



SOUTHERN NEVADA
WATER AUTHORITY

LAS VEGAS VALLEY
WATER DISTRICT

PEOPLE
LEADING
THE WAY



Work Request Inquiry

LVVWD /SNWA

Avantis 4.2

Maintenance

Training Manual



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Introduction

This training manual is designed for LVVWD / SNWA personnel who are responsible for monitoring the status of Work Requests. The manual is meant to be used as both a training resource and a reference guide on how to use the Avantis system to search for and view Work Requests.

Your comments and suggestions on how to improve this training manual are encouraged.

Purpose

A Work Request is the document used to request work from one of the LVVWD / SNWA maintenance divisions. Most Work Requests will eventually become Work Orders. Before a Work Request is converted to a Work Order, however, LVVWD / SNWA personnel may want to periodically check on and monitor maintenance Work Requests for their department. This training manual will demonstrate how Work Requests can be viewed and monitored.

Objectives of this Manual

Upon completion of this manual, the user will be able to:

LOGIN to Avantis

SELECT the LVVWD Work Request Cabinet

USE the Prompted Filter Details Dialog Box

SELECT a Work Request from the List

BROWSE the Work Request

REVIEW other Work Request Views



1. Starting Avantis and Selecting a Work Request

To work with the Avantis asset management software, you must use your assigned **Login name** and **password**. After login you should select your department specific **Desktop**. Then you should open your department **Work Request Cabinet**.

When you select your department **Work Request Cabinet** the **Prompted Filter Details Dialog Box** will open. This screen allows you to choose search options based on several conditions. Then, only those Work Requests, matching those conditions, will appear in the Work Request Cabinet.

From the list, which appears in the **Work Request Cabinet**, you can then use different methods to open a **Work Request** for viewing.

Objectives of this Module

Upon completion of this module, the user will be able to:

Login to Avantis

Selecting the Work Request Cabinet

Using the Prompted Filter Details Dialog Box

Selecting a Work Request From the Work Request Cabinet



Login to Avantis

Only authorized users are allowed to use Avantis so, when you launch the application, you are required to login. The **Login name** field will default to the same name as your network login. If this is correct then press the **Tab** key to move to the **Password** field and enter the password assigned to you. Then click the **OK** button to continue.

1. Enter your **Login Name** and **Password** in the **Avantis Asset Management** Login Information window.
2. The fields for **Environment**, **Site** and **Language** are set by default, based on your sign-on, and should not be changed.
3. Click the **OK** button.

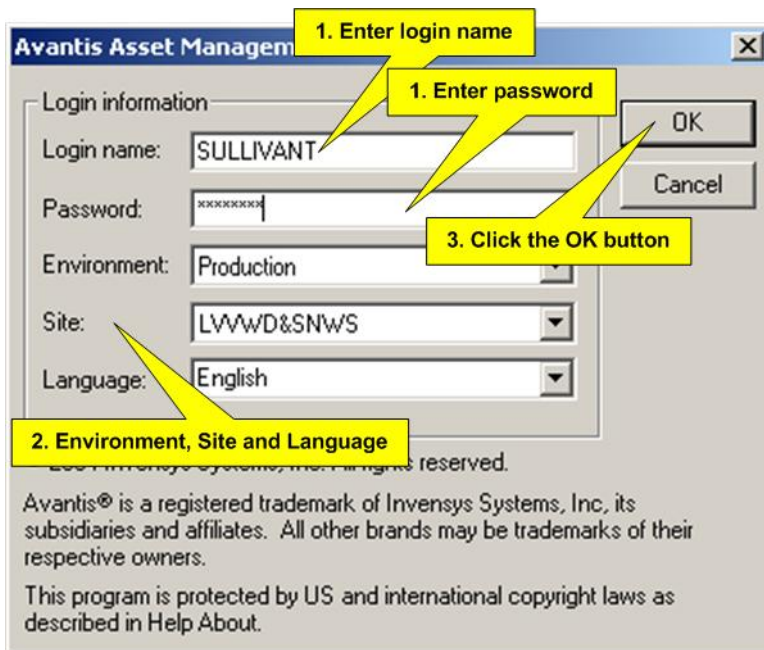


Figure 1 – Avantis Login Screen



NOTE: If you already have Avantis open and have used other options, you will not have to login a second time.

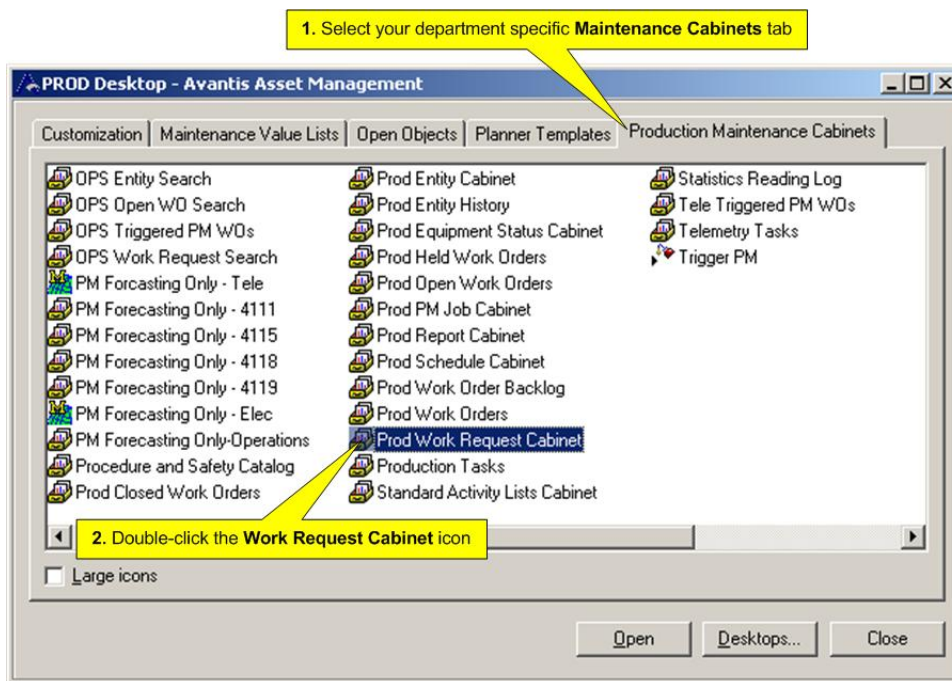


Selecting the Work Request Cabinet

After logging in, Avantis displays the **Desktop** screen which consists of a series of **Tabs** containing **Icons** representing department specific **Cabinets**. Each division has its own version of the Desktop and Avantis remembers which Desktop you last worked with.

