you select this option, you must enter the actual cost of the item(s) used in "**This Entry**" or "**As Corrected**".

Use calculated On Hand cost: If you select this option, the costs in "**This Entry**" and "**As Corrected**" will be set using the cost of the item(s) as taken from inventory records.

Use demand estimated cost: If you select this option, the costs in "**This Entry**" and "**As Corrected**" will be set using the cost of the item(s) as given in the original estimated demand.

This Entry, **As Corrected**: Corrects the actual cost (if necessary). Typically, you fill in "**As Corrected**" with the correct cost of the correct quantity. The alternative is to fill in "**This Entry**" with the difference between the cost you originally entered and the true cost.

If you fill in "**As Corrected**", MainBoss automatically sets "**This Entry**" and vice versa.

From Cost Center, **To Cost Center**: Read-only fields telling the cost centers involved in this operation. MainBoss creates accounting records indicating the transfer of money from the first cost center to the second. These fields are only visible if your database has an **Accounting** license key. For more, see *Accounting Facilities* on page 21.

Actual Hourly Inside

An Actual Hourly Inside record specifies that one of your personnel worked on a particular job, with the work paid at an hourly rate. You identify the worker by

specifying an hourly inside record; this record gives the worker's name and hourly rate. (For more on hourly inside records, see *Hourly Inside* on page 257.)

The usual way to reach the Actual Hourly Inside editor is to select a Demand Hourly Inside in the **Inside** subsection of the **Resources** section of a work order, then click **Actualize**. (For more on hourly inside demands, see *Demand Hourly Inside* on page 336.)

A single hourly inside demand can produce multiple Actual Hourly Inside records. For example, suppose the original Demand Hourly Inside estimates that a job will take eight hours. You might do four hours one day and four hours the next. In this case, you could create two Actual Hourly Inside records: one for the first four hours, and one for the next. Each of these records would have "**Hours**" set to 4:00. In general, if a job takes place over several days, it's up to you whether to create a separate Actual Hourly Inside record for each day, or a single Actual Hourly Inside record covering the whole job.

The Actual Hourly Inside editor contains the following:

Entry Date: A read-only field giving the date that this record was created.

Effective Date: The date/time when the work was done. By default, this is set to the current date/time.

Creator: A read-only field giving your user name. This will appear in MainBoss's accounting history to show who did the actualization.

Read-only fields: Provide information relevant to the job. This includes the work order number, the estimated time required and the time already actualized.

Use all remaining demand: If you checkmark this box, MainBoss completes the record to indicate that you used the time listed under "**Remaining Demand**". If you leave the box blank, you will have to fill in this information yourself.

Hours: The time under "**This Entry**" gives the number of hours actually used.

Calculated Labor Cost: Read-only fields giving the expected cost of the time worked.

Demand Estimated, **Demand Estimated Cost**: The estimated hours and cost stated in the original demand.

Manually Enter Cost: If you select this option, you must enter the actual cost of the labor in "**This Entry**".

Use calculated labor cost: If you select this option, "**This Entry**" will be set to the cost of the labor as taken from the chosen hourly inside record.

Use demand estimated cost: If you select this option, "**This Entry**" will be set to the cost of the labor as given in the original estimated demand.

This Entry: The actual cost of the labor used. This will be read-only unless you select **Manually Enter Cost**.

As Corrected: Will be the same as "**This Entry**" unless you have made a correction to this record after it was originally created.

From Cost Center, **To Cost Center**: Read-only fields telling the cost centers involved in this operation. MainBoss creates accounting records indicating the transfer of money from the first cost center to the second. These fields are only visible if your database has an **Accounting** license key. For more, see *Accounting Facilities* on page 21.

When you don't have permissions to see labor costs: Your security roles may permit you to record a worker's actual hours but not to view the costs of that person's work. In this case, MainBoss automatically assigns costs to the labor.

☐ If MainBoss intends to use the cost given in the original demand, MainBoss marks the **Use demand estimated cost** option.

☐ If MainBoss intends to use the cost specified in the hourly inside record, MainBoss marks the **Use calculated labor cost** option.

Corrections of Actual Hourly Inside

To correct an Actual Hourly Inside record, you start in the **Inside** subsection of the **Resources** section of the work order. Select the demand corresponding to the Actual Hourly Inside you want to correct. Click **Edit** to open the Demand Hourly Inside record. Go to the **Actuals** section of that record, click on the Actual Hourly Inside entry you want to correct, then click **Correct**. This opens a window where you can correct the record:

Entry Date: A read-only field giving the date that this record was created.

Effective Date: The date/time when the work was done.

Creator: A read-only field giving your user name. This will appear in MainBoss's accounting history to show who made the correction.

Read-only fields: Provide information relevant to the job. This includes the work order number, the estimated time required and the time already actualized.

Use all remaining demand: If you checkmark this box, MainBoss completes the record to indicate that you used the time listed under "**Remaining Demand**". If you leave the box blank, you will have to fill in this information yourself.

Hours: Corrects the hours actually used. Typically, you fill in the "**As Corrected**" field with the actual hours—the correct time, as opposed to the time you originally recorded. The alternative is to fill in "**This Entry**" with the difference between the time you originally entered and the true time.

For example, suppose you really used 3:00 hours but you accidentally typed 1:00 in the original record. You could fill in "**As Corrected**" with 3:00 (the correct number) or fill in "**This Entry**" with 2:00 (the difference between what

you originally typed and the true quantity). "**This Entry**" may be a negative number if you originally typed in too much.

If you fill in "**As Corrected**", MainBoss automatically sets "**This Entry**" and vice versa.

Calculated Labor Cost: Read-only fields giving the expected cost of the corrected quantity. The "**Hourly Rate**" column gives the cost per hour and the "**Total Cost**" column gives the total cost.

Demand Estimated, **Demand Estimated Cost**: The estimated hours and cost stated in the original demand.

Manually Enter Cost: If you select this option, you must enter the actual cost of the labor in "**This Entry**" or "**As Corrected**".

Use calculated labor cost: If you select this option, the costs in "**This Entry**" and "**As Corrected**" will be set using the labor cost given in the original hourly inside record.

Use demand estimated cost: If you select this option, the costs in "**This Entry**" and "**As Corrected**" will be set using the labor cost given in the original estimated demand.

This Entry, **As Corrected**: Corrects the actual cost (if necessary). Typically, you fill in "**As Corrected**" with the correct cost of the correct number of hours. The alternative is to fill in "**This Entry**" with the difference between the cost you originally entered and the true cost.

If you fill in "**As Corrected**", MainBoss automatically sets "**This Entry**" and vice versa.

From Cost Center, **To Cost Center**: Read-only fields telling the cost centers involved in this operation. MainBoss creates accounting records indicating the transfer of money from the first cost center to the second. These fields are only visible if your database has an **Accounting** license key. For more, see *Accounting Facilities* on page 21.

Actual Per Job Inside

An Actual Per Job Inside record specifies that one of your personnel worked on a particular job, with the work paid at a per job rate. You identify the worker by specifying a per job inside record; this record gives the worker's name and rate for this job. (For more on per job inside records, see *Per Job Inside* on page 263.)

The usual way to reach the Actual Per Job Inside editor is to select a Demand Per Job Inside in the **Inside** subsection of the **Resources** section of a work order, then click the **Actualize** button. (For more on per job inside demands, see *Demand Per Job Inside* on page 339.)

A single per job inside demand can produce multiple Actual Per Job Inside records. For example, suppose the original Demand Per Job Inside specifies painting four rooms, with a per job rate for painting each room. You might paint two rooms one day and two rooms the next. In this case, you could create two Actual Per Job Inside records: one for the first two rooms, and one for the next. Each of these records would have "**Quantity**" set to 2 (for two rooms). In general, if a job takes place over several days, it's up to you whether to create a separate Actual Per Job Inside record for each day, or a single Actual Per Job Inside record covering the whole job.

The Actual Per Job Inside editor contains the following:

Entry Date: A read-only field giving the date that this record was created.

Effective Date: The date/time when the work was done. By default, this is set to the current date/time.

Creator: A read-only field giving your user name. This will appear in MainBoss's accounting history to show who did the actualization.

Read-only fields: Provide information relevant to the job. This includes the work order number, the estimated "per job" units required and the units already actualized.

Use all remaining demand: If you checkmark this box, MainBoss completes the record to indicate that you used the time listed under "**Remaining Demand**". If you leave the box blank, you will have to fill in this information yourself.

Quantity: The quantity under "**This Entry**" gives the number of job units actually performed.

Calculated Job Cost: Read-only fields giving the expected cost of the work done.

Manually Enter Cost: If you select this option, you must enter the actual cost of the labor in "**This Entry**".

Use calculated job cost: If you select this option, "**This Entry**" will be set to the cost of the labor as taken from the chosen per job inside record.

Use demand estimated cost: If you select this option, "**This Entry**" will be set to the cost of the labor as given in the original estimated demand.

This Entry: The actual cost of the labor used. This will be read-only unless you selected **Manually Enter Cost**.

As Corrected: Will be the same as "**This Entry**" unless you have made a correction to this record after it was originally created.

From Cost Center, **To Cost Center**: Read-only fields telling the cost centers involved in this operation. MainBoss creates accounting records indicating the transfer of money from the first cost center to the second. These fields are only visible if your database has an **Accounting** license key. For more, see *Accounting Facilities* on page 21.

When you don't have permissions to see labor costs: Your security roles may permit you to record a worker's actual quantity of work but not to view the costs of that person's work. In this case, MainBoss automatically assigns costs to the labor.

☐ If MainBoss intends to use the cost given in the original demand, MainBoss marks the **Use demand estimated cost** option.

☐ If MainBoss intends to use the cost specified in the per job inside record, MainBoss marks the **Use calculated job cost** option.

Corrections of Actual Per Job Inside

To correct an Actual Per Job Inside record, you start in the **Inside** subsection of the **Resources** section of the work order. Select the demand corresponding to the Actual Per Job Inside you want to correct. Click **Edit** to open the Demand Per Job Inside record. Go to the **Actuals** section of that record, click on the Actual Per Job Inside entry you want to correct, then click **Correct**. This opens a window where you can correct the record:

Entry Date: A read-only field giving the date that this record was created.

Effective Date: The date/time when the work was done.

Creator: A read-only field giving your user name. This will appear in MainBoss's accounting history to show who made the correction.

Read-only fields: Provide information relevant to the job. This includes the work order number, the estimated "per job" units required and the units already actualized.

Use all remaining demand: If you checkmark this box, MainBoss completes the record to indicate that you did the work listed under "**Remaining Demand**". If you leave the box blank, you will have to fill in this information yourself.

Quantity: Corrects the quantity of work actually done. Typically, you fill in the "**As Corrected**" field with the work quantity—the correct quantity, as opposed to what you originally recorded. The alternative is to fill in "**This Entry**" with the difference between the quantity you originally entered and the true quantity.

For example, suppose the worker really did 3 units of work but you accidentally typed 1 in the original record. You could fill in "**As Corrected**" with 3 (the correct number) or fill in "**This Entry**" with 2 (the difference between what you originally typed and the true quantity). "**This Entry**" may be a negative number if you originally typed in too much.

If you fill in "**As Corrected**", MainBoss automatically sets "**This Entry**" and vice versa.

Calculated Job Cost: Read-only fields giving the expected cost of the corrected quantity. The "**Unit Cost**" column gives the cost per job and the "**Total Cost**" column gives the total cost.

Demand Estimated, **Demand Estimated Cost**: The estimated quantity and cost stated in the original demand.

Manually Enter Cost: If you select this option, you must enter the actual cost of the labor in "**This Entry**" or "**As Corrected**".

Use calculated job cost: If you select this option, the costs in "**This Entry**" and "**As Corrected**" will be set using the labor cost given in the original per job inside record.

Use demand estimated cost: If you select this option, the costs in "**This Entry**" and "**As Corrected**" will be set using the labor cost given in the original estimated demand.

This Entry, **As Corrected**: Corrects the actual cost (if necessary). Typically, you fill in "**As Corrected**" with the correct cost of the correct work quantity. The alternative is to fill in "**This Entry**" with the difference between the cost you originally entered and the true cost.

If you fill in "**As Corrected**", MainBoss automatically sets "**This Entry**" and vice versa.

From Cost Center, **To Cost Center**: Read-only fields telling the cost centers involved in this operation. MainBoss creates accounting records indicating the transfer of money from the first cost center to the second. These fields are only visible if your database has an **Accounting** license key. For more, see *Accounting Facilities* on page 21.

Actual Hourly Outside

An Actual Hourly Outside record specifies that an outside contractor worked on a particular job, with the work paid at an hourly rate. You identify the contractor by specifying an hourly outside record; this record gives the contractor's name and hourly rate. (For more on hourly outside records, see *Hourly Outside* on page 260.)

The usual way to reach the Actual Hourly Outside editor is to select a Demand Hourly Outside in the **Outside** subsection of the **Resources** section of a work order, then click the **Actualize** button. (For more on hourly outside demands, see *Demand Hourly Outside* on page 341.)

A single hourly outside demand can produce multiple Actual Hourly Outside records. For example, suppose the original Demand Hourly Outside estimates that a job will take eight hours. The contractor might do four hours one day and four hours the next. In this case, you could create two Actual Hourly Outside records: one for the first four hours, and one for the next. Each of these records would have "**Quantity**" set to 4:00. In

general, if a job takes place over several days, it's up to you whether to create a separate Actual Hourly Outside record for each day, or a single Actual Hourly Outside record covering the whole job.

The Actual Hourly Outside editor contains the following:

Entry Date: A read-only field giving the date that this record was created.

Effective Date: The date/time when the work was done. By default, this is set to the current date/time.

Creator: A read-only field giving your user name. This will appear in MainBoss's accounting history to show who did the actualization.

Read-only fields: Provide information relevant to the job. This includes the work order number, the estimated time required and the time already actualized.

Vendor: The contractor who did the work. For more on vendors, see *Vendors* on page 230.

Hours: Read-only fields listing the hours originally demanded and the hours that have already been actualized.

Use all remaining demand: If you checkmark this box, MainBoss completes the record to indicate that you used the time listed under "**Remaining Demand**". If you leave the box blank, you will have to fill in this information yourself.

Hours: The time under "**This Entry**" gives the number of hours actually used.

Calculated Labor Cost: Read-only fields giving the expected cost of the time worked.

Demand Estimated, **Demand Estimated Cost**: The estimated quantity and cost stated in the original demand.

Manually Enter Cost: If you select this option, you must enter the actual cost of the labor in "**This Entry**".

Use calculated labor cost: If you select this option, "**This Entry**" will be set to the cost of the labor as taken from the chosen hourly outside record.

Use demand estimated cost: If you select this option, "**This Entry**" will be set to the cost of the labor as given in the original estimated demand.

This Entry: The actual cost of the labor used. This will be read-only unless you select **Manually Enter Cost**.

As Corrected: Will be the same as "**This Entry**" unless you have made a correction to this record after it was originally created.

From Cost Center, **To Cost Center**: Read-only fields telling the cost centers involved in this operation. MainBoss creates accounting records indicating the transfer of money from the first cost center to the second. These fields are only

visible if your database has an **Accounting** license key. For more, see *Accounting Facilities* on page 21.

When you don't have permissions to see labor costs: Your security roles may permit you to record a worker's actual hours but not to view the costs of that person's work. In this case, MainBoss automatically assigns costs to the labor.

☐ If MainBoss intends to use the cost given in the original demand, MainBoss marks the **Use demand estimated cost** option.

☐ If MainBoss intends to use the cost specified in the hourly outside record, MainBoss marks the **Use calculated labor cost** option.

Corrections of Actual Hourly Outside

To correct an Actual Hourly Outside record, you start in the **Outside** subsection of the **Resources** section of the work order. Select the demand corresponding to the Actual Hourly Outside you want to correct. Click **Edit** to open the Demand Hourly Outside record. Go to the **Actuals** section of that record, click on the Actual Hourly Outside entry you want to correct, then click **Correct**. This opens a window where you can correct the record:

Entry Date: A read-only field giving the date that this record was created.

Effective Date: The date/time when the work was done.

Creator: A read-only field giving your user name. This will appear in MainBoss's accounting history to show who made the correction.

Read-only fields: Provide information relevant to the job. This includes the work order number, the estimated time required and the time already actualized.

Use all remaining demand: If you checkmark this box, MainBoss completes the record to indicate that you used the time listed under "**Remaining Demand**". If you leave the box blank, you will have to fill in this information yourself.

Hours: Corrects the hours actually used. Typically, you fill in the "**As Corrected**" field with the actual hours—the correct time, as opposed to the time you originally recorded. The alternative is to fill in "**This Entry**" with the difference between the time you originally entered and the true time.

For example, suppose you really used 3:00 hours but you accidentally typed 1:00 in the original record. You could fill in "**As Corrected**" with 3:00 (the correct number) or fill in "**This Entry**" with 2:00 (the difference between what you originally typed and the true quantity). "**This Entry**" may be a negative number if you originally typed in too much.

If you fill in "**As Corrected**", MainBoss automatically sets "**This Entry**" and vice versa.

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Calculated Labor Cost: Read-only fields giving the expected cost of the corrected quantity. The "**Hourly Rate**" column gives the cost per hour and the "**Total Cost**" column gives the total cost.

Demand Estimated, **Demand Estimated Cost**: The estimated hours and cost stated in the original demand.

Manually Enter Cost: If you select this option, you must enter the actual cost of the labor in "**This Entry**" or "**As Corrected**".

Use calculated labor cost: If you select this option, the costs in "**This Entry**" and "**As Corrected**" will be set using the labor cost given in the original hourly outside record.

Use demand estimated cost: If you select this option, the costs in "**This Entry**" and "**As Corrected**" will be set using the labor cost given in the original estimated demand.

This Entry, **As Corrected**: Corrects the actual cost (if necessary). Typically, you fill in "**As Corrected**" with the correct cost of the correct number of hours. The alternative is to fill in "**This Entry**" with the difference between the cost you originally entered and the true cost.

If you fill in "**As Corrected**", MainBoss automatically sets "**This Entry**" and vice versa.

From Cost Center, **To Cost Center**: Read-only fields telling the cost centers involved in this operation. MainBoss creates accounting records indicating the transfer of money from the first cost center to the second. These fields are only visible if your database has an **Accounting** license key. For more, see *Accounting Facilities* on page 21.

Actual Hourly Outside (with PO)

An Actual Hourly Outside record specifies that an outside contractor worked on a particular job, with the work paid at an hourly rate. You identify the contractor by specifying an hourly outside record; this record gives the contractor's name and hourly rate. (For more on hourly outside records, see *Hourly Outside* on page 260.)

If a work order has an attached *issued* purchase order for the contractor's services, you can go to the **Outside** subsection of the **Resources** section of a work order, click on a corresponding "purchase hourly outside" record, and then click **New Actual Hourly Outside (with PO)**. MainBoss opens a window to let you record what work actually took place. (The purchase order *must* be in the issued state.)

A single hourly outside demand can produce multiple Actual Hourly Outside records. For example, suppose the original Demand Hourly Outside estimates that a job will take eight hours. The contractor might do four hours one day and four hours the next. In this case, you could create two Actual Hourly Outside records: one for the first four hours,

and one for the next. Each of these records would have "**Quantity**" set to `4:00`. In general, if a job takes place over several days, it's up to you whether to create a separate Actual Hourly Outside record for each day, or a single Actual Hourly Outside record covering the whole job.

The Actual Hourly Outside (with PO) editor contains the following:

Entry Date: A read-only field giving the date that this record was created.

Effective Date: The date/time when the work was done. By default, this is set to the current date/time.

Creator: A read-only field giving your user name. This will appear in MainBoss's accounting history to show who did the actualization.

Read-only fields: Provide information relevant to the job. This includes the purchase order number and the vendor.

Receipt: A receipt to be used for recording that the labor was actually received. For more, see *Receipts* on page 491

Read-only fields: Provide more information relevant to the job. This includes the work order number and the quantity of work that was specified in the original demand/purchase entries.

Use Order Remaining Quantity: If you checkmark this box, MainBoss completes the record to indicate that you used the time listed under "**Order Remaining**". If you leave the box blank, you will have to fill in this information yourself.

Hours: If you have not checkmarked **Use Order Remaining Quantity**, fill in "**Hours**" with the time actually spent.

Read-only fields: Provide cost information from the original hourly outside record and the demand.

Manually Enter Cost: If you select this option, you must enter the actual cost of the work in "**This Entry**".

Use calculated remaining order cost: If you select this option, "**This Entry**" will be set to the cost of the work as taken from the original hourly outside record.

Use demand estimated cost: If you select this option, "**This Entry**" will be set to the cost given in the original demand (stated in "**Demand Estimated Cost**").

This Entry: The actual cost of the quantity used. This will be read-only unless you selected **Manually Enter Cost**.

As Corrected: Will be the same as "**This Entry**" unless you have made a correction to this record after it was originally created.

From Cost Center, **To Cost Center**: Read-only fields telling the cost centers involved in this operation. MainBoss creates accounting records indicating the transfer of money from the first cost center to the second. These fields are only

visible if your database has an **Accounting** license key. For more, see *Accounting Facilities* on page 21.

When you don't have permissions to see labor costs: Your security roles may permit you to record a worker's actual hours but not to view the costs of that person's work. In this case, MainBoss automatically assigns costs to the labor.

☐ If MainBoss intends to use the cost given in the original demand, MainBoss marks the **Use demand estimated cost** option.

☐ If MainBoss intends to use the cost specified in the hourly outside record, MainBoss marks the **Use calculated remaining order cost** option.

Corrections of Actual Hourly Outside (with PO)

To correct an Actual Hourly Outside (with PO) record, you start in the **Outside** subsection of the **Resources** section of the work order. Select the demand corresponding to the Actual Hourly Outside you want to correct. Click **Edit** to open the Demand Hourly Outside record. Go to the **Actuals** section of that record, click on the Actual Hourly Outside entry you want to correct, then click **Correct**. This opens a window where you can correct the record:

Entry Date: A read-only field giving the date that this record was created.

Effective Date: The date/time when the work was done.

Creator: A read-only field giving your user name. This will appear in MainBoss's accounting history to show who made the correction.

Read-only fields: Provide information relevant to the job. This includes the purchase order number, work order number, and the amount of time remaining to be accounted for.

Use Order Remaining Quantity: If you checkmark this box, MainBoss completes the record to indicate that you used the time listed under "**Order Remaining**". If you leave the box blank, you will have to fill in this information yourself.

Hours: Corrects the hours actually spent on the work. Typically, you fill in the "**As Corrected**" field with the actual hours—the correct number, as opposed to what you originally recorded. The alternative is to fill in "**This Entry**" with the difference between the hours you originally entered and the true amount.

For example, suppose you really used 3:00 but you accidentally typed 1:00 in the original record. You could fill in "**As Corrected**" with 3:00 (the correct time) or fill in "**This Entry**" with 2:00 (the difference between what you originally typed and the true amount). "**This Entry**" may be a negative number if you originally typed in too much.

If you fill in "**As Corrected**", MainBoss automatically sets "**This Entry**" and vice versa.

Calculated Remaining Order Cost: Read-only fields giving the expected cost of the corrected quantity. The "**Hourly Rate**" column gives the cost per hour and the "**Total Cost**" column gives the total cost.

Demand Estimated, **Demand Estimated Cost**: The estimated hours and cost stated in the original demand.

Manually Enter Cost: If you select this option, you must enter the actual cost of the labor in "**This Entry**" or "**As Corrected**".

Use calculated labor cost: If you select this option, the costs in "**This Entry**" and "**As Corrected**" will be set using the labor cost given in the original hourly outside record.

Use demand estimated cost: If you select this option, the costs in "**This Entry**" and "**As Corrected**" will be set using the labor cost given in the original estimated demand.

This Entry, **As Corrected**: Corrects the actual cost (if necessary). Typically, you fill in "**As Corrected**" with the correct cost of the correct number of hours. The alternative is to fill in "**This Entry**" with the difference between the cost you originally entered and the true cost.

If you fill in "**As Corrected**", MainBoss automatically sets "**This Entry**" and vice versa.

From Cost Center, **To Cost Center**: Read-only fields telling the cost centers involved in this operation. MainBoss creates accounting records indicating the transfer of money from the first cost center to the second. These fields are only visible if your database has an **Accounting** license key. For more, see *Accounting Facilities* on page 21.

Actual Per Job Outside

An Actual Per Job Outside record specifies that an outside contractor worked on a particular job, with the work paid at a per job rate. You identify the contractor by specifying a per job outside record; this record gives the contractor's name and rate for this job. (For more on per job outside records, see *Per Job Outside* on page 265.)

The usual way to reach the Actual Per Job Outside editor is to select a Demand Per Job Outside in the **Outside** subsection of the **Resources** section of a work order, then click the **Actualize** button. (For more on per job outside demands, see *Demand Per Job Outside* on page 343.)

A single per job outside demand can produce multiple Actual Per Job Outside records. For example, suppose the original Demand Per Job Outside specifies painting four rooms, with a per job rate for painting each room. The contractor might paint two rooms one day and two rooms the next. In this case, you could create two Actual Per Job Outside records: one for the first two rooms, and one for the next. Each of these records

would have "**Quantity**" set to 2 (for two rooms). In general, if a job takes place over several days, it's up to you whether to create a separate Actual Per Job Outside record for each day, or a single Actual Per Job Outside record covering the whole job.

The Actual Per Job Outside editor contains the following:

Entry Date: A read-only field giving the date that this record was created.

Effective Date: The date/time when the work was done. By default, this is set to the current date/time.

Creator: A read-only field giving your user name. This will appear in MainBoss's accounting history to show who did the actualization.

Read-only fields: Provide information relevant to the job. This includes the work order number and the "per job" rate of the contractor.

Vendor: The contractor who did the work. For more on vendors, see *Vendors* on page 230.

Quantity: Read-only fields listing the quantity of work originally demanded and the quantity that has already been actualized.

Use all remaining demand: If you checkmark this box, MainBoss completes the record to indicate that you are actualizing the amount of work listed under "**Remaining Demand**". If you leave the box blank, you will have to fill in this information yourself.

Quantity: The value under "**This Entry**" gives the amount of work actually done.

Calculated Job Cost: Read-only fields giving the expected cost of the work done.

Demand Estimated, **Demand Estimated Cost**: The estimated quantity and cost stated in the original demand.

Manually Enter Cost: If you select this option, you must enter the actual cost of the labor in "**This Entry**".

Use calculated job cost: If you select this option, "**This Entry**" will be set to the cost of the labor as taken from the chosen per job outside record.

Use demand estimated cost: If you select this option, "**This Entry**" will be set to the cost of the labor as given in the original estimated demand.

This Entry: The actual cost of the labor. This will be read-only unless you select **Manually Enter Cost**.

As Corrected: Will be the same as "**This Entry**" unless you have made a correction to this record after it was originally created.

From Cost Center, **To Cost Center**: Read-only fields telling the cost centers involved in this operation. MainBoss creates accounting records indicating the transfer of money from the first cost center to the second. These fields are only

visible if your database has an **Accounting** license key. For more, see *Accounting Facilities* on page 21.

When you don't have permissions to see labor costs: Your security roles may permit you to record a worker's actual quantity of work but not to view the costs of that person's work. In this case, MainBoss automatically assigns costs to the labor.

☐ If MainBoss intends to use the cost given in the original demand, MainBoss marks the **Use demand estimated cost** option.

☐ If MainBoss intends to use the cost specified in the per job outside record, MainBoss marks the **Use calculated labor cost** option.

Corrections of Actual Per Job Outside

To correct an Actual Per Job Outside record, you start in the **Outside** subsection of the **Resources** section of the work order. Select the demand corresponding to the Actual Per Job Outside you want to correct. Click **Edit** to open the Demand Per Job Outside record. Go to the **Actuals** section of that record, click on the Actual Per Job Outside entry you want to correct, then click **Correct**. This opens a window where you can correct the record:

Entry Date: A read-only field giving the date that this record was created.

Effective Date: The date/time when the work was done.

Creator: A read-only field giving your user name. This will appear in MainBoss's accounting history to show who made the correction.

Read-only fields: Provide information relevant to the job. This includes the work order number, the estimated "per job" units required and the units already actualized.

Use all remaining demand: If you checkmark this box, MainBoss completes the record to indicate that you did the work listed under "**Remaining Demand**". If you leave the box blank, you will have to fill in this information yourself.

Quantity: Corrects the quantity of work actually done. Typically, you fill in the "**As Corrected**" field with the work quantity—the correct quantity, as opposed to what you originally recorded. The alternative is to fill in "**This Entry**" with the difference between the quantity you originally entered and the true quantity.

For example, suppose the worker really did 3 units of work but you accidentally typed 1 in the original record. You could fill in "**As Corrected**" with 3 (the correct number) or fill in "**This Entry**" with 2 (the difference between what you originally typed and the true quantity). "**This Entry**" may be a negative number if you originally typed in too much.

If you fill in "**As Corrected**", MainBoss automatically sets "**This Entry**" and vice versa.

Calculated Job Cost: Read-only fields giving the expected cost of the corrected quantity. The "**Unit Cost**" column gives the cost per job and the "**Total Cost**" column gives the total cost.

Demand Estimated, **Demand Estimated Cost**: The estimated quantity and cost stated in the original demand.

Manually Enter Cost: If you select this option, you must enter the actual cost of the labor in "**This Entry**" or "**As Corrected**".

Use calculated job cost: If you select this option, the costs in "**This Entry**" and "**As Corrected**" will be set using the labor cost given in the original per job outside record.

Use demand estimated cost: If you select this option, the costs in "**This Entry**" and "**As Corrected**" will be set using the labor cost given in the original estimated demand.

This Entry, **As Corrected**: Corrects the actual cost (if necessary). Typically, you fill in "**As Corrected**" with the correct cost of the correct work quantity. The alternative is to fill in "**This Entry**" with the difference between the cost you originally entered and the true cost.

If you fill in "**As Corrected**", MainBoss automatically sets "**This Entry**" and vice versa.

From Cost Center, **To Cost Center**: Read-only fields telling the cost centers involved in this operation. MainBoss creates accounting records indicating the transfer of money from the first cost center to the second. These fields are only visible if your database has an **Accounting** license key. For more, see *Accounting Facilities* on page 21.

Actual Per Job Outside (with PO)

An Actual Per Job Outside (with PO) record specifies that an outside contractor worked on a particular job, with the work paid at a "per job" rate. You identify the contractor by specifying a per unit outside record; this record gives the contractor's name and "per job" rate. (For more on per job outside records, see *Per Job Outside* on page 265.)

If a work order has an attached *issued* purchase order for the contractor's services, you can go to the **Outside** subsection of the **Resources** section of a work order, click on a corresponding "purchase per job outside" record, and then click **New Actual Per Job Outside (with PO)**. MainBoss opens a window to let you record what work actually took place. (The purchase order *must* be in the issued state.)

A single per job outside demand can produce multiple Actual Per Job Outside records. For example, suppose the original Demand Per Job Outside specifies painting four rooms, with a per job rate for painting each room. The contractor might paint two rooms one day and two rooms the next. In this case, you could create two Actual Per Job

Outside records: one for the first two rooms, and one for the next. Each of these records would have "**Quantity**" set to 2 (for two rooms). In general, if a job takes place over several days, it's up to you whether to create a separate Actual Per Job Outside record for each day, or a single Actual Per Job Outside record covering the whole job.

The Actual Per Job Outside (with PO) editor contains the following:

Entry Date: A read-only field giving the date that this record was created.

Effective Date: The date/time when the work was done. By default, this is set to the current date/time.

Creator: A read-only field giving your user name. This will appear in MainBoss's accounting history to show who did the actualization.

Read-only fields: Provide information relevant to the job. This includes the purchase order number and the vendor.

Receipt: A receipt to be used for recording that the labor was actually received. For more, see *Receipts* on page 491

Read-only fields: Provide more information relevant to the job. This includes the work order number and the quantity of work that was specified in the original demand/purchase entries.

Use Order Remaining Quantity: If you checkmark this box, MainBoss completes the record to indicate that you used the time listed under "**Order Remaining**". If you leave the box blank, you will have to fill in this information yourself.

Quantity: If you have not checkmarked **Use Order Remaining Quantity**, fill in "**Quantity**" with the time actually spent.

Read-only fields: Provide cost information from the original per job outside record and the demand.

Manually Enter Cost: If you select this option, you must enter the actual cost of the work in "**This Entry**".

Use calculated remaining order cost: If you select this option, "**This Entry**" will be set to the cost of the work as taken from the original per job outside record.

Use demand estimated cost: If you select this option, "**This Entry**" will be set to the cost given in the original demand (stated in "**Demand Estimated Cost**").

This Entry: The actual cost of the quantity used. This will be read-only unless you selected **Manually Enter Cost**.

As Corrected: Will be the same as "**This Entry**" unless you have made a correction to this record after it was originally created.

From Cost Center, **To Cost Center**: Read-only fields telling the cost centers involved in this operation. MainBoss creates accounting records indicating the transfer of money from the first cost center to the second. These fields are only

visible if your database has an **Accounting** license key. For more, see
Accounting Facilities on page 21.

Corrections of Actual Per Job Outside (with PO)

To correct an Actual Per Job Outside (with PO) record, you start in the **Outside**
subsection of the **Resources** section of the work order. Select the demand
corresponding to the Actual Per Job Outside you want to correct. Click **Edit** to open the
Demand Per Job Outside record. Go to the **Actuals** section of that record, click on the
Actual Per Job Outside (with PO) entry you want to correct, then click **Correct**. This
opens a window where you can correct the record:

Entry Date: A read-only field giving the date that this record was created.

Effective Date: The date/time when the work was done.

Creator: A read-only field giving your user name. This will appear in MainBoss's
accounting history to show who made the correction.

Read-only fields: Provide information relevant to the job. This includes information
from the work order and purchase order, as well as how much work remains to
be done according to the original estimated demand.

