



Utility Work Orders Strategies

Utility Management Work Order Process

Creating and Managing Work Orders to help improve daily processes.

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Work Orders Overview

....What will we be focusing on today

Work Order Overview

- Work Order Permissions, Validation Sets & Settings
- Setting up Work Order Types
- Creating, Completing, Results & Reporting
- Adding Charges To Work Orders
- Best Practices
- Troubleshooting/Common Issues
- Questions



Utility Management Utility Work Orders Strategies [1759]

New World ERP | ICC-237-Level 2
CPE Eligible: No.

Permissions & Setup



Permissions

Maintenance > new world ERP Suite > Security > Users

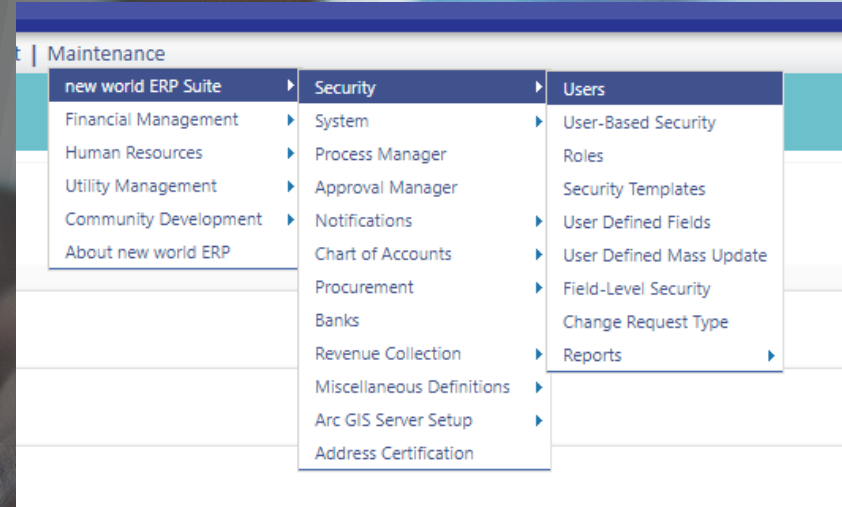
Security Component Search: **Work Order**

Applications: **Utility Management**

Feature Groups: **UM – Work Orders**

Main permissions you want to be aware of...

- *UM Customer Service – Work Orders*
- *UM Customer Service – Work Orders Maintenance*
- *UM Work Order Interface*



Filter

Search Security Components ×

Applications
Utility Management ▼ ×

Feature Groups
UM - Work Orders ▼ ×

Permissions ▼ ×

- Show All
- Show Access Only
- Show No Access Only

Permissions

<input type="checkbox"/> Security Component	Full	Add	Change	Delete	View	Print	Undo Checkout	Finalize
<input type="checkbox"/> Completed Work Order Report	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
<input type="checkbox"/> Print Work Order Form	<input checked="" type="checkbox"/>						<input checked="" type="checkbox"/>	
<input type="checkbox"/> Print Work Orders	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
<input type="checkbox"/> TCM UM Work Order Form	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> UM Account Process - WorkOrders	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
<input type="checkbox"/> UM Customer Service - Work Orders	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			
<input type="checkbox"/> UM Work Order Interface	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
<input type="checkbox"/> Work Order Assignment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>		
<input type="checkbox"/> Work Order Import	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Work Order List	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
<input type="checkbox"/> Work Order Results	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
<input type="checkbox"/> Work Order Type	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		

SAVE USER SECURITY INHERIT

User specific Template overridden Template rule

Work Order Forms

Maintenance > new world ERP Suite > System > Form Layout

The Form Layout List page includes Echo, SSRS and ReadyForm

Form Type selected under UM Settings General Tab

myFavorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance

Form Layout List

Form Type	Echo	SSRS	ReadyForm	Format	Renderer	File Name	Standard
End Of Year Forms (4)	✓	✗	✗	WORK ORDER	Echo	0000FM3	
Inventory Issue (1)	✗	✓	✓	CUSTOM WORK ORDER	SSRS	UBWorkOrder/WorkOrder	
License Delinquent Notice (1)	✓	✓	✓	Standard SSRS	SSRS	UT/WorkOrders/WorkOrder	✓
License Form (2)	✓	✓	✓				
License Renewal Form (2)	✓	✓	✓				
Miscellaneous Billing Customer St...	✓	✗	✓				
Miscellaneous Billing Invoices (1)	✓	✗	✗				
Miscellaneous Billing Notices (1)	✓	✗	✗				
Permit Form (1)	✓	✓	✓				
Purchase Orders (8)	✓	✓	✓				
Receipt (5)	✓	✓	✓				
Request For Payment (1)	✓	✗	✓				
Requisitions (1)	✓	✓	✓				
Utility Aggregate Bills (1)	✓	✓	✓				
Utility Bills (4)	✓	✓	✓				
Utility Consumption Trend Report ...	✗	✓	✗				
Utility Notices (1)	✓	✓	✓				
Utility Transaction Statement (2)	✓	✓	✗				
Utility Work Orders (3)	✓	✓	✓				
Vendor 1099 (0)	✓	✗	✗				

New Echo New SSRS New ReadyForm Delete Refresh

UM Settings > Work Orders

Workflow Tab

- Add New Service

Options creating work orders when adding a new service.