(If you need to change the Desktop, click the **Desktops...** button and select from the list that appears.)

1. From your department **Desktop** screen, select your department specific **Maintenance Cabinets** tab.
2. Double-click the **Work Request Cabinet** icon to open your department Work Request Cabinet.



**Figure 2 –
Maintenance
Cabinets Screen**



Using the Prompted Filter Details Dialog Box

When the **Work Request Cabinet** opens, Avantis displays the default **View**. This view may contain a list of hundreds, or even thousands, of Work Requests. The length of this list may make it difficult to work with, and challenging to find the specific Work Request that you wish to display.

To allow the display of only a limited number of Work Requests, the **Prompted Filter Details** dialog box will automatically appear each time you open a **View**. This screen allows you to choose search options based on several conditions. Then, only those Work Requests, matching those conditions, will appear in the list

(Each **view** of the **Work Request Cabinet** has a slightly different **Prompted Filter Details** dialog box with different search options.)

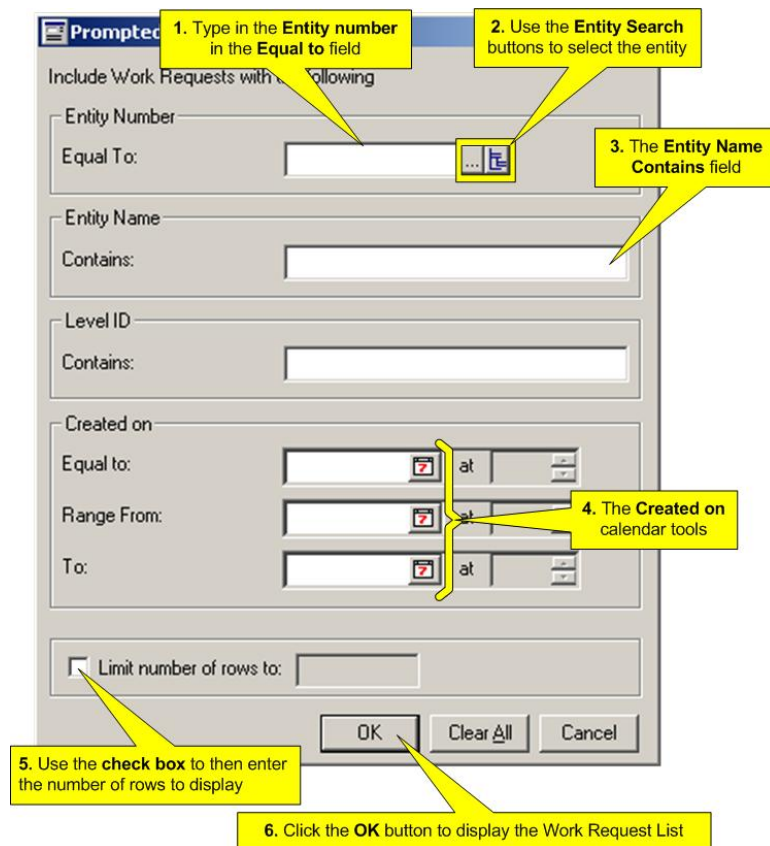


Figure 3 – Prompted Filter Details Dialog Box

1. If known, type in the **Entity Number** in the **Equal To** field.
2. If the Entity number is not known, use the **Entity Search** buttons (the **Ellipses** and **Hierarchal** buttons) to select the entity.



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3. To search for a Work Request by **Entity Name**, enter at least one word or number, which should be in the name, into the **Contains** field.
4. To search for a work request by the date it was **Created on**, use the calendar tools.
5. Select the check box for **Limit number of rows to**, and then enter a number in the field that appears to the right. This will display only the number of rows you selected, in the Work Request Cabinet.
6. Click the **OK** button and a list of Work Requests displays.



NOTE: *To search all Work Requests, leave all of the fields blank.*



Selecting a Work Request From the Work Request Cabinet

The **Work Request Cabinet** displays a list of **Work Requests** based on the criteria selected in the **Prompted Filter Details** dialog box. From the **Work Request Cabinet**, there are three methods to open a **Work Request**:

- From the list that appears in the **Work Request Cabinet**, find the **Work Request** you wish to display and click on it once to select it. Then do one of the following:
 - Click the **Open Selected Object** tool, on the toolbar.
 - Double-click the selected work request or its **Work Request Icon**.
 - Click the **Selected** button to open its menu.
 - Choose the **Open As** option.
 - Select the **General Information** view.
- The selected **Work Request** opens in its own window.