Use order remaining quantity: If you checkmark this box, MainBoss completes
the record to indicate that you did the work listed under "**Order Remaining**". If
you leave the box blank, you will have to fill in this information yourself.

Quantity: Corrects the quantity of work actually done. Typically, you fill in the "**As
Corrected**" field with the work quantity—the correct quantity, as opposed to
what you originally recorded. The alternative is to fill in "**This Entry**" with the
difference between the quantity you originally entered and the true quantity.

For example, suppose the worker really did 3 units of work but you accidentally
typed 1 in the original record. You could fill in "**As Corrected**" with 3 (the
correct number) or fill in "**This Entry**" with 2 (the difference between what you
originally typed and the true quantity). "**This Entry**" may be a negative number
if you originally typed in too much.

If you fill in "**As Corrected**", MainBoss automatically sets "**This Entry**" and
vice versa.

Calculated Remaining Order Cost: Read-only fields giving the expected cost of
the corrected quantity. The "**Unit Cost**" column gives the cost per job and the
"**Total Cost**" column gives the total cost.

Demand Estimated, **Demand Estimated Cost**: The estimated quantity and cost
stated in the original demand.

Manually Enter Cost: If you select this option, you must enter the actual cost of
the labor in "**This Entry**" or "**As Corrected**".

Use calculated remaining order cost: If you select this option, the costs in "**This Entry**" and "**As Corrected**" will be set using the labor cost given in the original per job outside record.

Use demand estimated cost: If you select this option, the costs in "**This Entry**" and "**As Corrected**" will be set using the labor cost given in the original estimated demand.

This Entry, **As Corrected**: Corrects the actual cost (if necessary). Typically, you fill in "**As Corrected**" with the correct cost of the correct work quantity. The alternative is to fill in "**This Entry**" with the difference between the cost you originally entered and the true cost.

If you fill in "**As Corrected**", MainBoss automatically sets "**This Entry**" and vice versa.

From Cost Center, **To Cost Center**: Read-only fields telling the cost centers involved in this operation. MainBoss creates accounting records indicating the transfer of money from the first cost center to the second. These fields are only visible if your database has an **Accounting** license key. For more, see *Accounting Facilities* on page 21.

Actual Miscellaneous

An Actual Miscellaneous record specifies the actual amount of a miscellaneous cost. You specify the cost with a work order miscellaneous record; this record describes the nature of the expense and an expected cost. (For more on miscellaneous costs, see *Work Order Miscellaneous* on page 271.)

The usual way to reach the Actual Miscellaneous editor is to select a Demand Miscellaneous in the **Miscellaneous** subsection of the **Resources** section of a work order, then click the **Actualize** button. (For more on miscellaneous demands, see *Demand Miscellaneous* on page 345.)

The Actual Miscellaneous editor contains the following:

Entry Date: A read-only field giving the date that this record was created.

Effective Date: The date/time when the cost was incurred. By default, this is set to the current date/time.

Creator: A read-only field giving your user name. This will appear in MainBoss's accounting history to show who did the actualization.

Read-only fields: Provide information relevant to the job. This includes the work order number and the estimated cost from the demand.

Demand Estimated Cost: The estimated cost that was stated in the original demand.

Manually Enter Cost: If you select this option, you must enter the actual miscellaneous cost in "**Cost**".

Use suggested cost: If you select this option, "**Cost**" will be set to the cost as taken from the original miscellaneous cost record.

Use demand estimated cost: If you select this option, "**Cost**" will be set to the cost given in the original estimated demand.

Cost: The actual cost of this expense. This will be read-only unless you selected **Manually Enter Cost**.

From Cost Center, **To Cost Center**: Read-only fields telling the cost centers involved in this operation. MainBoss creates accounting records indicating the transfer of money from the first cost center to the second. These fields are only visible if your database has an **Accounting** license key. For more, see *Accounting Facilities* on page 21.

Corrections of Actual Miscellaneous

To correct an Actual Miscellaneous record, you start in the **Miscellaneous** subsection of the **Resources** section of the work order. Select the demand corresponding to the Actual Miscellaneous you want to correct. Click **Edit** to open the Demand Miscellaneous record. Go to the **Actuals** section of that record, click on the Actual Miscellaneous entry you want to correct, then click **Correct**. This opens a window where you can correct the record:

Entry Date: A read-only field giving the date that this record was created.

Effective Date: The date/time when the cost was incurred.

Creator: A read-only field giving your user name. This will appear in MainBoss's accounting history to show who made the correction.

Read-only fields: Provide information relevant to the job. This includes the work order number and the estimated cost from the demand.

Demand Estimated Cost: The estimated cost that was stated in the original demand.

Manually Enter Cost: If you select this option, you must enter the actual miscellaneous cost in "**Cost**".

Use suggested cost: If you select this option, "**Cost**" will be set to the cost as taken from the original miscellaneous cost record.

Use demand estimated cost: If you select this option, "**Cost**" will be set to the cost given in the original estimated demand.

Cost: Corrects the cost. Typically, you fill in the "**As Corrected**" field with the actual cost—the correct cost, as opposed to the cost you originally recorded. The

alternative is to fill in "**This Entry**" with the difference between the cost you originally entered and the true cost.

For example, suppose the cost was really 3 but you accidentally typed 1 in the original record. You could fill in "**As Corrected**" with 3 (the correct cost) or fill in "**This Entry**" with 2 (the difference between what you originally typed and the true cost). "**This Entry**" may be a negative number if you originally typed in too much.

If you fill in "**As Corrected**", MainBoss automatically sets "**This Entry**" and vice versa.

From Cost Center, **To Cost Center**: Read-only fields telling the cost centers involved in this operation. MainBoss creates accounting records indicating the transfer of money from the first cost center to the second. These fields are only visible if your database has an **Accounting** license key. For more, see *Accounting Facilities* on page 21.

Receiving Items

You can receive items from a storeroom assignment record by going to the **Activities** section, clicking the drop-down arrow associated with **New Item Issue**, and clicking **Receive**. This process does *not* require a purchase order; it's typically used when you buy materials with petty cash, especially in connection with a work order.

For more on storage assignment records, see *Editing Storeroom Assignments* on page 115.

For example, suppose a room's wall gets damaged and you have to repair it. Once you've patched the wall, you want to paint the patched area the same color as the rest of the wall, but you don't have paint of the right color. You therefore go to a paint store and buy a small can of appropriate paint out of petty cash. You can then use **Receive** to record the cost of the paint and other information about the purchase.

Before you can receive an item on a work order, you have to create a temporary storage location for the work order, and then a temporary storage assignment for the item in the temporary storage location. (You do this in the work order's **Temporary Storage** section.)

Once you've created the temporary storage assignment, there are several ways to receive items into it:

☐ You can click on the temporary storage assignment record you just created in the work order's **Temporary Storage** section, then click **Edit**. This opens the temporary storage assignment record. In the record's **Activity** section, click the drop-down arrow associated with **New Item Issue**, then click **Receive**.

☐ You can also start from the demand in the work order's **Resources** section (**Items** subsection). Click on the demand, then click **View Storage Assignment**. In the **Activity** section of the storage assignment record, click the drop-down arrow associated with **New Item Issue**, then click **Receive**. This receives the new materials into the location associated with the storage assignment. You can then use the storage assignment's **New Item Transfer To** button to transfer the received item into the temporary storage location.

Whatever approach you use, MainBoss opens a window containing the following:

Entry Date: A read-only field giving the date that this record was created.

Effective Date: The effective date/time when the item was received. By default, this is set to the current date/time.

Creator: A read-only field giving your user name. This will appear in MainBoss's accounting history to show who recorded the receipt.

Receiving Storage Assignment: A storeroom assignment record that tells what item was purchased and where you stored it. This also records the price you paid. For more, see *Storeroom Assignments* on page 113.

Vendor: The vendor from whom you purchased the item. For more, see *Vendors* on page 230.

Payment Terms: The payment terms for the item. For more, see *Payment Terms* on page 136.

Quantity (read-only): Displays the maximum amount needed in the storeroom, the quantity already in the storeroom, and what needs to be received in order to get back up to the maximum.

Use Remaining Quantity: If you checkmark this box, MainBoss will fill in the second "**Quantity**" line with the quantity needed to get back to the storeroom's maximum.

Quantity: The quantity actually received.

Item Pricing and Purchasing History: This area lets you specify a pricing record for the item you want to purchase. Pricing records may be price quotes or actual prices paid in the past. (For more on price quotes, see *Item Pricing* on page 448.)

At the bottom of this area is a drop-down list which will display storage assignments based on the options specified in the "**Storage Assignment**" area. By choosing appropriate options, you can reduce the entries that are shown in the drop-down list, making it quicker and easier to choose the one you want. The possible options are:

Use Item Pricing or Purchase History only for this vendor: If you checkmark this box, the drop-down list will only contain price records for this item purchased from the specific "**Vendor**". If you leave the checkbox blank, the drop-down list will also contain price records for other vendors.

Do not include Purchasing History: If you checkmark this box, the drop-down list will only contain price quotes. If you leave the checkbox blank, the drop-down list will also contain actual prices paid to vendors in the past.

Drop-down list: The drop-down list at the end of the "**Item Pricing and Purchasing History**" area shows pricing records that satisfy the options you have specified.

Read-only fields: A sequence of read-only fields give information on the price and quantity of the storeroom's current supply of the item.

Calculated Item Price Cost: A read-only field giving the cost of the received quantity, as calculated from MainBoss's current price information.

Use calculated item price cost: If you checkmark this box, MainBoss fills in "**This Entry**" with information from "**Calculated Item Price Cost**".

This Entry: The actual cost of what you received. If you fill in the "**Total Cost**" column, MainBoss automatically fills in "**Unit Cost**" and vice versa.

As Corrected: If there has been a correction for this record, this line will have read-only fields giving the corrected values.

From Cost Center, **To Cost Center**: Read-only fields telling the cost centers involved in this operation. MainBoss creates accounting records indicating the transfer of money from the first cost center to the second. These fields are only visible if your database has an **Accounting** license key. For more, see *Accounting Facilities* on page 21.

Correcting Item Receipts

To correct receive item records, you select the record and click **Correct**. MainBoss opens a window containing the following:

Entry Date: A read-only field giving the date that this record was created.

Effective Date: The effective date/time when the item was received. By default, this is set to the current date/time.

Creator: A read-only field giving your user name. This will appear in MainBoss's accounting history to show who recorded the receipt.

Receiving Storage Assignment: A storeroom assignment record that tells what item was purchased and where you stored it. This also records the price you paid. For more, see *Storeroom Assignments* on page 113.

Vendor: The vendor from whom you purchased the item. For more, see *Vendors* on page 230.

Payment Terms: The payment terms for the item. For more, see *Payment Terms* on page 136.

Price Quote: A price quote record giving price information. For more, see *Item Pricing* on page 448.

Quantity: The quantity under "**This Entry**" gives the difference by which the receive item should be corrected; the quantity under "**As Corrected**" gives the final amount that should be recorded in the receive item record. If you fill in one quantity, MainBoss automatically adjusts the other.

For example, if you enter −1 under "**This Entry**", you're saying you want to subtract 1 from the current receive item quantity. MainBoss adjusts the "**As Corrected**" column to show the new quantity with this correction.

Item Pricing and Purchasing History: This area lets you specify a pricing record for the item you want to purchase. Pricing records may be price quotes or actual prices paid in the past. (For more on price quotes, see *Item Pricing* on page 448.)

At the bottom of this area is a drop-down list which will display storage assignments based on the options specified in the "**Storage Assignment**" area. By choosing appropriate options, you can reduce the entries that are shown in the drop-down list, making it quicker and easier to choose the one you want. The possible options are:

Use Item Pricing or Purchase History only for this vendor: If you checkmark this box, the drop-down list will only contain price records for this item purchased from the specific "**Vendor**". If you leave the checkbox blank, the drop-down list will also contain price records for other vendors.

Do not include Purchasing History: If you checkmark this box, the drop-down list will only contain price quotes. If you leave the checkbox blank, the drop-down list will also contain actual prices paid to vendors in the past.

Drop-down list: The drop-down list at the end of the "**Item Pricing and Purchasing History**" area shows pricing records that satisfy the options you have specified.

Read-only fields: Give information about the quantity of the item in the selected storeroom and what the actual item record said before this correction.

Calculated Cost: Read-only fields giving the expected cost of the corrected quantity. The "**Unit Cost**" column gives the cost per unit and the "**Total Cost**" column gives the total cost.

Use calculated cost: If you checkmark this box, MainBoss will fill in "**This Entry**" and "**As Corrected**" with the values obtained from "**Calculated Cost**". If you don't want to use these calculations, leave the checkbox blank and fill in "**This Entry**" or "**As Corrected**".

This Entry: The cost of the correction. This is the cost of the quantity given in the "**Quantity**" line under "**This Entry**". The cost will be negative if the quantity is. If you fill in "**Cost**", MainBoss automatically fills in "**As Corrected Cost**".

As Corrected: The cost of the item receipt after the correction is made. This is the cost of the quantity given in the "**Quantity**" line under "**As Corrected**". If you fill in "**As Corrected**", MainBoss automatically fills in "**This Entry**".

From Cost Center, **To Cost Center**: Read-only fields telling the cost centers involved in this operation. MainBoss creates accounting records indicating the transfer of money from the first cost center to the second. These fields are only visible if your database has an **Accounting** license key. For more, see *Accounting Facilities* on page 21.

Requested Work Orders

Requests may be linked with work orders and vice versa. The most common way this happens is when a work order is created from a request (by clicking **Create Work Order** in the request record). This automatically links the request and work order together.

You can also create links in a **Requests** viewer or in a request itself, you can click **Link to Work Order**. Similarly, you can create links from a work order, starting in the work order's **Requests** section and clicking **New Requested Work Order**.

Here are some situations in which you might want to link a work order to a request:

☐ You get several requests reporting the same problem. You create a work order from one of the requests, then link the same work order to all the other requests. This makes it easier to keep track of the connections between the work order and the requests.

☐ A single request leads to multiple work orders. For example, suppose someone reports that a machine has broken down. The maintenance manager might decide to write up two work orders: one for a quick short-term fix, and one for a long-term solution that can be done when there's more time. Both of these work orders can be linked to the original request so that you have accurate records of how everything is connected.

When a work order is linked to a request, the record associated with the linkage is called a *requested work order*.

> If you have turned on the **Requests are automatically set In Progress when linked to a work order, and are closed when work order closes** option (for requests), closing a work order automatically closes each linked request, provided that the request only has one linked work order. For more on this option, see *Editing Requests* on page 293.

When you ask MainBoss to link a request and a work order, MainBoss opens a window that contains the following:

Request area: Fields describing the request. These will be read-only if you are starting at a request and linking it to a work order.

Number: The number of the request.

Requestor: The person who made the request.

Subject: A read-only field giving the subject of the request. This is filled in when you specify a request.

State: A read-only field giving the current state of the request.

Estimated Completion Date: A read-only field giving when the request is expected to be finished.

Number of Linked Work Orders: A read-only field telling how many work orders are already linked to this request.

Description: The "**Description**" field from the request.

Work Order area: Fields describing the work order. These will be read-only if you are starting at a work order and linking it to a request.

Number: The number of the work order.

Subject: A read-only field giving the subject of the work order. This is filled in when you specify a work order.

State: A read-only field giving the current state of the work order.

Description: The "**Description**" field from the work order.

Temporary Storage Locations

You may designate temporary storage locations for the materials you use on a work order. For example, if you are doing a substantial renovation, you may decide to store some materials in a room near the work site rather than keep them in a normal storeroom. You should still record where the materials are, so that workers don't have to guess which materials are in temporary storage and which are still back in your standard storerooms.

A temporary storage assignment specifies a location (the storage place) and the work order for which the storage will be used. Temporary storage locations are typically identified by the number of the work order that is using the storage.

Details section: Shows basic information for the record.

Work Order: A work order that will use the given location for temporary storage. (If you started from a work order, this field will already be filled in.) For more on work orders, see *Work Orders* on page 309.

Location: A location (from the **Locations** table) to be used as temporary storage. For more on locations, see *Locations* on page 126.

Description: A description of the temporary storage location.

Comments: Any comments you want to associate with the temporary storage record.

Temporary Storage Assignments section: Lists any temporary storage assignments associated with this location. For more, see *Temporary Storage Assignments* on page 376.

Temporary Storage Listing Report

You can print temporary storage records by clicking the **Print** button in a window for selecting temporary storage locations. This opens a window that contains the following:

Grouping section: Options controlling how the report is organized.

Group by list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

Sort Direction: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

Sort by list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling which temporary storage records will be included in the report.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Temporary Storage Assignments

In a work order, a temporary storage assignment specifies an item that will be stored in a temporary storage location associated with the work order. Typically, you specify the temporary storage location first (as described in *Temporary Storage Locations* on page 374) and then you specify the item(s) to be kept in that location.

There are several ways to create a temporary storage assignment:

☐ Go to the **Resources** section of a work order. In the **Items** subsection, drop the arrow on **New Temporary Storage** and click **New Temporary Storage Assignment**.

☐ In a storeroom record, go to the **Temporary Storage Assignment** section and click **New Temporary Storage Assignment**.

In all of the above cases, MainBoss opens a window that contains the following:

Details section: Shows basic information for the record.

Item: The item that will be stored in the temporary storage location.

Location: A temporary storage location associated with this work order.

Preferred Pricing: A price or price quote on the item. Typically, this is used to indicate the vendor from whom you prefer to purchase the item. For more on item pricing, see *Item Pricing* on page 448.

Read-only fields: Information on quantities of the specified item which are already in the given location.

Cost Center (only visible if your database has an **Accounting** license key): The cost center to be used for any costs associated with holding this item at this location. For more on cost centers, see *Cost Centers* on page 96.

Activity section: Information about changes in the item at this location. For example, you could use entries in the activity section to record the transfer of items to and from the temporary storage location.

New Item Adjustment: Adds or subtracts a quantity of the given item from the temporary storage location. For more, see *Making Item Adjustments* on page 101.

New Item Issue: Issues a quantity of the given item from the temporary storage location. For more, see *Issuing Items* on page 111. This button contains the following in its drop-down list:

New Item Transfer To: Transfers this type of item from this temporary storage to some other location. For more, see *Transferring Items from One Storeroom to Another* on page 116.

New Item Transfer From: Transfers this type of item from some other location to this temporary storage. For more, see *Transferring Items from One Storeroom to Another* on page 116.

Receive (with PO): Records the receipt of an item that appears on a purchase order. For more information, see *Receiving Purchase Order Items* on page 493.

Receive: Opens a window where you can record the receipt of this type of item into inventory. This window is described in *Receiving Items* on page 369.

A typical scenario is when you use petty cash to buy items for use on a job (e.g. paint, glue, tape, etc.). In order to track all your maintenance expenses, you should record the purchase as part of the work order.

Correct: Makes a correction to an existing entry.

Assigning Someone to a Work Order

You can assign someone to a work order, provided that the person has an entry in the **Work Orders Assignees** table (**Work Orders** | **Assignees** or **Coding Definitions** | **Work Orders** | **Assignees**). When someone is assigned to a work order, it indicates that the person has some interest in the work order. For further information on assignments, see *Assignments* on page 32.

To assign someone to a work order, click the **New Work Order Assignment** button in the **Assignees** section of a work order. This opens a window that contains the following:

Work Order area: If you started from a work order record, this area will contain a read-only field identifying the work order.

If you started from a work order assignee record, the **Work Order** area allows you to choose one or more work orders to which the person should be assigned. You specify these work orders using the multi-select drop-down list at the bottom of the **Work Order** area. Option buttons in the **Work Order** area let you shorten the contents of the drop-down list, to make it easier to choose the work orders you want. The option buttons include:

Only show Draft Work Orders: If you choose this option, the drop-down list will only show work orders in the Draft state.

Only show Open Work Orders: If you choose this option, the drop-down list will only show work orders in the Open state.

Only show Closed Work Orders: If you choose this option, the drop-down list will only show work orders in the Closed state.

Show all Work Orders: If you choose this option, the drop-down list shows all work orders.

Drop-down list: A list of all work orders that match the criteria specified above.

Work Order Assignee area: If you started from a work order assignee record, this area will contain a read-only field identifying the work order assignee.

If you started from a work order record, the **Work Order Assignee** area lets you specify one or more people to whom you are assigning to this work order. The bottom of the area contains a multi-select drop-down list where you can specify the assignees. The options in the area let you reduce the number of possibilities shown in the drop-down list.

Show prospects for Work Order Assignee for this Work Order: If you click this option, the drop-down list will show people who are already mentioned in this work order in some other context. This often includes the requestor and workers who've already been assigned to the work order.

Show all Work Order Assignees not currently assigned to this Work Order: If you click this option, the drop-down list will show everyone in the **Work Order Assignee** table who isn't already assigned to this work order.

Drop-down list: A list of all potential assignees who match the criteria specified above.

Chargebacks

Some maintenance organizations charge customers for specific maintenance jobs. For example, a property management company might make tenants pay for certain types of jobs (e.g. special renovations). In MainBoss, this type of situation is called a *chargeback*: some third party is charged for all or part of the maintenance work.

Chargebacks are created with **Work Orders** | **Chargebacks** or with **New Chargeback** in a work order's **Chargebacks** section. Each chargeback consists of:

☐ A main record telling who is being charged. This is always a *billable requestor* (see *Billable Requestors* on page 240).

☐ Multiple *chargeback line records* giving details of the charges. This makes it possible to create itemized lists of chargeback costs (e.g. the cost for each worker involved, the cost of materials, and so on).

Chargebacks are independent of actual costs. The **Resources** section of work order states the actual costs to your maintenance department (e.g. the actual amount you pay your personnel). The **Chargebacks** section states how much you're charging outside parties for the work, which may or may not be the same as your real costs.

Chargeback records may have an associated category. For example, you might categorize chargebacks into labor costs or material costs. For more, see *Chargeback Categories* on page 243.

Correcting Chargebacks: You cannot directly delete chargebacks—when you create a chargeback, MainBoss creates an accounting record which (for audit purposes) cannot be deleted. If you wish to negate a chargeback, use **Correct** on the lines in the chargeback and set the charges to zero.

Viewing Chargebacks

You view chargeback records with **Work Orders** | **Chargebacks**. The window contains the following:

View section: Shows the list of chargeback records.

Work Order: Click this heading to sort the list by work order number. Click again to reverse the order (from ascending to descending or vice versa).

Code: Click this heading to sort the list by chargeback identification code. Click again to reverse the order.

Billable Requestor Name: Click this heading to sort the list by billable requestor. Click again to reverse the order.

Total Cost: Click this heading to sort the list by total cost billed to the requestor. Click again to reverse the order.

Details section: Shows basic information from the selected record.

Chargeback Activity: Lists information about the chargeback charges associated with the selected chargeback. For more, see *Editing Chargeback Line Records* on page 381.

Defaults for Chargeback section: Shows any defaults to be used when creating new chargeback records.

Editing Chargebacks

The Chargeback editor lets you create the main record of a chargeback, specifying the party who will be charged for maintenance work. It also lets you specify chargeback line records, which give itemized details of the charges.

To open the Chargebacks editor, click **New Chargeback** or **Edit** in the **Chargebacks** section of a work order or in **Work Orders** | **Chargebacks**. The window contains the following:

Details section: Shows basic information for the record.

Work Order: The work order with which the chargeback will be associated.

Code: An identification code for this chargeback record (e.g. the invoice number that will be used when billing the client).

Billable Requestor: The person or organization being charged for this work. For more, see *Billable Requestors* on page 240.

Business Phone and **E-mail**: Read-only fields giving the requestor's phone number and e-mail address (as taken from the requestor's entry in the **Contacts** table).

Total Cost: A read-only field giving the total cost of the charges associated with this record. MainBoss calculates this cost by adding up the costs of all the entries in the **Chargeback Activity** section.

Comments: Any internal comments you want to record about this job.

Chargeback Activity section: The details of the costs that are actually being charged.

New Chargeback Line: Adds a new entry to the chargeback activity list. MainBoss will open a window where you can enter the information. For more, see *Editing Chargeback Line Records* on page 381.

Correct: Opens a window where you can correct an existing chargeback. This lets you make corrections to monetary values.

Editing Chargeback Line Records

In a work order, chargeback lines provide an itemized list of charges being transferred to a third party. For example, you might have a line for each worker who participated in the job, indicating how much will be charged for each worker. Similarly, you might have a line for each spare part and other materials used in the job.

The charges specified in a chargeback line record may or may not be the same as the maintenance department's actual costs. For example, a property management company may charge tenants a fixed rate for each worker's time, no matter how much the workers are actually paid. Chargeback lines state the charges, not the actual costs. (Actual costs are given in the **Resources** section of a work order; for more, see *Resources* on page 333.)

To record chargeback lines, you start in the **Chargebacks** section of a work order. Use **New Chargeback** to create a main chargeback record (which identifies who will pay the charges). In the main chargeback record, click **New Chargeback Line** in the **Chargeback Activity** section to create new chargeback lines. The window for editing chargeback lines contains the following:

Entry Date: A read-only field giving the date that this record was created.

Effective Date: The date/time of the charge. For example, if this chargeback is for a part, the date/time on which the part was used. By default, this is set to the current date/time.

Creator: A read-only field giving your user name. This will appear in MainBoss's accounting history to show who made the chargeback.

Chargeback: A read-only field giving the work order, the chargeback, and the billable requestor.

Billable Requestor: A read-only field telling who's being charged for the work and/or materials. This is taken from the main chargeback record. For more on billable requestors, see *Billable Requestors* on page 240.

Chargeback Category: A classification for this chargeback line. For more, see *Chargeback Categories* on page 243.

Cost: The cost of this chargeback.

Comments: Any internal comments you want to associate with this chargeback.

This Entry: The cost of this chargeback.

As Corrected: Only used when an existing chargeback line is being corrected.

From Cost Center, **To Cost Center**: Read-only fields telling the cost centers involved in this operation. MainBoss creates accounting records indicating the transfer of money from the first cost center to the second. These fields are only

visible if your database has an **Accounting** license key. For more, see *Accounting Facilities* on page 21.

Correcting Chargeback Line Records

To correct a chargeback line, you select the line in the chargeback record, then click **Correct**. This opens a window containing the following:

Entry Date: A read-only field giving the date that this record was created.

Effective Date: The date/time of the work.

Creator: A read-only field giving your user name. This will appear in MainBoss's accounting history to show who made the correction.

Chargeback: A read-only field giving the work order, the chargeback, and the billable requestor.

Work Order: A read-only field giving the work order's identification number.

Billable Requestor: A read-only field telling who's being charged for the work and/or materials. This is taken from the main chargeback record. For more on billable requestors, see *Billable Requestors* on page 240.

Chargeback Category: A read-only field giving a classification for this chargeback line. For more, see *Chargeback Categories* on page 243.

Comments: Any internal comments you want to associate with this chargeback.

This Entry, **As Corrected**: Corrects the actual cost (if necessary). Typically, you fill in "**As Corrected**" with the correct cost. The alternative is to fill in "**This Entry**" with the difference between the cost you originally entered and the true cost.

If you fill in "**As Corrected**", MainBoss automatically sets "**This Entry**" and vice versa.

Comments: Any internal comments you want to associate with this chargeback.

From Cost Center, **To Cost Center**: Read-only fields telling the cost centers involved in this operation. MainBoss creates accounting records indicating the transfer of money from the first cost center to the second. These fields are only visible if your database has an **Accounting** license key. For more, see *Accounting Facilities* on page 21.

Printing Chargeback Information

You can print chargeback information by clicking the **Print** button in **Work Orders** | **Chargebacks**. This opens a window that contains the following:

Sorting section: Options controlling how the contents of groups are sorted.

> **Sort by** list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.
>
> **Sort Direction**: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling what kind of chargeback information will be included in the report. The window lets you select work orders in several ways:

> **Show only active records**: If this checkbox is checkmarked, the Active filter will automatically be applied when preparing the report; this means that information from old requests will not be included in the report. If this checkbox is blank, the Active filter is ignored; MainBoss uses information from *all* requests, no matter how old. For more about the active filter, see *The Active Filter* on page 55.
>
> **Chargeback Filters**: Make selections based on properties of the chargeback. For example, if you filter by **Billable Requestor**, you can restrict the print-out to chargebacks charged to a particular set of requestors.
>
> **Work Order Filters**: Make selections based on properties of the work order. For example, if you filter by **Requestor**, you can restrict the print-out to chargeback information from a particular set of work orders.
>
> **Unit Filters**: Make selections based on the unit involved in the work order. For example, if you filter by **Unit Location**, you can restrict the print-out to chargeback information on units at a particular location (e.g. all work orders in a specific building).
>
> **Unit Value Filters**: Make selections based on properties of the unit involved in the work order. For example, if you filter by **Purchase Vendor**, you can restrict the print-out to chargeback information on units purchased from a particular vendor.

Advanced section: Miscellaneous options.

> **Suppress Costs**: Omits any money information that might otherwise be displayed in the report.
>
> **Format Report in Columns**: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.
>
> **Title**: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Work Order Summary Report

The Work Order Summary report provides a quick summary of your work orders. By default, the report has a line for each work order, showing the most important information about the work orders. Options in the **Advanced** section let you add more information to the report. (The Work Order Summary report is actually the same as the Work Order History report, but with different options selected by default.)

To print a work order summary, use **Work Orders** | **Reports** | **Summary**. This opens a window that contains the following:

Grouping section: Options controlling how the report is organized.

Group by list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

Sort Direction: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

Sort by list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling what kind of work orders will be included in the report. The window lets you select work orders in several ways:

Show only active records: If this checkbox is checkmarked, the Active filter will automatically be applied when preparing the report; this means that information from old work orders will not be included in the report. If this checkbox is blank, the Active filter is ignored; MainBoss uses information from *all* work orders, no matter how old.

For more about the active filter, see *The Active Filter* on page 55.

Work Order Filters: Make selections based on properties of the work order. For example, if you filter by **Requestor**, you can restrict the print-out to work orders from a particular set of requestors (e.g. all work orders from a specified person).

Unit Filters: Make selections based on the unit involved in the work order. For example, if you filter by **Unit Location**, you can restrict the print-out to work orders on units at a particular location (e.g. all work orders for work in a specific building).

Unit Value Filters: Make selections based on properties of the unit involved in the work order. For example, if you filter by **Purchase Vendor**, you can restrict the print-out to work orders on units purchased from a particular vendor.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Overdue Work Orders Report

The Overdue Work Orders report lists work orders with the following characteristics:

☐ They are still open.

☐ Their "**Work End Date**" has passed.

If a work order has no end date, it will never be overdue. For this reason, anyone who creates a work order should set "**Work End Date**" to some reasonable value (e.g. "We'd ought to do this job sometime in the next week").

To print an Overdue Work Orders report, use **Work Orders** | **Reports** | **Overdue**. This opens a window that contains the following:

Grouping section: Options controlling how the report is organized.

Group by list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

Sort Direction: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

Sort by list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling what kind of work orders will be included in the report. The window lets you select work orders in several ways:

Show only active records: If this checkbox is checkmarked, the Active filter will automatically be applied when preparing the report; this means that information from old requests will not be included in the report. If this checkbox is blank, the Active filter is ignored; MainBoss uses information from *all* requests, no matter how old.

For more about the active filter, see *The Active Filter* on page 55.

Work Order Filters: Make selections based on properties of the work order. For example, if you filter by **Requestor**, you can restrict the print-out to work orders from a particular set of requestors (e.g. all work orders requested by a specified person).

Unit Filters: Make selections based on the unit involved in the work order. For example, if you filter by **Unit Location**, you can restrict the print-out to work orders on units at a particular location (e.g. all work orders in a specific building).

Unit Value Filters: Make selections based on properties of the unit involved in the work order. For example, if you filter by **Purchase Vendor**, you can restrict the print-out to work orders on units purchased from a particular vendor.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Work Order History Report

The Work Order History report displays information about past work orders. To print such a report, use **Work Orders** | **Reports** | **History**. This opens a window that contains the following:

Grouping section: Options controlling how the report is organized.

Group by list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

Sort Direction: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

Sort by list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling what kind of work orders will be included in the report. The window lets you select work orders in several ways:

Show only active records: If this checkbox is checkmarked, the Active filter will automatically be applied when preparing the report; this means that information from old requests will not be included in the report. If this checkbox is blank, the Active filter is ignored; MainBoss uses information from *all* requests, no matter how old.

For more about the active filter, see *The Active Filter* on page 55.

Work Order Filters: Make selections based on properties of the work order. For example, if you filter by **Requestor**, you can restrict the print-out to work orders from a particular set of requestors (e.g. all work orders requested by a specified person).

Unit Filters: Make selections based on the unit involved in the work order. For example, if you filter by **Unit Location**, you can restrict the print-out to work orders on units at a particular location (e.g. all work orders in a specific building).

Unit Value Filters: Make selections based on properties of the unit involved in the work order. For example, if you filter by **Purchase Vendor**, you can restrict the print-out to work orders on units purchased from a particular vendor.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show summary charts for each Work Order: If this box is checkmarked, the report will include a summary for each work order.

Show summary charts for each group: If this box is checkmarked, the report will include summaries for each group. For example, if the report is grouped by unit, then there'll be summary information for each unit.

Show summary charts for the report: If this box is checkmarked, the report will have a summary covering all the information in the report.

Show Resource Detail: If this box is checkmarked, the report will provide extra details on the use of resources.

Show Transactions: If you checkmark this option, the report will show all the accounting transactions associated with a work order. If you leave the option blank, you will just get a summary line for each item, worker, and miscellaneous charge.

For example, suppose you make an error in recording the price of an external

contractor and have to make a correction. If you checkmark **Show Transactions**, the work order history will show the original erroneous accounting entry, and also the correction. If you leave **Show Transactions** blank, you will just see the final corrected amount.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Work Order State History Report

The Work Order State History report tells when history records were created for one or more work orders. History records are typically created when a work order changes its state or status, e.g. when the work order is created, opened, and finally closed.