- Customer Service

See a history of work orders associated with that utility account

Ease of Access

Highlight and click the 'Use' checkbox

NWERP 2021.1 Search

myFavorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance

UM Settings

General | **Work Flow** | Accounts | Consumption | Bills | Receipts | Delinquencies | Adjustments | Work Orders | Deposits | Counters

New Account Process

User Defined, Used Use
Billing Items, Used Required
Bank Drafting, Used Required Before Next
Deposits, Used
Approvals, Not used
Budget Billing, Not used
Recurring Credit Card, Not used
Documents, Not used
Remote Documents, Not used
Activate, Used

Add New Service

Meters / Non Metered Units, Used Use
Rates, Used Required
Work Orders, Not used Required Before Next
Deposits, Not used
Activate, Used

Move In/Out Process

User Defined, Used Use
Bank Drafting, Used Required
Deposits, Used Required Before Next
Recurring Credit Card, Not used
Billing Items, Not used
Approvals, Not used
Budget Billing, Not used
Remote Documents, Not used
Documents, Not used
Activate, Used

Customer Service

Transactions, Used Use
Services, Used
Associated Customers, Used
Work Orders, Used
Billing Items, Used
Payment Plan, Used
Bank Drafting, Used
Bad Debt, Used
User Defined, Used
Documents, Used

Show Consumption Graph Collapsed

Move In/Out Automation

Automatically Create Move Out on Move In
Set Move Out Date to One Day Prior to Move In

Meter Entry

Allow Quick Meter Entry from Meter Service Maintenance

Billing

Use Non-Metered Entry
Use Non-Metered Audit
Use Meter Audit
Use Billing Audit
Use Billing Register
Use Bill Export
Confirm Meter Audit Rejection
Confirm Non Metered Audit Rejection


Customer Service

Account

Address

Name

Go **Recent Accounts** **Reset**

- Customer Service
 - 30140380-001 - Active
 - Laprise, Xavier
 - 291 W Richards ST
 - Transactions
 - Services
 - Storm Water ✗
 - Trash collection ✗
 - Water & Sewer ✗
 - Associated Customers (0)
 - Work Orders (1 open)** 
 - User Defined ✓
 - Bank Drafting
 - Billing Items (0)

Work Orders

Account Number 30140380-001

Service Address 291 W Richards ST
Troy MI 48085-153

Name Xavier Laprise

Phone

Billing Profile Monthly (Zones 1-3)

Account Type Residential

Class

Date Moved In 01/01/2000

Number of Units 1

Number	Type	Priority	Request Date	Scheduled Date	Complete Date	Meter Number	Account Number	Requested By
9701659	ZConversion		04/17/1997	04/17/1997	04/17/1997		30140380-001	
9300020	ZConversion		07/01/1993	07/01/1993	07/01/1993		30140380-001	
2024-00000138	EXCHANGE METER		05/06/2024		Open	0042579201	30140380-001	NWS

New **Delete** **Refresh**

Work Orders

Account

Account Number 30140380-001
Service Address 291 W Richards ST
Troy MI 48085-153
Name Xavier Laprise
Phone

Service

Service Fireline Flat
Start Date 05/09/2024 Override Units
End Date

Work Orders

Work Order Number	Type	Priority	Request Date	Completed Date	Meter Number
-------------------	------	----------	--------------	----------------	--------------