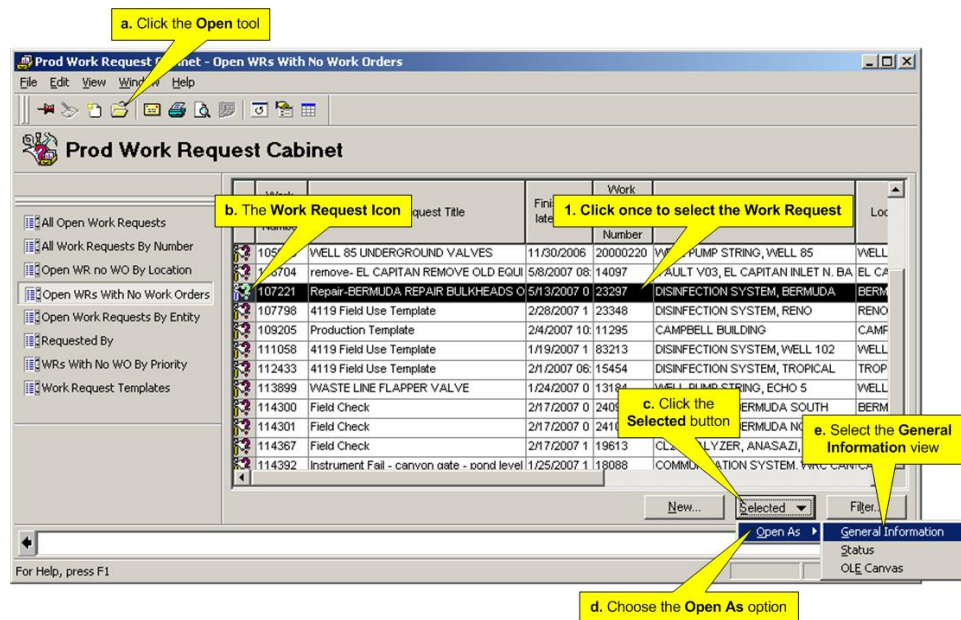


Figure 4 – The Work Request Cabinet



NOTE: If the Work Request has been turned into a Work Order, it is listed in the Work Request cabinet but cannot be modified.



Module 1 Exercise – Starting Avantis and Selecting a Work Request

In this exercise you will practice:

- Starting the Avantis program
- Opening your department specific Desktop
- Using the Prompted Filter Details dialog box to select a list of Work Requests
- Using different methods to open a Work Request

1. Start Avantis and login using the following information supplied by your instructor:

Login name: _____

Password: _____

Environment: _____

2. Open your department specific Desktop.
3. Open your department specific Work Request cabinet.
4. In the Prompted Filter Details dialog box do the following:

Use the Entity Search buttons to select Entity: _____

Search for Entity names containing: _____

Search for Entities created on: _____

5. From the Work Request Cabinet, open Work Request _____ by:

- Double-clicking on the Work Request Icon
- Using the toolbar
- Using the Selected button



Module 1 Review

In this module you learned to:

- Start the Avantis program
- Open your department specific Desktop
- Use the Prompted Filter Details dialog box to select a list of Work Requests
- Use different methods to open a Work Request



2. Browsing the Work Request

When the **Work Request** window opens, you can select different **Views** which display different sets of information about the Work Request. The default **View** is **General Information**. Within the **General Information** View there are a series of **Tabs** containing specific information about the Work Request: **General**, **More Information**, **Keywords**, and **Categories**.

As each **Tab** is selected, you can display further information about the Work Request.

Objectives of this Module

Upon completion of this module, the user will be able to:

Browse the General Tab

Browse the More Information Tab

Browse the Keywords Tab

Browse the Categories Tab



General Tab

The **General Tab** displays general information about the **Work Request** such as the work request **Number**, **Name**, **Location**, **Description**, and **Priority**.

As each **Tab** is selected, you can choose to just display the data (all fields will appear gray) or, if you activate the **Allow Editing** tool, you can modify the entries (most fields will appear white).

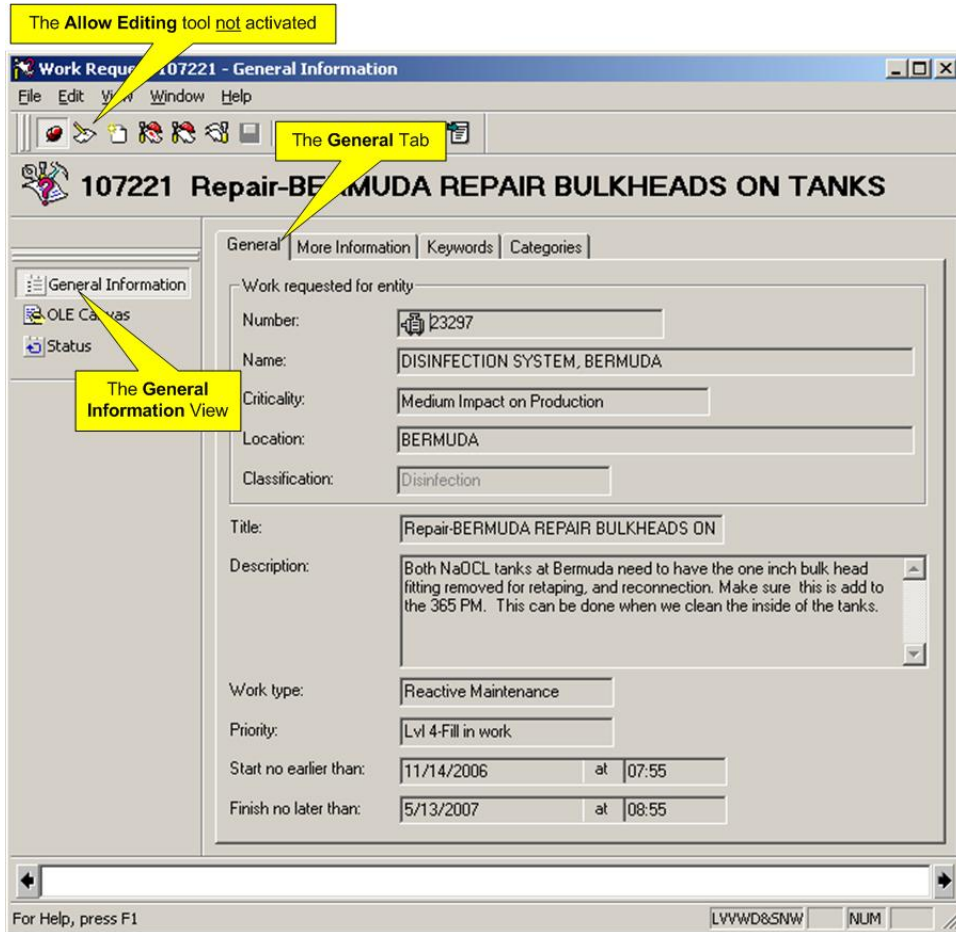


Figure 5 –
General
Information View
- General Tab
(Allow Editing
Not Activated)



General Tab (cont.)