To print this report, use **Work Orders** | **Reports** | **State History**. This opens a window that contains the following:

Grouping section: Options controlling how the report is organized.

Group by list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

Sort Direction: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

Sort by list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling what kind of work orders will be included in the report. The window lets you select work orders in several ways:

Show only active records: If this checkbox is checkmarked, the Active filter will automatically be applied when preparing the report; this means that information from old requests will not be included in the report. If this checkbox is blank, the Active filter is ignored; MainBoss uses information from *all* requests, no matter how old.

For more about the active filter, see *The Active Filter* on page 55.

Work Order State History Filters: Make selections based on fields in the history records. For example, if you filter by **Creator**, you can restrict the print-out to history records created by a particular person.

Work Order Filters: Make selections based on properties of the work order. For example, if you filter by **Requestor**, you can restrict the print-out to work orders from a particular set of requestors (e.g. all work orders requested by a specified person).

Unit Filters: Make selections based on the unit involved in the work order. For example, if you filter by **Unit Location**, you can restrict the print-out to work orders on units at a particular location (e.g. all work orders in a specific building).

Unit Value Filters: Make selections based on properties of the unit involved in the work order. For example, if you filter by **Purchase Vendor**, you can restrict the print-out to work orders on units purchased from a particular vendor.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Work Order Status Statistics Report

The Work Order Status Statistics report tells the length of time that work orders spent with a particular status code. For more on status codes, see *Work Order Status Codes* on page 278.

To print this report, use **Work Orders** | **Reports** | **Status Statistics**. This opens a window that contains the following:

Grouping section: Options controlling how the report is organized.

> **Group by** list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

> **Sort Direction**: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

> **Sort by** list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

> **Sort Direction**: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling what kind of work orders will be included in the report. The window lets you select work orders in several ways:

Show deleted records: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Show only active records: If this checkbox is checkmarked, the Active filter will automatically be applied when preparing the report; this means that information from old requests will not be included in the report. If this checkbox is blank, the Active filter is ignored; MainBoss uses information from *all* requests, no matter how old.

> For more about the active filter, see *The Active Filter* on page 55.

Work Order State History Filters: Make selections based on fields in the history records. For example, if you filter by **Status**, you can restrict the print-out to history records one or more specific status codes.

Work Order Filters: Make selections based on properties of the work order. For example, if you filter by **Requestor**, you can restrict the print-out to work orders from a particular set of requestors (e.g. all work orders requested by a specified person).

Unit Filters: Make selections based on the unit involved in the work order. For example, if you filter by **Unit Location**, you can restrict the print-out to work orders on units at a particular location (e.g. all work orders in a specific building).

Unit Value Filters: Make selections based on properties of the unit involved in the work order. For example, if you filter by **Purchase Vendor**, you can restrict the print-out to work orders on units purchased from a particular vendor.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Work Order Hourly Inside Labor History Report

The Work Order Hourly Labor History report displays information about the hourly work of your maintenance personnel. For example, you can obtain a report on all the work orders assigned to a particular employee.

To print this kind of report, use **Work Orders** | **Reports** | **Hourly Inside Labor History**. This opens a window that contains the following:

Grouping section: Options controlling how the report is organized.

> **Group by** list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

> **Sort Direction**: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

> **Sort by** list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

> **Sort Direction**: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling what kind of work orders will be included in the report. The window lets you select work orders in several ways:

> **Show only active records**: If this checkbox is checkmarked, the Active filter will automatically be applied when preparing the report; this means that information from old work orders will not be included in the report. If this checkbox is blank, the Active filter is ignored; MainBoss uses information from *all* work orders, no matter how old.

> For more about the active filter, see *The Active Filter* on page 55.

> **Labor Filters**: Make selections based on properties of the workers. For example, if you filter by **Employee**, you can restrict the print-out to work orders done by a specific employee or set of employees.

Work Order Filters: Make selections based on properties of the work order. For example, if you filter by **Work Category**, you can restrict the print-out to work orders from a particular set of categories.

Unit Filters: Make selections based on the unit involved in the work order. For example, if you filter by **Unit Location**, you can restrict the print-out to work orders on units at a particular location (e.g. all work orders in a specific building).

Unit Value Filters: Make selections based on properties of the unit involved in the work order. For example, if you filter by **Purchase Vendor**, you can restrict the print-out to work orders on units purchased from a particular vendor.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Work Order Hourly Outside Labor History Report

The Work Order Hourly Labor History report displays information about the hourly work of outside contractors. For example, you can obtain a report on all the work orders assigned to a particular contractor.

> **Grouping** section: Options controlling how the report is organized.
>
>> **Group by** list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.
>>
>> **Sort Direction**: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.
>
> **Sorting** section: Options controlling how the contents of groups are sorted.
>
>> **Sort by** list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.
>>
>> **Sort Direction**: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.
>
> **Filtering** section: Options controlling what kind of work orders will be included in the report. The window lets you select work orders in several ways:
>
>> **Show only active records**: If this checkbox is checkmarked, the Active filter will automatically be applied when preparing the report; this means that information from old work orders will not be included in the report. If this checkbox is blank, the Active filter is ignored; MainBoss uses information from *all* work orders, no matter how old.
>>
>> For more about the active filter, see *The Active Filter* on page 55.
>>
>> **Labor Filters**: Make selections based on properties of the workers. For example, if you filter by **Vendor**, you can restrict the print-out to work orders done by a specific contractor or set of contractors.
>>
>> **Work Order Filters**: Make selections based on properties of the work order. For example, if you filter by **Work Category**, you can restrict the print-out to work orders from a particular set of categories.
>>
>> **Unit Filters**: Make selections based on the unit involved in the work order. For example, if you filter by **Unit Location**, you can restrict the print-out to work orders on units at a particular location (e.g. all work orders in a specific building).

Unit Value Filters: Make selections based on properties of the unit involved in the work order. For example, if you filter by **Purchase Vendor**, you can restrict the print-out to work orders on units purchased from a particular vendor.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Work Order Material History Report

The Work Order Material History report displays information about the use of inventory items in work orders. For example, you can obtain a report on all the work orders that use a particular item.

Grouping section: Options controlling how the report is organized.

Group by list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

Sort Direction: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

Sort by list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling what kind of work orders will be included in the report. The window lets you select work orders in several ways:

Show only active records: If this checkbox is checkmarked, the Active filter will automatically be applied when preparing the report; this means that information from old work orders will not be included in the report. If this checkbox is blank, the Active filter is ignored; MainBoss uses information from *all* work orders, no matter how old.

For more about the active filter, see *The Active Filter* on page 55.

Item Filters: Make selections based on properties of the items. For example, if you filter by **Item**, you can restrict the print-out to work orders that use a particular item or set of items.

Work Order Filters: Make selections based on properties of the work order. For example, if you filter by **Work Category**, you can restrict the print-out to work orders from a particular set of categories.

Unit Filters: Make selections based on the unit involved in the work order. For example, if you filter by **Unit Location**, you can restrict the print-out to work orders on units at a particular location (e.g. all work orders in a specific building).

Unit Value Filters: Make selections based on properties of the unit involved in the work order. For example, if you filter by **Purchase Vendor**, you can restrict the print-out to work orders on units purchased from a particular vendor.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Work Order Statistics Report

The Work Order Statistics History report analyzes various kinds of information about your work orders. For example, you can obtain charts that display the percentages of work orders that fall into each of your work order categories.

To print this kind of report, use **Work Orders** | **Reports** | **Statistics**. This opens a window that contains the following:

Grouping section: Options controlling how the report is organized.

Group by list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

Sort Direction: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

Sort by list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling what kind of work orders will be included in the report. The window lets you select work orders in several ways:

Show only active records: If this checkbox is checkmarked, the Active filter will automatically be applied when preparing the report; this means that information from old work orders will not be included in the report. If this checkbox is blank, the Active filter is ignored; MainBoss uses information from *all* work orders, no matter how old.

For more about the active filter, see *The Active Filter* on page 55.

Work Order Filters: Make selections based on properties of the work order. For example, if you filter by **Requestor**, you can restrict the print-out to work orders from a particular set of requestors (e.g. all work orders requested by a specified person).

Unit Filters: Make selections based on the unit involved in the work order. For example, if you filter by **Unit Location**, you can restrict the print-out to work orders on units at a particular location (e.g. all work orders in a specific building).

Unit Value Filters: Make selections based on properties of the unit involved in the work order. For example, if you filter by **Purchase Vendor**, you can restrict the print-out to work orders on units purchased from a particular vendor.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show summary charts for each group: If this box is checkmarked, the report will include summaries for each group. For example, if the report is grouped by unit, then there'll be summary information for each unit.

Show summary charts for the report: If this box is checkmarked, the report will have a summary covering all the information in the report.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Chargeback Summary Report

The Chargeback Summary report provides a quick summary of your chargebacks. By default, the report has a line for each chargeback, showing the most important information about the chargebacks. Options in the **Advanced** section let you add more information to the report. (The Chargeback Summary report is actually the same as the Chargeback History report, but with different options selected by default.)

To print a chargeback summary, use **Work Orders** | **Reports** | **Chargeback Summary**. This opens a window that contains the following:

Grouping section: Options controlling how the report is organized.

Group by list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

Sort Direction: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

Sort by list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling what kind of chargebacks will be included in the report. The window lets you select chargebacks in several ways:

Show only active records: If this checkbox is checkmarked, the Active filter will automatically be applied when preparing the report; this means that information from old chargebacks will not be included in the report. If this checkbox is blank, the Active filter is ignored; MainBoss uses information from *all* chargebacks, no matter how old.

For more about the active filter, see *The Active Filter* on page 55.

Chargeback Filters: Make selections based on properties of the chargebacks. For example, if you filter by **Billable Requestor Name**, you can restrict the print-out to chargebacks to a particular set of requestors.

Work Order Filters: Make selections based on properties of the work order. For example, if you filter by **Project**, you can restrict the print-out to work orders from a particular set of projects.

Unit Filters: Make selections based on the unit involved in the work order. For example, if you filter by **Unit Location**, you can restrict the print-out to work orders on units at a particular location (e.g. all work orders in a specific building).

Unit Value Filters: Make selections based on properties of the unit involved in the work order. For example, if you filter by **Purchase Vendor**, you can restrict the print-out to work orders on units purchased from a particular vendor.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Chargeback History Report

The Work Order Chargeback History report displays information about chargebacks in work orders. For example, you can obtain a report on all the work orders that are charged back to a particular person/organization.

Grouping section: Options controlling how the report is organized.

Group by list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

Sort Direction: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

Sort by list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling what kind of work orders will be included in the report. The window lets you select work orders in several ways:

Show only active records: If this checkbox is checkmarked, the Active filter will automatically be applied when preparing the report; this means that information from old work orders will not be included in the report. If this checkbox is blank, the Active filter is ignored; MainBoss uses information from *all* work orders, no matter how old.

For more about the active filter, see *The Active Filter* on page 55.

Chargeback Filters: Make selections based on properties of the chargebacks. For example, if you filter by **Billable Requestor**, you can restrict the print-out to work orders with chargebacks to particular person/organization.

Work Order Filters: Make selections based on properties of the work order. For example, if you filter by **Work Category**, you can restrict the print-out to work orders from a particular set of categories.

Unit Filters: Make selections based on the unit involved in the work order. For example, if you filter by **Unit Location**, you can restrict the print-out to work orders on units at a particular location (e.g. all work orders in a specific building).

Unit Value Filters: Make selections based on properties of the unit involved in the work order. For example, if you filter by **Purchase Vendor**, you can restrict the print-out to work orders on units purchased from a particular vendor.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show Chargeback Activities: If this box is checkmarked, the report will show details about the activities within each chargeback. If the box is blank, the report will only show general information about each chargeback.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Planned Maintenance

Scheduling Planned Maintenance on page 19 gives a step-by-step overview of how to schedule planned maintenance operations. It shows the typical pattern of how you use MainBoss to create a task description, how you assign units to that task, and how you use MainBoss to generate planned work orders automatically. You will find it useful to read the overview before reading the details contained in this chapter.

As a quick review, here are the elements of MainBoss's planned maintenance facilities:

☐ **Tasks**: A task record describes what should be done in a planned maintenance job. It might provide step-by-step instructions or a checklist of actions to take. For example, a task record might describe what should be done in a car oil change. For more, see *Tasks* on page 184.

☐ **Maintenance Timing**: A maintenance timing record tells when a job should be done, either in terms of the calendar (e.g. "every three months") or in terms of a meter (e.g. "every 3000 miles"). For more, see *Maintenance Timing* on page 168.

☐ **Unit Maintenance Plans**: A unit maintenance plan combines a task, a maintenance timing record, and a unit. For example, the task might be an oil change, the timing might be "every 3000 miles" and the unit might be a particular car; the unit maintenance plan indicates that the car needs an oil change every 3000 miles. Note that you can specify the same task and timing record for a lot of different units; for example, you might specify an oil change every 3000 miles for each car you maintain. For more about unit maintenance plans, see *Unit Maintenance Plans* on page 158.

☐ **Generating Work Orders**: On a regular schedule (e.g. once a week), you ask MainBoss to create new planned maintenance work orders. You do this through **Unit Maintenance Plans** | **Generate Planned Maintenance** in the control panel, which gives you the planned maintenance generation table viewer. This table contains a record for each previous time you generated planned maintenance work orders. Each record lists the time that you generated the work orders and lists the work orders that were created. This means that you have a history of all the PM work orders you've previously created. For more about the planned maintenance generation table viewer, see *Viewing Planned Maintenance Generation Records* on page 409.

Important: MainBoss does not generate planned maintenance work orders until you tell it to do so! For example, you might tell MainBoss to generate planned maintenance work orders for the next week; MainBoss will then figure out what jobs need to be done in that week and will generate the necessary work orders. However, the work orders are *not* created until you explicitly tell MainBoss to generate them.

PM Work Orders: You create planned maintenance work orders like this:

1. In the control panel, go to **Unit Maintenance Plans** | **Generate Planned Maintenance**.

2. Click **New Planned Maintenance Batch** to begin generating new work orders. This opens a window for the generation process.

3. In "**Batch End Date**" fill in a date up to which work orders should be generated. For example, if you want to deal with all planned maintenance that should be done by next Monday, put in next Monday's date.

4. In "**Maintenance Plans**" select the set of unit maintenance plans for which you wish to generate work orders. By default, all plans are selected; however, you can choose a subset of the plans if you wish.

5. Click **Generate**. The **Generation Details** section will display any work that ought to be done in the given period.

6. Examine the information in the **Generation Details** section. By clicking on a line, you can see information such as the unit, the date on which the PM job should start, and other useful data.

7. At this point, the work orders haven't actually been created—MainBoss has only determined which work orders should be created if you choose to go ahead. If you see any surprises in the list, you still have a chance to make corrections. This is particularly useful when you're first setting up your PM schedules—you can set up a schedule, test how it works, and correct any problems...all without actually creating any real work orders.

    If you decide something needs to be corrected (for example, a timing record needs to be fixed), click **Change Scheduling Parameters**. This clears the **Generation Details** section; you can then change maintenance timing record or anything else related to planned maintenance. Click **Generate** again to regenerate a new list of tentative planned maintenance jobs.

8. When you're satisfied with the **Generation Details** list, click **Commit** to create the actual work orders. The creation process may take a considerable amount of time, especially if there are a lot of work orders to make.

Generation Interval: Planned maintenance works best if you generate PM work orders on a regular basis. For example, each Friday, you might generate work orders for the following week (from Monday to Sunday). By generating the work orders ahead of time, you have advance warning of what work you'll have to do. You can even generate work orders farther in advance; each Monday, you might generate work orders for the week beginning the following Monday, giving every a week's notice of what PM jobs are necessary.

To make it easier for you to generate PM work orders on a regular basis, MainBoss lets you set a value called the "**Generation Interval**". This indicates how often you intend to generate new PM work orders. The time is measured in days; for example, if you set

"**Generation Interval**" to 7, it means you intend to generate PM work orders once a week. If you set "**Generation Interval**" to 14, it means you intend to generate PM work orders every two weeks.

MainBoss uses your "**Generation Interval**" value when setting a default for "**Batch End Date**". The new end date will be calculated by adding "**Generation Interval**" to the previous end date—the last time you generated PM work orders. For example, suppose "**Generation Interval**" is 7 and the last time you generated work orders, you did so up to January 1. Then the next time you generate work orders, the default will be to generate them up to January 8. The time after that, the default will be to generate them up to January 15, and so on.

You can always change "**Batch End Date**" from its default value to something else. For example, before you go on vacation, you might generate two or three weeks of work orders rather than only one. Setting "**Generation Interval**" simply tells MainBoss how to set the end date automatically rather than requiring you to set it by hand.

You set "**Generation Interval**" like this:

1. Select **Unit Maintenance Plans** | **Generate Planned Maintenance** from the control panel.

2. In the **Defaults for Planned Maintenance Batch** section, click **Edit Defaults**.

3. MainBoss opens a window where you can set "**Generation Interval**".

4. Once you've set "**Generation Interval**" to your preferred value, click **Save & Close**.

5. When you return to the previous window, you may have to click **Refresh** in order to see the value you just set.

Corrective vs. Preventive Maintenance in Reports: Several reports let you distinguish information on preventive (planned) maintenance work orders from information on corrective work orders. This is done using the **Is Preventive** option in report printing windows.

☐ If you select **Is Preventive** under **Group by** in the **Grouping and Sorting** section of a report window, MainBoss groups preventive work orders in one part of the report and all other work orders (i.e. corrective ones) in the other part of the report.

☐ If you select **Is Preventive** in the **Filtering** section of a report window, you can specify that you only want to see information on preventive work orders (**Is Preventive** is `True`) or only on corrective work orders (**Is Preventive** is `False`).

A work order is preventive if it was created by **Unit Maintenance Plans** | **Generate Planned Maintenance**. A work order is corrective if it was generated in some other way.

Viewing Planned Maintenance Generation Records

Each time you generate planned maintenance work orders, MainBoss creates a record describing the generation process. In particular, these records list the work orders that were generated. Such records are called *planned maintenance generation records*.

To generate new planned maintenance work orders, you begin by creating a new planned maintenance generation record. For details of the generation process, see *Planned Maintenance* on page 406.

To see your planned maintenance generation records (or to create new ones), select **Unit Maintenance Plans** | **Generate Planned Maintenance** from the control panel. This opens a window that contains the following:

> **View** section: Shows the list of existing planned maintenance generation records.
>
> > **Generation Date**: The date on which the record was created (which means the date on which work orders were generated).
> >
> > **Batch End Date**: The date ending the generation period. For example, if you ask MainBoss to generate all planned maintenance jobs that should be done up to and including next Monday, "**Batch End Date**" will be the date of next Monday.
> >
> > **Details** section: Shows basic information from the selected record.
> >
> > **Generation Details** section: Lists information about the generated work orders associated with the selected generation record.
> >
> > **Work Orders** section: Lists work orders generated in association with the record currently selected in the **View** list.
> >
> > **Errors** section: Lists any errors that were discovered in the **Commit** process of the selected generation record.
>
> **Defaults for Planned Maintenance Batch** section: Shows any defaults to be used when creating new unit maintenance plans.

Note: You use the **Defaults for Planned Maintenance Batch** section to set the generation interval for your planned maintenance scheduling. For more details, see *Planned Maintenance* on page 406.

Editing Planned Maintenance Generation Records

The Planned Maintenance Generation Editor lets you generate new planned maintenance work orders. (For more on planned maintenance, see *Planned Maintenance* on page 406.)

To open the editor, go to **Unit Maintenance Plans** | **Generate Planned Maintenance** in the control panel and click either <u>**New Planned Maintenance Batch**</u> or <u>**Edit**</u>. The editor window contains the following:

<u>**Details**</u> section: Shows basic information for the record.

Creator: A read-only field telling who generated the planned maintenance record. (If you are creating a new record, this will be your own name.)

Generation Interval [only appears when editing defaults]: Specifies a number of days. This states how often you intend to generate planned maintenance work orders; for example, if "**Generation Interval**" is 7, you intend to generate PM work orders every week. For more, see *Planned Maintenance on page 406*.

Generation Date: A read-only field giving the date when this record was created.

Batch End Date: MainBoss will generate work orders for planned maintenance jobs that should be done up to and including the given date. (The default date set by MainBoss is based on your "**Generation Interval**" value.)

Maintenance Plans: Is a multi-select field which specifies the unit maintenance plans that MainBoss will look at in order to determine which work orders should be generated. By default, the field specifies all of your existing unit maintenance plans. However, you may use the multi-select facilities to choose only a subset of your existing plans. For example, if you only want to generate plans for a particular unit, click the "..." button to get a selection window, then select the plans you want to use for generating work orders. (For more details on multiple selection, see *Multi-Select Features on page 26*.)

<u>**Single Purchase Orders**</u>: If this box is checkmarked, MainBoss will examine all the purchase order templates associated with the work orders to be generated. If several templates are directed to the same vendor, MainBoss will create a single purchase order that contains all the items from all the templates for that vendor. Some users may find the combined purchase order more useful than several separate orders for the same vendor.

If <u>**Single Purchase Orders**</u> is left blank, MainBoss will generate a single purchase order from each purchase order template associated with each generated work order.

For more on purchase order templates, see *Purchase Order Templates on page 174*. For more on purchase orders, see *Purchase Orders on page 462*.

Purchase Order Creation State override: When MainBoss generates a purchase order from a template, the purchase order may be put into several states: `Draft`, `Issued`, `Voided`, or `Closed`. For example, if you put a purchase order into the `Draft` state, it is considered tentative and subject to

change; if you put a purchase order into the `Issued` state, it is considered ready to be submitted to the vendor. A purchase order template may specify what state should be used when a purchase order is generated from the template. "**Purchase Order Creation State override**" lets you specify a different state from the one specified in the template. The state you specify in "**Purchase Order Creation State override**" will be applied to all purchase orders generated in this batch.

Work Order Creation State override: Similar to "**Purchase Order Creation State override**". By default, each generated work order is created in the draft state. However, you may wish to put generated work orders into some other state instead—most likely the open state, indicating that the work order is ready to be printed. (Remember though that if a work order is open, some of its information is locked down and can't be changed unless you first **Suspend** the work order.)

For Access Code options: Let you specify what to do when the access code for a unit is different than the access code for the task description:

Prefer value from Task: If both the task record and the unit record specify an access code, MainBoss assigns generated work orders the access code from the task. However, if the task record doesn't have an access code, MainBoss uses the code from the unit.

Prefer value from Unit: If both the task record and the unit record specify an access code, MainBoss assigns generated work orders the access code from the unit. However, if the unit record doesn't have an access code, MainBoss uses the code from the task.

Only use value from Task: MainBoss always uses the access code from the task record. (If the task record doesn't have an access code, generated work orders won't have an access code either.)

Only use value from Unit: MainBoss always uses the access code from the unit record. (If the unit record doesn't have an access code, generated work orders won't have an access code either.)

For Expense Model options: Let you specify what to do when the expense model in the unit record is different from the one in the task record. The options work the same way as the options in **For Access Code**.

Comments: Any comments you want to associate with this particular generation process.

Generation Details section: Lists preliminary details about the work orders to be generated. This section is only filled in when you click the **Generate** button.

Generation details are provided as a way to review the potential schedule before work orders are actually created. This is particularly important when you set up your initial PM scheduling and when you introduce new PM tasks/timing

records. You can review the details to make sure they make sense. If not, you can revise your timings and try again (by hitting the section's **Refresh** button).

Code: Which unit is involved in each job. Under each unit, you'll see one or more lines indicating jobs that should be scheduled for the unit. Each line has a *sequence number*, useful in situations where more than one job needs to be scheduled for the same unit. In this case, the first job is numbered Seq 0, the next is numbered Seq 1, and so on.

Work Start Date: The date on which work will be scheduled to start if the work order is actually generated.

Entries in the **Generation Details** list are marked with various symbols. For an explanation of these symbols, see

http://www.mainboss.com/english/support/faq/mb30_gendetails.shtml

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View Work Order: Displays the contents of a work order selected in the **Generation Details** list. Note that the list often contains entries that do not correspond with work orders; the **View Work Order** button will only be enabled when you select an entry that *does* have an associated work order.

Refresh: Updates the generation details to reflect any recent changes. In particular, if you adjust any of your maintenance timing records, the details are regenerated with the new timing.

When you are first setting up maintenance plans, you can create a timing record and then **Generate** to see what jobs will be generated. If the list isn't correct, adjust a timing record, then **Refresh** to see if you've corrected the problem. In this way, you can fine-tune your unit maintenance plans until they work the way you want.

Search: Searches the generation details for a particular record.

Work Orders section: Lists actual work orders that have been generated. It's a good idea to review the work orders that you generate, in case they need adjusting. For example, you should make sure that jobs haven't been assigned to people who are on vacation. You should also check **Items** | **Reports** | **Restocking** in case you need to order materials for the newly created work orders.

The buttons in this section are similar to the buttons in the work order table viewer. For example, you can use **Add Work Order Comment** to add a comment to the currently selected work order. For more information, see *Viewing Work Orders* on page 310.

View Work Order: Displays the contents of a work order selected in the **Work Orders** list. Note that the list often contains entries that do not correspond

with work orders; the **View Work Order** button will only be enabled when you select an entry that *does* have an associated work order.

Errors section: Lists any errors that were encountered during the **Commit** process. Every time you **Commit** a set of generated work orders, you should check this section to see if errors occurred. Check the "**Disposition details**" field of each entry in the list to see the nature of the error; in many cases, this will indicate that a task or maintenance timing record has a problem that needs to be corrected.

Generate: Clicking this button fills the **Generation Details** section with entries. Once these have been generated, the button changes into **Change Scheduling Parameters**.

Change Scheduling Parameters: Clears out the **Generation Details** section so you can start again with new parameters. For example, if you made a mistake typing "**Batch End Date**", you might end up with far more or far fewer work orders than you expect; in this case, click **Change Scheduling Parameters** to delete everything in **Generation Details**, then retype "**Batch End Date**" and **Generate** again.

Refresh: Re-evaluates all unit maintenance plans and fills in **Generation Details** again.

Commit: Generates the final work orders. MainBoss will create a **Work Orders** section in this record which lists the work orders that were created.

Commit & Close: Performs a **Commit** operation, then closes the window.

Save: Saves the generation record (if necessary) after work has been done.

Close: Closes the window. If you've generated **Generation Details** by clicking **Generate**, but have not yet generated actual work orders by clicking **Commit**, MainBoss will ask you if you really want to close the window. If you do close the window, MainBoss does *not* create a planned maintenance generation record.

Unit Maintenance Plan Summary

The unit maintenance plan summary displays a one-line summary about each of your unit maintenance plans. You obtain this summary with **Unit Maintenance Plans** | **Reports** | **Summary**.

> **Note:** The "**Labor**" value displayed in the summary is the sum of the hours given on all the labor demands in the task. This may or may not be a useful indication of the actual labor hours spent on a specific job.

The report window contains the following:

Grouping section: Options controlling how the report is organized.

Group by list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

Sort Direction: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

Sort by list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling what kind of information will be included in the report. The window lets you select work orders in several ways:

Show deleted records: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Maintenance Timing: If this box is checkmarked, you can select the unit maintenance plans to be included based on their maintenance timing records. Otherwise, all plans will be included, regardless of their maintenance timing records.

Task Filters: Make selections based on the task. For example, if you filter by **Work Category**, you can restrict the print-out to tasks with a certain work category.

Unit Filters: Make selections based on the unit involved. For example, if you filter by **Unit Location**, you can restrict the print-out to work orders on units at a particular location (e.g. all work orders in a specific building).

Unit Value Filters: Make selections based on value of the unit involved. For example, if you filter by **Purchase Vendor**, you can restrict the print-out to units purchased from a particular vendor.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be

difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Summary Format: If this checkbox is checkmarked, the report is essentially a summary of the summary. You don't see information on individual unit maintenance plans; instead, you get a summary of all plans in a particular group, as dictated by the options specified in the **Grouping** section. For example, if you are grouping by **Work Category**, you will get a summary for each category.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Date Grouping: Inside sections, work orders are grouped by dates. The "**Date Grouping**" options determine whether these groups will be for months, weeks, or days.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Labor Forecast Report

The labor forecast report displays the jobs that have been assigned to your personnel over a given period of time. You obtain a labor forecast report with **Unit Maintenance Plans** | **Reports** | **Labor Forecast Report**.

Note: In order to create this report, MainBoss must do the same amount of work that's required to generate preventive maintenance work orders. This can take a great deal of time, especially if you have a lot of unit maintenance plans.

By default, the report covers the forthcoming week, starting today and ending a week from today. To change the report's period, set the "**From Date**" and "**To Date**" values in the **Filtering** section of the report window.

The report window contains the following:

Grouping section: Options controlling how the report is organized.

Group by list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

Sort Direction: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

Sort by list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling what kind of information will be included in the report. The window lets you select work orders in several ways:

Labor Filters: Make selections based on the worker. For example, if you filter by **Employee**, you can restrict the print-out to a particular set of employees.

Work Filters: Make selections based on properties of the work. For example, if you filter by **Work Category**, you can restrict the print-out to work in a particular set of categories.

Unit Filters: Make selections based on the unit involved. For example, if you filter by **Unit Location**, you can restrict the print-out to work orders on units at a particular location (e.g. all work orders in a specific building).

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Date Grouping: Inside sections, work orders are grouped by dates. The "**Date Grouping**" options determine whether these groups will be for months, weeks, or days.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Material Forecast Report

The material forecast report predicts the items that MainBoss expects will be used in a specified period of time. MainBoss assumes that all materials for a job are needed on the work start date. You obtain a material forecast report with **Unit Maintenance Plans | Reports | Material Forecast Report**.

Note: In order to create this report, MainBoss must do the same amount of work that's required to generate preventive maintenance work orders. This can take a great deal of time, especially if you have a lot of unit maintenance plans.

By default, the report covers the forthcoming week, starting today and ending a week from today. To change the report's period, set the "**From Date**" and "**To Date**" values in the **Filtering** section of the report window.

The report window contains the following:

Grouping section: Options controlling how the report is organized.

Group by list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you

select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

Sort Direction: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

Sort by list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling what kind of information will be included in the report. The window lets you select work orders in several ways:

Item Filters: Make selections based on the item. For example, if you filter by **Item Category**, you can restrict the print-out to a particular set of categories.

Work Filters: Make selections based on properties of the work. For example, if you filter by **Work Category**, you can restrict the print-out to work in a particular set of categories.

Unit Filters: Make selections based on the unit involved. For example, if you filter by **Unit Location**, you can restrict the print-out to work orders on units at a particular location (e.g. all work orders in a specific building).

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Maintenance Forecast Report

The maintenance forecast report predicts the work orders that should be done in a specified period of time. This includes both corrective and planned maintenance work orders. In order to determine which planned maintenance work orders might come due during the period, MainBoss goes through the usual PM generate procedure, *but doesn't actually generate any work orders*.

> **Note:** In order to create this report, MainBoss must do the same amount of work that's required to generate preventive maintenance work orders. This can take a great deal of time, especially if you have a lot of unit maintenance plans.

By default, the report covers the forthcoming week, starting today and ending a week from today. To change the report's period, set the "**From Date**" and "**To Date**" values in the **Filtering** section of the report window.

You obtain a maintenance forecast report with **Unit Maintenance Plans** | **Reports** | **Maintenance Forecast Report**. The report window contains the following:

Grouping section: Options controlling how the report is organized.

Group by list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

Sort Direction: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

Sort by list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling what kind of information will be included in the report. The window lets you select work orders in several ways:

Work Filters: Make selections based on properties of the work. For example, if you filter by **Work Category**, you can restrict the print-out to work in a particular set of categories.

Unit Filters: Make selections based on the unit involved. For example, if you filter by **Unit Location**, you can restrict the print-out to work orders on units at a particular location (e.g. all work orders in a specific building).

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Date Grouping: Inside sections, work orders are grouped by dates. The "**Date Grouping**" options determine whether these groups will be for months, weeks, or days.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Units

The equipment and facilities you maintain are called *units*. Every unit has a location; in fact, units can *be* locations. For example, in a shopping mall, stores might be considered locations, but they might also be considered units, since they are facilities you maintain. Here are some examples of units:

☐ Vehicles (e.g. company cars, forklift trucks, lawn tractors)

☐ Manufacturing equipment

☐ Office suites, hotel rooms, stores in a mall, cottages in a resort, and other spaces a maintenance department may have to deal with

☐ Heating/air-conditioning equipment

☐ Washrooms, elevators, and other public spaces

Sub-Units: Units can contain other units. For example, if a shopping mall treats each store as a unit, then it might be useful to divide large stores into smaller sections (e.g. "Store X Northwest Section", "Store X Northeast Section", and so on.) As another example, consider a forklift truck. This is a single unit, but you might treat the engine and forklift mechanism as sub-units of the truck.

Because units are like locations, and because units can have sub-units (which can also have sub-units), MainBoss depicts units using a *map* similar to the structure used to depict folders, subfolders, and files in Windows Explorer. The map shows locations and the units they contain.