0 - 0 of 0 records

New Delete Refresh Save/Next Create Activity Create Notes

Work Order

Work Order

Account 30140380-001

Type

Request Date 05/09/2024

Scheduled

Priority

Scheduled Date

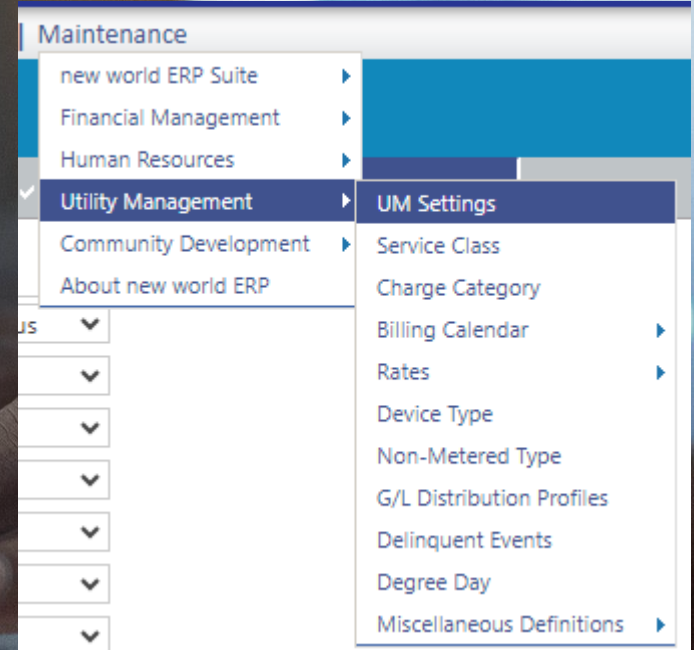
Comments

OK Cancel

UM Settings > Work Orders

Work Orders Tab

- Completion Date and Results fields enabled in Work Order Maintenance
- Meters inactivated when a shut off is performed
- Work Orders Printed On Enter (recommended smaller organizations)
- User-Defined Fields



UM Settings > Work Orders Tab

UM Settings

General ▾ | Work Flow ▾ | Accounts ▾ | Consumption ▾ | Bills ▾ | Receipts ▾ | Delinquencies ▾ | Adjustments ▾ | **Work Orders ▾** | Deposits ▾ | Counters ▾

Work Orders

Allow Work Orders to Be Completed in Maintenance

Inactivate Meter on Shut Off

Print Work Orders as They Are Entered

Require Rate and Service Information on Attach Work Orders

Form User-Defined Fields

User-Defined Field 1

User-Defined Field 2

User-Defined Field 3

User-Defined Field 4

User-Defined Field 5

User-Defined Field 6

User-Defined Field 7

User-Defined Field 8

User-Defined Field 9

User-Defined Field 10

Save **Reset**

A close-up photograph of a person's hand with light-colored nail polish clicking a black computer mouse. The background is a blurred office environment with a computer monitor and a window showing green foliage. A dark grey horizontal bar is overlaid across the middle of the image, containing white text.

Work Order Types

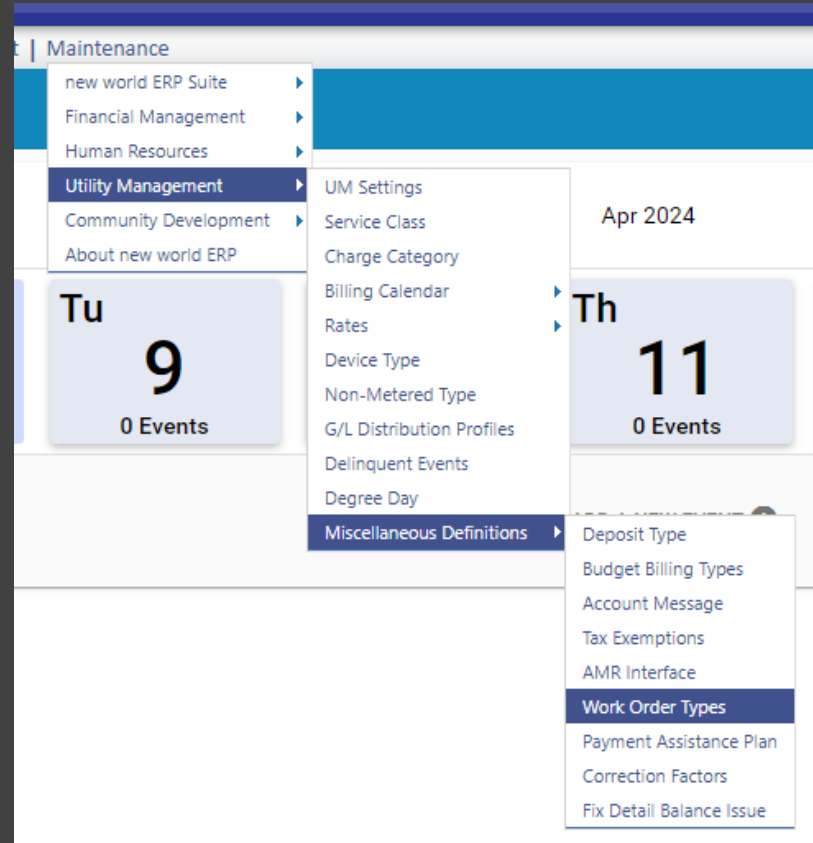
Creating/Editing Work Orders

Work Order Types

Maintenance > Utility Management > Miscellaneous Definitions > Work Order Types

Define and maintain the different work order types

- List contains all Work Order Types created.
- Immediate information available can be useful including which work orders have added charges
- Able to print this list!