When the **Allow Editing** tool is activated, the fields that can be modified will become available for editing and appear white.

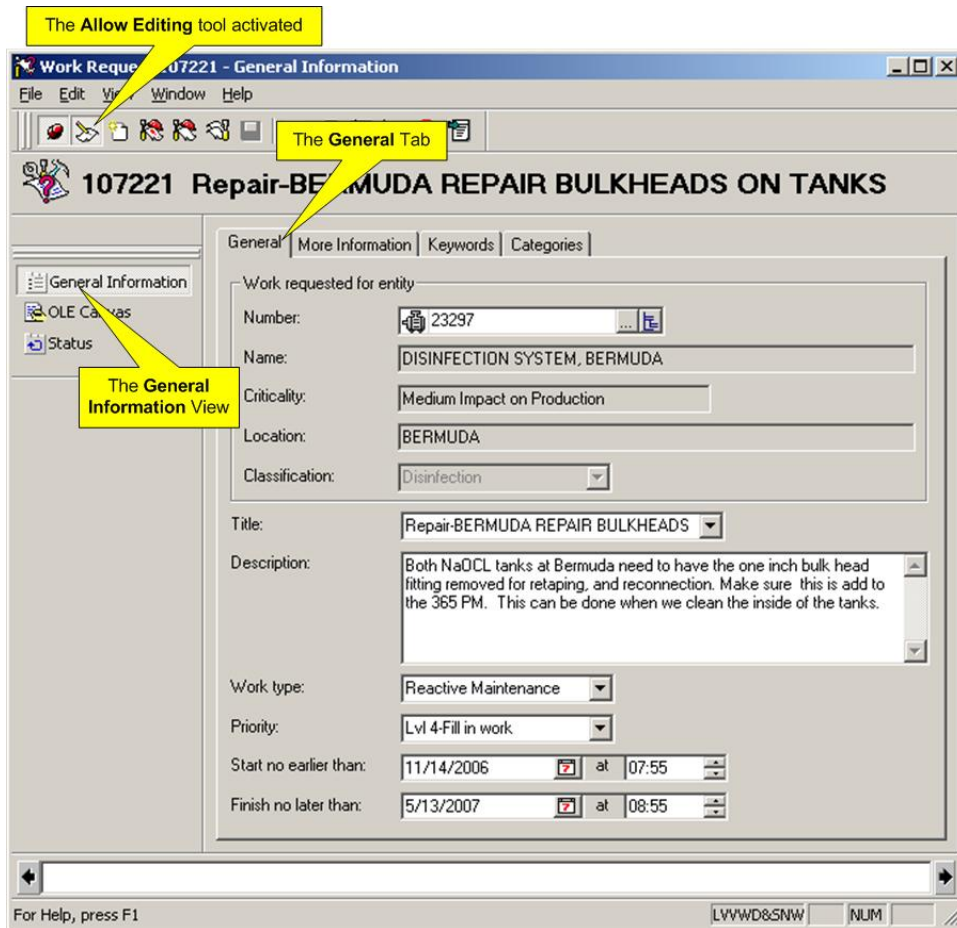


Figure 6 – General Information View - General Tab (Allow Editing Activated)



More Information Tab

The **More Information Tab** displays additional information about the Work Request such as the **Estimated Cost**, name of the **Planner**, **Requester information**, and when the Work Request was **Requested on**.

