MainBoss Advanced 4.2
Web Operations

Introduction
Welcome to MainBoss Advanced

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

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

Connecting to the Web

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

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

Authentication

MainBoss can be configured so that you're required to identify yourself to Windows before you can use **Web Access** or **Web Requests**. In this case, you have to enter a Windows user name and password, in much the same way that you do whenever you login to Windows. This means you must be a registered Windows user on the computer or network that hosts your MainBoss web site.

Alternatively, MainBoss can be configured to require different forms of identification. For example, if you want to use **Web Requests** to enter a work request, you may only have to specify your email address.

The Web Requests Module

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

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

Submitting a Request

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

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

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

- **Number**: A tracking number that will be used for your request. You cannot change this value.
- **Subject**: Fill in this box with a brief summary of the request.
- **Unit Location**: Fill in this box with any information that might help workers find the problem (e.g. a room number or a description of what equipment needs fixing).
- **Request Priority** (optional): If you wish, you may click the drop-down button and choose a priority from the available choices. (Setting a priority usually isn't necessary unless there's something special about your request.)
- **Description**: Fill in this box with a full description of the problem.

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

Note: When you specify your email address for this web page, MainBoss attempts to set a web-browser "cookie" to remember your address. This means that you won't have to type in your email address again (unless you tell your web browser not to accept or remember cookies). The same principle applies if you have logged in to the Web Access module (described later in this document)—if MainBoss can determine your email address based on your Windows login, MainBoss will automatically assume that address when you're using Web Requests.

Unit Autocomplete: Your organization has the option of using autocomplete for the "**Unit Location**" field in the request. The user starts by typing a few characters; the web page then downloads a list of units that contain those characters and the user can pick the appropriate unit from the list.

Autocomplete makes it easier for users to specify a unit. However, there are some potential disadvantages. If you have a large number of units whose names contain the characters that the user typed in, the user will be presented with a long list of names; this can be difficult for users to use, especially if they are submitting their requests using smart-phones with relatively small screens. It is also possible that the characters typed by the user don't match any known units; the user may have to make several attempts before guessing an appropriate name.

If your organization chooses not to use autocomplete, the "**Unit**" field in the created request will contain whatever the user typed in, whether or not it matches any known unit name.

For information on how to turn autocomplete on or off, see Unit Autocomplete.

Notifications and Additional Comments

People who submit requests may receive email *notifications* about that request. (In order for a requestor to receive notifications, the maintenance department must checkmark the **Receive Acknowledgements** checkbox in the requestor's record in **Coding Definitions** | **Requestors**.)

Note: If your organization uses Windows Active Directory, and if you have multiple email addresses recorded in the active directory, MainBoss only sends notifications to your *primary* email address (as specified in the active directory). This may not be the address you specified when you submitted the request.

Notification messages are sent out at the following times:

- When MainBoss Service receives the request and adds it to the MainBoss database
- When maintenance personnel mark the request as **In Progress**
- When the request is used to create a work order
- Whenever a comment is added to the request

Notification email messages include any “**Comment to Requestor**” that were entered as part of the action that caused the notification. For example, if you add a comment to a request, the resulting notification includes the comment, provided that you entered the comment in the “**Comment to Requestor**” field. (The window for entering comments also includes a “**Comments**” field; comments recorded in this field are *not* sent to the requestor.)

Each notification email message received by a requestor will include a URL link. Clicking this link goes to a web page where the requestor may add comments to the original request. This makes it possible for maintenance personnel to obtain additional information from the requestor. For example, suppose that an original request doesn’t provide enough information for the maintenance department to locate the problem. Maintenance personnel can add a comment to the request asking for more information; MainBoss will automatically send this comment as a notification to the requestor. The requestor can then use the URL in the notification message to add an answering comment to the request.

Of course, communications with requestors can be done using normal email. However, by using comments to requests, you make sure that these communications are stored along with the request record. This makes it easy for all authorized MainBoss users to obtain the information; it also means that MainBoss retains a complete history of communications between the requestor and the maintenance department, in case this may be useful in future.

Before adding a comment to a request, requestors may be asked to specify the email address from which they submitted the original request.

Outdated URLs: Each notification message sent out contains a *new* URL for adding comments to the request. The URLs in previous notifications are considered outdated and will no longer work—this ensures that the requestor is always responding to the most recent comment, not to comments that are old. If a requestor does attempt to use an outdated URL, the requestor will be told that this URL can no longer be used for adding comments.

Automatically Authorizing New Requestors

You can configure MainBoss to accept requests from people who aren’t currently authorized requestors. For example, you might decide that you’ll accept requests from anyone in your organization, even if they aren’t currently in MainBoss’s table of recognized **Requestors**.