List of Created Work Orders

- Work Order Type: Uniquely identifies the work order type.
- Description: Additional details to help identify the work order type.
- Service Class: Category of services (e.g., water & sewer)
- Activity: The task that will be performed to complete this work order (e.g., read).
- Create Charges: Displays if this work order will result in charges being assessed to the account.

myFavorites Financial Management Human Resources Utility Management Community Development Maintenance						
Work Order Type List						
Work Order Type	Description	Service Class	Activity	Create C...	Export W...	
New Meter Set	New Meter Set	Water and Sewer - Water & Sewer	Attach			
ZZ REIN Attach	Reinstall meter Attach - OLD	Water and Sewer - Water & Sewer	Attach	✓		
Install Meter	Install Meter	Water and Sewer - Water & Sewer	Attach	✓		
Pull Meter-DEMO	Pull Meter Permanent	Water and Sewer - Water & Sewer	Remove	✓		
Shut Off	Shut off meter	Water and Sewer - Water & Sewer	Shut Off			
Turn On	Turn On shut off meter	Water and Sewer - Water & Sewer	Turn On	✓		
EL Register chg	EL register change out	Electric - Electric	Change Out			
Meter Change Out	Meter Change Out	Water and Sewer - Water & Sewer	Change Out			
Plumbing Repair	Plumbing Repairs / Read	Water and Sewer - Water & Sewer	Read			
Re-Check	Re-Read	Water and Sewer - Water & Sewer	Read			
ZZ Uncompleted	Unable to complete - OLD	Water and Sewer - Water & Sewer	Read			
Customer Change	Customer Change	Water and Sewer - Water & Sewer	Read			
MIU	MIU - Remove, Install, or Rewire	Water and Sewer - Water & Sewer	Read			
ZZ Pll Mtr-Seasl	Pull Meter Seasonal - OLD	Water and Sewer - Water & Sewer	Read	✓		
Pull Meter - Tem	Pull Meter -Mtr assigned to acct	Water and Sewer - Water & Sewer	Read	✓		
Reinstall	Reinstall Assigned meter	Water and Sewer - Water & Sewer	Read	✓		
Re-Read	Re-Read	Water and Sewer - Water & Sewer	Read	✓		
Billing Read	Cycle or Out of Cycle Billing	Water and Sewer - Water & Sewer	Read	✓		
Read Verify	Read Verify	Water and Sewer - Water & Sewer	Read	✓		
Malfunction	Meter Malfunction	Water and Sewer - Water & Sewer	Malfunction			
Shop Repair	In Shop Repair	Refuse - Refuse	Miscellaneous			
Curb Stop Repair	Curb Stop Repair	Water and Sewer - Water & Sewer	Miscellaneous			
Miscellaneous	Non Metered Accounts	Water and Sewer - Water & Sewer	Miscellaneous			
Shop Flow Test	Flow Test	Water and Sewer - Water & Sewer	Miscellaneous			
Work Order Chg	Work Order w/ Charge	Water and Sewer - Water & Sewer	Miscellaneous	✓		
Shop Meter Test	Meter Test Maintenance	Water and Sewer - Water & Sewer	Miscellaneous	✓		

1 - 26 of 26 records

New Delete Refresh Print

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Creating Work Orders

New World ERP Search

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Work Order Type List
Work Order Type - INSTALL NEW

Description

Work Order Type: INSTALL NEW
Description: INSTALL NEW METER AND RF
Service Class: Water & Sewer - Water & Sewer
Activity: Attach

Characteristics

Standard Time:
Default Priority:
Default Read Type:
Default Completion Date: Scheduled Date
Export Through Work Order Interface:

Employees Charges


Department: Council

Available Employees: 56

- Beebee, Joanne C
- Beecken, Marlon
- Blessman, Colton L
- Bobseine, Heather L
- Brassell, Tyrone
- Casterline, Rose G
- Choat, Blaise L
- Chrismon, Christiana
- Cottman, Keyshawn D
- Cozza, Felipe
- Cutrell, Keith
- Debeaumont, Dayana

Assigned Employees: 3

- Adelblue, Julie G
- Amaker, Anahi W
- Bacchus, Peyton A

 Note: Employee Setup in HR under Workforce Administration

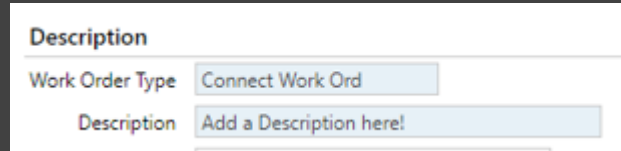
Save Save/New Delete Reset

Creating Work Orders

Required Fields

(Any Field with a light Blue Hue)

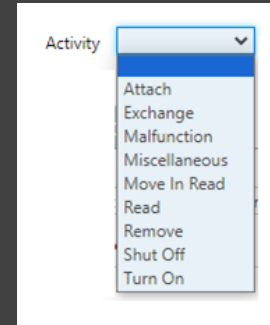
- Name
- Description
- Activity
- Assigned Employees*