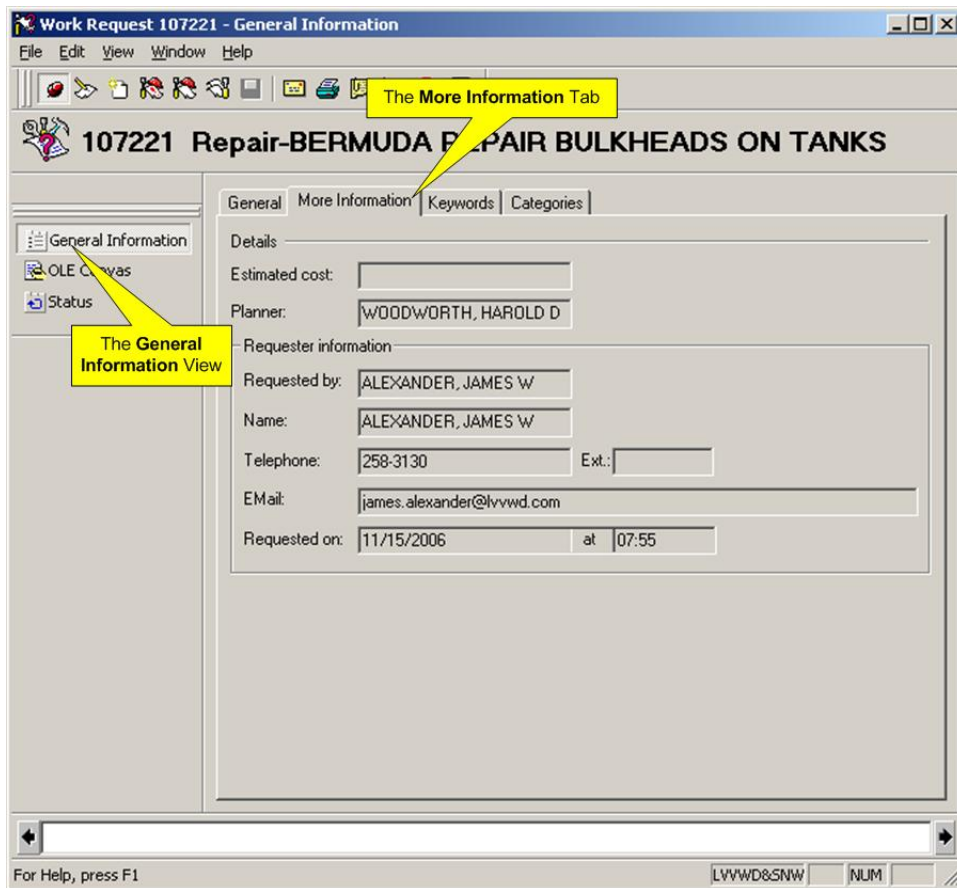


Figure 7 –
General
Information View
- More
Information Tab



Keywords Tab

The **Keywords Tab** displays keywords associated with the **Work Request**. This information can be used to easily categorize and search for specific groups of **Work Requests**.

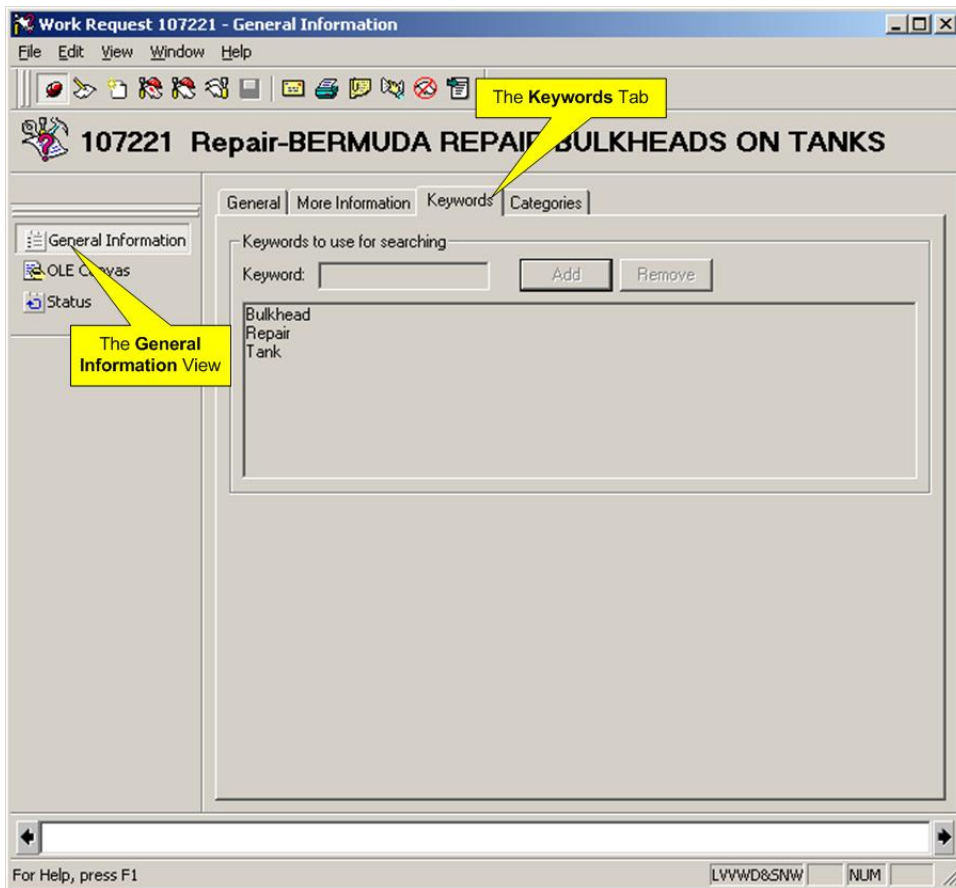


Figure 8 –
General
Information View
- Keywords Tab



Categories Tab

The **Categories Tab** displays the **Categories this object belongs to**. The most important category is the **Level ID**. This defines which department is responsible for the Work Request.