Organization is Important! Since locations and units are shown in map format, you can make your life easier by setting up your location and unit records in some well-organized manner. For example, suppose you're maintaining a large commercial building. It's a bad idea to set up your location records like this:
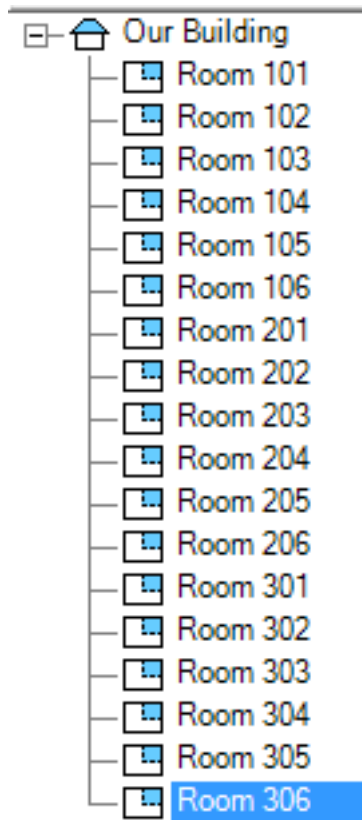
With one long list of rooms, it's harder to find the one you want (and you end up scrolling a lot back and forth through the list). Here's a better way to organize the same locations:
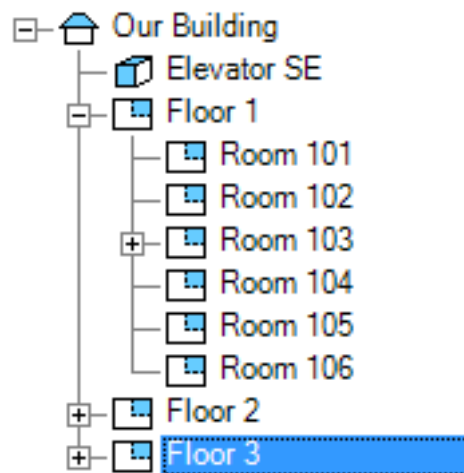
Organizing rooms by floor (or in some other sensible way) makes it easier to find the location you want, since you don't have to search through long lists. Organizing your locations also makes it easier to find units, since every unit is a location.

Coding Definitions: The following appear under **Coding Definitions** | **Units** to define codes used in unit records:

- ☐ **Asset Codes** (*Asset Codes* on page 200): Balance sheet account numbers that are used to capitalize equipment in your organization's general ledger.

- ☐ **Categories** (*Unit Categories* on page 202): Codes used to categorize your units by type.

- ☐ **Meter Classes** (*Meter Classes* on page 204): Codes used to categorize meters by type.

- ☐ **Meters** (*Meters* on page 207): Information on meters that are associated with units.

- ☐ **Ownerships** (*Ownerships* on page 209): Codes used to identify who owns which unit.

- ☐ **Parts** (*Spare Parts* on page 211): A table recording which spare parts (items) are used by each unit.

- ☐ **Service Contracts** (*Service Contracts* on page 214): Information about the service contracts that cover your units.

- ☐ **Specification Forms** (*Specification Forms* on page 217): Used in recording specific information about different types of equipment. For example, the specification for a forklift truck might include info like height, weight, motor size, lifting capacity, and so on. You create your own specification forms so that you can record distinctive information about any type of unit.

- ☐ **Systems** (*Systems* on page 223): Codes that allow you to state that a number of units form an interconnected system.

- ☐ **Usage Classifications** (*Usage Classifications* on page 225): Codes that let you classify units according to their use.

Before you start recording information about your units, you should think about which of the above codes you intend to use. You don't have to use all the possibilities immediately; for example, when you're just starting out you may decide to omit service contract information—you can always add it later on. However, the more information you record what you start out, the more useful MainBoss can be.

As an example, consider information about spare parts. It can be a lot of work recording which spare parts are used in which unit. Nevertheless, this information can save you a lot of wasted effort: when workers go out to a job, they can look up spare part requirements in advance and can head to the work site prepared. To take a simple example, suppose you record what type of light bulbs are used in every room in your company. (In this case, rooms are the units and the bulbs are spare parts.) When you get a call that a light has burned out, your workers can immediately find out what type of replacement bulb is needed; they never end up having to make two trips because they brought the wrong kind of bulb.

You get back what you put in. Even if you don't record all possible spare parts used by your units, recording *some* spare part information will save you *some* wasted effort. Recording more information gives you the potential for more savings. Gradually adding more information (or phasing in the use of different types of codes) will help you get the most from your software.

Unit Records

A unit record contains information about a single unit. This could be, for example, a piece of equipment, a vehicle, an office, a hotel room, or anything else that your maintenance department has to maintain.

> Because the term "unit" includes such a wide range of possibilities, some of the fields in a unit record may not be relevant to some types of units.

Viewing Units

You view units with **Units** or **Coding Definitions** | **Units**. The window contains the following:

View section: Displays information about units in current use.

Code view: Contains a map of units and their locations. *The map only shows locations that currently contain units.* You can open or close locations and units by clicking the + or − sign beside them. When you open a location or unit, you see the locations/units that it contains.

Description: Descriptions of the associated units. When you click this heading, MainBoss sorts the units within each location by the unit's "**Description**" field (ascending alphabetical order). Click again to reverse the order.

Details section: Shows basic information from the selected record.

Service section: Shows any service contracts associated with the selected unit. For more, see *Service Contracts* on page 214.

Related section: Shows any relationships this unit has. For more, see *Relationships* on page 143.

Parts section: Shows any spare parts associated with the selected unit. For more, see *Spare Parts* on page 211.

Specifications section: Shows any specifications associated with the selected unit. For more, see *Specifications* on page 432.

Value Section: Shows information on the unit's purchase value, scrap value (if any), and replacement costs.

Meters section: Shows any meters associated with the selected unit. For more, see *Meters* on page 207.

Attachments section: Shows any attachments associated with the selected unit. For more, see *Attachments* on page 431.

Requests section: Shows any requests associated with the selected unit. For more, see *Requests* on page 284.

Maintenance Plan section: Shows any unit maintenance plans associated with the selected unit. For more, see *Unit Maintenance Plans* on page 158.

Work Orders section: Shows any work orders associated with the selected unit. For more, see *Work Orders* on page 309.

Temporary Storage section: Shows any temporary storage locations associated with the selected unit. For more, see *Temporary Storage Locations* on page 374.

Temporary Storage and Items section: Shows any temporary storage locations and assignments associated with the selected unit. For more, see *Temporary Storage Locations* on page 374 and *Temporary Storage Assignments* on page 376.

Note: If you have not set a default location, the "**Location**" field in the new unit record will initially be set to the unit that was highlighted at the time you clicked **New Unit**.

Show on Map: If the currently selected unit record has map coordinates, MainBoss attempts to open Google Maps to a map showing the unit's geographic location. If the current unit record doesn't have map coordinates, MainBoss checks the unit and/or location record that contains the current unit, then the container of the container, and so on, until MainBoss either finds a record that has map coordinates or else reaches a record with no container.

If MainBoss finds no record with map coordinates, but does find a postal address record containing postal information, MainBoss passes the postal information to Google Maps.

In order to see the geographic location in Google Maps, you must have an active Internet connection and a suitable web browser.

Defaults for Unit section: Shows any defaults to be used when creating new units.

Editing Units

You create or modify units using the unit editor. The usual way to open the editor is to click **New Unit** or **Edit** in the **View** section of **Units**. (For more on units, see *Units* on page 422.)

The unit editor window contains the following:

Details section: Shows basic information for the record.

Code: A brief code to identify this record. No two units in the same location may have the same code (but units in different locations can have the same code).

Description: A longer description of the unit.

External Tag: A short string of characters which can be turned into a bar code associated with this unit. For more information, see *Bar Code Support* on page 87.

Map Coordinates: The geographic location of this unit. Coordinates are specified in longitude and latitude.

> As a special feature, MainBoss makes it easy for you to use Google Maps to specify "**Map Coordinates**". First, use Google Maps to find the location's geographic position. Then, right-click on the location in the Google Maps display and click **Center map here** in the resulting menu. Next, click the button in the left-hand panel with the link icon on it (a section of chain). Finally, copy the given URL (beginning with `http:`) and paste it into the "**Map Coordinates**" field in MainBoss. MainBoss will extract the longitude and latitude from the Google Maps URL.

Location: The location that contains the unit. This may be another unit. For more on locations, see *Locations* on page 126.

Make, **Model**, **Serial Number**: Standard identification information for pieces of equipment.

> **Mobile Units and Serial Numbers:** If a unit can possibly be moved, it's useful to assign it a serial number, even if there isn't a serial number from the manufacturer. This makes it easier to keep track of which unit is which, especially when two units are moved into the same location.

Usage: A usage classification for this unit. For more on such classifications, see *Usage Classifications* on page 225.

Unit Category: The kind of unit this is. For more, see *Unit Categories* on page 202.

System: The system that this unit belongs to, if any. For more, see *Systems* on page 223.

Drawing: Information identifying any drawing(s) associated with this unit. Depending on your department's methods of organization, this can be anything from "Drawing 123-45J" to "Second drawer in filing cabinet beside the fax machine."

Comments: Any comments that should be associated with this unit. In particular, this is a good place to record useful information like, "Always carry 30 amp fuses, this machine blows them regularly."

Service section: Lists service contracts and other information related to performing service on the unit.

Access Code: Indicates any special conditions for gaining access to the unit. For more, see *Access Codes* on page 89.

Expense Model: The default expense model to be used for any work done on this unit. For more on expense models, see *Expense Models* on page 250.

Service Contracts list: Lists any service contracts on this unit. For more, see *Service Contracts* on page 214.

Related section: Lists any relationships this unit has with other units or contact people. For more on relationships, see *Relationships* on page 143.

New Unit Related Unit: Lets you specify a relationship between this unit and another unit. For more on unit-to-unit relationships, see *Unit-to-Unit Relationships* on page 431.

New Unit Related Contact: Lets you specify a relationship between this unit and a contact person. For more, see *Unit-to-Contact Relationships* on page 93.

View: Is only enabled if you select a relationship line in the list of relationships. If you do, clicking **View** displays the associated relationship record.

Delete: Is only enabled if you select a relationship line in the list of relationships. If you do, clicking **Delete** deletes the chosen relationship.

Parts section: Lists spare parts associated with this unit. For more, see *Spare Parts* on page 211.

Specifications section: Lists any specifications associated with this unit. For more, see *Specifications* on page 432.

To add a specification, use the drop-down field immediately below the list of existing specifications. Drop the arrow, select a specification form, then click the **New** button that follows the drop-down field. MainBoss opens a form that you can fill in with specification data. When you click **Save** in the form, you will see the specification added to the list of this unit's specifications.

The other buttons that follow the drop-down field let you work with the specification that is selected in the list of existing specifications.

Value section: Lists information about the purchase value of the unit, as well as projected replacement costs.

Purchase Date: The date on which the unit was purchased. If you don't know the exact date, it's useful to put in a reasonable estimate. This will help in calculating the expected lifespan of the equipment.

Purchase Vendor: The vendor who sold you the unit. For more on vendors, see *Vendors* on page 230.

Purchase Cost: The cost of the unit when purchased.

Ownership: Who owns this unit. For more, see *Ownerships* on page 209.

Asset Code: A code indicating the fixed asset balance sheet account number that is used to capitalize this equipment in your organization's general ledgers. For more, see *Asset Codes* on page 200.

Future Value: Information in this section is used when creating a replacement value report. For more on this report, see *Replacement Forecast Report* on page 440.

> **Replacement Cost Estimation Date**: The date on which you fill in the values in the **Future Value** section. This is *not* the date when you think you'll need to replace the unit, but the date on which you make your estimates. Recording this date helps you in future, to determine how up-to-date the information is. For example, if you see that it's been a long time since you estimated future values, maybe you should check that the estimates are still reasonable.

> **Estimated Replacement Cost**: How much you think it will take to replace the unit at *today's* rates. When you run a replacement forecast report, MainBoss will factor in expected rates of inflation.

> **Typical Life (years)**: The total expected lifespan of this type of equipment. Note that this is the *total* lifespan, not the remaining lifespan.

> **Scrap Date**: The expected date on which you'll take this equipment out of commission.

> **Scrap Value**: The expected value for which you can sell the equipment when you decommission it.

Meters section: Lists any meters associated with this unit. You can create meter records directly from this section if you wish, and perform all the actions available from the **Meters** table viewer. For more on meters, see *Meters* on page 207.

Attachments section: Lists any attachments associated with this unit. An attachment is any file you wish to associate with the unit. For example, if you have files that contain schematic diagrams or specifications for a piece of equipment, you could list them in the **Attachments** section; this makes it easy for workers to find information that might be useful on the job.

Attachments may also be Internet URLs. For example, you might record the

URL of the manufacturer's web site, or a web page containing information about the unit.

File/URL: When you select an entry in the attachment list, "**File/URL**" provides a link to the attachment. Clicking the link opens the file or URL. The program used for this is the default for such files on your computer. For example, HTML files will be opened with your default web browser, PDF files will be opened with your default PDF reader, and so on.

Requests section: Lists requests on this unit, both past and present. You can create requests directly from this section if you wish, and perform all the operations available through the Requests table viewer. For more on requests, see *Requests on page 284*.

Maintenance Plan section: Lists unit maintenance plans associated with this unit. You can create unit maintenance plans directly from this section if you wish, and perform all the operations available from the unit maintenance plan table viewer. For more on unit maintenance plans, see *Unit Maintenance Plans on page 158*.

Work Orders section: Lists work orders on this unit, both past and present. You can create work orders directly from this section if you wish, and perform all the operations available from the Work Order table viewer. For more on work orders, see *Work Orders on page 309*.

Temporary Storage section: Shows any temporary storage locations associated with the unit. For more, see *Temporary Storage Locations on page 374*.

Temporary Storage and Items section: Shows any temporary storage locations and assignments associated with the unit. For more, see *Temporary Storage Locations on page 374* and *Temporary Storage Assignments on page 376*.

Show on Map: If this unit record has map coordinates, MainBoss attempts to open Google Maps to a map showing the unit's geographic location. If the current unit record doesn't have map coordinates, MainBoss checks the unit and/or location record that contains the current unit, then the container of the container, and so on, until MainBoss either finds a record that has map coordinates or else reaches a record with no container.

If MainBoss finds no record with map coordinates, but does find a postal address record containing postal information, MainBoss passes the postal information to Google Maps.

In order to see the geographic location in Google Maps, you must have an active Internet connection and a suitable web browser.

Unit-to-Unit Relationships

You create unit-to-unit relationships by clicking **New Unit Related Unit** in the **Related** section of a unit record. For more information, see *Relationships* on page 143.

The editor window contains the following:

Relationship: The relationship between the two units. This must be a unit-to-unit relationship record.

Once you specify a relationship, the blank field between the two "**Unit**" lines will be filled in with the appropriate phrase from the relationship record. For example, if the relationship states that the first unit heats the second unit, the blank field will be filled in with Heats.

Unit, **Unit**: The two sides of the unit-to-unit relationship. Make sure that you set the fields correctly and don't get them backward.

One of the "**Unit**" fields must specify the original unit record you started with (i.e. the one where you clicked **New Unit Related Unit**); the field must specify only the original unit, not multiple units. The other "**Unit**" field may use multi-select to specify multiple units, in which case each of the selected units will be put into the specified relationship with the original unit.

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Attachments

An *attachment* is any computer file that you wish to associate with a unit. For example, if you have files containing schematic diagrams or specifications for a piece of equipment, you might specify those as attachments. As another example, if a unit represents a space rented by a tenant, you might attach a file containing your contract with that tenant so that you know exactly what is and isn't covered by the contract.

To see the contents of an attached file, click the link labeled "**File/URL**" in the **Attachments** section of the associated unit record, or click **Open Attachment** in the editor window.

To add an attachment to a unit record, click **New Attachment** in the **Attachments** section of the record. This opens a window containing the following:

Unit: A read-only field identifying the unit.

Name: A name identifying the file. For example, you might use Schematic Diagrams to identify such a file. "**Name**" does *not* have to be the actual name of the file; for example, if the file's real name doesn't suggest what the file contains, you can use "**Name**" to describe the file's purpose and/or contents.

Description: A fuller description of what the file contains.

File/URL: The name of the file you want to attach. This can be the full name of a file on your computer or network. If you have an Internet connection, it can also be a URL.

For file names, you can either type the name of the file or use the **Select File** button to locate the file.

Select File: Opens a standard Windows dialog that will let you specify a file or URL.

Comments: Any comments you wish to record about the file, or about the associated unit.

Open Attachment: Opens the specified "**File/URL**" using whatever program is used for that purpose on your system. For example, if "**File/URL**" is a URL, it will be opened with your web browser.

Specifications

A *specification* records information about a unit. For example, specifications on an electric motor might include voltage, amps, RPM, horsepower, fuse sizes, bearing sizes, a list of tools needed for various operations, and so on. Workers can look at such information to find out in advance what they might need when going out to repair the unit.

Specification information is recorded using a *specification form*. You create your own specification forms (as discussed in *Specification Forms* on page 217). Each form contains whatever information you consider useful about a particular type of unit. Before you can enter specification information about a unit, you must create an appropriate form.

A single unit may have more than one specification. For example, consider different types of vehicles: cars, trucks, etc. You might create one specification form for engines: a form that you can use for every type of vehicles. In addition, you might create one form that contains additional information for cars, a form that contains additional information for trucks, a form that contains additional information for forklifts, and so on. Each vehicle then has two associated forms: one for its engine, and one for everything else.

You enter specification information using the **Specifications** section of a unit record. To begin, add a new specification, select a specification form using the drop-down list immediately below the list of current specifications. Once you have selected a form, click **New** beside the drop-down list. MainBoss opens a window that contains the following:

Based on: A read-only field giving the specification form that you've selected.

Code: An identification code for this specification.

Description: A more detailed description of what the specification contains.

Unit: A read-only field identifying the unit whose information you're recording.

Specification fields: The fields associated with the chosen specification form. You fill in these fields with the appropriate information. For example, if you see fields labeled `Voltage`, `RPM`, etc., you fill in those fields with the appropriate information for the given "**Unit**".

Comments: Any comments you want to associate with this specification. For example, this might be used to record additional information not covered by the form.

Meter Readings

MainBoss can schedule planned maintenance by meter reading. For example, if a car needs an oil change every 3000 miles, MainBoss can schedule the work when you reach the 3000-mile mark. In fact, MainBoss can estimate in advance when the car is likely to reach 3000 miles and schedule the oil change based on the estimate. However, this only works if you record mileage readings on a regular basis: that way, MainBoss has up-to-date mileage figures and can determine the average distance driven in a day.

It's useful to record meter readings on a regular basis, even if you don't use them for scheduling planned maintenance. Meter readings show you patterns of use, and may make it easier to diagnose or avoid problems. For example, if you notice a sudden increase or decrease of use for a piece of equipment, maybe you should adjust your lubrication schedules.

Editing Meter Readings

You create or modify meter readings using the meter reading editor. There are several ways you can get to this editor; here are some examples:

☐ In a unit record, go to the **Meters** section, select a meter from the list, and click **New Meter Reading**.

☐ In the control panel, go to **Coding Definitions** | **Units** | **Meters**, select a meter from the list, and click **New Meter Reading**.

However you get to the meter reading editor, the window contains the following:

Meter Class: A read-only field giving the class of the meter whose reading you are recording. For more, see *Meter Classes* on page 204.

Unit: A read-only field giving the unit with which the meter is associated. For more on units, see *Units* on page 422.

UOM: A read-only field giving the units of measure associated with this meter. For more on units of measure, see *Units of Measure* on page 228.

Reading Offset: A read-only field giving the offset associated with this meter. For more, see the section titled **Effective vs. Actual Readings** in *Meters* on page 207.

Effective Date: The date/time when the reading was taken.

Reading: The actual reading from the meter. When you type a number in this field, MainBoss automatically sets "**Effective Reading**" to "**Reading**" plus "**Reading Offset**".

Effective Reading: The sum of "**Reading**" and "**Reading Offset**". This gives you the true value of the meter, after adjusting for roll-over, resetting, and other special conditions.

Work Order Meter Readings

You can record a meter reading from a work order. Start in the work order's **Meters** section, click on a meter, and click **New Work Order Meter Reading**. The resulting window contains the following:

Meter Class: A read-only field giving the class of the meter whose reading you are recording. For more, see *Meter Classes* on page 204.

Unit: A read-only field giving the unit with which the meter is associated. For more on units, see *Units* on page 422.

Work Order: A read-only field giving the work order with which this meter reading is associated. For more on work orders, see *Work Orders* on page 309.

UOM: A read-only field giving the units of measure associated with this meter. For more on units of measure, see *Units of Measure* on page 228.

Reading Offset: A read-only field giving the offset associated with this meter. For more, see the section titled **Effective vs. Actual Readings** in *Meters* on page 207.

Effective Date: The date/time when the reading was taken.

Reading: The actual reading from the meter. When you type a number in this field, MainBoss automatically sets "**Effective Reading**" to "**Reading**" plus "**Reading Offset**".

Effective Reading: The sum of "**Reading**" and "**Reading Offset**". This gives you the true value of the meter, after adjusting for roll-over, resetting, and other special conditions.

Reports on the Units Menu

The reports available through the **Units** section of the control panel provide information about your organization's units.

Unit Listing

The *Units Listing* is a report that lists information about units. A large number of options let you select units to appear in the report (e.g. to have the report deal with a single unit category) and to organize/sort the report in various ways.

To print a unit listing, go to **Units** and click **Print**. The window contains the following:

Grouping section: Options controlling how the report is organized.

> **Group by** list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

> **Sort Direction**: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

> **Sort by** list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

> **Sort Direction**: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling which units will be included in the report. The window lets you select units in several ways:

> **Show deleted records**: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

> **Unit Filters**: Make selections based on basic unit information. For example, if you filter by **Unit Location**, you can restrict the print-out to units at a particular location (e.g. all units in a specific building).

> **Unit Value Filters**: Make selections based on other properties of the unit. For example, if you filter by **Purchase Vendor**, you can restrict the print-out to units purchased from a particular vendor.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Bar Code Symbology: Specifies a format to be used for printing bar codes in this report. If you choose **None**, no bar codes will be printed; otherwise, a bar code containing the unit's "**Unit Code**" will be printed for every unit in the report. For more information, see *Bar Code Support* on page 87.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Unit Summary Report

The Unit Summary report provides a quick summary of information about your units. By default, the report has a line for each unit, showing the most important information about each one. Options in the **Advanced** section let you add more information to the report.

To print a unit summary, use **Units** | **Reports** | **Summary**. This opens a window that contains the following:

Grouping section: Options controlling how the report is organized.

    Group by list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

    Sort Direction: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

    Sort by list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

    Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling what kind of units will be included in the report. The window lets you select units in several ways:

    Show deleted records: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

    Unit Filters: Make selections based on properties of the unit. For example, if you filter by **Unit Location**, you can restrict the print-out to units on units at a particular location (e.g. all units for work in a specific building).

    Unit Value Filters: Make selections based on properties of the unit involved in the unit. For example, if you filter by **Purchase Vendor**, you can restrict the print-out to units on units purchased from a particular vendor.

Advanced section: Miscellaneous options.

    Suppress Costs: Omits any money information that might otherwise be displayed in the report.

    Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

    Title: The title to be printed at the beginning of the report.

    Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Bar Code Symbology: Specifies a format to be used for printing bar codes in this report. If you choose **None**, no bar codes will be printed; otherwise, a bar code containing the unit **Code** will be printed for every unit in the report. For more information, see *Bar Code Support* on page 87.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Unit Maintenance History

The *Maintenance History* report lists information about work orders on units. A large number of options let you select which work orders and units should be covered by the report.

To print a maintenance history report, go to **Units** | **Reports** | **Maintenance History**. The window contains the following:

Grouping section: Options controlling how the report is organized.

Group by list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

Sort Direction: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

Sort by list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling which units and work orders will be included in the report. The window lets you select units and work orders in several ways:

Show only active records: If this checkbox is checkmarked, the Active filter will automatically be applied when preparing the report; this means that information from old work orders will not be included in the report. If this checkbox is blank, the Active filter is ignored; MainBoss uses information from *all* work orders, no matter how old.

For more about the active filter, see *The Active Filter* on page 55.

Unit Filters: Make selections based on basic unit information. For example, if you filter by **Unit Location**, you can restrict the print-out to units at a particular location (e.g. all units in a specific building).

Unit Value Filters: Make selections based on other properties of the unit. For example, if you filter by **Purchase Vendor**, you can restrict the print-out to units purchased from a particular vendor.

Work Order Filters: Make selections based on aspects of the work orders. For example, if you filter by **Work Category**, you can restrict the print-out to work orders that belong to a particular category.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Replacement Forecast Report

The *Replacement Forecast* report lists information about expected replacement of units due to age. Information for this report is taken from the **Value** section of a unit record. (For more, see *Editing Units* on page 426.)

In order for a unit to be listed in the replacement forecast, the unit record must have replacement-related information. Specifically:

☐ Either the record has a non-blank "**Scrap Date**" exists, or the record has a non-blank "**Purchase Date**" and a "**Typical Life**" greater than zero.

☐ Either the record has a non-blank "**Replacement Cost Last Date**" or a non-blank "**Purchase Date**"

To print a replacement forecast, go to **Units** | **Reports** | **Replacement Forecast**. The window contains the following:

Grouping section: Options controlling how the report is organized.

Group by list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

Sort Direction: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

Sort by list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling which units will be included in the report. The window lets you select units in several ways:

Show deleted records: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Unit Filters: Make selections based on basic unit information. For example, if you filter by **Unit Location**, you can restrict the print-out to units at a particular location (e.g. all units in a specific building).

Unit Value Filters: Make selections based on other properties of the unit. For example, if you filter by **Purchase Vendor**, you can restrict the print-out to units purchased from a particular vendor.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Inflation rate (%): The expected annual inflation rate to be used in estimating replacement costs. For example, if you enter 5, MainBoss will calculate costs using an annual 5% inflation rate.

In a unit record, replacement costs should be estimated using *current dollars* (i.e. current prices, not adjusted for inflation). To account for inflation, you set "**Inflation rate (%)**" to a possible inflation rate; MainBoss will then calculate future replacement costs using this rate.

You might want to run the report several times using different inflation rates to get an idea of replacement costs under various economic conditions.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview

and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Unit Meters Report

The Meters report lists meter readings on selected meters/units. For more on meters, see *Meters* on page 207.

To print a Meters report, go to **Units** | **Reports** | **Meters**. The window contains the following:

Grouping section: Options controlling how the report is organized.

Group by list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

Sort Direction: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

Sort by list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling which units and meters will be included in the report. The window lets you select units and meters in several ways:

Show deleted records: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Unit Filters: Make selections based on basic unit information. For example, if you filter by **Unit Location**, you can restrict the print-out to units at a particular location (e.g. all units in a specific building).

Unit Value Filters: Make selections based on other properties of the unit. For example, if you filter by **Purchase Vendor**, you can restrict the print-out to units purchased from a particular vendor.

Meter Reading Filters: Make selections based on aspects of the meter readings. For example, if you filter by **Reading Date**, you can restrict the print-out to readings taken in a given range of dates.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Inventory Items

The **Items** part of the control panel is where inventory purchases, receipts and adjustments are recorded. Issues from stock can also be recorded, though most will be accounted for automatically when work orders are closed (completed).

How Inventory Works

MainBoss uses a number of terms to describe inventory actions. This section discusses those terms and explains the details of how MainBoss handles inventory.

> **Note:** To avoid surprises, we strongly recommend that you familiarize yourself with the following material.

Storeroom Assignment: A *storeroom assignment* specifies that a particular item should be stored in a particular storeroom. In addition, it specifies the maximum quantity that should ever be in the storeroom, and the minimum quantity allowed before you have to reorder. For more, see *Storeroom Assignments* on page 113.

On Hand: When MainBoss tells you the quantity of an item that is currently *on hand*, that is the quantity that is expected to be present in a particular storeroom or in all storerooms combined.

On Order: As soon as you add an item to a purchase order, the given quantity is considered *on order*. Note that the purchase order does *not* have to be issued; items are on order even if the purchase order is only in the draft state. For more on purchase orders, see *Purchase Orders* on page 462.

> **Note:** Inventory items are considered to be *on order* as soon as they appear on a draft purchase order. MainBoss does this to avoid over-ordering stock—once an item has been put on one purchase order, the corresponding "stock available" quantities are all updated to show the quantity of stock that will eventually arrive.
>
> The drawback of this approach is that the items are considered on order before the purchase order is actually issued. If the purchase order isn't issued for a long time, you may be misled into thinking that the stock is soon going to show up, when in fact, the purchase order hasn't even been sent to the vendor. For this reason, you should try not to leave any purchase order in the draft stage for an extended period of time.

On Reserve: When you create a work order, you can reserve inventory materials for use in the work order. These materials are said to be *on reserve*. You put materials on reserve when you use **New Demand Item** in the **Resources** section of a work order. More precisely, the materials are put on reserve when you **Save** the demand.

Materials can be removed from reserve in several ways:

☐ You can **Void** the work order. In this case, all materials that were on reserve become available for use again.

☐ You can use **Delete** in the **Resources** section of the work order to delete demands from the list. Deleting a demand makes reserved materials available once more.

☐ You can use **Actualize** to state that reserved materials have actually been used. For example, suppose you use **New Demand Item** to reserve 10 quarts of oil for a job, then use **Actualize** to say that the job actually used 8 quarts. MainBoss will update its records to say that you now have only 2 quarts on reserve, since you used 8 of the original 10 quarts. (MainBoss will also update its records to say that you have 8 quarts less on hand.)

☐ When you close a work order, MainBoss removes all outstanding reservations for materials on that work order. For example, suppose you reserved 10 quarts of oil but only used 8 quarts. This leaves 2 quarts still on reserve. However, when you close the work order, MainBoss removes those 2 quarts from the reserve. Since the work order has been closed, the job is finished and the extra 2 quarts obviously weren't needed.

The total quantity of an item on reserve is the sum of all *on reserve* quantities from *open* work orders. For example, if one work order calls for 10 quarts of oil and another calls for 20, you have a total of 30 quarts on reserve.

Stock Available: When MainBoss tells you the total quantity of an item *available* (either in a single storeroom or in all storerooms combined), the quantity is calculated as

```
Stock Available = OnHand + OnOrder - OnReserve
```

When MainBoss needs to determine whether stock should be restocked, it looks at the *available* quantity, not at the quantity on hand.

Closed Work Orders: After a work order has been closed, the use of **New Demand Item** does *not* put materials on reserve. Since the job is already finished, there is no point in putting materials on reserve. (The only reason you would use **New Demand Item** would be to correct your records after the fact.)

Inventory Item Records

The **Items** table contains information on inventory items. Inventory items can include such things as:

☐ Spare parts used to maintain pieces of equipment

☐ Materials used in general maintenance (lubricants, tape, glue, nails, etc.)

☐ Materials bought for specific jobs (paint, dry-wall, etc.)

☐ Anything else whose purchase and/or use you wish to record

For some types of items, it's impractical to keep track of their usage during jobs. For example, workers don't want to keep track of every inch of duct tape they use. On the other hand, it may be vitally important to keep track of other materials: if certain pieces of equipment are crucial to your company, you need to make sure you have the right spare parts on hand at all times and that you reorder such parts before you run low. It's up to you which items you track in detail and which you don't.

Viewing Item Records

The **Items** table lists the parts and materials you use in your maintenance work. To view the table, select **Items** from the control panel. The viewer window contains the following:

View section: Shows the list of current items.

Code: Click this heading to sort the list by code. Click again to reverse the order (from ascending to descending or vice versa).

Description: Click this heading to sort the list by description. Click again to reverse the order.

Category: Click this heading to sort the list by item category. Click again to reverse the order. For more on item categories, see *Item Categories* on page 106.

On Hand: Click this heading to sort the list by the quantity on hand. Click again to reverse the order.

Unit Cost: Click this heading to sort the list by each item's unit cost. Click again to reverse the order.

Total Cost: Click this heading to sort the list by the total cost of each type of item in inventory. Click again to reverse the order.

Details section: Shows basic information from the selected record.

Storeroom Assignments section: Lists storerooms where the item is stored. For more, see *Storeroom Assignments* on page 113.

Temporary Storage Assignments section: Lists temporary storage locations where the item is stored. For more, see *Temporary Storage Locations* on page 374.

Task Temporary Storage Assignments section: Lists task temporary storage locations where the item is stored. For more, see *Editing Task Temporary Storage Assignments* on page 193.

Pricing section: Lists pricing information on the item (price quotes and purchase prices).

Purchasing section: Lists "purchase item" records for the item, including the purchase order on which the item appeared.

Receiving section: Lists receipts of the item.

Usage section: Lists units where the item is used as a spare part.

Maintenance section: Lists planned maintenance tasks that require the item.

Defaults for Item section: Shows any defaults to be used when creating new item records.

Editing Item Records

You create or modify item records using the item editor. The usual way to open the editor is to click **New Item** or **Edit** in the **View** section of the control panel entry for **Items**.

The item editor window contains the following:

Details section: Shows basic information for the record.

Code: A brief code to identify this record. No two records may have the same code.

Description: A longer description of the item.

UOM: The units of measurement used to measure this item. For more about units of measurement, see *Units of Measure* on page 228.

Item Category: The category to which this item belongs. For more about item categories, see *Item Categories* on page 106.

On Hand: Read-only fields giving the total quantity of this item currently present in all storerooms, plus the unit cost and total cost of the items.

On Order: The quantity on order.

On Reserve: A read-only field giving the total quantity of the item that has been reserved for use on work orders.

Available: A read-only field giving the total quantity of the item that is available for use. This is equal to **On Hand** + **On Order** – **On Reserve**.

Comments: Any comments you want to associate with the item.

Storeroom Assignments section: Lists any storerooms where this item may be stored. For more on storeroom assignments, see *Storeroom Assignments* on page 113.

Temporary Storage Assignments section: Lists any temporary storage locations where this item is stored. For more on temporary storage, see *Temporary Storage Locations* on page 374.

Task Temporary Storage Assignments section: Lists task temporary storage locations where the item is stored. For more, see *Editing Task Temporary Storage Assignments* on page 193.

Pricing section: Shows price quotes and purchase prices for this item. Each line gives information about a particular vendor.

Purchasing section: Lists "purchase item" records for the item, including the purchase order on which the item appeared.

Receiving section: Shows receipts of this item.

Usage section: Shows units where the item is used as a spare part. For more, see *Spare Parts* on page 211.