Description

Work Order Type

Description

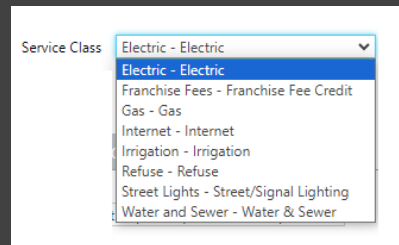


Activity

- Attach
- Exchange
- Malfunction
- Miscellaneous
- Move In Read
- Read
- Remove
- Shut Off
- Turn On

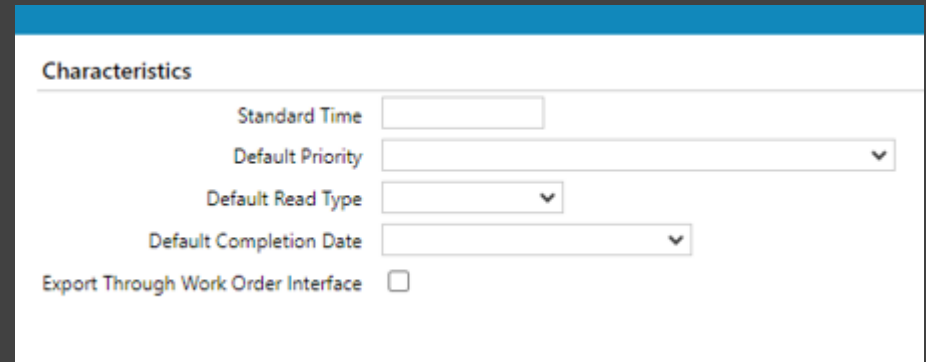
Optional Fields

- Service Class
- Characteristic



Service Class

- Electric - Electric
- Franchise Fees - Franchise Fee Credit
- Gas - Gas
- Internet - Internet
- Irrigation - Irrigation
- Refuse - Refuse
- Street Lights - Street/Signal Lighting
- Water and Sewer - Water & Sewer



Characteristics

Standard Time

Default Priority

Default Read Type

Default Completion Date

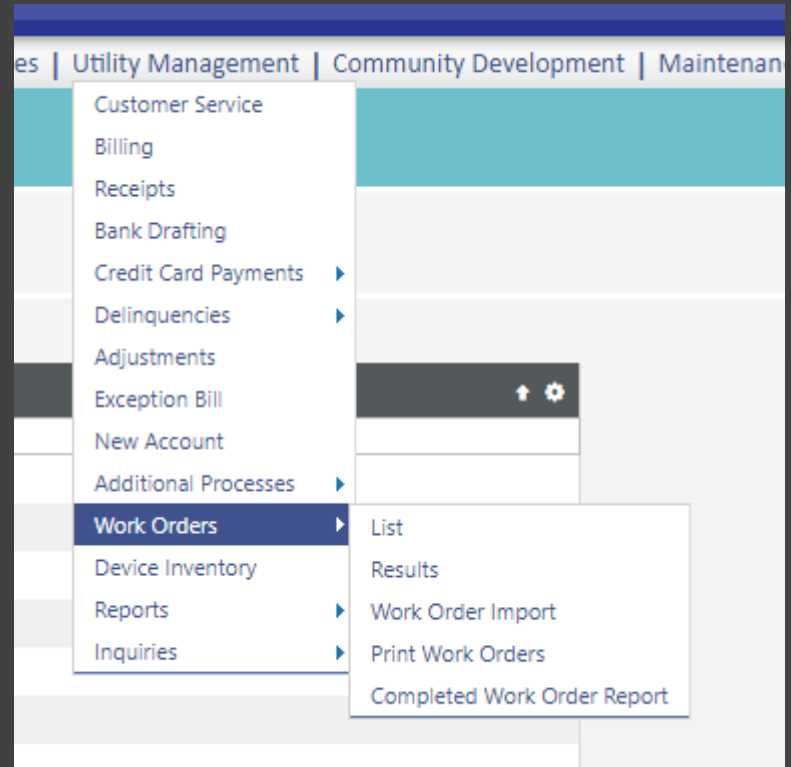
Export Through Work Order Interface



Accessing Work Orders

How do I navigate to Work Orders?

- Utility Management > Work Orders
 - List
 - Results
 - Work Order Import
 - Print Work Orders
 - Completed Work Order Reports



Work Orders: List

Search and display open and completed work orders.

Create new work orders, export work orders, print a listing of search results, and assign work orders to employees.

- Managers & Users: See what work orders have not been assigned.
- Employees: Find work orders that have been assigned to them.