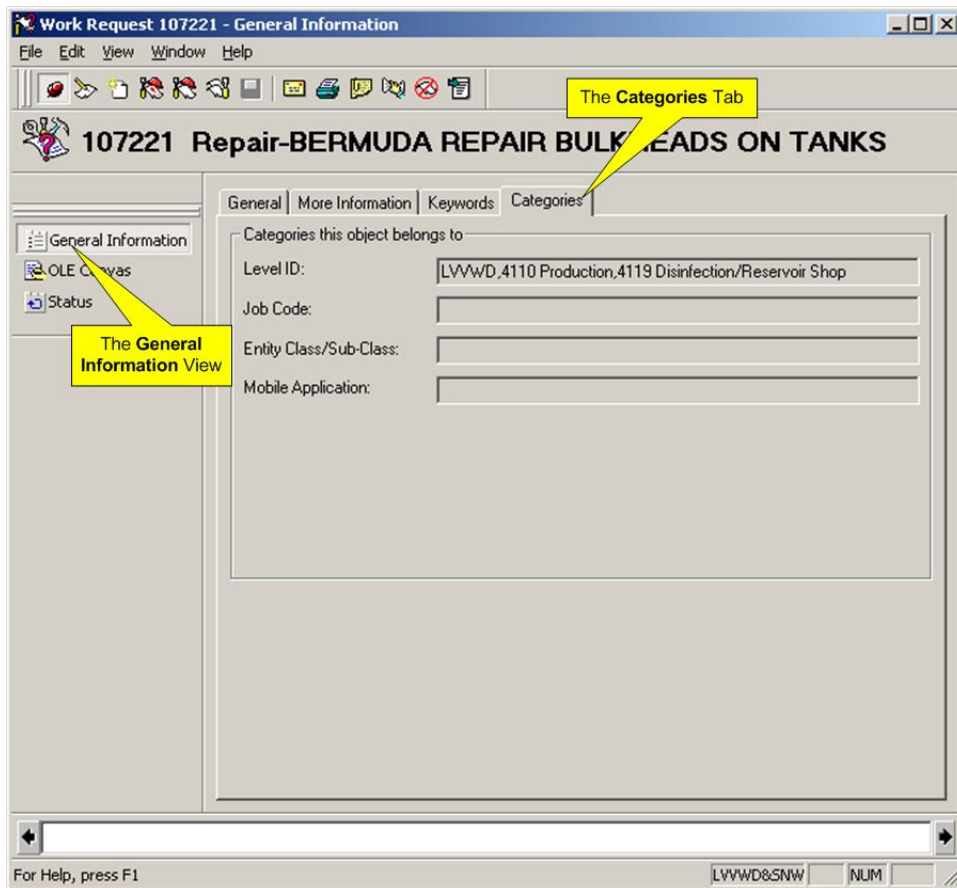


Figure 9 –
General
Information View
- Categories Tab



Module 2 Exercise – Browsing the Work Request

In this exercise you will practice:

- Activating and de-activating the Allow Editing mode
- Browsing the General Tab
- Browsing the More Information Tab
- Browsing the Keywords Tab
- Browsing the Categories Tab

1. Open the Work Request: _____
2. Activate and de-activate the Allow Editing mode.
3. On the General Tab, what is the Priority: _____
4. On the More Information Tab, whose name is in the Requested by field: _____

5. What are 2 of the Keywords associated with the Work Request: _____

6. What is the Level ID: _____



Module 2 Review

In this module you learned to:

- Activate and de-activate the Allow Editing mode
- Browse the General Tab
- Browse the More Information Tab
- Browse the Keywords Tab
- Browse the Categories Tab



3. Other Work Request Views

The General Information View is the default View for the Work Request window, but there are other **Views** that contain additional information about the **Work Request**. These are the **OLE Canvas** and the **Status View**.

The **OLE Canvas** is a link to a **Microsoft Word** document that allows formatted information to be attached to the **Work Request**.

The **Status View** contains a series of **Tabs** that have updated information on what is the current situation of the **Work Request**.

Objectives of this Module

Upon completion of this module, the user will be able to:

View the OLE Canvas

Use the Status View



OLE Canvas

If the text to be entered in the **Description** field, of the General Information view, needs to be more than 2,000 characters, or simple diagrams are required, then the **OLE Canvas** View should be used instead.

OLE stands for Object Linking and Embedding. The object that will be linked or embedded to the **Work Request** is a **Microsoft Word** document. When working in the **OLE Canvas** View, all the features of Microsoft Word are available to you. You can type as much text as you need, use different fonts, use color highlighting, and even add simple diagrams.

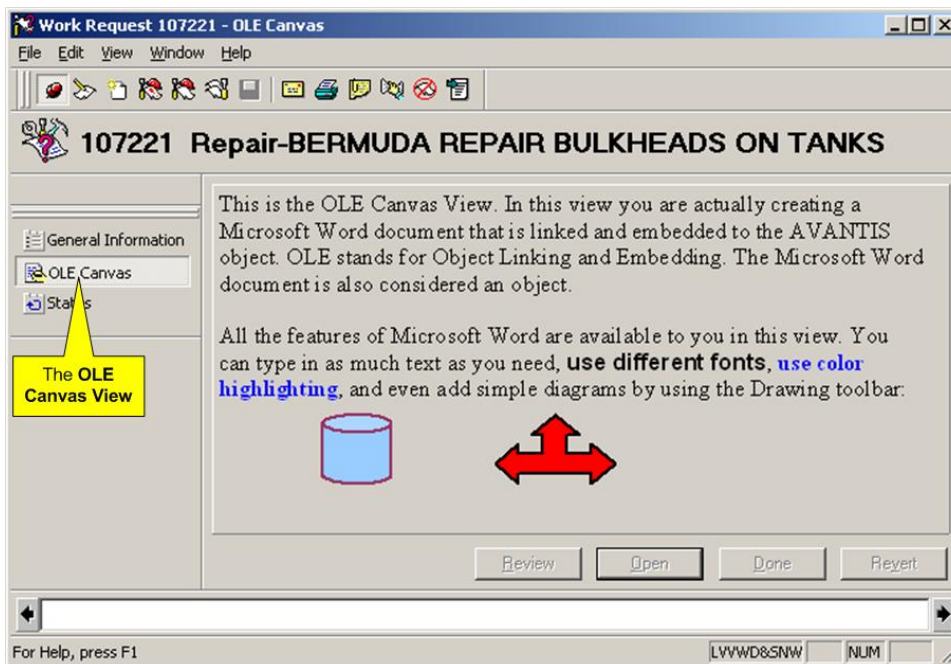


Figure 10 – The OLE Canvas View



The Status View

Under the **Status** view, there are a series of **Tabs** containing specific information about the current situation of the **Work Request**. The **Tabs** are **Created**, **Work**, **Approval** and **Audit**.

Created Tab

The **Created Tab** displays information about when the work was **Requested on**, **Requested by**, and the **Priority** of the **Work Request**.