Maintenance section: Shows any tasks that use this item. For more on tasks, see *Tasks* on page 184.

New Task Demand Item: Opens a window where you can add a demand for this item to a task.

Item Pricing

Item pricing entries record pricing on items. This may be either the price of an actual purchase or a price quote. New item pricing records can be created from vendor entries or from the items table.

The item pricing editor contains the following:

Effective Date: The date/time on which the price was paid or quoted. This defaults to the current date and time.

Item: The item being priced. This item should already exist in your items table. For more information, see *Inventory Item Records* on page 445.

Vendor: The vendor who supplied the item or the quote. This vendor should already exist in your vendors table. For more information, see *Vendors* on page 230.

Quoted Pricing: The quantity bought or quoted, plus the unit cost and the total cost. If you fill in "**Unit Cost**", MainBoss automatically sets "**Cost**" to the total cost (and vice versa).

Order Line Text: The text that should be printed on a purchase order when this item is ordered from the specified vendor. For example, this might be a complete description of the item, plus the catalog number used by the vendor.

Item Restocking Table

The *Item Restocking* table lists items that need to be restocked. This means that in a particular storeroom, the stock available is less than the minimum specified for that

storeroom. (You specify minimums for each storeroom using storeroom assignments. For more, see *Storeroom Assignments* on page 113.)

The main part of the table contains an entry for each item that needs to be restocked. Under each item is a list of one or more storerooms that need restocking. If there are one or more storerooms with a surplus of the item, they're also listed; this shows you where you might get stock that you can transfer where it's needed.

You can also get restocking information as a report using **Items** | **Reports** | **Restocking**. This lets you print a report containing similar information to what's shown in the restocking table. For more, see *Item Restocking Report* on page 456.

Note: Stock available is calculated as `On Hand + On Order − On Reserve`.

To see the item restocking table, go to **Items** | **Restocking**. The table contains the following:

Code: Click this heading to sort the list by code. Click again to reverse the order (from ascending to descending or vice versa).

Minimum: Click this heading to sort the list by minimum quantity (i.e. the minimum quantity of the item that a given storeroom should contain). Click again to reverse the order.

Quantity: Click this heading to sort the list by actual quantity in the given storeroom. Click again to reverse the order.

For storerooms that need to be restocked, "**Quantity**" is always less than "**Minimum**". The table may also show storerooms that have a surplus of stock (storerooms whose "**Quantity**" is greater than their "**Minimum**"). This tells you where you might get stock to transfer to storerooms that are below their minimum.

If there's an item where there's no surplus of stock in any storeroom, under that item you'll just see a list of storerooms that need restocking.

UOM: Click this heading to sort the list by unit of measurement. Click again to reverse the order.

Unit Cost: Click this heading to sort the list by unit cost. Click again to reverse the order.

Information area: If you select an inventory item in the main list, the information area below the list shows information from the item's record. For more, see *Inventory Item Records* on page 445.

If you select a storeroom in the main list, the information area below the list shows information from the storeroom assignment record associated with the item and storeroom. For more, see *Storeroom Assignments* on page 113.

Note that there are two types of storerooms that may be listed in the main list:

storerooms that need to be restocked (i.e. their "**Quantity**" is less than their "**Minimum**"); and storerooms that contain a surplus of stock (i.e. their "**Quantity**" is greater than their "**Minimum**").

New Item Transfer: Opens a window that lets you record a transfer of item from a "surplus" storeroom to a storeroom that needs restocking. If there are no surplus storerooms for a given item, the **New Item Transfer** button is disabled. For more on item transfers, see *Transferring Items from One Storeroom to Another on page 116*.

New Item Transfer has a drop-down button that contains the following:

New Purchase Order: Opens a window that lets you create a purchase order for restocking the given item. This button is only enabled if the selected storeroom assignment has a preferred pricing price quote or if there's a history of buying this type of item from a specific vendor.

For more on purchase orders, see *Purchase Orders on page 462*.

Item Reports

MainBoss offers a variety of reports that describe the current state of your item inventory.

Item Listing Report

The *Items Listing* is a report that lists information about items. A large number of options let you select items to appear in the report (e.g. to have the report deal with a single item category) and to organize/sort the report in various ways.

To print an item listing, go to **Items** and click **Print**. The window contains the following:

Grouping section: Options controlling how the report is organized.

Group by list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

Sort Direction: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

Sort by list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling which items will be included in the report. For example, if you filter by **Item Category**, you can restrict the print-out to items in a particular category.

Show deleted records: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Item Summary Report

The Item Summary report provides a quick summary of your current stock of inventory. By default, the report has a line for each item, showing the most important information about the items. Options in the **Advanced** section let you add more information to the report.

To print a item summary, use **Items** | **Reports** | **Summary**. This opens a window that contains the following:

Grouping section: Options controlling how the report is organized.

> **Group by** list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

> **Sort Direction**: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

> **Sort by** list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

> **Sort Direction**: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling what kind of items will be included in the report. The window lets you select items in several ways:

Show deleted records: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show Report in Columns: Organizes the report so that there is a single "line" for each record in the report, with the fields of each line broken up into separate columns. This format can be useful if you only want to see a few pieces of information from each record, as dictated by the **Show** checkboxes. However, it becomes unreadable if you try to cram too many pieces of information on a single line.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Item Activity Report

Items Activity is a report that lists changes in your item inventory, including the use of items on work orders, the purchase and receipt of new items, and the transfer of items from one storeroom to another. A large number of options let you select what the report covers and organize the result in various ways.

To print an item activity report, go to **Items** | **Reports** | **Activity**. The window contains the following:

Grouping section: Options controlling how the report is organized.

Group by list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

Sort Direction: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

Sort by list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling which items will be included in the report. For example, if you filter by **Item Category**, you can restrict the print-out to items in a particular category.

Show deleted records: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Item Issue Report

The *Items Issued* report lists removals of items from inventory. In most cases, this means using the items for a work order; however, you may also issue items for other reasons. (For more information, see *Issue Codes* on page 108.)

To print an item issue report, go to **Items** | **Reports** | **Issued**. The window contains the following:

Grouping section: Options controlling how the report is organized.

Group by list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

Sort Direction: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

Sort by list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling which items will be included in the report. For example, if you filter by **Item Category**, you can restrict the print-out to items in a particular category.

Show deleted records: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of

compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Item Restocking Report

The *Item Restocking* report lists items that need to be restocked. This means that in a particular storeroom, the stock available is less than the minimum specified for that storeroom. (You specify minimums for each storeroom using storeroom assignments. For more, see *Storeroom Assignments* on page 113.)

You can also get restocking information directly from the control panel at **Items** | **Restocking**. This lists all items that need to be restocked; accompanying each item is a list of the storerooms where restocking is required. For more, see *Item Restocking Table* on page 448.

Note: Stock available is calculated as `On Hand + On Order - On Reserve`.

To print an item restocking report, go to **Items** | **Reports** | **Restocking**. The window contains the following:

Grouping section: Options controlling how the report is organized.

Group by list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

Sort Direction: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

Sort by list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling which items will be included in the report. For example, if you filter by **Item Category**, you can restrict the print-out to items in a particular category.

Show deleted records: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show Items at min value: If you leave this option blank, the report will only show items that are below their specified minimum quantity. If you checkmark the option, the report will show you items that have exactly reached their specified minimum quantity, as well as items that have fallen below their minimum; this lets you see items that may soon fall below their minimum.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Item Location and Status Report

The *Item Location and Status* report lists the storerooms where items are stored, and the quantity of the item in that storeroom.

To print such a report, go to **Items** | **Reports** | **Location and Status**. The window contains the following:

Grouping section: Options controlling how the report is organized.

Group by list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

Sort Direction: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

Sort by list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling which items will be included in the report. For example, if you filter by **Item Category**, you can restrict the print-out to items in a particular category.

Show deleted records: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Item Usage Report

The *Item Usage* report lists units and items: which units have required which items during the course of work orders. For example, the report will tell you when a particular item was used to repair a particular unit.

To print an item usage report, go to **Items** | **Reports** | **Usage**. The window contains the following:

Grouping section: Options controlling how the report is organized.

Group by list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

Sort Direction: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

Sort by list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling which units and items will be included in the report. The window lets you select units and meters in several ways:

Show deleted records: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Unit Filters: Make selections based on basic unit information. For example, if you filter by **Unit Location**, you can restrict the print-out to units at a particular location (e.g. all units in a specific building).

Unit Value Filters: Make selections based on other properties of the unit. For example, if you filter by **Purchase Vendor**, you can restrict the print-out to units purchased from a particular vendor.

Item Filters: Make selections based on aspects of the items. For example, if you filter by **Item Category**, you can restrict the print-out to items in a given category.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Purchase Orders

MainBoss lets you create purchase orders for you. Such a purchase order may cover the purchase of both goods and services (i.e. inventory items and outside labor expenses). In addition, the purchase order may include *miscellaneous items* such as taxes and service surcharges.

Purchase Order States

To accommodate organizations that require approvals before making a purchase, the process of creating a purchase order can have many stages:

☐ **Draft:** This is the stage where you first enter the information about the purchase order. The purchase order remains in its draft state until you issue it (see below).

Many organizations require a formal approval process for some or all purchase orders created by the maintenance department. Typically, a purchase order remains in the draft stage until it receives all the necessary approvals.

> **Note:** Inventory items are considered to be *on order* as soon as they appear on a draft purchase order. MainBoss does this to avoid over-ordering stock—once an item has been put on one purchase order, the corresponding "stock available" quantities are all updated to show the quantity of stock that will eventually arrive.
>
> The drawback of this approach is that the items are considered on order before the purchase order is actually issued. If the purchase order isn't issued for a long time, you may be misled into thinking that the stock is soon going to show up, when in fact, the purchase order hasn't even been sent to the vendor. For this reason, you should try not to leave any purchase order in the draft stage for an extended period of time.

☐ **Issued:** Once the purchase order has been approved, it can be issued to the vendor who will supply the goods. An issued purchase order has actually been submitted to the vendor.

Once a purchase order has been issued, you can't add more items to it. If you've issued a purchase order but find that you have to make changes before sending it to the vendor, MainBoss lets you *withdraw* the purchase order.

You cannot record the receipt of goods or services in connection with a purchase order until the purchase order is issued.

☐ **Closed:** Once you have received all the items specified in the purchase order, the purchase order may be closed. The purchase order may also be closed if some items have been received and orders for outstanding items have been cancelled.

A closed purchase order can't be edited. If you really want to make changes, you

have to *reactivate* it first. If you want to add comments to the purchase order, you should do so before you close it.

☐ **Void:** A draft purchase order may be canceled by marking it as void.

MainBoss has various buttons for changing the state of purchase orders. These are summarized below:

☐ **Void**: Changes **Draft** to **Void**, and also opens a window where you may record a comment about why you decided to cancel the purchase order

☐ **Draft Purchase Order**: Changes **Void** to **Draft**, and also opens a window where you may record a comment about why you decided to reopen the purchase order

☐ **Issue**: Changes **Draft** to **Issued**

☐ **Issue (With Comment)**: Same as **Issue**, but also opens a window where you may record a comment about what you're doing

☐ **Withdraw Purchase Order**: Changes **Issued** to **Draft**, and also opens a window where you may record a comment explaining why you're withdrawing the purchase order

☐ **Close Purchase Order**: Changes **Issued** to **Closed**

☐ **Close Purchase Order (With Comment)**: Same as **Close Purchase Order**, but also opens a window where you may record a comment about what you're doing

☐ **ReActivate Purchase Order**: Changes **Closed** to **Issued**, and also opens a window where you may record a comment explaining why you're reactivating the purchase order

Purchase orders may be created in a number of different ways. The simplest is creating one directly from the purchase order viewer (**Purchase Orders** in the control panel). Purchase orders may also be created as part of the process of creating a work order. When a work order requires hiring outside contractors or the purchase of non-inventory materials, MainBoss lets you create a purchase order to cover those labor or material costs. For more on this way to create purchase orders, see *Editing Work Orders* on page 320.

Purchase Order Status Codes: In addition to the standard purchase order states, you can create your own custom *status codes* to describe the condition of purchase orders. For example, you might have status codes like

```
Waiting for price quote
Waiting for management approval
Items on back-order
```

For more on purchase order status codes, see *Purchase Order Status Codes* on page 141.

Viewing Purchase Orders

The **Purchase Orders** table lists the purchase orders you have created. This includes draft, issued, and closed purchase orders as well as void (cancelled) ones.

There are also a number of specialized table viewers showing only one type of purchase order. See:

☐ *Viewing Draft Purchase Orders* on page 466

☐ *Viewing Issued Purchase Orders* on page 467

☐ *Viewing Closed Purchase Orders* on page 469

☐ *Viewing Void Purchase Orders* on page 470

The general viewer for all purchase orders contains the following:

View section: Shows the list of current purchase orders.

Number: Click this heading to sort the list by purchase order number. Click again to reverse the order (from ascending to descending or vice versa).

Vendor: Click this heading to sort the list by vendor. Click again to reverse the order.

Summary: Click this heading to sort the list by summary. Click again to reverse the order.

Details section: Shows basic information about the selected purchase order.

Line Items section: Lists what materials and labor are being ordered on the selected purchase order.

Assignees section: Lists people who have been assigned to the selected purchase order. For more on assignments, see *Assignments* on page 32.

Receiving section: Lists items and labor that have already been received in connection with the selected purchase order.

Receipts section: Lists receipts associated with the selected purchase order. For more on receipts, see *Receipts* on page 491.

Work Orders section: Lists any work orders linked to the selected purchase order.

State History section: Lists when the selected purchase order changed its state. This may include when it was created, issued, closed, and/or voided.

Print: Opens a window to let you print your purchase orders. For more information, see *Printing Purchase Orders* on page 488.

ReActivate Purchase Order: Applies to a purchase order that has been closed. The purchase order is put back into the issued state. **ReActivate Purchase Order** has a drop-down list containing the following:

Issue: Applies to a purchase order that is currently in its draft state. The purchase order is marked as issued.

Issue (With Comment): Same as **Issue**, but also opens a window where you may record a comment about what you're doing

Close Purchase Order: Applies to a purchase order that has been issued. The purchase order is marked as closed. MainBoss opens a window where you can record a comment and other information.

Close Purchase Order (With Comment): Same as **Close Purchase Order**, but also opens a window where you may record a comment about what you're doing

Withdraw Purchase Order: Applies to a purchase order that has been issued. The purchase order is put back into the draft state.

Void: Applies to a purchase order that is currently in its draft state. The purchase order is put into the void state (cancelled).

Draft Purchase Order: Applies to a purchase order that has been voided. The purchase order is put back into the draft state.

> **Note: Issue**, **Close Purchase Order**, **Withdraw Purchase Order**, **ReActivate Purchase Order**, **Void**, and **Draft Purchase Order** all open a window where you can record comments about what you're doing. This window also lets you set an effective date for the action. For more on recording such information, see *Purchase Order State History Records* on page 487.

Add Purchase Order Comment: Opens a window that allows you to create a state history record for this purchase order. This record has a **Comments** field where you can enter any comments about this PO. For example, you can use the state history record to provide date-stamped information for other users. For more on purchase order state history records, see *Purchase Order State History Records* on page 487.

Defaults for Purchase Order section: Shows any defaults to be used when creating new purchase orders.

Edit Defaults: Opens a window to let you change the displayed default values.

Refresh: Updates the list to reflect any recent changes.

Viewing Draft Purchase Orders

Purchase Orders | **Draft** lists purchase orders that have been created but not yet issued. The viewer contains the following:

View section: Shows the list of purchase orders that are currently in their draft state.

Number: Click this heading to sort the list by purchase order number. Click again to reverse the order (from ascending to descending or vice versa).

Vendor: Click this heading to sort the list by vendor. Click again to reverse the order.

Summary: Click this heading to sort the list by summary. Click again to reverse the order.

Details section: Shows basic information about the selected purchase order.

Line Items section: Lists what materials and labor are being ordered on the selected purchase order.

Assignees section: Lists people who have been assigned to the selected purchase order. For more on assignments, see *Assignments* on page 32.

Receiving section: Lists items and labor that have already been received in connection with the selected purchase order.

Receipts section: Lists receipts associated with the selected purchase order. For more on receipts, see *Receipts* on page 491.

Work Orders section: Lists any work orders linked to the selected purchase order.

State History section: Lists when the selected purchase order changed its state. This may include when it was created, issued, closed, and/or voided.

Issue: Issues the selected purchase order. **Issue** has a drop-down list containing the following:

Issue (With Comment): Same as **Issue**, but also opens a window where you may record a comment about what you're doing

Void: Voids (cancels) the selected purchase order.

Close Purchase Order, **Close Purchase Order (With Comment)**, **Withdraw Purchase Order**, **ReActivate Purchase Order**, **Draft Purchase Order**: Disabled in this table viewer because the actions do not apply to draft purchase orders.

> **Note: Issue (With Comment)** and **Void** open a window where you can record comments about what you're doing. This window also lets you set an effective date for the action. For more on recording such information, see *Purchase Order State History Records* on page 487.

        Add Purchase Order Comment: Opens a window that allows you to create a state history record for this purchase order. This record has a **Comments** field where you can enter any comments about this PO. For example, you can use the state history record to provide date-stamped information for other users. For more on purchase order state history records, see *Purchase Order State History Records* on page 487.

    Defaults for Purchase Order section: Shows any defaults to be used when creating new purchase orders.

        Edit Defaults: Opens a window to let you change the displayed default values.

        Refresh: Updates the list to reflect any recent changes.

There are a number of other purchase order viewers:

☐ *Viewing Purchase Orders* on page 464 (shows all types of purchase orders)

☐ *Viewing Issued Purchase Orders* on page 467

☐ *Viewing Closed Purchase Orders* on page 469

☐ *Viewing Void Purchase Orders* on page 470

Viewing Issued Purchase Orders

Purchase Orders | **Issued** lists purchase orders that have been issued. The viewer contains the following:

    Effective Date: Click this heading to sort the list by effective date. Click again to reverse the order (from earliest to latest or vice versa).

    Number: Click this heading to sort the list by purchase order number. Click again to reverse the order.

    Vendor: Click this heading to sort the list by vendor. Click again to reverse the order.

    Status: Click this heading to sort the list by purchase order status. Click again to reverse the order.

    Summary: Click this heading to sort the list by summary. Click again to reverse the order.

    Details section: Shows basic information about the selected purchase order.

Line Items section: Lists what materials and labor are being ordered on the selected purchase order.

Assignees section: Lists people who have been assigned to the selected purchase order. For more on assignments, see *Assignments* on page 32.

Receiving section: Lists items and labor that have already been received in connection with the selected purchase order.

Receipts section: Lists receipts associated with the selected purchase order. For more on receipts, see *Receipts* on page 491.

Work Orders section: Lists any work orders linked to the selected purchase order.

State History section: Lists when the selected purchase order changed its state. This may include when it was created, issued, closed, and/or voided.

Close Purchase Order: Closes the selected purchase order. **Close Purchase Order** has a drop-down list containing the following:

Close Purchase Order (With Comment): Same as **Close Purchase Order**, but also opens a window where you may record a comment about what you're doing.

Withdraw Purchase Order: Puts the selected purchase order back into its draft state.

Issue, **Issue (With Comment)**, **ReActivate Purchase Order**, **Void**, **Draft Purchase Order**: Disabled in this table viewer because the actions do not apply to issued purchase orders.

> **Note: Close Purchase Order (With Comment)** and **Withdraw Purchase Order** open a window where you can record comments about what you're doing. This window also lets you set an effective date for the action. For more on recording such information, see *Purchase Order State History Records* on page 487.

Add Purchase Order Comment: Opens a window that allows you to create a state history record for this purchase order. This record has a **Comments** field where you can enter any comments about this PO. For example, you can use the state history record to provide date-stamped information for other users. For more on purchase order state history records, see *Purchase Order State History Records* on page 487.

There are a number of other purchase order viewers:

☐ *Viewing Purchase Orders* on page 464 (shows all types of purchase orders)

☐ *Viewing Draft Purchase Orders* on page 466

☐ *Viewing Closed Purchase Orders* on page 469

☐ *Viewing Void Purchase Orders* on page 470

Viewing Closed Purchase Orders

Purchase Orders | **Closed** lists purchase orders that have been closed. The viewer contains the following:

Number: Click this heading to sort the list by purchase order number. Click again to reverse the order (from ascending to descending or vice versa).

Vendor: Click this heading to sort the list by vendor. Click again to reverse the order.

Summary: Click this heading to sort the list by summary. Click again to reverse the order.

Details section: Shows basic information about the selected purchase order.

Line Items section: Lists what materials and labor are being ordered on the selected purchase order.

Assignees section: Lists people who have been assigned to the selected purchase order. For more on assignments, see *Assignments* on page 32.

Receiving section: Lists items and labor that have already been received in connection with the selected purchase order.

Receipts section: Lists receipts associated with the selected purchase order. For more on receipts, see *Receipts* on page 491.

Work Orders section: Lists any work orders linked to the selected purchase order.

State History section: Lists when the selected purchase order changed its state. This may include when it was created, issued, closed, and/or voided.

ReActivate Purchase Order: Puts the selected purchase order back into the issued state. **ReActivate Purchase Order** has a drop-down list containing the following:

Issue, **Issue(With Comment)**, **Close Purchase Order**, **Close Purchase Order (With Comment)**, **Withdraw Purchase Order**, **Void**, **Draft Purchase Order**: Disabled in this table viewer because the actions do not apply to closed purchase orders.

Note: ReActivate Purchase Order opens a window where you can record comments about what you're doing. This window also lets you set an effective date for the action. For more on recording such information, see *Purchase Order State History Records* on page 487.

Add Purchase Order Comment: Opens a window that allows you to create a state history record for this purchase order. This record has a **Comments** field where you can enter any comments about this PO. For example, you can use the state history record to provide date-stamped information for other users. For more on

purchase order state history records, see *Purchase Order State History Records on page 487*.

There are a number of other purchase order viewers:

☐ *Viewing Purchase Orders* on page 464 (shows all types of purchase orders)

☐ *Viewing Draft Purchase Orders* on page 466

☐ *Viewing Issued Purchase Orders* on page 467

☐ *Viewing Void Purchase Orders* on page 470

Viewing Void Purchase Orders

Purchase Orders | **Void** lists purchase orders that have been voided (cancelled). The viewer contains the following:

Number: Click this heading to sort the list by purchase order number. Click again to reverse the order (from ascending to descending or vice versa).

Summary: Click this heading to sort the list by summary. Click again to reverse the order.

Details section: Shows basic information about the selected purchase order.

Line Items section: Lists what materials and labor are being ordered on the selected purchase order.

Assignees section: Lists people who have been assigned to the selected purchase order. For more on assignments, see *Assignments* on page 32.

Receiving section: Lists items and labor that have already been received in connection with the selected purchase order.

Receipts section: Lists receipts associated with the selected purchase order. For more on receipts, see *Receipts* on page 491.

Work Orders section: Lists any work orders linked to the selected purchase order.

State History section: Lists when the selected purchase order changed its state. This may include when it was created, issued, closed, and/or voided.

Draft Purchase Order: Puts the selected purchase order back into the draft state. **Draft Purchase Order** has a drop-down list containing the following:

Issue, **Issue (With Comment)**, **Close Purchase Order**, **Close Purchase Order (With Comment)**, **Withdraw Purchase Order**, **ReActivate Purchase Order**, **Void**: Disabled in this table viewer because the actions do not apply to void purchase orders.

> **Note: Draft Purchase Order** opens a window where you can record comments about what you're doing. This window also lets you set an effective date for the action. For more on recording such information, see *Purchase Order State History Records* on page 487.

Add Purchase Order Comment: Opens a window that allows you to create a state history record for this purchase order. This record has a **Comments** field where you can enter any comments about this PO. For example, you can use the state history record to provide date-stamped information for other users. For more on purchase order state history records, see *Purchase Order State History Records* on page 487.

There are a number of other purchase order viewers:

☐ *Viewing Purchase Orders* on page 464 (shows all types of purchase orders)

☐ *Viewing Draft Purchase Orders* on page 466

☐ *Viewing Issued Purchase Orders* on page 467

☐ *Viewing Closed Purchase Orders* on page 469

Editing Purchase Orders

A purchase order lists goods and/or services that you wish to purchase from a vendor. It can also list information such as where purchased items should be stored when they're received and the payment terms for the order.

To create a purchase order, go to **Purchase Orders** and click the **New Purchase Order** button. This opens a window that contains the following:

Details section: Basic information about the purchase order.

Number: An identification number to label this purchase order. No two purchase orders may have the same code.

Number Format [only appears when editing defaults]: Specifies the format to be used when numbering new purchase orders. The default is `PO {0:D8}`. This means that the numbering format consists of the letters `PO` followed by a space and then eight decimal digits.

The `0` before the `:` is necessary. The number after the `D` is the minimum number of decimal digits in the resulting number. As an example, suppose you want to include the year in purchase orders numbers. If you set "**Number Format**" to `PO 2007-{0:D6}`, you'll get numbers like `PO 2007-000001`. You can also put text after the closing `}`; for example, you could write `PO {0:D6}-2007` to get numbers like `PO 000001-2007`.

For more on number formats, see *Number Formats* on page 27.

We recommend that you use enough digits in your numbers to ensure that there is always a leading zero.

Number Sequence [only appears when editing defaults]: Specifies the number to used the next time you create a new purchase order. For example, if you set this to 1000, the next purchase order you create will be given the number 1000.

If you include the year in "**Number Format**", you should change the format at the beginning of each year and reset "**Number Sequence**" to 1.

Send Invoice To [only appears when editing defaults]: Specifies a contact person within your organization to whom invoices should be sent. To fill in this field, you specify an entry in your **Contacts** table. For more on contacts, see *Contacts* on page 91.

Summary: A summary describing the nature of the purchase order.

Current: Read-only fields indicating the purchase order's current status.

State: Whether the purchase order is `Draft` (recently created), `Open` (ready to be sent to the vendor), `Void` (cancelled), or `Closed` (marked as complete). A new purchase order's "**State**" is blank until the first time the purchase order is saved.

Status: A user-defined status code for this purchase order. Typically, a code means that the purchase order requires someone's attention. For more on purchase order status codes, see *Purchase Order Status Codes* on page 141.

Effective Date: The date/time that the purchase order entered its current state.

Required By Date: The date by which you expect this PO to be filled (i.e. when the goods/services will be delivered).

Vendor: The supplier or contractor who'll supply the goods and services. For more on vendors, see *Vendors* on page 230.

Use payment terms from vendor: If you checkmark this box, MainBoss will set the "**Payment Terms**" field to the default payment terms associated with the given vendor (if any). If you leave the box blank, you can set "**Payment Terms**" manually.

Payment Terms: The terms on which you intend to pay for the goods/services. For more on payment terms, see *Payment Terms* on page 136.

Shipping Mode: How you want goods shipped to your organization. For more on shipping terms, see *Shipping Modes* on page 139.

Deliver to Location: The location where you want the goods/services delivered (e.g. the loading dock for a particular building). For more on locations, see *Locations* on page 126.

Comments to Vendor: Any comments that should be printed on the purchase order when it is issued to the vendor.

Comments: Any internal comments you want to record on the purchase order. These will *not* be printed on the purchase order when it's issued.

Select for Printing: Makes it simpler to print the purchase order after it has been created. For more on the use of **Select for Printing**, see *Select For Printing* on page 85.

Line Items section: The actual goods and/or services paid for by this purchase order.

New Purchase Item: Specifies an item you want to purchase. If you click this button, MainBoss opens a window where you can give more details about the item. For more, see *Purchase Item* on page 476.

New Purchase Hourly Outside: Specifies that you want to hire the vendor to do work, paid by the hour. If you click this button, MainBoss opens a window where you can give more details about the work. For more, see *Purchase Hourly Outside* on page 479.

New Purchase Per Job Outside: Specifies that you want to hire the vendor to do work, paid by the hour. If you click this button, MainBoss opens a window where you can give more details about the work. For more, see *Purchase Per Job Outside* on page 482.

New Purchase Miscellaneous Item: Specifies that you want the purchase order to include a miscellaneous item (e.g. that you'll pay a service charge for quick delivery). If you click this button, MainBoss opens a window where you can give more details about the item. For more, see *Purchase Miscellaneous Item* on page 484.

Assignees section: Lists people who have been assigned to this purchase order. For more information on assignments, see *Assignments* on page 32.

New Purchase Order Assignment: Opens a window where you can assign someone to this purchase order. For more details, see *Assigning Someone to a Purchase Order* on page 485.

Receiving section: Indicates which items have been received. For more on receiving and receipts, see *Receipts* on page491.

Receive: Indicates that you have received some or all of the currently selected line item. If you click this button, MainBoss opens a window where you can record information about what you received. For more on receiving line items, see *Receiving Purchase Order Items* on page 493, *Actual Hourly*

Outside (with PO) on page 358, *Actual Per Job Outside (with PO)* on page 364, and *Receiving Purchase Order Miscellaneous Items* on page 495.

Correct: Lets you change an existing receipt entry. Clicking the button opens an appropriate window that gives you the opportunity to change what was previously recorded. For more on correcting line item receipts, see *Correcting Receive Item Entries* on page 494, *Corrections of Actual Hourly Outside (with PO)* on page 360, *Corrections of Actual Per Job Outside (with PO)* on page 366, and *Correcting Receive Miscellaneous Entries* on page 496.

Edit: Lets you change an existing purchase entry. Clicking the button opens an appropriate window for editing the information.

If you use **Edit** on a receipt entry, it only lets you change a few fields in the record. To make more substantial changes, use **Correct**.

Receipts section: Indicates any receipts (waybills) associated with this purchase order.

New Receipt: Opens a window where you can create a new receipt. For more information, see *Editing Receipts* on page 492.

Edit: Opens a window to edit the selected receipt.

View: Opens a window to let you view (but not change) the selected receipt.

Work Orders section: Shows any work orders associated with this purchase order. For more on work orders, see *Work Orders* on page 309.

New Work Order Purchase Order: Opens a window where you can associate a work order with this purchase order. Typically, this should be an *existing* work order. For more, see *Associating Work Orders with Purchase Orders* on page 487.

Edit: Lets you change a work order association.

View: Lets you view (but not change) the selected work order association.

Delete: Deletes a work order from the list. (The work order itself is not deleted, just the connection with this purchase order.)

State History section: Shows the states that purchase order has gone through: when it was opened, when it was issued, and so on.

Printed Form section [only appears when editing defaults]: Specifies information that will be used when printing purchase orders.

Title: Zero or more lines of text that should appear at the beginning of the purchase order. For example, you might put in any legal notices that your organization requires.

Additional Lines: A number. MainBoss will add this number of blank lines after the body of the purchase order. For example, if you specify the number 6, MainBoss will add six blank lines after the body of the purchase order, leaving space for people to write in any useful information.

Additional Information: Zero or more lines of text that should appear at the end of the purchase order. For example, you might use this to indicate where an authorization signature goes.

Print: Opens a window to let you print purchase orders. For more information, see *Printing Purchase Orders* on page 488.

Issue: Applies to a purchase order that is currently in its draft state. The purchase order is marked as issued. **Issue** has a drop-down list containing the following:

Issue (With Comment): Same as **Issue**, but also opens a window where you may record a comment about what you're doing.

Close Purchase Order: Applies to a purchase order that has been issued. The purchase order is marked as closed. MainBoss opens a window where you can record a comment and other information.

Close Purchase Order (With Comment): Same as **Close Purchase Order**, but also opens a window where you may record a comment about what you're doing.

Withdraw Purchase Order: Applies to a purchase order that has been issued. The purchase order is put back into the draft state.

ReActivate Purchase Order: Applies to a purchase order that has been closed. The purchase order is put back into the issued state.

Void: Applies to a purchase order that is currently in its draft state. The purchase order is put into the void state (cancelled).

Draft Purchase Order: Applies to a purchase order that has been voided. The purchase order is put back into the draft state.

> **Note:** **Issue (With Comment)**, **Close Purchase Order (With Comment)**, **Withdraw Purchase Order**, **ReActivate Purchase Order**, **Void**, and **Draft Purchase Order** all open a window where you can record comments about what you're doing. This window also lets you set an effective date for the action. For more on recording such information, see *Purchase Order State History Records* on page 487.

Add Purchase Order Comment: Opens a window that allows you to create a state history record for this purchase order. This record has a **Comments** field where you can enter any comments about this PO. For example, you can use the state history record to provide date-stamped information for other users. For more on purchase order state history records, see *Purchase Order State History Records* on page 487.

Purchase Item

A "purchase item" line in a purchase order requests that an item be purchased from the vendor associated with the purchase order. When you specify an item, you also specify the storeroom where you intend to store it after delivery. To specify both the item and the storeroom, you use a storeroom assignment. For more, see *Storeroom Assignments on page 113*.

To see the Purchase Item editor, click **New Purchase Item** in the **Line Items** section of a purchase order. The editor contains the following:

Item Number: A number that can be used to specify the location of this line item in the purchase order. If you don't use item numbers, line items on the purchase order will be sorted in the order they were recorded when you filled out the purchase order. If you do use item numbers, line items on the purchase order will be sorted from lowest "**Item Number**" to highest.

Purchase Order: This area lets you specify a draft purchase order to include the item you want to purchase. If you reached this window from a purchase order, it will simply be a read-only field identifying the original purchase order.

Otherwise, at the bottom of this area is a drop-down list which will display purchase orders based on the options specified in the "**Purchase Order**" area. By choosing appropriate options, you can reduce the entries that are shown in the drop-down list, making it quicker and easier to choose the one you want. The possible options are:

Only include Purchase Orders from the Vendor named in the preferred Price Quote for this Storage Assignment: If you select this option, the drop-down list will only include existing purchase orders directed toward the vendor named in the storage assignment's preferred price quote. (If the storage assignment doesn't have a preferred price quote, the drop-down list won't have any entries.)