New World ERP Search

myfavorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance

Work Orders

Employee: <All> Only Open:

General | **Routes**

Work Order Number: Account Number:

Requested From: Through:

Completed From: Through:

Scheduled From: Through:

Title Type: Priority:

Search **Reset**

Work Order Nu...	Account Number	Type	Printed	Request Date	Scheduled Date	Completed Date	Address	Priority	Route
20771535-006	30190830-005	FINAL		05/18/2023	05/19/2023		274 Pine AVE	Any time	Zone 2, Book 077
2021-00003035	30110830-002	TURN OFF		07/16/2021	07/19/2021		989 Weems AVE	Any time	Zone 3, Book 019
2021-00004644	21010205-007	DELINQ/TURN OFF		10/19/2021	10/20/2021		187 Creek ST	Any time	
2021-00004847	10610465-002	FINAL		11/03/2021	11/04/2021		633 Prayer DR	HIGH	Zone 2, Book 101
2022-00003158	30190220-001	FINAL		08/04/2022	08/05/2022		965 E Aultry ST	Afternoon	Zone 1, Book 061
2022-00003380	21050310-003	TURN ON		08/17/2022	08/17/2022		61 W Pompano CT	Any time	Zone 3, Book 019
2022-00003580	30250605-001	REREAD		08/26/2022	08/29/2022		57 W Overlook ST	Afternoon	Zone 2, Book 105
2022-00003904	21011015-003	FINAL		09/14/2022	09/15/2022		244 W Wood ST	Any time	Zone 3, Book 025
2022-00004863	10450065-001	FINAL		11/02/2022	11/04/2022		252 W Overlook ST	Any time	
2023-00000313	20771665-001	VERIFY		01/19/2023	01/20/2023		943 E Cantrell ST	Afternoon	
2023-00003042	21141335-002	FINAL		07/25/2023	07/28/2023		563 Heritage AVE	Any time	Zone 2, Book 077
							644 Howell DR	Any time	Zone 2, Book 114

1 - 50 of 93 records

Print **New** **Delete** **Assign**

Work Orders

Employee Only Open

General Routes

Work Order Number Account Number

Requested

From

Through

Scheduled

From

Through

Completed

From

Through

Title

Type

Priority

Search Reset

Work Order Nu...	Account Number	Type	Printed	Request Date	Scheduled Date	Completed Date	Address	Priority	Route
20771535-006	30190830-005	FINAL		05/18/2023	05/19/2023		274 Pine AVE	Any time	Zone 2, Book 077
2021-00003035	30110830-002	TURN OFF		07/16/2021	07/19/2021		187 Creek ST	Any time	
2021-00004644	21010205-007	DELINQ TURN OFF		10/19/2021	10/20/2021		633 Prayer DR	HIGH	Zone 2, Book 101
2021-00004847	10610465-002	FINAL		11/03/2021	11/04/2021		965 E Austry ST	Afternoon	Zone 1, Book 061
2022-00003158	30190220-001	FINAL		08/04/2022	08/05/2022		61 W Pompano CT		Zone 3, Book 019
2022-00003380	21050310-003	TURN ON		08/17/2022	08/17/2022		57 W Overlook ST	Afternoon	Zone 2, Book 105
2022-00003580	30250605-001	REREAD		08/26/2022	08/29/2022		244 W Wood ST	Any time	Zone 3, Book 025
2022-00003904	21011015-003	FINAL		09/14/2022	09/15/2022		252 W Overlook ST	Any time	
2022-00004863	10450065-001	FINAL		11/02/2022	11/04/2022		943 E Cantrell ST	Afternoon	
2023-00000313	20771665-001	VERIFY		01/19/2023	01/20/2023		563 Heritage AVE	Any time	Zone 2, Book 077
2023-00003042	21141335-002	FINAL		07/25/2023	07/28/2023		644 Howell DR	Any time	Zone 2, Book 114

1 - 50 of 93 records

Print New Delete Assign

Work Order

Work Order

Account 30140380-001

Type EXCHANGE METER - INSTALL NEW METER AND RF

Meter 0042579201

Request Date 05/06/2024

Scheduled

Priority

Scheduled Date

Employee

Comments

OK Cancel

11/04/2022 943 E Cantrell ST Afternoon

Select Account

Select Type (Required)

Request Date (Required)

- Priority (Optional)
- Schedule Date (Optional)
- Employee (Optional)
- Comments (Optional)

Work Order Nu...	Account Number	Type	Printed	Request Date	Scheduled Date	Completed Date	Address	Priority	Route
2024-00000138	30140380-001	EXCHANGE METER		05/06/2024			291 W Richards ST		Zone 3, Book 014

1. Confirm the work order exists
2. Assign Work Order using the Assignment window.
3. Employee dropdown at the top

New World ERP

Work Order Assignment

Employee: Goffney, Trent L

Requested: From [] Through []

Scheduled: From [] Through []

Available Routes: 135

- Zone 1, 040,
- Zone 1, 041,
- Zone 1, 042,
- Zone 1, 043,
- Zone 1, 044,
- Zone 1, 045,
- Zone 1, 046,
- Zone 1, 047,
- Zone 1, 048,
- Zone 1, 049,
- Zone 1, 050,
- Zone 1, 051,