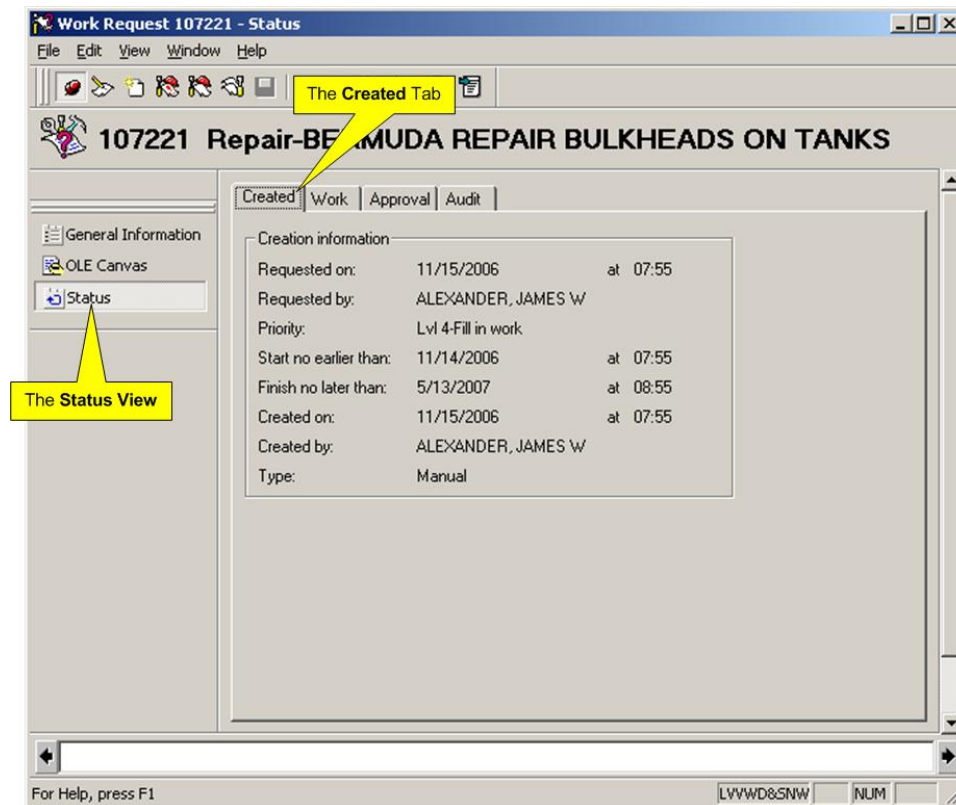


Figure 11 – Status View - Created Tab



Work Tab

The **Work Tab** displays a table listing any **Work Orders** that have been created from the **Work Request**.

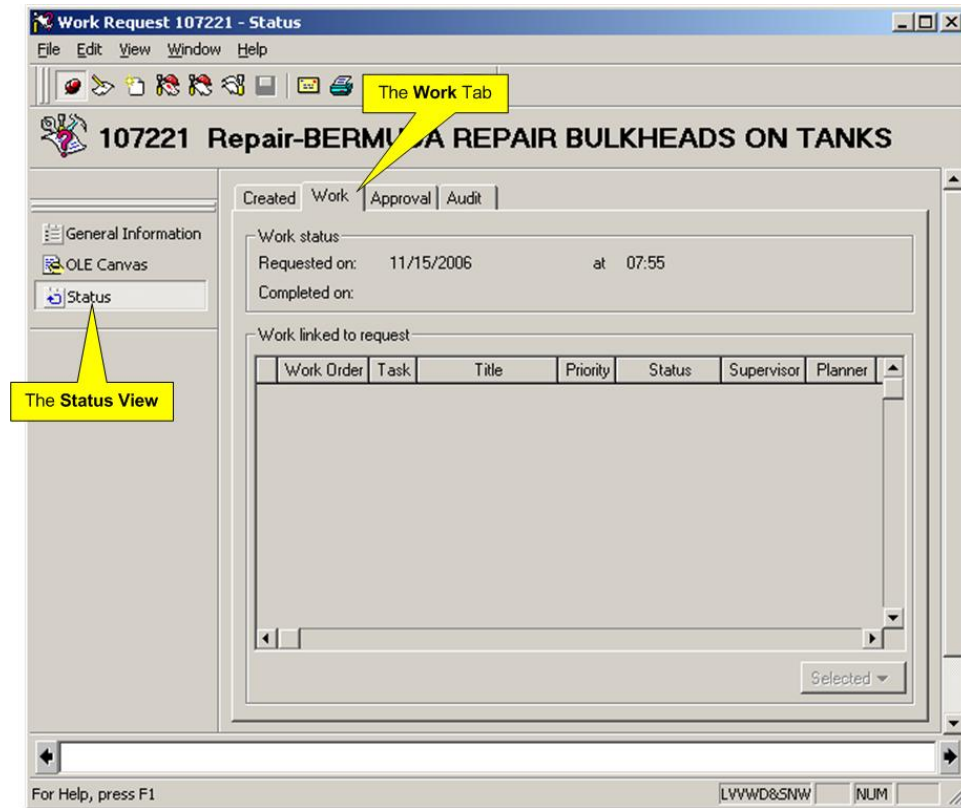


Figure 12 – Status View - Work Tab



NOTE: To view a Work Order, double-click the Work Order icon and the Work Order window displays.



Approval Tab

The **Approval** tab indicates the approval history of the **Work Request**. The information includes when it was reviewed, who reviewed it, reason rejected (if applicable), and any approval comments.