Only include Purchase Orders from Vendors who have a price quote for the Item in this Storage Assignment: If you select this option, the drop-down list will only include vendors who have ever made a price quote on the item associated with the "**Storage Assignment**" record.

Only include Purchase Orders from Vendors who have previously supplied the Item in this Storage Assignment: If you select this option, the drop-down list will only include vendors who have ever sold you the item associated with the "**Storage Assignment**" record.

Do not filter Purchase Orders based on Vendors in Pricing or Purchasing History: If you select this option, the drop-down list will show all draft purchase orders.

Drop-down list: The drop-down list at the end of the "**Purchase Order**" area shows draft purchase orders that satisfy the options you have specified.

Storage Assignment: This area lets you specify a storage assignment that states what item you want to purchase and where you want to store it. If you reached this window from a storage assignment record, this will be a read-only field identifying the original storage assignment.

Otherwise, at the bottom of this area is a drop-down list which will display storage assignments based on the options specified in the "**Storage Assignment**" area. By choosing appropriate options, you can reduce the entries that are shown in the drop-down list, making it quicker and easier to choose the one you want. The possible options are:

Only include Storage Assignments which have a preferred Price Quote associated with them: A storage assignment record may or may not specify a *preferred price* for an item. If you select this option, the "**Storage Assignment**" drop-down list will only show storage assignments that have such a price.

Only include Storage Assignments for items which have a Price Quote associated with them: If you select this option, the "**Storage Assignment**" drop-down list will only show storage assignments for items whose records have any associated price quote.

Only include Storage Assignments for items which have previously been received: If you select this option, the "**Storage Assignment**" drop-down list will only show storage assignments for items which have been previously purchased (i.e. that show up in MainBoss's purchasing history). Typically, this option is combined with **Use Pricing or Purchasing history only for the Purchase Order's vendor**, in which case the drop-down list only shows items you've purchased from the same vendor.

Do not filter Storage Assignments based on Pricing or Purchasing History: If you select this option, the "**Storage Assignment**" drop-down list will not be affected by any of the preceding options.

Use Pricing or Purchasing history only for the Purchase Order's vendor: If you checkmark this box, the "**Storage Assignment**" drop-down list only shows storage assignment records with price quotes or purchases from the same vendor as the purchase order.

Only include Storage Assignments which are below minimum and cannot be replenished using transfers: If you checkmark this box, the "**Storage Assignment**" drop-down list only shows storage assignment records where the item quantity is below the storeroom's specified minimum, and where there isn't enough surplus in other storerooms to get back up to the minimum.

Only include Storage Assignments which are below minimum: If you checkmark this box, the "**Storage Assignment**" drop-down list only shows storage assignment records where the item quantity is below the storeroom's specified minimum.

Only include Storage Assignments which are below maximum and should not be replenished using transfers: If you checkmark this box, the "**Storage Assignment**" drop-down list only shows storage assignment records where the item quantity is below the storeroom's specified maximum, and where transferring items from other storerooms would put those other storerooms below their maximums.

Only include Storage Assignments which are below maximum: If you checkmark this box, the "**Storage Assignment**" drop-down list only shows storage assignment records where the item quantity is below the storeroom's specified maximum.

Do not filter Storage Assignments based on quantity available: If you select this option, the "**Storage Assignment**" drop-down list will not be affected by any of the preceding options.

Drop-down list: The drop-down list at the end of the "**Storage Assignment**" area shows storage assignments that satisfy the options you have specified.

Quantity: Read-only fields telling current quantities of the item in the storeroom specified by "**Storage Assignment**". The "**To Order**" value is the quantity that needs to be ordered in order to get back up to the "**Maximum**" for that storeroom.

Item Pricing and Purchasing History: This area lets you specify a pricing record for the item you want to purchase. Pricing records may be price quotes or actual prices paid in the past. (For more on price quotes, see *Item Pricing* on page 448.)

At the bottom of this area is a drop-down list which will display storage assignments based on the options specified in the "**Storage Assignment**" area. By choosing appropriate options, you can reduce the entries that are shown in the drop-down list, making it quicker and easier to choose the one you want. The possible options are:

Use Item Pricing or Purchase History only for this vendor: If you checkmark this box, the drop-down list will only contain price records for this item purchased from the specific "**Vendor**". If you leave the checkbox blank, the drop-down list will also contain price records for other vendors.

Do not include Purchasing History: If you checkmark this box, the drop-down list will only contain price quotes. If you leave the checkbox blank, the drop-down list will also contain actual prices paid to vendors in the past.

Drop-down list: The drop-down list at the end of the "**Item Pricing and Purchasing History**" area shows pricing records that satisfy the options you have specified.

Suggested Text: A suggestion for what should appear on the purchase order in order to describe this item. This text is taken from the record chosen for "**Item Pricing and Purchasing History**".

Use suggested text: If you checkmark this box, MainBoss will fill in "**Order Line Text**" with what appears in "**Suggested Text**". If you leave the box blank, you should fill in "**Order Line Text**" yourself.

Order Line Text: The text that will actually appear on the purchase order as a description for this item. Typically, this should be the name and catalog number that this vendor uses for the item.

Use To Order quantity: If you checkmark this box, MainBoss will fill in "**Order Quantity**" with the "**To Order**" value given in the read-only "**Quantity**" line. If you leave the box blank, you must fill in "**Order Quantity**" yourself.

Order Quantity: The quantity of the item that you want to order.

UOM: A read-only field giving the unit of measurement for this item (taken from the item record).

Pricing Basis, **Calculated Cost**: Read-only fields giving the cost for the item, as based on the record specified in "**Item Pricing and Purchasing History**".

Use calculated cost: If you checkmark this box, MainBoss will fill in "**Order**" with the values in the read-only "**Calculated Cost**". If you leave the box blank, you must fill in "**Order**" yourself.

Order: The cost of the item(s) ordered. If you fill in "**Unit Cost**", MainBoss automatically fills in "**Total Cost**" or vice versa.

Purchase Hourly Outside

When a purchase order contains a "purchase hourly outside" line, it indicates that an outside contractor should be hired to do work that is paid by the hour. When you specify this kind of entry, you also specify the hourly rate. To specify the contractor, the rate and the expected duration of the work, you use an hourly outside demand. For more, see *Demand Hourly Outside* on page 341.

To see the Purchase Hourly Outside editor, go to the **Line Items** section of a purchase order, drop down the arrow of **New Purchase Item** and click **New Purchase Hourly Outside**. Alternatively, you can begin with an hourly outside demand on a work order and click **New Purchase Outside**. The editor contains the following:

Item Number: A number that can be used to specify the location of this line item in the purchase order. If you don't use item numbers, line items on the purchase

order will be sorted in the order they were recorded when you filled out the purchase order. If you do use item numbers, line items on the purchase order will be sorted from lowest "**Item Number**" to highest.

Purchase Order area: The purchase order that will cover this purchase. If you began from a purchase order, you'll see a read-only field identifying the purchase order.

Otherwise, the area ends with a drop-down list where you can specify the purchase order. The options preceding this list dictate what you see when you drop down the list. By choosing appropriate options, you can reduce the entries that are shown in the drop-down list, making it quicker and easier to choose the one you want. The possible options are:

Only include Purchase Orders for Vendors who can perform this work: If you select this option, the contents of the drop-down list will be affected by the demand specified in "**Hourly Outside Demand**". If the demand states a specific vendor, the drop-down list will only show purchase orders addressed to that vendor. If the demand doesn't state a specific vendor, the drop-down list will show purchase orders addressed to any vendor.

Only include Purchase Orders for Vendors who have previously performed this work: If you select this option, the drop-down list will only include purchase orders for vendors who have been previously associated with the given hourly outside record.

Drop-down list: The drop-down list at the end of the "**Purchase Order**" area shows draft purchase orders that satisfy the options you have specified.

Hourly Outside Demand area: The hourly outside demand for the labor that will be purchased. If you began from an hourly outside demand on a work order, you'll see a read-only field identifying the demand.

Otherwise, this area ends with a drop-down list where you can specify an hourly outside demand record. The options preceding this list dictate what you see when you drop down the list. By choosing appropriate options, you can reduce the entries that are shown in the drop-down list, making it quicker and easier to choose the one you want. The possible options are:

Only include Demands for work specifically from this Purchase Order's Vendor: If you select this option, the drop-down list only shows hourly outside demand records that specifically mention the specified "**Vendor**".

Only include Demands for work that this Purchase Order's Vendor could perform: If you select this option, the drop-down list shows hourly outside demand records that have the specified "**Vendor**" or whose "**Vendor**" field is blank.

Do not filter Demands based on the Vendor associated with the work: If you select this option, the drop-down list will not be restricted by vendor or trade.

Only include demands for work previously performed by this vendor: If you checkmark this box, the drop-down list only shows hourly outside demands that have been used in previous purchase orders to this vendor.

Only include demands where quantity demanded exceeds quantity currently ordered: If you checkmark this box, the drop-down list will only show hourly outside demands where the demand is greater than the quantity of hourly outside work currently on order.

Drop-down list: The drop-down list at the end of the "**Hourly Outside Demand**" area shows hourly outside demand records that satisfy the options you have specified.

Hours: Read-only fields giving information about the work you've specified. This information is taken from the hourly outside demand record and from other tables in MainBoss.

Demanded: The total amount of time contained in the labor demand.

Already Ordered: The amount of time (if any) that has already been "received" on this purchase order. For example, suppose a job is expected to take several days. At the end of each day, you might use the purchase order to record how much labor you received on that day.

Remaining Demand: Equals "**Demanded**" minus "**Already Ordered**".

Hourly Rate: The hourly rate paid to the contractor.

Suggested Text: A suggestion for what should appear on the purchase order in order to describe this work. This text is taken from the hourly outside demand record.

Use suggested text: If you checkmark this box, MainBoss will fill in "**Order Line Text**" with what appears in "**Suggested Text**". If you leave the box blank, you should fill in "**Order Line Text**" yourself.

Order Line Text: The text that will actually appear on the purchase order as a description for this work.

Use remaining demand as quantity to order: If you checkmark this box, MainBoss will set "**Order Time**" to the "**Remaining Demand**" value. If you leave the box blank, you must fill in "**Order Time**" yourself.

Order Time: The amount of the contractor's time that you want covered by this entry. This may not be the full time expected. For example, if a job takes several days, you may decide to record each day's time separately.

Calculated Cost: Read-only fields giving the expected cost of "**Order Time**" if you use "**Hourly Rate**".

Use calculated cost: If you checkmark this box, MainBoss fills in "**Order**" with the values in "**Calculated Cost**". Otherwise, you must fill in "**Order**" yourself.

Order: The cost of the given amount of work. If you fill in the "**Hourly Rate**" box, MainBoss automatically fills in "**Total Cost**" and vice versa.

Purchase Per Job Outside

A "purchase per job outside" line in a purchase order requests that an outside contractor should be hired to do work that is paid by the job. When you specify this kind of entry, you also specify the per job rate. To specify the contractor, the rate and the expected quantity of work, you use a per job outside demand. For more, see *Demand Per Job Outside* on page 343.

To see the Purchase Per Job Outside editor, go to the **Line Items** section of a purchase order, drop down the arrow of **New Purchase Item** and click **New Purchase Per Job Outside**. Alternatively, you can begin with a per job outside demand on a work order and click **New Purchase Outside**. The editor contains the following:

Item Number: A number that can be used to specify the location of this line item in the purchase order. If you don't use item numbers, line items on the purchase order will be sorted in the order they were recorded when you filled out the purchase order. If you do use item numbers, line items on the purchase order will be sorted from lowest "**Item Number**" to highest.

Purchase Order area: The purchase order that will cover this purchase. If you began from a purchase order, you'll see a read-only field identifying the purchase order.

Otherwise, the area ends with a drop-down list where you can specify the purchase order. The options preceding this list dictate what you see when you drop down the list. By choosing appropriate options, you can reduce the entries that are shown in the drop-down list, making it quicker and easier to choose the one you want. The possible options are:

Only include Purchase Orders for Vendors who can perform this work: If you select this option, the contents of the drop-down list will be affected by the demand specified in "**Per Job Outside Demand**". If the demand states a specific vendor, the drop-down list will only show purchase orders addressed to that vendor. If the demand doesn't state a specific vendor, the drop-down list will show purchase orders addressed to any vendor.

Only include Purchase Orders for Vendors who have previously performed this work: If you select this option, the drop-down list will only include

purchase orders for vendors who have been previously associated with the given per job outside record.

Drop-down list: The drop-down list at the end of the "**Purchase Order**" area shows draft purchase orders that satisfy the options you have specified.

Per Job Outside Demand area: The per job outside demand for the labor that will be purchased. If you began from a per job outside demand on a work order, you'll see a read-only field identifying the demand.

Otherwise, this area ends with a drop-down list where you can specify a per job outside demand record. The options preceding this list dictate what you see when you drop down the list. By choosing appropriate options, you can reduce the entries that are shown in the drop-down list, making it quicker and easier to choose the one you want. The possible options are:

Only include Demands for work specifically from this Purchase Order's Vendor: If you select this option, the drop-down list only shows per job outside demand records that specifically mention the specified "**Vendor**".

Only include Demands for work that this Purchase Order's Vendor could perform: If you select this option, the drop-down list shows per job outside demand records that have the specified "**Vendor**" or whose "**Vendor**" field is blank.

Do not filter demands based on the Vendor associated with the work: If you select this option, the drop-down list will not be restricted by vendor or trade.

Only include demands for work previously performed by this vendor: If you checkmark this box, the drop-down list only shows per job outside demands that have been used in previous purchase orders to this vendor.

Only include demands where quantity demanded exceeds quantity currently ordered: If you checkmark this box, the drop-down list will only show per job outside demands where the demand is greater than the quantity of per job outside work currently on order.

Drop-down list: The drop-down list at the end of the "**Per Job Outside Demand**" area shows per job outside demand records that satisfy the options you have specified.

Quantity: Read-only fields giving information about the work you've specified. This information is taken from the per job outside demand record and from other tables in MainBoss.

Demanded: The total quantity of labor contained in the labor demand.

Already Ordered: The quantity of labor (if any) that has already been "received" on this purchase order. For example, suppose the work consists of painting a number of rooms, with a fixed cost per room. At the end of

each day, you might use the purchase order to record how many rooms were painted on that day and therefore the quantity of "per job" labor.

Remaining Demand: Equals "**Demanded**" minus "**Already Ordered**".

Per Job Rate: The per job rate paid to the contractor.

Suggested Text: A suggestion for what should appear on the purchase order in order to describe this work. This text is taken from the per job outside demand record.

Use suggested text: If you checkmark this box, MainBoss will fill in "**Order Line Text**" with what appears in "**Suggested Text**". If you leave the box blank, you should fill in "**Order Line Text**" yourself.

Order Line Text: The text that will actually appear on the purchase order as a description for this work.

Use remaining demand as quantity to order: If you checkmark this box, MainBoss will set "**Order Quantity**" to the "**Remaining Demand**" value. If you leave the box blank, you must fill in "**Order Quantity**" yourself.

Order Quantity: The amount of work that you want covered by this entry. This may not be the full quantity expected. For example, if a job takes several days, you may decide to record each day's work separately.

Calculated Cost: Read-only fields giving the expected cost of "**Order Quantity**" if you use "**Per job Rate**".

Use calculated cost: If you checkmark this box, MainBoss fills in "**Order**" with the values in "**Calculated Cost**". Otherwise, you must fill in "**Order**" yourself.

Order: The cost of the given amount of work. If you fill in the "**Unit Cost**" box, MainBoss automatically fills in "**Total Cost**" and vice versa.

Purchase Miscellaneous Item

A "purchase miscellaneous item" line in a purchase order specifies some additional charge to add to the purchase order (e.g. a surcharge for rush service). To specify the charge, you use miscellaneous item record. For more, see *Purchase Order Miscellaneous* on page 134.

> **Note:** There is no connection between purchase order miscellaneous items and work order miscellaneous items. A purchase order miscellaneous item is typically an extra cost associated with the act of purchasing (e.g. sales tax). A work order miscellaneous item is typically an extra cost associated with doing a job (e.g. parking for a worker).

To see the Purchase Miscellaneous Item editor, go to the **Line Items** section of a purchase order, drop down the arrow of **New Purchase Item** and click **New Purchase Miscellaneous Item**. The editor contains the following:

Item Number: A number that can be used to specify the location of this line item in the purchase order. If you don't use item numbers, line items on the purchase order will be sorted in the order they were recorded when you filled out the purchase order. If you do use item numbers, line items on the purchase order will be sorted from lowest "**Item Number**" to highest.

Purchase Order: A read-only field giving the purchase order number.

Miscellaneous Item area: This area ends with a drop-down list where you can specify a miscellaneous item.

> **Only include Miscellaneous items previously provided by this vendor**: If you checkmark this box, the drop-down list on the next line only shows miscellaneous items that have been used in previous purchase orders to this vendor.

> Drop-down list: The drop-down list at the end of the "**Miscellaneous Item**" area shows miscellaneous items that satisfy any option you have specified.

Unit Cost: A read-only field giving the cost of the item from the "**Miscellaneous Item**" record.

Suggested Text: A suggestion for what should appear on the purchase order in order to describe this item. This text is taken from the "**Miscellaneous Item**" record.

Use suggested text: If you checkmark this box, MainBoss will fill in "**Order Line Text**" with what appears in "**Suggested Text**". If you leave the box blank, you should fill in "**Order Line Text**" yourself.

Order Line Text: The text that will actually appear on the purchase order as a description for this item.

Order Quantity: The quantity of the miscellaneous item that you want to order.

Calculated Cost: Read-only fields giving the cost for the item, as based on the specified "**Miscellaneous Item**".

Use calculated cost: If you checkmark this box, MainBoss will fill in "**Order**" with the values in the read-only "**Calculated Cost**". If you leave the box blank, you must fill in "**Order**" yourself.

Order: The cost of the item(s) ordered. If you fill in "**Unit Cost**", MainBoss automatically fills in "**Total Cost**" or vice versa.

Assigning Someone to a Purchase Order

You can assign someone to a purchase order, provided that the person has an entry in the **Purchase Orders Assignees** table (**Purchase Orders** | **Assignees** or **Coding Definitions** | **Purchase Orders** | **Assignees**). When someone is assigned to a purchase

order, it indicates that the person has some interest in the purchase order. For further information on assignments, see *Assignments* on page 32.

To assign someone to a purchase order, click the **New Purchase Order Assignment** button in the **Assignees** section of a purchase order. This opens a window that contains the following:

Purchase Order area: If you started from a purchase order record, this area will contain a read-only field identifying the purchase order.

If you started from a purchase order assignee record, the **Purchase Order** area allows you to choose one or more purchase orders to which the person should be assigned. You specify these purchase orders using the multi-select drop-down list at the bottom of the **Purchase Order** area. Option buttons in the **Purchase Order** area let you shorten the contents of the drop-down list, to make it easier to choose the purchase orders you want. The option buttons include:

Only show Draft Purchase Orders: If you choose this option, the drop-down list will only show purchase orders in the Draft state.

Only show Issued Purchase Orders: If you choose this option, the drop-down list will only show purchase orders in the Issued state.

Only show Closed Purchase Orders: If you choose this option, the drop-down list will only show purchase orders in the Closed state.

Show all Purchase Orders: If you choose this option, the drop-down list shows all purchase orders.

Drop-down list: A list of all purchase orders that match the criteria specified above.

Purchase Order Assignee area: If you started from a purchase order assignee record, this area will contain a read-only field identifying the purchase order assignee.

If you started from a purchase order record, the **Purchase Order Assignee** area lets you specify one or more people to whom you are assigning to this purchase order. The bottom of the area contains a multi-select drop-down list where you can specify the assignees. The options in the area let you reduce the number of possibilities shown in the drop-down list.

Show prospects for Purchase Order Assignee for this Purchase Order: If you click this option, the drop-down list will only show people who are already associated with this purchase order in some way (e.g. vendors).

Show all Assignees not currently assigned to this Purchase Order: If you click this option, the drop-down list will show everyone in the **Purchase Order Assignee** table who isn't already assigned to this purchase order.

> Drop-down list: A list of all potential assignees who match the criteria specified above.

Associating Work Orders with Purchase Orders

You can associate work orders with purchase orders using the **Work Orders** section of a purchase order or the **Purchase Orders** section of a work order. Clicking **New Work Order Purchase Order** in either section opens a window that contains the following:

> **Work Order**: The work order that you want to associate with the purchase order. If you started from a work order, this field is read-only.

> **Purchase Order**: The purchase order that you want to associate with the work order. If you started from a purchase order, this field is read only.

Purchase Order State History Records

A purchase order may be in a number of states: draft, issued, closed, and void. Whenever a purchase order changes state, MainBoss opens a window where you can record comments and set the effective date of what happened. For example, when you close a purchase order, MainBoss opens a window where you can specify a date that the PO was closed and record any relevant comments. You can also create a state history record by clicking **Add Purchase Order Comment** in any window where the button appears.

The window that records state information contains the following:

> **Number**: A read-only field identifying the purchase order whose state is changing.

> **Current State**: A read-only field telling the current state of the purchase order (before the state changes).

> **Current Status**: A read-only field giving the current status of the purchase order. For more on purchase order statuses, see *Purchase Order Status Codes* on page 141.

> **Effective Date**: The date/time when the state changed. By default, MainBoss fills this in with the current date/time. (Note that MainBoss also records the *actual* date/time on which the state changed—i.e. the date when you're actually filling out this record.)

> **Creator**: A read-only field identifying the person who created this record.

> **Purchase Order State**: A read-only field identifying the new state of the purchase order (the state the purchase order will enter once you **Save & Close** this record).

> **Purchase Order Status**: A new status code that you want to assign to this purchase order. Typically, a status code should only be assigned to a purchase order when

the purchase order needs attention from someone; otherwise, the status should be blank.

Comments: Any comments you want to record at this time.

Save & Close: Saves the current record and closes the editor window. This changes the state of the purchase order.

Close: Closes the window *without* changing the state of the purchase order.

Printing Purchase Orders

You can print your current purchase orders by clicking the **Print** button in **Purchase Orders** or with **Purchase Orders** | **Print**.

When a purchase order is printed, it can include contact information for someone in your organization who is authorized to deal with vendor questions. This person is called your organization's *purchasing contact*. You specify your purchasing contact in **Administration** | **Company Information**.

When you ask to print purchase orders, MainBoss opens a window that contains the following:

Sorting section: Options controlling how the report is organized.

Sort by list: These options determine how purchase orders will be sorted in the resulting report. If you choose a **Sort by** option, you will be offered a second set of **Sort by** options which let you sort purchase orders within the initial sort criteria.

Sort Direction options: Determine whether the report is sorted from lowest values to highest or vice versa.

Filtering section: Options controlling what kind of purchase orders will be included in the report.

Show only active records: If this checkbox is checkmarked, the Active filter will automatically be applied when preparing the report; this means that information from old purchase orders will not be included in the report. If this checkbox is blank, the Active filter is ignored; MainBoss uses information from *all* purchase orders, no matter how old.

For more about the active filter, see *The Active Filter* on page 55.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of

compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Additional Lines: May be filled in with a number. If so, MainBoss will add that number of blank lines to the purchase order. This can be used to write in any extra information that might be needed.

Additional Information: Extra information to be printed in the purchase order. For example, you can use this area to specify a line reading `Authorized by` which would then be followed by the signature of someone authorizing the purchase.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Clear Select for Printing: If you click this button, MainBoss removes the checkmark from all **Select for Printing** boxes on all purchase orders. Typically, you do this after printing purchase orders that have been marked **Select for Printing**. For more, see *Select For Printing* on page 85.

Printing Purchase Order States

You can print purchase order states by clicking the **Print** button in a window for choosing a purchase order's state. This opens a window that contains the following:

Sorting section: Options controlling how the report is organized.

Sort by list: These options determine how items are sorted.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick a **Sort by** option where sort direction is relevant.

Filtering section: Options controlling which status codes will be included in the report.

Show deleted records: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Receipts

A *receipt* records the contents of a shipment from a vendor. Receipts may also record the receipt of services from a vendor (e.g. when an outside contractor does work for you).

Receipts occur in response to a specific purchase order. If a single shipment contains items specified by several different purchase orders, you should break the shipment up into multiple receipts: one for each original purchase order. For more on purchase orders, see *Purchase Orders* on page 462.

Whenever you receive a shipment, you should start a new receipt record using **Purchase Orders** | **Receipts**. Each receipt needs an identifier called the *waybill number* or simply the waybill. The receipt also has line items listing the goods and/or services that were delivered. Each receipt line item should refer back to a line item in an existing purchase order, indicating where the good/service was originally ordered.

Viewing Receipts

The Receipt table viewer lets you examine shipment receipts. For example, if you want to create a new receipt or edit an existing one, you begin by opening the Receipt table viewer.

The Receipt table viewer window contains the following:

> **View** section: Shows the list of current receipts.
>
>> **Entry Date**: Click this heading to sort the list by receipt date. Click again to reverse the order (from ascending to descending or vice versa).
>>
>> **Purchase Order**: Click this heading to sort the list by purchase order number. Click again to reverse the order.
>>
>> **Vendor**: Click this heading to sort the list by vendor. Click again to reverse the order.
>>
>> **Waybill**: Click this heading to sort the list by waybill number. Click again to reverse the order.
>>
>> **Description**: Click this heading to sort the list by description. Click again to reverse the order.
>>
>> **Cost**: Click this heading to sort the list by cost. Click again to reverse the order.
>>
>> **Details** section: Lists basic information about the selected receipt.
>>
>> **Activity** section: Lists the items or services received on the selected receipt.
>
> **Defaults for Receipt** section: Shows any defaults to be used when creating new receipts.

Editing Receipts

A receipt describes goods and/or services that you've received from a vendor. To create a receipt, go to **Purchase Orders** | **Receipts** and click the **New Receipt** button. This opens a window that contains the following:

Details section: Basic information about the receipt.

Entry Date: The date/time when the goods and/or services were received. By default, this is set to the current date/time.

Purchase Order: The purchase order to which this receipt is responding. For more on purchase orders, see *Purchase Orders* on page 462.

Vendor: A read-only field giving the vendor associated with "**Purchase Order**".

Waybill: A brief code identifying this receipt.

Reference: Any reference number that might be associated with the actual shipment (e.g. vendor's delivery code).

Description: A more detailed description of the shipment.

Comments: Any comments you want to record in connection with this shipment.

Activity section: Lists the goods and/or services that you received. Each line in the list refers to a separate item or service.

Receive: Opens a window to record the receipt of the selected line item. The line item may be an inventory item, an outside labor expense, or a miscellaneous item.

Correct: Lets you change an existing receipt entry. Clicking the button opens an appropriate window that gives you the opportunity to change what was previously recorded. For more, see *Correcting Receive Item Entries* on page 494.

Edit: Lets you change an existing purchase entry. Clicking the button opens an appropriate window for editing the information.

If you use **Edit** on a receipt entry, it only lets you change a few fields in the record. To make more substantial changes, use **Correct**.

View: Lets you view an entry, but not make changes in it.

Refresh: Updates the list to reflect any recent changes.

Search: Searches the list for a specific entry.

Receiving Purchase Order Items

A "receive" line in a purchase order or receipt indicates that you have received some or all of an item that was ordered.

To see the Receive editor, go to the **Line Items** section of a purchase order or the **Activity** section of a receipt, select a "purchase item" line, and click **Receive**. The editor contains the following:

> **Entry Date**: A read-only field giving the actual date and time when this entry was made.

> **Effective Date**: The date/time that you want to say the item was received. The default is the current date and time.

> **Creator**: A read-only field giving your user name. This will appear in MainBoss's accounting history to show who recorded the receipt.

> **Order Line**: The line item in the purchase order corresponding to the item received. (This may be a read-only field if you started from a storage assignment.)

> Read-only fields: A series of read-only fields giving information from the purchase order.

> **Receipt**: The receipt where this item was received. (This may be a read-only field if you started from a receipt record.)

> Read-only fields: A series of read-only fields giving information from the receipt record.

> **Receiving Storage Assignment**: Specifies the item that was received and the storeroom where it should be stored. MainBoss fills this in with information from the original purchase item record, but the information can be changed if desired. (For more on storeroom assignments, see *Storeroom Assignments* on page 113.)

> Read-only fields: The editor window contains a number of read-only fields giving information about supplies of the item you've specified. This information is taken from various tables in MainBoss.

>> **Ordered**: The quantity and cost of the item as originally ordered.

>> **Already Received**: The quantity that has already been received in previous shipments.

>> **Order Remaining**: Equals "**Ordered**" minus "**Already Received**".

> **Use order remaining quantity**: If you checkmark this box, MainBoss will use "**Order Remaining**" as the actual quantity you received. If you leave the box blank, you must fill in "**Quantity**" yourself.

> **Quantity**: The actual quantity of the line item that you received.

Calculated Remaining Order Cost: Read-only fields giving the cost of the given "**Quantity**" based on existing price information.

Use calculated remaining order cost: If you checkmark this box, MainBoss will use "**Calculated Cost**" as the actual cost of what you received. If you leave the box blank, you must fill the cost into "**This Entry**" yourself.

This Entry: The actual cost of the quantity received.

As Corrected: If there has been a correction for this record, this line will have read-only fields giving the corrected values.

From Cost Center, **To Cost Center**: Read-only fields telling the cost centers involved in this operation. MainBoss creates accounting records indicating the transfer of money from the first cost center to the second. These fields are only visible if your database has an **Accounting** license key. For more, see *Accounting Facilities* on page 21.

Correcting Receive Item Entries

In order to correct a line item on a receipt, you must select the item you want to correct (in the **Activity** section of the receipt or in the **Receiving** section of a purchase order), then click the **Correct** button. This opens a window where you can record the correction. The window contains the following:

Entry Date: A read-only field giving the actual date and time when this entry was made.

Effective Date: The date/time that you want to assign to the correction. The default is the current date and time.

Creator: A read-only field giving your user name. This will appear in MainBoss's accounting history to show who made the correction.

Read-only fields: A series of read-only fields giving information from the purchase order and receipt where this line item originally appeared. For specifics about this information, see *Receiving Purchase Order Items* on page 493.

Use order remaining quantity: If you checkmark this box, MainBoss will use "**Order Remaining**" as the actual quantity you received. If you leave the box blank, you must fill in "**Quantity**" yourself.

Quantity: Corrects the quantity actually received. Typically, you fill in the "**As Corrected**" field with the actual quantity received—the correct quantity, as opposed to the quantity you originally recorded. The alternative is to fill in "**This Entry**" with the difference between the quantity you originally entered and the true quantity.

For example, suppose you really received 3 but you accidentally typed 1 in the original record. You could fill in "**As Corrected**" with 3 (the correct number) or

fill in "**This Entry**" with 2 (the difference between what you originally typed and the true quantity). "**This Entry**" may be a negative number if you originally typed in too much.

If you fill in "**As Corrected**", MainBoss automatically sets "**This Entry**" and vice versa.

Calculated Remaining Order Cost: Read-only fields giving the expected cost of the corrected quantity.

Use calculated remaining order cost: If you checkmark this box, MainBoss will fill in "**This Entry**" and "**As Corrected**" with the values obtained from "**Calculated Cost**". If you don't want to use these calculations, leave the checkbox blank and fill in "**This Entry**" or "**As Corrected**".

This Entry, **As Corrected**: Corrects the actual cost (if necessary). Typically, you fill in "**As Corrected**" with the correct cost of the correct quantity. The alternative is to fill in "**This Entry**" with the difference between the cost you originally entered and the true cost.

If you fill in "**As Corrected**", MainBoss automatically sets "**This Entry**" and vice versa.

From Cost Center, **To Cost Center**: Read-only fields telling the cost centers involved in this operation. MainBoss creates accounting records indicating the transfer of money from the first cost center to the second. These fields are only visible if your database has an **Accounting** license key. For more, see *Accounting Facilities* on page 21.

Receiving Purchase Order Miscellaneous Items

In the **Line Items** section of a purchase order, when you click **Receive** on a Miscellaneous line item, MainBoss displays the following:

Entry Date: A read-only field giving the actual date and time when this entry was made.

Effective Date: The date/time that you want to say the miscellaneous item was received. The default is the current date and time.

Creator: A read-only field giving your user name. This will appear in MainBoss's accounting history to show who recorded the receipt.

Read-only fields: A series of read-only fields giving information from the purchase order.

Receipt: The receipt where this miscellaneous item was received. (This may be a read-only field if you started from a receipt record.)

Read-only fields: A series of read-only fields giving information from the receipt record. These fields also state how much of the miscellaneous item was originally ordered.

Use order remaining quantity: If you checkmark this box, MainBoss will use "**Order Remaining**" as the actual quantity you received. If you leave the box blank, you must fill in "**Quantity**" yourself.

Quantity: The actual quantity of the miscellaneous item that you received.

Calculated Remaining Order Cost: Read-only fields giving the cost of the given "**Quantity**" based on existing price information.

Use calculated remaining order cost: If you checkmark this box, MainBoss will use "**Calculated Cost**" as the actual cost of what you received. If you leave the box blank, you must fill the cost into "**This Entry**" yourself.

This Entry: The actual cost of the miscellaneous item received.

As Corrected: If there has been a correction for this record, this line will have read-only fields giving the corrected values.

From Cost Center, **To Cost Center**: Read-only fields telling the cost centers involved in this operation. MainBoss creates accounting records indicating the transfer of money from the first cost center to the second. These fields are only visible if your database has an **Accounting** license key. For more, see *Accounting Facilities* on page 21.

Correcting Receive Miscellaneous Entries

In order to correct a miscellaneous line item on a receipt, you must select the item you want to correct (in the **Activity** section of the receipt or in the **Receiving** section of a purchase order), then click the **Correct** button. This opens a window where you can record the correction. The window contains the following:

Entry Date: A read-only field giving the actual date and time when this entry was made.