Various options let you specify when you will and won’t accept someone as a new requestor. These options are specified in the **Incoming Mail** section of the MainBoss Service configuration record. The options apply to requests submitted by email as well as to requests submitted through your Web Requests web site. For further information, open the MainBoss service configuration record and then consult the online help.

The Web Access Module

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

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

Viewing Your Active Assignments

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

- If your organization has a **Web Access** license but not a **Web Requests** license, you will immediately go to a list of your assignments.
- If your organization has both licenses, the web page will contain a link labeled **Login as MainBoss User to view your assignments**. Click this link. You will be prompted to enter your Windows login name and password in order to identify yourself.

Your list of active assignments contains information about the following:

- New or in-progress requests that have not been assigned to anyone. If you have the appropriate security roles, you can view these requests and can assign yourself to them if you choose to do so.
- New requests assigned to you. These are requests which have been created, but may still be subject to significant revisions. New requests may even be voided (rejected or cancelled) by the maintenance department.
- In-progress requests assigned to you. These are requests which have been accepted by the maintenance department. Work may have already begun on these requests.
- Draft work orders that have not been assigned to anyone. If you have the appropriate security roles, you can view these work orders and can assign yourself to them if you choose to do so.
- Draft work orders assigned to you. These are work orders which have been created but may still be subject to significant revisions.
- Open work orders assigned to you. These are work orders which are considered "ready to go"—ready to be handed to the workers who will actually do the job. Work may have already begun on these jobs.

- Requests and work orders that haven't been assigned to anyone. If you have the appropriate security roles, you can claim these requests/work orders for yourself.

  For example, suppose you're working on the night shift and you see an urgent request appear in the **Not Assigned** list. (This might be a request submitted through the **Web Requests** module.) You can click on the request, then click the **Self Assign** button to say that you'll deal with the request. From this point on, you're assigned to the request and no one else will see it in the **Not Assigned** list.

  This feature is useful if there are times when there are workers on duty but no one who officially assigns requests and/or work orders. In this case, authorized workers can keep an eye on unassigned work and take on the jobs themselves, if appropriate.

The web page tells you how many of each there are. The page also provides links which let you see more about the requests and work orders.

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

Closed Work Orders and Requests: When a job is finished, the associated work order is *closed*. Since the web site only displays draft and open work orders, you cannot access closed work orders through the usual web page. However, you should still be able to access a closed work order through the web; to do so, go to any acknowledgement email that you have received about the work order and click the link at the end of the email.

Note that you will only be allowed to view the work order, not change any of its values. You cannot edit work orders after they've been closed.

The same principle applies to requests. Your list of requests does not include requests that have been closed; however, you can access a closed request by using the link in an acknowledgement email about that request. You will be able to view the request, but will not be able to change it any way.

Viewing In-Progress Requests

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

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

- The subject line of the request.

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

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

Adding Comments to Requests

To add a comment to a request, click the request's ID number in the list of requests. This opens a web page for viewing the request. This web page contains an **Add Comment** button. Click the button to add a comment to the request's associated history. For example, you might add a comment to note if the job will be significantly delayed.

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

Viewing Open Work Orders

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

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

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

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

Work Order Displays

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

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

Adding Comments to Work Orders

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

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

Closing Work Orders

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

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

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

- For materials, this is the quantity used.

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

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

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

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

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

When you have finally recorded all actual expenses on a job, you can close the work order. To do so, click the **Close** button above the work order's **History** section. MainBoss opens a window where you can record any final information for the work order. Click **Close WorkOrder** when you have entered any such information.

Claiming Unassigned Requests and Work Orders

The **View Assignment Status** web page has entries for unassigned requests and work orders—requests and work orders that are not currently assigned to anyone. If you have appropriate security roles, you can assign yourself to such requests and work orders; essentially, you'll be saying, "I'll handle this."

To examine unassigned requests or work orders, click the appropriate **Not Assigned** link on the **View Assignment Status** web page. MainBoss will display a list of unassigned requests or work orders.

In this list, the ID number is a link to the corresponding request or work order. If you click this link, MainBoss displays a web page showing the associated request or work order. This web page has a button labeled **Self Assign**. If you click this button, MainBoss displays a web page that lets you assign yourself to the request or work order.

It also lets you specify other information, such as the estimated completion date. When you have filled in any appropriate information, click **Self Assign** to complete the self-assignment process.

Logging Out

Every web page has a **Logout** button that lets you quit your MainBoss session. The next time you want to see your work orders, you will have to login again with your Windows login name and password.