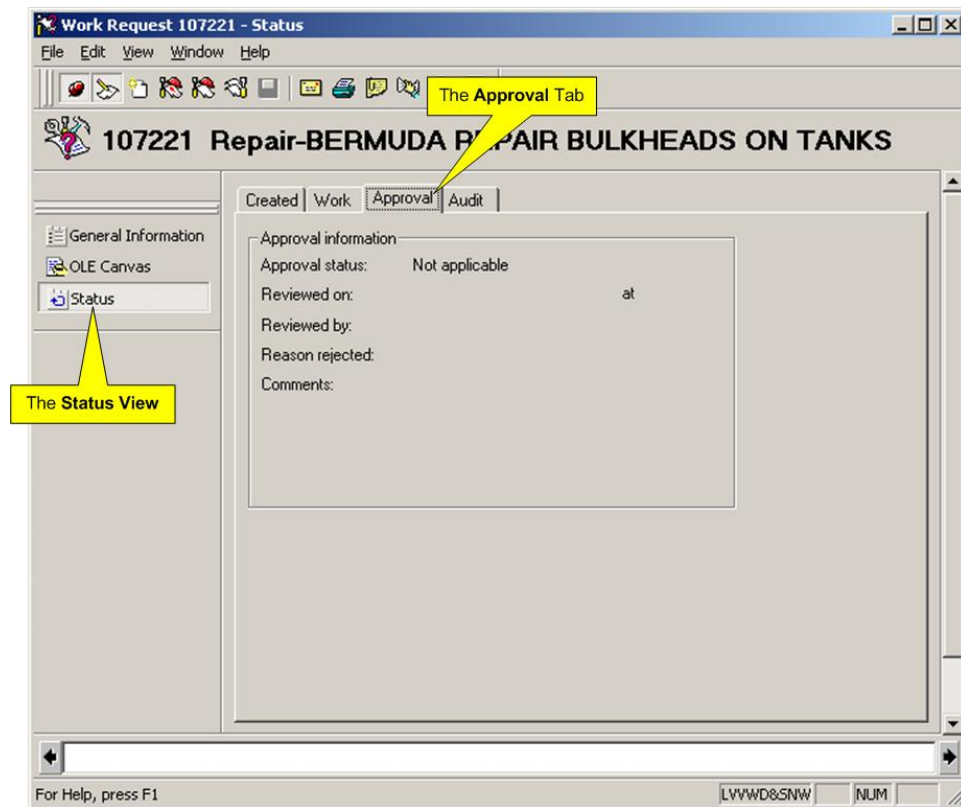


Figure 13 – Status View - Approval Tab



Audit Tab

The **Audit** tab is an electronic “paper trail” that lists the **Date and Time of Change** and the **User Name** for every change made to the **Work Request**.

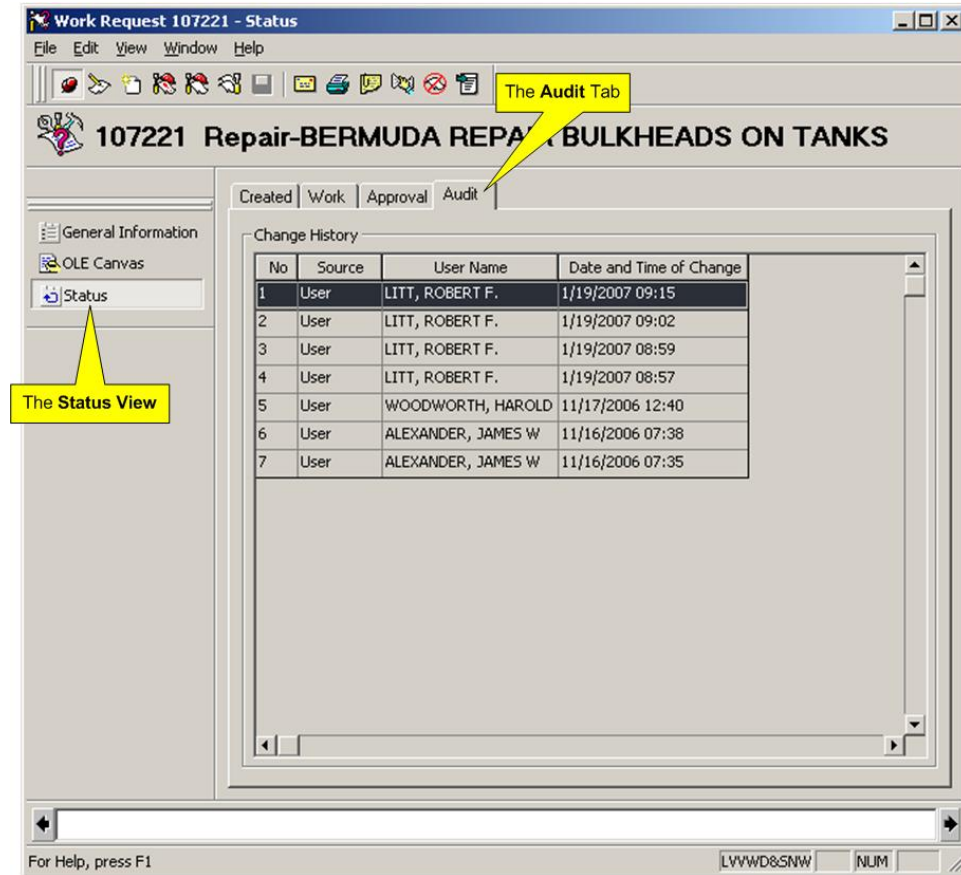


Figure 14 – Status View - Audit Tab



Module 3 Exercise – Other Work Request Views

In this exercise you will practice:

- Browsing the OLE Canvas
- Browsing the Status view, Created tab
- Browsing the Status view, Work tab
- Browsing the Status view, Approval tab
- Browsing the Status view, Audit tab

1. What information can be found in the OLE Canvas view of Work Request: _____

2. When was the Work Request Requested on: _____

3. What Work Order was created from the Work Request: _____

4. What is the Approval status: _____

5. Name 2 people who have made changes to the Work Request: _____



Module 3 Review

In this module you learned to:

- Start the Avantis program
- Open your department specific Desktop
- Use the Prompted Filter Details dialog box to select a list of Work Requests
- Use different methods to open a Work Request



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