Effective Date: The date/time that you want to assign to the correction. The default is the current date and time.

Creator: A read-only field giving your user name. This will appear in MainBoss's accounting history to show who made the correction.

Read-only fields: A series of read-only fields giving information from the purchase order and receipt where this line item originally appeared. For specifics about this information, see *Receiving Purchase Order Items* on page 493.

Use order remaining quantity: If you checkmark this box, MainBoss will use "**Order Remaining**" as the actual quantity you received. If you leave the box blank, you must fill in "**Quantity**" yourself.

Quantity: Corrects the quantity actually received. Typically, you fill in the "**As Corrected**" field with the actual quantity received—the correct quantity, as opposed to the quantity you originally recorded. The alternative is to fill in "**This Entry**" with the difference between the quantity you originally entered and the true quantity.

For example, suppose you really received 3 but you accidentally typed 1 in the original record. You could fill in "**As Corrected**" with 3 (the correct number) or fill in "**This Entry**" with 2 (the difference between what you originally typed and the true quantity). "**This Entry**" may be a negative number if you originally typed in too much.

If you fill in "**As Corrected**", MainBoss automatically sets "**This Entry**" and vice versa.

Calculated Remaining Order Cost: Read-only fields giving the expected cost of the corrected quantity.

Use calculated remaining order cost: If you checkmark this box, MainBoss will fill in "**This Entry**" and "**As Corrected**" with the values obtained from "**Calculated Cost**". If you don't want to use these calculations, leave the checkbox blank and fill in "**This Entry**" or "**As Corrected**".

This Entry, **As Corrected**: Corrects the actual cost (if necessary). Typically, you fill in "**As Corrected**" with the correct cost of the correct quantity. The alternative is to fill in "**This Entry**" with the difference between the cost you originally entered and the true cost.

If you fill in "**As Corrected**", MainBoss automatically sets "**This Entry**" and vice versa.

From Cost Center, **To Cost Center**: Read-only fields telling the cost centers involved in this operation. MainBoss creates accounting records indicating the transfer of money from the first cost center to the second. These fields are only visible if your database has an **Accounting** license key. For more, see *Accounting Facilities* on page 21.

Purchase Order Reports

A number of reports are available under **Purchase Orders** | **Reports**:

☐ The **On Order** report lists items that are currently on order from your suppliers. For more, see *On Order Report* on page 498.

☐ The **Receiving** report lists information about receipts. For more, see *Receiving Report* on page 499.

☐ The **Purchase Summary** report summarizes information from a collection of purchase orders. For more, see *Purchase Order Summary Report* on page 501.

☐ The **Purchase History** report provides more detailed information about your purchase orders. For more, see *Purchase Order* History .

☐ The **Purchase Order State History** provides information about the history of changes in selected purchase orders. For more, see *Purchase Order State History Report* .

☐ The **Purchase Order Status Statistics** report provides statistics about changes to purchase orders (e.g. how long a purchase order stayed in a particular state). For more, see *Purchase Order Status Statistics Report* .

On Order Report

This report lists all inventory items currently on order. Note that an item is considered to be on order if it appears in an draft or issued purchase order but has not yet been received. (For more on purchase orders, see *Purchase Orders* .

To get an on order report, use **Purchase Orders** | **Reports** | **On Order**. This window contains the following:

Grouping section: Options controlling how the report is organized.

Group by list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

Sort Direction: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

Sort by list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling what information will be included in the report. For example, you can obtain a report that only lists items on order from a particular vendor or set of vendors.

Show deleted records: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Show only active records: If this checkbox is checkmarked, the Active filter will automatically be applied when preparing the report; this means that

information from old purchase orders will not be included in the report. If this checkbox is blank, the Active filter is ignored; MainBoss uses information from *all* purchase orders, no matter how old.

For more about the active filter, see *The Active Filter* on page 55.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Receiving Report

This report lists information about items received on purchase orders. To get a receiving report, use **Purchase Orders** | **Reports** | **Receiving**. This window contains the following:

Grouping section: Options controlling how the report is organized.

Group by list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

Sort Direction: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

Sort by list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling what information will be included in the report. For example, you can obtain a report that only lists receipts from a particular vendor or set of vendors.

Show only active records: If this checkbox is checkmarked, the Active filter will automatically be applied when preparing the report; this means that information from old purchase orders will not be included in the report. If this checkbox is blank, the Active filter is ignored; MainBoss uses information from *all* purchase orders, no matter how old.

For more about the active filter, see *The Active Filter* on page 55.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Purchase Order Summary Report

The Purchase Order Summary report provides a quick summary of your purchase orders. By default, the report has a line for each purchase order, showing the most important information about the purchase orders. Options in the **Advanced** section let you add more information to the report. (The Purchase Order Summary report is actually the same as the Purchase Order History report, but with different options selected by default.)

To print a purchase order summary, use **Purchase Orders** | **Reports** | **Summary**. This opens a window that contains the following:

Grouping section: Options controlling how the report is organized.

Group by list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

Sort Direction: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

Sort by list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling what kind of purchase orders will be included in the report. The window lets you select purchase orders in several ways:

Show only active records: If this checkbox is checkmarked, the Active filter will automatically be applied when preparing the report; this means that information from old purchase orders will not be included in the report. If this checkbox is blank, the Active filter is ignored; MainBoss uses information from *all* purchase orders, no matter how old.

For more about the active filter, see *The Active Filter* on page 55.

Filters: Make selections based on properties of the purchase order. For example, if you filter by **Vendor**, you can restrict the print-out to purchase orders submitted to a particular set of vendors.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Purchase Order History

This report lists purchase orders over a specified period, including when each order was opened, issued, and/or closed. To get a purchase history report, use **Purchase Orders** | **Reports** | **History**. This window contains the following:

Grouping section: Options controlling how the report is organized.

Group by list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

Sort Direction: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

Sort by list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling what information will be included in the report. For example, you can obtain a report that only lists purchase orders sent to a particular vendor or set of vendors.

Show only active records: If this checkbox is checkmarked, the Active filter will automatically be applied when preparing the report; this means that information from old purchase orders will not be included in the report. If this checkbox is blank, the Active filter is ignored; MainBoss uses information from *all* purchase orders, no matter how old.

For more about the active filter, see *The Active Filter* on page 55.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show summary charts for each Purchase Order: If this box is checkmarked, the report will include summaries for each purchase order.

Show summary charts for each group: If this box is checkmarked, the report will include summaries for each group of purchase orders. For example, if the report is grouped by vendor, then there'll be summary information for each vendor.

Show summary charts for the report: If this box is checkmarked, the report will have a summary covering all the information in the report.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Purchase Order State History Report

The Purchase Order State History report tells when history records were created for one or more purchase orders. History records are typically created when a purchase order changes its state or status, e.g. when the purchase order is created, opened, and finally closed. For more on purchase order state history records, see *Purchase Order State History Records* on page 487.

To print this report, use **Purchase Orders** | **Reports** | **State History**. This opens a window that contains the following:

Grouping section: Options controlling how the report is organized.

Group by list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

Sort Direction: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

Sort by list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling what kind of purchase orders will be included in the report. The window lets you select purchase orders in several ways:

Show only active records: If this checkbox is checkmarked, the Active filter will automatically be applied when preparing the report; this means that information from old purchase orders will not be included in the report. If this checkbox is blank, the Active filter is ignored; MainBoss uses information from *all* purchase orders, no matter how old.

For more about the active filter, see *The Active Filter* on page 55.

Purchase Order State History Filters: Make selections based on fields in the history records. For example, if you filter by **Creator**, you can restrict the print-out to history records created by a particular person.

Purchase Order Filters: Make selections based on properties of the purchase order. For example, if you filter by **Vendor**, you can restrict the print-out to purchase orders directed to a particular set of vendors.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information

will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Purchase Order Status Statistics Report

The Purchase Order Status Statistics report tells the length of time that purchase orders spent with a particular status code. For more on status codes, see *Purchase Order Status Codes* on page 141.

To print this report, use **Purchase Orders** | **Reports** | **Status Statistics**. This opens a window that contains the following:

Grouping section: Options controlling how the report is organized.

Group by list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

Sort Direction: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

Sort by list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling what kind of purchase orders will be included in the report. The window lets you select purchase orders in several ways:

Show deleted records: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Show only active records: If this checkbox is checkmarked, the Active filter will automatically be applied when preparing the report; this means that information from old purchase orders will not be included in the report. If this checkbox is blank, the Active filter is ignored; MainBoss uses

information from *all* purchase orders, no matter how old.

Purchase Order State History Filters: Make selections based on fields in the history records. For example, if you filter by **Status**, you can restrict the print-out to history records one or more specific status codes.

Purchase Order Filters: Make selections based on properties of the purchase order. For example, if you filter by **Requestor**, you can restrict the print-out to purchase orders from a particular set of requestors (e.g. all purchase orders requested by a specified person).

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

MainBoss Administration

The **Administration** section of the control panel covers operations that are typically only used by the person who supervises MainBoss at your site. These operations include:

☐ Basic administration information (see *Administration Information* on page 508)

☐ Information about your company, including its logo (see *Company Information* on page 509)

☐ Determining who is allowed to use MainBoss at your site (see *Users* on page 512)

☐ Determining what each MainBoss user is permitted to do (see *Security Roles* on page 517)

☐ Entering license keys for activating MainBoss features (see *License Keys* on page 521)

☐ Tracking major changes to your database (see *Database History* on page 526)

☐ Backing up the contents of your database (see *Backups* on page 527)

☐ Displaying accounting records that have been created by MainBoss (see *Accounting Records* on page 532)

☐ Controlling the MainBoss Service module (see *The MainBoss Service Module* on page 535)

Administration Information

The **Administration** entry in the control panel displays information about MainBoss. This window contains:

Client list: The top part of the window lists people who are currently connected to this MainBoss database.

Client Name: Lists people currently connected with the database. Names are given in the form `DOMAIN/COMPUTER/USERNAME`.

Application: Lists the application that each person is running. Usually, this will be `MainBoss`, indicating the main program.

Started: The date/time when the user began using MainBoss.

If you accidentally turn off your computer while using MainBoss, MainBoss doesn't detect the problem immediately—MainBoss simply thinks you aren't currently typing anything. After 30 minutes (approximately) of receiving no input, MainBoss checks to see if the computer is still connected; if the computer is *not* connected, MainBoss then removes your name from the list of active connections. In other words, users stay "active" for about half an hour after an unplanned disconnection.

Modules area: Lists what module licenses you do and don't have.

Refresh: Updates the client list. Note that **Refresh** does *not* update the **Licensing** area. The licensing information only gets updated if you quit MainBoss, then start the program again.

Search: Searches the client list for a particular entry.

Company Information

MainBoss can record information about your company. For example, it can put your company logo on your work orders, provided that you have the logo in some standard graphic format (e.g. as a JPG or GIF file).

To view your company information settings, use **Administration** | **Company Information**. The viewer shows the following. (Note that all are read-only fields; to change any value click **Edit**.)

Company Logo: A picture showing your organization's logo.

Purchasing Contact: Specifies someone in your organization whose name should go on purchase orders as a contact person. For more on purchase orders, see *Purchase Orders* on page 462.

Organization Name: The name of your organization.

Company Location: Can refer to an entry in the **Locations** table giving your company's postal address.

Reports area: Various settings that affect how your reports are printed.

Font Size: The default font size for printing reports.

Main Font: The default font to be used for all information, except for fixed-width information.

Fixed-width Font: The default font to be used for printing information when the characters should all have the same width.

Bar Code Symbology: Specifies a default format to be used for printing bar codes in any report where bar codes can appear. This will be used as the default setting for bar codes in all such reports; however, users can switch to a different setting for any specific report. For more information, see *Bar Code Support* on page 87.

Filters area: Settings to control the effects of the active filter. For more about this filter, see *The Active Filter* on page 55.

   Active filter shows only records less than this many days old: If you assign a value to this field, the active filter for table viewers will only show requests, work orders, and purchase orders whose most recent history record is more recent than the given number of days ago. For example, if the value is 500, the table viewers for requests, work orders, and purchase orders will only show entries whose most recent history record is less than 500 days old.

   Active filter shows only records updated since this date: If you assign a value to this field, the active filter for table viewers will only show requests, work orders, and purchase orders whose most recent history record was made after the given date. For example, if you set the date to December 31, 2009, the table viewers for requests, work orders, and purchase orders will only show entries whose most recent history record was made on January 1, 2010 or later.

> By changing the active filter settings in this window, you change the default active filter for everyone at your site. Individual users can still change their own active filters whenever they choose.

Company Name and Address: By default, "**Organization Name**" is set to the organization name that was specified when this database was created. If this isn't the name that you want appearing on requests, work orders and purchase orders, you should change "**Organization Name**" to the name that you prefer. Similarly, you should create a postal address **Location** record for your organization and set "**Company Location**" to that postal address. In this way, the address will be printed on requests, work orders and purchase orders.

Editing Company Information

You create or modify company information using the company information editor. The usual way to open the editor is to click **Edit** in **Administration** | **Company Information**.

The company information editor window contains the following:

   Company Logo: If you've already specified a company logo, it will be displayed here.

   Select new Company Logo: Opens a standard file selection window. Use this to specify a file that contains your company logo; this can be a JPG, GIF, or a bitmap. Once you've specified a logo file, the logo will be displayed in the "**Company Logo**" field.

Purchasing Contact: Specifies someone in your organization whose name should go on purchase orders as a contact person. For more on purchase orders, see *Purchase Orders* on page 462.

Organization Name: The name of your organization. By default, this will be the organization name specified at the time this MainBoss database was created.

Company Location: The name and address of your company. This is specified with a postal address location record. (For more on location records, see *Locations* on page 126.)

Once you have specified an appropriate location record, your company's name and postal address will appear on all printed requests, work orders and purchase order.

Font Size: The default font size to be used in reports.

Main Font: The default font for most information printed in reports.

Select Main Font: Opens a window where you can specify a different value for "**Main Font**".

Fixed-width Font: The default font for report information that is printed in fixed width (e.g. specifications).

Select Fixed-width Font: Opens a window where you can specify a different value for "**Fixed-width Font**".

Bar Code Symbology: Specifies a default format to be used for printing bar codes. If you choose **None**, the default will be to print no bar codes; otherwise, the chosen bar code format will be set as the default in any report where bar codes may appear. For more information on bar codes, see *Bar Code Support* on page 87.

Active filter shows only records less than this many days old: If you fill in this field, you change the definition of `Active` requests, work orders and purchase orders for everyone using this MainBoss database. For example, if you set the field's value to 400, requests, work orders and purchase orders are only considered active if their most recent history record is less than 400 days old. Remember that this affects everyone who uses the database; if you only want to affect yourself, use **Change Active Filter** in the **View** menu. (See *The Active Filter* on page 55.)

Active filter shows only records updated since this date: If you fill in this field, you change the definition of `Active` requests, work orders and purchase orders for everyone using the MainBoss database. For example, if you set the field to `January 1, 2009`, requests, work orders and purchase orders are only considered active if their most recent history record is newer than the given date. Remember that this affects everyone who uses the database; if you only want to affect yourself, use **Change Active Filter** in the **View** menu.

Be very careful using "**Active filter shows only records updated since this date**". If you don't change the date very often, the lists of active records will keep growing, making it harder and harder to find what you want.

Users

In order for users to access a MainBoss maintenance organization, their login names must be recorded in the MainBoss database. When a maintenance organization is first created, the only user who can access the organization is the person who originally created the database.

For full details on authorizing users for both MainBoss and SQL Server, see the *Installation and Administration Guide*.

Scopes: When setting up user records, you record the login names of people authorized to use MainBoss. During this process, you'll be given the opportunity to specify a *scope* for that person's login name.

☐ If your site uses *trusted domains*, the scope should be the trusted domain to which the user belongs.

☐ If your site doesn't use trusted domains (or if you aren't sure whether you use them or not), **we strongly recommend leaving the** "**Scope Name**" **field blank**. A blank scope field means that the given login name is a valid account on the computer where SQL Server runs. SQL Server will then accept access from any other computer in your local network, provided that the login name and password on the other computer match the name and password on the Server computer.

For example, suppose you authorize `jsmith` to use MainBoss and leave "**Scope Name**" blank. Then the Server computer must accept `jsmith` as a login name. SQL Server will accept access from any other `jsmith` in your local network, provided the password for `jsmith` on non-Server computers is the same as the password for `jsmith` on the Server computer.

Note that the names in MainBoss's **Users** list must be individual login names; they can't be groups. In MainBoss, login names are associated with records in order to create an audit trail. This is why MainBoss itself doesn't accept group authorizations—an audit should record exactly who made a particular change, which means tracking the individual login name, not just a group name.

Security Roles: When you create a new user record, it has no associated security roles. This means that new users have no permission to do anything in MainBoss, unless you specifically assign them roles. You must therefore assign each user at least one security role if you expect the person to use MainBoss in any way. For more on security roles, see *Security Roles* on page 517.

SQL Server Authorization: In order for someone to use MainBoss, the person's login name must be registered in both the MainBoss database and with SQL Server. Only someone with SQL Server Administration privileges can register new users with SQL Server.

☐ The easiest scenario for adding new users to MainBoss is if someone with SQL Server Administration privileges does the work. In this case, MainBoss can automatically register each new user in the MainBoss database and with SQL Server.

☐ If the person who adds new users to MainBoss *doesn't* have SQL Server Administration privileges, then the process needs two separate steps:

> ☐ Registering the new users with MainBoss, as described in *Editing User Records* on page 514 (which can be done by anyone who's already registered with MainBoss and SQL Server)
>
> ☐ Registering the new users with SQL Server, as described in the *Installation and Administration Guide* (which can only be done by someone with SQL Server Administration privileges)

In order to deal with these two scenarios, MainBoss has an option set in **Administration** | **Users**. Go to the **Defaults for User** section.

☐ If the option **MainBoss manages SQL Security** is checkmarked, anyone adding new users must have SQL Server Administration privileges

☐ If the option is blank, you must use the two-stage approach to adding new users (add the users in MainBoss first, then add them in SQL Server)

(As an alternative two-stage approach, you could create a Windows group named `mainboss` in the domain. A SQL Server Administrator could then set up SQL Server permissions so that anyone in the group could access the MainBoss database. Then, whenever someone new needs to be authorized to use MainBoss, a Windows administrator simply adds the new person to the group. Some IT departments may prefer the group approach over authorizing each individual within SQL Server.)

Viewing Users

You view user authorizations with **Administration** | **Users**. The window contains the following:

Details section: Shows the list of current users.

> **Scope**: Click this heading to sort the list by scope (domain name or computer name). Click again to reverse the order (from ascending to descending or vice versa).
>
> **User**: Click this heading to sort the list by the user's login name. Click again to reverse the order.

Description: Click this heading to sort the list by description. Click again to reverse the order.

Print: Prints information about users. For more information, see *Printing User Records* on page 516.

Evaluate Security As: Lets you see the effect of the selected user's security roles. See below for more details.

Defaults for User section: Shows any defaults to be used when creating new user records.

Evaluating Security Roles: When you assign security roles to a user, it can be difficult to figure out the effect of those roles: what the user can and can't do with the roles you've assigned.

To make it easier to see the effects of a person's security roles, you can use the **Evaluate Security As** button. If you select a user in the **Users** table, then click this button, your MainBoss session changes to have the same security permissions as the selected user. If certain types of data are invisible to that user, they'll become invisible to you too; if certain buttons are disabled, they'll be disabled for you too.

Evaluate Security As is a very powerful feature. It is only available to people with the `Administration` security role.

Evaluate Security As gives you the same security roles as the selected user, but it does *not* change who you are. In particular, you keep your own set of assigned requests, work orders and purchase orders.

Note: If you use this feature to evaluate the security roles of someone who doesn't have `Administration` or `AdministrationView`, the first thing that will happen is that you lose permission to see **Administration** | **Users**. This may look as if you're being told that you don't have permission to use **Evaluate Security As**; however, it really means that the person you're evaluating doesn't have that permission.

Once you've examined what the user can and can't do, you can return to your own security roles by going to the **Session** menu and clicking **Reset to user YOURNAME security**.

Editing User Records

You create or modify user records using the User editor. The usual way to open the editor is to click **New User** or **Edit** in the **View** section of **Administration** | **Users**.

Only someone with SQL Server Administration privileges can register new users with SQL Server. You will receive an error message if you try to add a new user but do not have appropriate permissions. The error occurs when you try to **Save** the new user's record.

The user editor window contains the following:

Details section: Provides general information about the user.

User Name: The name of the user.

Contact: Contact information for this user. The contact information is given by a record in the **Contacts** table. For more on contacts, see *Contacts* on page 91.

Description: A description of the user (typically the person's real name).

Comments: Any comments you want to associate with the user.

Security Roles section: Specifies security permissions for the user. For more on roles, see *Security Roles* on page 517.

By adding a security role to the user's list of roles, you give the user all security permissions associated with that role. Each role record has a "**Comments**" field explaining what permissions are associated with the role.

A user may have any number of assigned security roles. We expect that **most people will have multiple security roles.**

If you assign someone a "full" permission, you don't have to assign a "view" permission too. For example, if you assign someone the WorkOrder role (permission to edit work orders), you don't have to assign WorkOrderView (permission to view work orders) since WorkOrder automatically implies WorkOrderView. Similarly, "view" permissions automatically imply "summary" permissions; for example, WorkOrderSummary isn't necessary if someone already has WorkOrderView.

We recommend that you be generous in assigning people "summary" roles (e.g. UnitSummary) since these provide a small amount of information that is useful for people performing many different jobs within your organization.

> **Important:** If a user has no assigned security roles, that person will not be able to use MainBoss in any way. Therefore, you should normally assign at least one security role to each user.
>
> After you assign security roles to a user, MainBoss makes it easy to test the effects of those security roles. For more, see the description of **Evaluate Security As** in *Viewing Users* on page 513.

New User Security Role: Opens a window which lets you specify a new role for this user. For more information, see *Assigning Security Roles to Users* on page 516.

Delete: Removes the assigned security role from this user.

Advanced section: Options for advanced users.

Scope Name: The name of the user's domain or computer. **We strongly recommend that this be left blank**, in which case MainBoss accepts access under the given login name from any domain or computer.

Assigning Security Roles to Users

You can assign a security role to someone from the **Security Roles** section of the person's user record or from the **Users** section of the role record. Click **New User Security Role** to assign a new role to a user or vice versa. MainBoss opens a window containing the following:

Security Role area: Specifies the role you want to assign to the user.

> **Name**: The name of the role. This will be read-only if you began from a role record.

> **Description**: A read-only description of the role.

> **Comments**: More detailed information about the role.

User area: Specifies the user whom you want to assign the role.

> **User Name**: The login name of the user.

> **Description**: The description field from the person's user record.

> **Comments**: Any comments given in the person's user record.

> **Note:** Assign security roles based on the work that a particular user will be expected to do. For example, a maintenance manager will typically have more roles (more permissions) than a general worker. The department bookkeeper will typically have different roles than someone working on a helpdesk.

Printing User Records

You can print your current user records by clicking the **Print** button in **Administration | Users**. This opens a window that contains the following:

Sorting section: Options controlling how the report is organized.

> **Sort by** list: These options determine how items are sorted.

> **Sort Direction**: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick a **Sort by** option where sort direction is relevant.

Filtering section: Options controlling which users will be included in the report.

> **Show deleted records**: If this box is checkmarked, the report will include deleted records. Otherwise, deleted records are omitted from the report.

Advanced section: Miscellaneous options.

> **Suppress Costs**: Omits any money information that might otherwise be displayed in the report.

> **Format Report in Columns**: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

> **Title**: The title to be printed at the beginning of the report.

> **Font Size**: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

> **Main Font**: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

> **Fixed-width Font**: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

> **Show** checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Security Roles

Security roles make it possible for your organization to restrict access to information. By assigning a role to a MainBoss user, you give that user permission to perform various operations within MainBoss.

In many cases, a single user will be given multiple security roles. Each new role that a user receives will give additional permissions to that person. If a user has no assigned roles, the user cannot use any feature in MainBoss; therefore, when you add a new user to the MainBoss **Users** table, you should assign that person at least one role.

Important: Each built-in security role has a brief description and a much longer "**Comments**" field describing how the role works. We strongly recommend that you read the "**Comments**" to understand the role in detail.

There are several general types of security roles:

☐ *Summary* roles: Let you read a subset of the information that a record contains. For example, the `UnitSummary` role lets you read basic information about a unit but doesn't let you to read all the information in a unit record.

Summary roles are intended for people whose primary concern is some other aspect of MainBoss but who may have need for a small amount of information on other subjects. For example, someone working on a help-desk is primarily concerned with requests, but might also be given `WorkOrderSummary` (in order to tell clients, "Yes, your job is on our schedule for next Thursday" and to link requests to existing work orders) and `UnitSummary` (in order to make sure that the unit specified in a request really is the unit that needs service).

We recommend that organizations be generous in assigning *Summary* roles, but cautious in handing out roles that allow wider access to information.

☐ *View* roles: Let you read information but not change it. For example, the `UnitView` role lets you read all the information in a unit record, but doesn't let you change any of that information.

A view role includes all the information available through the corresponding summary role. For example, `WorkOrderView` includes all the information of `WorkOrderSummary` (and more). Therefore, if you assign someone a view role, you don't need to assign the corresponding summary role.

☐ *Fulfillment* roles: Let you perform selected operations on a type of record. Loosely speaking, these operations are ones you'd do in day-to-day work *except* for actually creating the record. For example, `WorkOrderFulfillment` doesn't let you create work orders, but lets you perform operations related to closing existing work orders. `RequestFulfillment` lets you add comments to requests and to send comments to requestors (if you have licensed the **MainBoss Service** module). `ItemFulfillment` doesn't let you create item records, but lets you record item information including physical counts, item issues, and item transfers.

With `WorkOrderFulfillment`, you can only affect work orders that you can already see because of other permissions. In particular, if you don't have `WorkOrder` or `WorkOrderView`, you will only be allowed to deal with work orders to which you've been assigned. A similar principle applies to `RequestFulfillment`.

☐ Create/edit roles: Let you create and edit various types of records. For example, the `WorkOrder` role lets you create/edit work orders while the `Item` role lets you create/edit item records.

A create/edit role includes all the information available through roles in the same "family". For example, if you assign someone `WorkOrder`, you don't have to assign that person `WorkOrderSummary`, `WorkOrderView` or `WorkOrderFulfillment`, since `WorkOrder` includes all the permissions of the other three roles (and more). Therefore, if you assign someone a create/edit role, you don't need to assign any other roles in the same "family".

☐ *Accounting* roles: Provide access to monetary information. If you do not have an appropriate accounting role, you may be prevented from seeing prices and costs; for example, if you have `WorkOrder` role but not `AccountingWorkOrder`, you will be able to record, say, the quantities of materials used on a job, but you will not see the actual cost of those materials.

In addition to the selective roles listed above, there is a role called `All`. This grants a user permission to use every aspect of the program. We recommend that you avoid using `All`; too often, we have seen organizations give `All` permission to users without thinking about it. Instead of taking the shortcut of `All`, decide which permissions a particular user really needs and only give the user those permissions.

Security roles are listed in the **Security Roles** table (**Administration** | **Security Roles**). To give someone one or more security roles, you open that person's record from the **Users** table (**Administration** | **Users**) and go to the record's **Security Roles** section. You then use **New User Security Role** to add role records to the user's list of roles. Each role record contains a "**Comments**" field explaining what permissions the role provides.

Some security roles combine with each other to provide users with more information. For example, if you have both `ItemSummary` and `WorkOrderView`, you can see more information about the items on a work order than either `ItemSummary` or `WorkOrderView` would provide individually.

When you assign security roles to a user, it can be difficult to figure out the effect of those roles: what the user can and can't do with the roles you've assigned. To make it easier to see the effects of a person's security roles, you can use the **Evaluate Security As** button in **Administration** | **Users**. For more information, see *Viewing Users* on page 513.

Viewing Security Roles

You view security roles with **Administration** | **Security Roles**. The window contains the following:

Name: Click this heading to sort the list by name. Click again to reverse the order (from ascending to descending or vice versa).

Description: Click this heading to sort the list by description. Click again to reverse the order.

Details section: Shows information about the selected security role.

Users section: Shows which users have the selected security role.

Print: Opens a window that lets you print security role information. For more, see *Printing Security Role Records* on page 520.

Editing Security Role Records

You create or modify role records using the Role editor. You can open this editor by clicking **Edit** or **View** in **Administration** | **Security Roles**.

> **Note:** This version of MainBoss doesn't let you edit the contents of built-in role records. However, you can use the Role editor window to change the list of users associated with a role.

The role editor window contains the following:

Details section: Provides general information about the role.

Name: The name of the role.

Description: A description of the role.

Built-in: Will be checkmarked if this role is one of the ones supplied as part of the MainBoss distribution.

Comments: More detailed information about the role.

Users section: Lists which users have this role. You may add or delete users from this list.

Printing Security Role Records

You can print your current security role records by clicking the **Print** button in **Administration** | **Security Roles**. This opens a window that contains the following:

Filtering section: Options controlling which roles will be included in the report.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

License Keys

License keys are used to specify what MainBoss modules you are licensed to use. For example, you might have a license key for MainBoss requests, work orders and planned maintenance, but not for MainBoss Service or inventory control. License keys also contain other information; for example, if your license allows you to have a maximum of 10 MainBoss users, that information is stored in the license key.

A license key has the form

```
AAAAA-AAAAA-AAAAA-AAAAA-AAAAA
```

where each A character is either a letter or a number.

You will need to enter a license key when you first install MainBoss. You will also need to enter license keys if you change your license, and whenever you renew your Annual Support Plan. In all these situations, you will be sent the license keys you need to enter.

The presence or absence of license keys will change the appearance of many MainBoss windows. For example, if you have not licensed the **Inventory** module, you will not see functions related to inventory in the control panel and in other parts of MainBoss.

Viewing Your License Keys

The License Key table viewer shows the license keys currently recorded for your MainBoss software. It also shows the information contained in the license keys. For example, it tells you any restrictions associated with your license.

To see the table viewer, use **Administration** | **Licenses**. The table viewer window contains the following:

Application: Click this heading to sort the list by software modules. Click again to reverse the order (from ascending to descending or vice versa).

License Key: Click this heading to sort the list by license key. Click again to reverse the order.

Update Licenses: If you click this button, MainBoss opens a window that lets you enter several license keys at a time. This is useful if, for example, Thinkage sends you new license keys in an e-mail message—just copy all the keys from the message, click **Update Licenses**, and paste the copied keys into the resulting box. For more details, see *Entering Multiple License Keys* on page 524.

Entering License Keys Manually

There are two ways to enter license keys:

☐ If you have received your keys electronically (for example, in an e-mail message), you can copy and paste all the keys in a single operation. For more information, see *Entering Multiple License Keys* on page 524.

☐ If you have received your keys on paper, you must enter the keys manually as described below.

You enter license keys manually by clicking the **New License** button in **Administration** | **Licenses**. This opens a window where you can enter the new key.

In general, MainBoss will not replace an old key with a new key unless the new key is "better" than the old one. This means that the new key must have a later expiry date or version number than the old key. Also, all your license keys must have the same License ID as the **MainBoss** key. (If you do not have a **MainBoss** key, the other keys must have the same License ID as the **MainBoss Requests** key.)

Note: If you change an existing license key or add a new one, you must close and open the database in order for the change to take effect. This means that you must go to MainBoss's **Session** menu and select **Change Maintenance Organization**. In the resulting window, select the same organization and then click **Open Organization**. Until you do this, MainBoss will behave as if you're still using the old license keys.

The window for editing license keys contains the following:

License Key: The key you were given by Thinkage Ltd. or a certified MainBoss dealer.

All remaining information in the record is given by read-only fields. These fields are filled in once you enter a valid license key in "**License Key**". The information is decoded from the license key itself.

Application ID: A read-only field containing a number. This number identifies the software module associated with the key.

Application: A read-only field giving the name of the software module.

License Count: The number associated with license type. For example, if this license limits the number of MainBoss Service requestors, "**License Count**" gives the maximum number of requestors allowed.

Expiry Model: Every license key may expire under a given set of circumstances. "**Expiry Model**" indicates how the license will expire. Possibilities are:

Demonstration Expiry: The key only allows the software to be used in Demonstration Mode. Demonstration mode has different effects on different packages; for example, with MainBoss itself, Demonstration mode puts limits on the number of work requests, work orders, etc. that can be created. It also means that `MainBoss Demonstration` will be printed across all printed reports. With MainBoss Service, Demo mode means that the service only runs for an hour, then shuts down; this gives a potential customer time to test the software, but should discourage unlicensed use.

Calendar Expiry: The key expires on a certain date. After that date, the software will only continue to work in Demo mode.

Version Expiry: The key is good for all versions of the software produced up to a particular date. For example, if the date is "December 31, 2008" the license key would be good for all versions of the software produced up to the end of 2008. This is what we use for Annual Support Plan customers. For example, if someone's renewal period will end Dec. 31, 2008, we give that customer a license key that's good for all releases up to that date. That way, the customer can just download new releases without needing to get a new license key.

Note the difference between **Calendar Expiry** and **Version Expiry**. With a calendar expiry, the software stops working after that date. With version expiry, existing software continues to work indefinitely; however, you can't install new releases that were created after the given date unless you get a new key.

Expiry Date: Appears for **Calendar Expiry** and **Version Expiry** licenses. It gives the date the license expires. For **Demonstration Expiry**, the date is blank.

License ID: A code number used to identify and check the license, so that several license keys with identical attributes can still be distinct.

Entering Multiple License Keys

Thinkage gives you the option of receiving new license keys by e-mail. This makes it possible to enter all the keys you receive by copying them from the e-mail message and "pasting" them into MainBoss.

> If you receive your license keys on paper, you must enter the keys manually. For more information, see *Entering License Keys Manually* on page 522.