Selected Routes: 0

Available Work Orders: 1

- 2024-00000138 - Miscellaneous information

Selected Work Orders: 1

- 2024-00000138 - INSTALL NEW METER AND RF: Zone 3- 014

Print New Delete Assign

Work Orders: Results

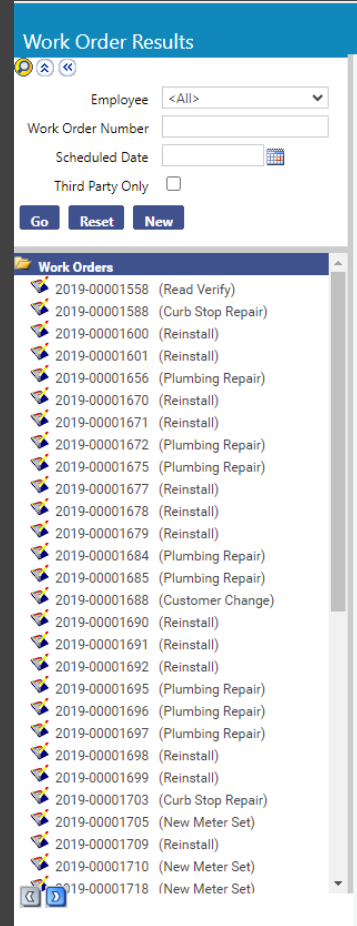
Utility Management > Work Orders > Results

Navigate here to complete/close out Work Orders

Search Pane allows user to search for their desired Work Orders

Assign to Employee (If Unassigned)

Enter in work order information (meter changeout example)



The screenshot displays the 'Work Order Results' interface. At the top, there is a search pane with the following fields and controls:

- Employee: A dropdown menu currently set to '<All>'. Below it are 'Go', 'Reset', and 'New' buttons.
- Work Order Number: An empty text input field.
- Scheduled Date: A date picker icon.
- Third Party Only: A checkbox that is currently unchecked.

Below the search pane is a scrollable list of work orders under the heading 'Work Orders'. Each entry consists of a small icon, a unique ID number, and a description in parentheses:

- 2019-00001558 (Read Verify)
- 2019-00001588 (Curb Stop Repair)
- 2019-00001600 (Reinstall)
- 2019-00001601 (Reinstall)
- 2019-00001656 (Plumbing Repair)
- 2019-00001670 (Reinstall)
- 2019-00001671 (Reinstall)
- 2019-00001672 (Plumbing Repair)
- 2019-00001675 (Plumbing Repair)
- 2019-00001677 (Reinstall)
- 2019-00001678 (Reinstall)
- 2019-00001679 (Reinstall)
- 2019-00001684 (Plumbing Repair)
- 2019-00001685 (Plumbing Repair)
- 2019-00001688 (Customer Change)
- 2019-00001690 (Reinstall)
- 2019-00001691 (Reinstall)
- 2019-00001692 (Reinstall)
- 2019-00001695 (Plumbing Repair)
- 2019-00001696 (Plumbing Repair)
- 2019-00001697 (Plumbing Repair)
- 2019-00001698 (Reinstall)
- 2019-00001699 (Reinstall)
- 2019-00001703 (Curb Stop Repair)
- 2019-00001705 (New Meter Set)
- 2019-00001709 (Reinstall)
- 2019-00001710 (New Meter Set)
- 2019-00001718 (New Meter Set)

Work Orders: Results

Utility Management > Work Orders > Results

The screenshot displays the 'Work Order Results' page in the New World ERP system. The browser address bar shows the URL: `nwerplab1.tylertech.com/nwper/UT/WorkOrders/WorkOrderResults.aspx?from=menu`. The navigation bar includes 'myFavorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance'. The main content area is titled 'Work Order Results' and features a sidebar with filters for 'Employee' (set to '<All>'), 'Work Order Number' (2024-00000138), and 'Scheduled Date'. The main panel shows details for 'Work Order 2024-00000138', including account number 30140380-001, name 'Laprise, Xavier', and address '291 W Richards ST'. The work order type is 'INSTALL NEW METER AND RF'. Below this, the 'Request Information' section shows the work order type and completion date (05/06/2024). A tabbed interface is visible with '1 General' selected. The 'Current Meter' section shows device 0042579201, category 'Meter', type 'Part Type 78 - Description 78', and location 'EAST - Description 18229'. The 'New Meter' section allows adding a new meter with the same device, category, and type. The 'Rate' section is disabled due to multiple rates being selected. The 'Final Read' section has a 'Read Type' dropdown set to 'Change out'.

