

# COMPASS Fleet Technician Quick Reference Guide


Icon	Function
 Dashboard	Home page for the Fleet application. Shows summary of work orders by stage and list of parts in low supply.
	Opens a calendar where work orders can be displayed by the number per day for the month, the number and link to each work order for the week, and the work orders for a specific day.
	Move forward or backward in the calendar. Select month, week, or day.
 Work Orders	Click to go to the work order list.
	Sort the Work Order table by the data contained in field whose name is underlined.
	Use the filter button to see only work orders by status, date range, or vehicle location if you have multiple garage locations.
	Click to open the form and create a new Work Order.
	Delete the selected work order.
	Print a work order details form for any selected work order.
<input type="checkbox"/>	Click in the box to select the item next to the box (work order, task, etc.)
<b>Fields in red are required</b>	When creating a new work order, all fields in red must be completed to move ahead from the Work Order tab to Tasks, Parts, or Time tabs.
Status * <input type="text"/>	Select from the drop down in the Status box to choose New, In Progress, Completed, etc. to allow for “at a glance” information in the Work Order List.
Tasks	Click on the Tasks tab to get the list of items to be completed related to the Work Order Type.
<input type="checkbox"/> Required	If doing an inspection when all tasks are mandatory, click on this button to select all tasks at once.
<input type="checkbox"/> Result <input type="text" value="OK"/> <input type="text" value="NOT OK"/>	If reporting on the result of an inspection or completion of a task, choose OK or NOT OK individually for each task, or put a check in the Result box to mark all tasks “OK.”
Parts	In the part tabs, parts used to complete the work order are recorded reducing the inventory automatically.
<input type="text" value="a"/> <input type="text" value="#a123 A Bus Widget"/>	In the Part Number box, begin typing the name of the part. A list of parts with the letters you type will come up along with the part number and populate the fields.
Time	In the time tab, select the date from the calendar and enter the time used to complete the job.
<input type="text" value="0"/> <input type="text" value="1/2"/>	Enter full hours in the box and use the drop down for fractions of hours.
<input type="button" value="Save"/>	Click Save to save the Work Order information.

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## Quick Tips for Compass Fleet

### How to Complete a Work Order Request



1. Click on **Work Orders** to open your list of Work Orders to find the work orders you need to complete.
2. Click on the box in front of the work order # to select a work order or work orders and click the  button to print the work orders you want to work on if you work from paper.

**OR**

3. Click on the Work Order # WO-00104 to open the work order directly in the application.
4. Collect your Work Orders from the printer and proceed to the bus to do your repairs, inspections, etc.

**OR**

Keeping the Work Order open, open the **Tasks** tab and look at the list of tasks to see what tasks are required for the job.

Other	Required	Result	Details
Other	<input checked="" type="checkbox"/>	▼	check operation of thingee Perform your work.

Upon completion of your work, complete the paper work order writing in the parts and quantities used, and the time spent completing the job.

**OR**

Click on the **Parts** tab. Fill in the part number by beginning to type the name of the part.

Part Number	Part Name
a123	A Bus Widget
#a123 A Bus Widget	

If there are multiple items in the list click on the part used. The part number and part name fields will populate with your choice. Don't forget to fill in the number of parts used.

If you used multiple different parts, click on **+ Add New Part Row** to add all parts used. This will automatically deduct the parts from the parts inventory.

Click on the **Time** tab to enter your time. Type the hours in the box and use the drop down for fractions

of an hour. 

Time (Hrs.)	Comments
1 1/2 ▼	Bus Widget repaired and tested

. Add comments if applicable.

**Save** your work!

5. Take your papers to the office. If you completed the form in the computer, change the **Status \*** Completed.