To enter license keys that you received by e-mail, follow these steps:

1. Select the *entire* e-mail message that contains the new license keys. You do not have to select individual keys.

2. Copy the message. In most e-mail programs, you can do this by pressing **<Ctrl+C>**.

3. In MainBoss, go to **Administration** | **Licenses**.

4. Click **Update Licenses**. MainBoss opens a window where you can perform the update operation.

5. Click **Refresh from Clipboard**. MainBoss scans through the e-mail message that you copied above, and extracts all the license keys. MainBoss displays these keys in the upper part of the window.

6. Click **Update Licenses**. This uses all the new license keys shown to replace the corresponding old ones, subject to the conditions stated below. (You cannot select just a few keys to update—MainBoss uses all the license keys shown in the window, whether or not they're selected.)

7. Click **Close** to close the window.

MainBoss will not replace an old key with a new key unless the new key is "better" than the old one. This means that the new key must have a later expiry date or version number than the old key. Also, all your license keys must have the same License ID as the **MainBoss** key. (If you do not have a **MainBoss** key, the other keys must have the same License ID as the **MainBoss Requests** key.) If your new keys have a different License ID than the old ones, you must first replace the **MainBoss** key (or the **MainBoss Requests** key if you don't have a **MainBoss** key). Then you will be allowed to change the other keys.

> **Note:** After changing keys, you must close and open the database in order for the change to take effect. This means that you must go to MainBoss's **Session** menu and select **Change Maintenance Organization**. In the resulting window, select the same organization and then click **Open Organization**. Until you do this, MainBoss will behave as if you're still using the old license keys.

The window for updating multiple license keys contains the following:

List of new license keys: Your new license keys, followed by information associated with the currently selected key. If this list is empty, click **Refresh from Clipboard**.

Refresh from Clipboard: Clicking this button fills the list in the upper part of the window with any keys currently in the Windows clipboard. If you have copied license keys from an e-mail message, the copied keys will be displayed.

Before you attempt to replace your current keys, you must select all the keys listed in the upper part of the window.

Update Licenses: Clicking this button will replace your current keys with the new ones, provided that they meet the conditions previously discussed.

Printing License Keys

You can print your current license keys by clicking the **Print** button in **Administration | Licenses**. This opens a window that contains the following:

Grouping section: Options controlling how the report is organized.

Group by list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

Sort Direction: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling which licenses will be included in the report.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Database History

MainBoss maintains a history of major changes to your database. These include:

☐ The creation of the database

☐ Importing data from MainBoss Basic (2.9)

☐ Upgrading to a new version of the database

☐ Backups and restores performed through MainBoss (but not ones done entirely through SQL Server)

To see your current database history, use **Administration** | **Database History**. The table viewer window displays the following:

Date: Click this heading to sort the list by the date on which the change occurred. Click again to reverse the order (from ascending to descending or vice versa).

Subject: Click this heading to sort the list by the nature of the change. Click again to reverse the order.

Printing Your Database History

You can print your database history by clicking the **Print** button in **Administration** | **Database History**. This opens a window that contains the following:

Sorting section: Options controlling how the report is organized.

Sort by list: These options determine how items are sorted.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick a **Sort by** option where sort direction is relevant.

Filtering section: Options controlling which entries will be included in the report.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Backups

To protect your data, you should make regular backups of your data. One way to do this is with automated *maintenance plans* as described in the MainBoss *Installation and Administration Guide*. Since these facilities do backups automatically, there's no risk of losing data because someone forgot to do a backup manually.

On the other hand, some sites may prefer to do manual backups. You can do this within MainBoss using **Administration** | **Backups**. The general procedure is:

1. Create one or more *backup names*. A backup name is the name of a file into which MainBoss should write backup data. For example, you might create seven backup names: one for each day of the week.

2. When you want to perform a backup, select a name from the list of available backup names. Then click **Backup**. This submits a request to the SQL Server asking the server to create a backup. (In order to use this function, you must have SQL Server Administrator privileges.) When the backup occurs, it will overwrite any current contents of the specified backup file.

3. The next time you want to do a backup, select a different name from the list and click **Backup** again. MainBoss sorts the backup names so that the oldest backup file is at the top of the list. Therefore, if you have seven backup names, and you always select the top name whenever you make a backup, your backup will always overwrite the oldest file. This makes it easy to reuse the same set of files by cycling through them.

4. When you initiate a backup operation, MainBoss makes an appropriate note in the database history (**Administration** | **Database History**—see *Database History* on page 526). If the backup fails for some reason, MainBoss makes note of the failure in the database history; however, if the backup succeeds, MainBoss doesn't make a history note. In other words, if there's no note about the backup failing, you can assume that it succeeded.

A number of important considerations apply to the backup name:

☐ Backup operations are run by SQL Server itself on the computer where SQL Server is running. Because SQL Server does the backup, backup names must refer to files that are accessible to the login name under which SQL Server runs. Furthermore, backup names are interpreted relative to the computer where SQL Server is running.

For example, suppose SQL Server is running on Computer X, but you're working on Computer Y. When you specify the backup name,

> `C:\MyBackups\Monday.bak`

you may think that this refers to a file on Computer Y's `C:` drive. However, the backup is done by SQL Server on Computer X; therefore, SQL Server will try to save to Computer X's `C:` drive, not Computer Y's. If the directory `C:\MyBackups` doesn't exist on Computer X (or if SQL Server's login name doesn't have permissions to write to that folder), you'll get an error message and the backup won't work.

☐ If you specify a backup name that does not begin with "`\\`" and does not begin with a drive letter (e.g. "`C:\`"), SQL Server automatically assumes the name refers to a file under SQL Server's working folder. The location of this working folder depends on information specified when SQL Server was installed.

☐ SQL Server backup files typically have names ending in the extension ".bak", as in MyBackup.bak. Therefore, if you specify a simple name for a backup name—a name that doesn't have any slashes, backslashes or dots—MainBoss automatically adds ".bak" on the end of the name. Therefore, if you specify a simple name like "abc", MainBoss automatically turns this into "abc.bak".

☐ For safety's sake, backup names should refer to a disk drive that is *different* from the one that contains the actual MainBoss database. Otherwise, if the disk drive malfunctions, you could lose both your original database and your backups. It's even better if the backup name refers to a completely different computer, as in \\NotTheSameComputer\MyBackups\Backup1.bak.

It's also a good idea to make copies of backup files and to keep those copies somewhere off your premises. That way, if you have a fire or some other problem that affects your entire site, you'll have backups someplace else safe.

(By default, SQL Server puts backup files on the same disk as the corresponding database. Therefore, you should make sure *not* to use the default location.)

When you specify a backup name, the "**Defaults**" line in **Administration** | **Backups** specifies the computer, the directory, and the file name extension. **We strongly recommend that you examine the** "**Defaults**" **line whenever you create a backup name and before you click Backup**. This will avoid failed backups or accidentally creating a backup file somewhere you don't expect.

> The information in "**Defaults**" is generated by MainBoss at the time the window is displayed. It's dependent on your SQL Server configuration. Therefore, suppose you specify a backup name of "abc". "**Defaults**" shows where the backup file would be written if you clicked **Backup** right now. However, if your SQL Server configuration changes, future backups with the "abc" backup name might be written to a different folder.

MainBoss also makes it possible to restore databases from backup files. For more information, see *Your Maintenance Organization List* on page 34.

The window for viewing backup names contains the following:

Name list: As noted above, the default is to put the oldest backup file at the top of the list.

Information area: The area below the list shows information about the selected backup name/file.

Last backup: The last date/time that backup information was stored in the selected file.

Name: The name you specified for the file.

Defaults: Information telling where the backup information will be written if you click **Backup** right now.

Comments: Any comments you've associated with this backup name.

New Backup Name: Opens a window where you can specify a new backup name. For more information, see *Specifying Backup Names* on page 530.

Delete: Deletes the selected backup name. This does *not* delete any existing backup files that have used this name—it only deletes the name from the list.

Backup: Begins a backup on your database. See the notes at the start of this section for further information on the backup process.

> **Note:** If you perform backups and restores entirely through SQL Server, MainBoss won't store information about such operations. You won't see corresponding entries in the **Backups** list or in the database history.

Specifying Backup Names

You create or modify backup names using the backup name editor. The usual way to open the editor is to click **New Backup Name** or **Edit** in **Administration** | **Backups**.

The backup name editor window contains the following:

Name: The name of a file to which you want to write backups. A number of rules apply to this name; for more, see *Backups* on page 527.

Comments: Any comments you want to associate with the backup name.

External Tags

An external tag is a value that can be represented as a bar code. (For more on bar codes, see *Bar Code Support* on page 87.) This includes the numbers of all requests, work orders and purchase orders, as well as values specified in the "**Unit Tag**" fields of unit records and the "**External Tag**" fields of storeroom and storeroom assignment records.

Viewing Your External Tags

The External Tag table viewer shows the external tags currently recorded in your MainBoss database. To see the table viewer, use **Administration** | **External Tags**. The table viewer window contains the following:

External Tag: Click this heading to sort the list by tag name. Click again to reverse the order (from ascending to descending or vice versa).

Record contents: When you select a tag in the list of tags, the table viewer changes to show you the contents of the record associated with that tag. For example, if you select a tag associated with a work order, the table viewer will change to show you the sections of that work order.

In addition, the bottom of the window will change to show you the buttons typically associated with the given type of record. For example, if you select a tag associated with a work order, the window will display all the buttons normally associated with a work order (e.g. **Add Work Order Comment**).

External Tag Records

You enter new license keys by clicking the **New License** button in the License Key table viewer. This opens a window where you can enter the new key.

> **Note:** If you change an existing license key or add a new one, you must close and open the database in order for the change to take effect. This means that you must go to MainBoss's **Session** menu and select **Change Maintenance Organization**. In the resulting window, select the same organization and then click **Open Organization**. Until you do this, MainBoss will behave as if you're still using the old license keys.

The window for editing license keys contains the following:

License Key: The key you were given by Thinkage Ltd. or a certified MainBoss dealer.

> All remaining information in the record is given by read-only fields. These fields are filled in once you enter a valid license key in "**License Key**". The information is decoded from the license key itself.

Application ID: A read-only field containing a number. This number identifies the software module associated with the key.

Application: A read-only field giving the name of the software module.

License Count: The number associated with license type. For example, if this license limits the number of MainBoss Service requestors, "**License Count**" gives the maximum number of requestors allowed.

Expiry Model: Every license key may expire under a given set of circumstances. "**Expiry Model**" indicates how the license will expire. Possibilities are:

Demonstration Expiry: The key only allows the software to be used in Demonstration Mode. Demonstration mode has different effects on different packages; for example, with MainBoss itself, Demonstration mode puts limits on the number of work requests, work orders, etc. that can be created. It also means that `MainBoss Demonstration` will be printed across all printed reports. With MainBoss Service, Demo mode means that the service only runs for an hour, then shuts down; this gives a potential customer time to test the software, but should discourage unlicensed use.

Calendar Expiry: The key expires on a certain date. After that date, the software will only continue to work in Demo mode.

Version Expiry: The key is good for all versions of the software produced up to a particular date. For example, if the date is "December 31, 2008" the license key would be good for all versions of the software produced up to the end of 2008. This is what we use for Annual Support Plan customers. For example, if someone's renewal period will end Dec. 31, 2008, we give that customer a license key that's good for all releases up to that date. That way, the customer can just download new releases without needing to get a new license key.

Note the difference between **Calendar Expiry** and **Version Expiry**. With a calendar expiry, the software stops working after that date. With version expiry, existing software continues to work indefinitely; however, you can't install new releases that were created after the given date unless you get a new key.

Expiry Date: Appears for **Calendar Expiry** and **Version Expiry** licenses. It gives the date the license expires. For **Demonstration Expiry**, the date is blank.

License ID: A code number used to identify and check the license, so that several license keys with identical attributes can still be distinct.

Accounting Records

Many MainBoss operations create accounting records. You can view these records with **Administration** | **Accounting**. It may take a considerable length of time for MainBoss to obtain all the accounting records from the database and to display them on your screen.

The **Administration** | **Accounting** window contains the following:

Effective Date: Click this heading to sort the list by the effective date specified for the accounting transaction. Click again to reverse the order (from ascending to descending or vice versa).

From: Click this heading to sort the list by the cost center from which money is being transferred. Click again to reverse the order.

To: Click this heading to sort the list by the cost center to which money is being transferred. Click again to reverse the order.

Accounting ID: Click this heading to sort the list by accounting ID. Click again to reverse the order. (The "**Accounting ID**" field isn't currently used, but is provided to support future expansion.)

Value: Click this heading to sort by the value of the transaction. Click again to reverse the order.

Accounting Transaction Report

You can print accounting transaction information by going to **Administration** | **Accounting** | **Transaction Report** or by clicking the **Print** button in **Administration** | **Accounting**. This opens a window that contains the following:

Grouping section: Options controlling how the report is organized.

> **Group by** list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

> **Sort Direction**: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

> **Sort by** list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

> **Sort Direction**: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling which entries will be aincluded in the report.

> **Show only active records**: If this checkbox is checkmarked, the Active filter will automatically be applied when preparing the report; this means that information from old requests, work orders, and purchase orders will not be included in the report. If this checkbox is blank, the Active filter is ignored; MainBoss uses information from *all* such data, no matter how old.

> For more about the active filter, see *The Active Filter* on page 55.

Advanced section: Miscellaneous options.

> **Suppress Costs**: Omits any money information that might otherwise be displayed in the report.

> **Format Report in Columns**: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

> **Title**: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Accounting Cost Center Report

Administration | **Accounting** | **Cost Center Report** prints accounting information organized by cost center. The window contains the following:

Grouping section: Options controlling how the report is organized.

Group by list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

Sort Direction: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

Sort by list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

Sort Direction: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling which entries will be aincluded in the report.

Show only active records: If this checkbox is checkmarked, the Active filter will automatically be applied when preparing the report; this means that information from old requests, work orders, and purchase orders will not be included in the report. If this checkbox is blank, the Active filter is ignored; MainBoss uses information from *all* such data, no matter how old.

For more about the active filter, see *The Active Filter* on page 55.

Advanced section: Miscellaneous options.

Suppress Costs: Omits any money information that might otherwise be displayed in the report.

Format Report in Columns: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

Title: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

The MainBoss Service Module

MainBoss Service is a piece of software which processes notifications sent to the assignees of requests, work orders, and purchase orders. It also processes requests submitted by authorized requestors via e-mail.

In order to use the facilities of MainBoss Service, you must have a **MainBoss Service** license key. For information about installing MainBoss Service, see the *Installation and Administration Guide*.

> **Note:** Earlier versions of MainBoss contained a facility named @Requests. MainBoss Service replaces @Requests; it does everything @Requests did but provides additional functionality.

Here's how MainBoss Service processes requests:

1. Users send e-mail requests to a designated mail address.

2. On a regular basis (e.g. every half hour), MainBoss Service checks for incoming mail at the designated address. If there are new messages, each one is turned into a request and added to the **Requests** table. Once a request has been made in this way, MainBoss Service sends e-mail to the requestor saying that the message has been received and processed.

3. Whenever the state of the request changes, MainBoss Service sends another acknowledgement message to the requestor. For example, when someone marks the request as **In Progress**, an appropriate e-mail message is sent to the requestor.

MainBoss Service follows a similar system for sending out notifications: on a regular basis, MainBoss Service checks to see if any notifications should be sent out. If so, MainBoss Service does so.

You can configure how often MainBoss Service checks for incoming requests and how often it checks if notifications should be sent. These can have different schedules; for example, you might check on incoming requests every half hour and on outgoing notifications every ten minutes.

You control the operation of MainBoss Service using **Administration** | **MainBoss Service**. This displays the following:

Machine Name: The name of the computer where MainBoss Service is running. (This will be blank if you haven't installed MainBoss Service yet.)

Service Name: The name of the MainBoss Service service. This will be "MainBoss Service - XXX" where XXX is the name of your MainBoss database.

Status: The current status of MainBoss Service on your system. Possibilities are:

NotInstalled: MainBoss Service has not yet been installed on any system.

Stopped: MainBoss Service isn't running.

Running: MainBoss Service is active.

Event Log: Diagnostic messages that have been generated in connection with MainBoss Service. To read the details of any message in the list, click the message. The details will be displayed in the **Details** area below the Event Log.

If you do not have Windows Administrator privileges on the computer where MainBoss Service is installed, or if there is some other reason why the event log can't be displayed, MainBoss shows a diagnostic message in place of the event log. For further information, see the *Installation and Administration Guide*.

Start Service/**Stop Service**: Starts or stops the service. You must have Windows Administration privileges in order to perform these operations.

Process All: Tells MainBoss Service to immediately process any incoming requests and to send out notifications and/or acknowledgements as appropriate. This supersedes the usual schedule. For example, suppose you have MainBoss Service set up to do its processing every half hour. Clicking **Process All** tells MainBoss Service to do its processing immediately, rather than waiting for its usual half-hour schedule.

This button has a drop-down list containing:

Process Request Acknowledgements: Immediately processes request acknowledgements only. This supersedes the usual schedule.

Process E-mail Requests: Immediately processes any incoming requests submitted by e-mail. This supersedes the usual schedule.

Process Assignment Notifications: Immediately processes any notifications that should be sent to assignees of requests, work orders, and purchase orders. This supersedes the usual schedule.

Pause Service: Temporarily suspends MainBoss Service. The software will not process any requests, acknowledgements or notifications while it is suspended.

Resume Service: Activates MainBoss Service after it has been suspended by **Pause Service**.

Note: In order to use **Start Service** and **Stop Service**, you need Windows Administrator privileges. For **Pause Service** and **Resume Service**, you only need the MainBoss `Administration` security role. If you want to reconfigure MainBoss Service, usually **Pause Service** and **Resume Service** are sufficient to suspend MainBoss Service while you make changes.

On the other hand, if you're running a demonstration version of MainBoss, MainBoss Service will only run for 60 minutes before terminating. In this case, you *must* use **Start Service** to restart the service, and you must have Windows Administrator privileges.

Set Minimum Logging: Tells MainBoss Service to generate as few log messages as possible. This button has a drop-down list containing:

Set Maximum Logging: Tells MainBoss Service to generate as many log messages as possible.

Set Medium Logging: Tells MainBoss Service to generate an intermediate number of log messages between the minimum and the maximum.

Set No Logging: Tells MainBoss Service not to generate any log messages.

Clear Events: Deletes all entries in the MainBoss Service events log.

Refresh: Updates the window to reflect any recent changes.

Close: Closes the window.

MainBoss Service Configuration Table

To configure MainBoss Service, you create a MainBoss Service configuration record. This record is stored in the MainBoss database; it provides MainBoss and MainBoss Service with the information they need to function correctly.

> The MainBoss Service configuration table cannot contain multiple records. Either it contains one record giving your current configuration, or it contains no records (indicating that you have no current configuration).

The MainBoss Service configuration table viewer is available at **Administration** | **MainBoss Service** | **Configuration**. It contains the following:

Code: Identifies your configuration. By default, "**Code**" is `MainBossService`.

Description: Describes the configuration you have created.

Details section: Shows basic configuration information.

Incoming Mail section: Shows options related to incoming e-mail messages.

Outgoing Mail section: Shows options related to outgoing e-mail messages.

Notification Preferences section: Controls notifications sent out by MainBoss Service.

New MainBoss Service Configuration: Creates a new MainBoss Service configuration. This button is disabled if you already have a configuration record; if you want to change an existing configuration, use the **Edit** button.

Edit/**View**: Opens an editor window to edit or view your configuration.

Set Service Parameters: Modifies MainBoss Service itself so that it uses the new configuration. Whenever you change the MainBoss Service configuration record, you should click **Set Service Parameters** after making the changes; this operation is what actually puts your changes into effect.

In order to use **Set Service Parameters**, you must have Windows Administration privileges.

If you do not click **Set Service Parameters** after changing the configuration record, your configuration won't actually change.

Grant Service SQL Permissions: MainBoss Service runs under a particular login name. (You specify this login name at the time that you install MainBoss Service.) The login name requires permissions on the SQL Server that manages your MainBoss database. If the login name doesn't have such permissions, click **Grant Service SQL Permissions** in order to give the name the appropriate permissions. (To do this, you must have SQL Server Administrator permissions on the appropriate instance of SQL Server.)

Many organizations will run MainBoss Service under the `Network Service` login name or some other built-in name. In this case, the name may or may not already have appropriate SQL Server permissions.

Delete: Deletes your MainBoss Service configuration. We do not recommend doing this; if you just want to change your configuration, use **Edit** to change the existing configuration record rather than deleting the record entirely.

Configuring MainBoss Service

The first time you configure MainBoss Service, you create a configuration record by clicking **New MainBoss Service Configuration** in **Administration** | **MainBoss Service** | **Configuration**. Once you have created an initial configuration, you can edit the configuration by clicking **Edit** in the same window.

In order to configure MainBoss Service, the service must be paused or stopped. This will be true the first time you configure MainBoss Service. If you want to change the configuration later on, you must click **Pause Service** or **Stop Service** in **Administration** | **MainBoss Service**. **Pause Service** requires the MainBoss `Administration` security role; **Stop Service** requires Windows Administration privileges.

After you have created or edited your configuration information and saved the configuration record, you must click Set Service Parameters in the Administration | MainBoss Service | Configuration window. Set Service Parameters is what actually changes the configuration, by copying information from the configuration record into the MainBoss Service software itself. If you do not click **Set Service Parameters**, MainBoss Service will not be adjusted with the new configuration information. In order to use **Set Service Parameters**, you must have Windows Administration privileges.

Once you have **Set Service Parameters**, you should go to **Administration** | **MainBoss Service** and use **Resume Service** or **Start Service** to start MainBoss Service running. **Resume Service** is used if you paused the service using **Pause Service**; **Start Service** is used if you stopped the service with **Stop Service**.

Configuring MainBoss Service requires that you specify a mailbox where people can send problem reports. You must also specify how MainBoss Service can send and receive messages from that mailbox.

☐ Messages are sent using a technique called SMTP.

☐ Messages are received (read) using one of two techniques: POP3 or IMAP4. We recommend that you use POP3 unless your site has a reason for preferring IMAP4. (For MainBoss's purposes, POP3 is more efficient than IMAP4.)

There are several versions of both POP3 and IMAP4. We do not recommend plain POP3 or IMAP4; these techniques transmit passwords in unencrypted form, making them insecure. POP3S and IMAP4S are secure enhancements of POP3 and IMAP4 that use encryption. TLS (Transport Level Security) offers a different approach to POP3 and IMAP4, also using encryption to obtain secure communications.

Which version should you use? It depends on your e-mail software. Different e-mail packages accept different techniques. If you don't know what your software accepts, we recommend trial and error in this order: TLS within POP3; POP3S; TLS within IMAP4; IMAP4S; POP3; IMAP4. As noted previously, POP3 and IMAP4 are not recommended—only use them if your e-mail software is too old to accept any of the secure techniques.

> For more information on SMTP, POP3 and IMAP, see the documentation for your e-mail software.

The window for configuring MainBoss Service contains the following:

Details section: Specifies basic information about MainBoss Service for this organization.

> **Code**: Identifies the service configuration record. By default, this is `MainBossService`.

> **Description**: A more detailed description of the configuration record.

> **Machine Name**: A read-only field telling the name of the computer on which the service is running (or will run).

> **ServiceName**: The actual Windows name of the service.

> **Comments**: Any comments you wish to record.

Incoming Mail section: Controls how MainBoss Service processes requests sent in by e-mail.

> **Allow processing of incoming request mail**: If this box is checkmarked, MainBoss Service will operate normally. If the box is blanked out, MainBoss Service will not process incoming requests. In general, this box should be checkmarked.

> **Incoming mail server type**: Choose one of the options listed.

Incoming mail server: The name of the computer that receives your incoming mail. For example, if you're running Microsoft Exchange, this is usually the name of your Exchange server. This machine must allow mail access through POP3 or IMAP4.

Incoming mail server port: The port used by the mail server. When you select an option under "**Incoming mail server type**", MainBoss automatically sets the port to the standard default:

- ☐ For POP3 and TLS within POP3: 110
- ☐ For POP3S: 995
- ☐ For IMAP4 and TLS within IMAP4: 143
- ☐ For IMAP4S: 993

Note: Getting the port numbers wrong is the most common source of errors when configuring MainBoss Service.

Username: The name of the e-mail account to which requests will be sent. For example, if users send mail to `workreqs@yourcompany.com`, the **Username** would be `workreqs`.

Password: The password (if any) for the specified **Username**.

Mailbox (IMAP4 only): The name of the mailbox, if you're using any version of IMAP4. The default is `inbox`.

Although the IMAP4 standard calls this the mailbox, most people would likely call this value a folder name. In general, the only time a value should be entered here is if incoming request e-mails somehow end up stored in a different folder from the default. (This can happen if you're using server-side rules to sort incoming mail into folders.)

Process E-mail Interval: Dictates how often MainBoss Service will check for new incoming messages. By default, this is `0:30` (every 30 minutes).

Automatically create new requestors: If this is checkmarked, MainBoss Service will automatically create new entries in the **Requestors** table (**Coding Definitions** | **Requests** | **Requestors**) whenever an e-mail message is received from someone who isn't currently on the list.

Remember that your **MainBoss Requests** license may place limits on the total number of requestors allowed in the **Requestors** table.

Outgoing Mail section: Controls how MainBoss Service sends out e-mail (acknoweldgements to requestors and notifications to assignees).

Allow processing of outgoing notification mail: If this box is checkmarked, MainBoss Service will send out notifications as normal. If the box is blanked

out, MainBoss Service will not send out notifications. In general, this box should be checkmarked.

Return E-mail address: The return e-mail address to be placed on acknowledgements and notifications (i.e. the address that will be used if the recipient wants to reply). This should be the e-mail address of a person in the maintenance department who can personally handle responses from clients.

Important: The "**Return E-mail address**" should *not* be the same as the mailbox to which users mail requests. If it is, you'll run into trouble if a requestor has an auto-reply set up, such as "Hi, I've gone on vacation and won't be answering my e-mail." What happens is this: if MainBoss Service sends an acknowledgement to the user, the auto-reply replies to the MainBoss Service mailbox; MainBoss Service thinks this is a new request, so sends an acknowledgement to the requestor; the requestor's auto-reply sends another reply to MainBoss Service; MainBoss Service sends another acknowledgement; and so on, until someone runs out of disk space. The way to avoid this is to set "**Return E-mail address**" to refer to a human being (who can be smart about dealing with auto-replies).

Return E-mail Display Name: The name to be associated with "**Return E-mail Address**".

Send E-mail notifications as HTML: If this is checkmarked, MainBoss Service sends notifications in HTML format. Otherwise, notifications are sent as plain text.

MainBoss Remote URL for E-mail notifications: If you have a **Web Access** license, MainBoss Service can add HTML links to notifications that will let users jump from the notification e-mail directly to a web page displaying an associated request or work order. In order to do this, you have to specify the URL of the web site that you use for MainBoss's **Web Access**. For example, you might set "**MainBoss Remote URL for E-mail notifications**" to

```
http://ourcompany.com/MainBossRemote
```

Notification Interval: Dictates how often MainBoss Service will check to see if notifications should be sent. By default, this is `0:10` (every 10 minutes).

Outgoing SMTP mail server: The name of the computer that will handle MainBoss Service's outgoing mail. Normally, this is the same as "**Incoming mail server**", but it doesn't have to be.

Outgoing SMTP port: The port used by the SMTP mail server. This is usually port 25.

Use SSL encryption for outgoing SMTP connection: If this box is checkmarked, MainBoss Service will use SSL encryption when sending out mail (to requestors).

Outgoing SMTP server authentication: The options in this area determine what kind of authentication (if any) MainBoss Service will use when sending out mail.

Anonymous: If this option is selected, MainBoss Service will not use authentication (mail is sent without going through any identification process).

Use the default network credential: If this option is selected, MainBoss Service uses whatever authentication is provided by the network as the default.

Using the specified SMTP domain, username and password: Choosing this option indicates that your SMTP server requires a domain, username, and password in order to send out mail. The fields below specify the required information:

Outgoing SMTP Domain: The domain that MainBoss Service should specify when sending out mail.

Outgoing SMTP Username: The username that MainBoss Service should specify when sending out mail.

Outgoing SMTP Password: The password for the given username.

Notification Preferences section: Controls how the format that MainBoss Service uses when sending out notifications.

Requestors subsection: Preferences for formatting e-mail acknowledgements sent to requestors.

Subject Prefix: A character string to be used at the beginning of the e-mail message's subject line.

Message Introduction: A character string to serve as the first line of the e-mail message itself.

Request Assignees subsection: Preferences for formatting e-mail notifications sent to people assigned to requests.

Subject Prefix: A character string to be used at the beginning of the e-mail message's subject line.

Message Introduction: A character string to serve as the first line of the e-mail message itself.

Work Order Assignees subsection: Preferences for formatting e-mail notifications sent to people assigned to work orders.

Subject Prefix: A character string to be used at the beginning of the e-mail message's subject line.

Message Introduction: A character string to serve as the first line of the e-mail message itself.

Purchase Order Assignees subsection: Preferences for formatting e-mail notifications sent to people assigned to purchase orders.

Subject Prefix: A character string to be used at the beginning of the e-mail message's subject line.

Message Introduction: A character string to serve as the first line of the e-mail message itself.

> **Important:** After saving and closing the configuration record, you must use **Set Service Parameters** to change MainBoss Service to the new configuration.

MainBoss Service E-mail Log

MainBoss Service handles incoming requests automatically. Usually, this means that there's no need for you to actually see the original e-mail messages that lead to requests. However, if you do want to look at an e-mail message sent to MainBoss Service, you can do so using **Administration** | **MainBoss Service** | **E-mail Requests**. This table viewer lists all e-mail messages received by MainBoss Service.

The window contains the following:

View section: Lists the e-mail messages that have been received.

Received: Click this heading to sort the list by the date that messages were received. Click again to reverse the order (from ascending to descending or vice versa).

E-mail: Click this heading to sort the list by the e-mail address of the sender. Click again to reverse the order.

State: Click this heading to sort the list by the state of the request. Click again to reverse the order.

Request: Click this heading to sort the list by the request identifier. Click again to reverse the order.

E-mail Requests Contents

You can examine the contents of an e-mail request (and can add comments to the message) by going to **Administration** | **MainBoss Service** | **E-mail Requests** and clicking **Edit**. This opens a window that contains the following:

Number: The number assigned to the request.

Received: The date-time the message was received.

E-mail: The e-mail address of the person who sent the message.

State: The current state of the request.

Comments: An area where you can record comments about the message and/or request.

Original E-mail: The text of the original e-mail message.

Printing the MainBoss Service E-mail Log

You can print e-mail requests by clicking **Print** in **Administration** | **MainBoss Service** | **E-mail Requests**. MainBoss opens a window where you can specify options for printing the information:

Grouping section: Options controlling how the report is organized.

> **Group by** list: These options determine how the report is broken into sections. Each section will start with a heading, and may have a footer as well. If you select a **Group by** option, one or more **Then group by** lists may appear to let you break sections into subsections.

> **Sort Direction**: Determines whether grouping will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Sorting section: Options controlling how the contents of groups are sorted.

> **Sort by** list: These options determine how records are sorted within each group. If you select a **Sort by** option, one or more **Then sort by** lists may appear to let you refine the sorting process.

> **Sort Direction**: Determines whether sorting will go from lowest to highest (**Ascending**) or highest to lowest (**Descending**). **Sort Direction** options only appear if you pick an option where sort direction is relevant.

Filtering section: Options controlling which e-mail messages will be included in the report.

Advanced section: Miscellaneous options.

> **Suppress Costs**: Omits any money information that might otherwise be displayed in the report.

> **Format Report in Columns**: If this checkbox is checkmarked, the report will have information formatted in columns; this has the advantage of compressing a lot of information into a small amount of space, but may be difficult to read, especially if you ask for many pieces of information to be displayed. If the checkbox is blank, information will be laid out in a less rigid format.

> **Title**: The title to be printed at the beginning of the report.

Font Size: The font size to be used for all standard characters in the print-out (i.e. anything that isn't a heading).

Main Font: The font that will be used for most of the characters in the report. This should be a font that is supported by both your Windows system and your printer.

Fixed-width Font: The font that will be used for information that is printed with fixed-width characters (mostly unit specifications). This should be a font that is supported by both your Windows system and your printer.

Show checkboxes: A list of checkboxes that let you determine what information is displayed in the report. If a box is checkmarked, that type of information will be displayed; if a box is blank, that type of information will not be displayed.

Preview section: Displays a visual preview of the report. If you click the **Preview** button, you automatically go to this section.

The **Preview** section contains buttons for looking through the report preview and for actually printing the information. For more on using the **Preview** section, see *Report Buttons* on page 81.

Appendix A: Troubleshooting

The *Installation and Administration Guide* contains a great deal of information about troubleshooting. We recommend that you consult that guide before contacting MainBoss Support.

Obtaining MainBoss Support

When you purchase MainBoss, you receive 30 days of free support, including toll-free phone calls and on-line support via the Internet. We also offer an Annual Support Plan that provides ongoing phone and on-line support. Support Plan Subscribers also receive free updates and one free upgrade per year containing enhancements and new features.

You can contact Thinkage Ltd. at:

Telephone:
> 1-800-563-0894 (U.S. and Canada)
> 1-519-895-1860 (outside Canada and the U.S.)

Fax:
> 1-519-895-1864

Address:
> Thinkage Ltd.
> 85 McIntyre Drive
> Kitchener, ON N2R 1H6, Canada

E-mail:
> support@mainboss.com

World Wide Web:
> http://www.mainboss.com

Support through the web site is available on the Services page. This page offers software updates and the most up-to-date list of answers to frequently asked questions, plus a form where you can request online support.

If you have suggestions for improvements to MainBoss, please e-mail us at:
> suggestions@mainboss.com

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