Work Order Results

Employee: <All>
Work Order Number: 2024-00000138
Scheduled Date: [Calendar]
Third Party Only:
Go Reset New

Work Orders
2024-00000138 (EXCHANGE METER)

Work Order 2024-00000138

Account Number	30140380-001	Work Order Type	INSTALL NEW METER AND RF
Name	Laprise, Xavier	Scheduled Date	
Address	291 W Richards ST	Priority	

Request Information

Work Order Type: INSTALL NEW METER AND RF
Work Completion Date: 05/06/2024
Employee: <Unassigned>
Unable to Complete:

1 General 2 Physical Characteristics 3 Rates 4 Overrides ✓

Current Meter

Device	0042579201
Category	Meter
Type	Part Type 78 - Description 78
Location	EAST - Description 18229

New Meter

Device	0042579201
Category	Meter
Type	Description 78

Rate

Rate: Disabled because multiple rates are selected.

Final Read

Read Type: Change out

Print Work Order

Utility Management > Work Orders > Print Work Orders

Tabs

- Work Order Types (required)
- Routes (optional)

Report requires one of the following fields...

- Work Order Number
- Scheduled Date Range
- Request Date Range
- Employee

The screenshot shows the 'Print Work Order' form in the New World ERP system. The form is divided into several sections:

- Header:** 'New World ERP' logo and a search bar.
- Navigation:** 'myFavorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance'.
- Form Fields:**
 - 'Load Saved Report' (dropdown)
 - 'Override Report Title' (text input)
 - 'Distribution Group' (dropdown)
 - 'Email Group' (dropdown)
 - 'From Scheduled Date' and 'To Scheduled Date' (date pickers)
 - 'From Requested Date' and 'To Requested Date' (date pickers)
 - 'Employee' (dropdown)
 - 'Work Order Number' (dropdown)
 - 'Priority' (dropdown)
 - 'Include Reprints' (checkbox)
 - 'Include Completed' (checkbox)
- Work Order Types:** A tabbed interface with 'Work Order Types' and 'Routes' tabs. The 'Work Order Types' tab is active, showing a list of available types (e.g., 'BILL MISC - Miscellaneous information', 'CHECK METER - SEE COMMENTS', etc.) and a 'Selected Work Order Type(s): 0' area.
- Buttons:** 'Print', 'Reset', 'Save', 'Save As', 'Delete', 'Print Form', and 'View Map'.

Print Work Order

Utility Management > Work Orders > Print Work Orders

Include Complete

Adds completed work orders to the list in the Work Order Number field.

Include Reprints

Adds previously printed work orders that fall within your selection criteria to be included

The screenshot shows the 'Print Work Order' interface in the New World ERP system. The header includes the company logo and name, a search bar, and navigation links for myFavorites, Financial Management, Human Resources, Utility Management, Community Development, and Maintenance. The main section is titled 'Print Work Order' and contains several input fields and checkboxes. At the bottom, there are two tabs: 'Work Order Types' and 'Routes'. The 'Work Order Types' tab is active, showing a list of available work order types on the left and a selected list on the right. The available list includes: BILL MISC - Miscellaneous information, CHECK METER - SEE COMMENTS, DELINQ TURN OFF - TURN OFF FOR DELINQUENCY, EXCHANGE METER - INSTALL NEW METER AND RF, FINAL - SEE COMMENTS, INSTALL NEW - INSTALL NEW METER AND RF, INSTALL RF - INSTALL RADIO DEVICE, LOW PRESSURE - LOW PRESSURE - CHECK METER, REMOVE METER - REMOVE METER FOR DEMO, REREAD - REREAD METER, and TARGET AREA - INSTALL NEW METR & RF. The selected list is currently empty. At the bottom of the interface, there are buttons for Print, Reset, Save, Save As, Delete, Print Form, and View Map.

New World ERP Search

myFavorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance

Print Work Order

Load Saved Report Distribution Group

Override Report Title Email Group

From Scheduled Date From Requested Date

To Scheduled Date To Requested Date

Employee Priority

Work Order Number Include Reprints

Include Completed

Work Order Types Routes

Available Work Order Type(s): 20

- BILL MISC - Miscellaneous information
- CHECK METER - SEE COMMENTS
- DELINQ TURN OFF - TURN OFF FOR DELINQUENCY
- EXCHANGE METER - INSTALL NEW METER AND RF
- FINAL - SEE COMMENTS
- INSTALL NEW - INSTALL NEW METER AND RF
- INSTALL RF - INSTALL RADIO DEVICE
- LOW PRESSURE - LOW PRESSURE - CHECK METER
- REMOVE METER - REMOVE METER FOR DEMO
- REREAD - REREAD METER
- TARGET AREA - INSTALL NEW METR & RF

Selected Work Order Type(s): 0

Print Reset Save Save As Delete Print Form View Map

Completed Work Order Report

Utility Management > Work Orders > Completed Work Order Report

- Two Required Fields:
 - From Date & To Date
 - Work Order Types

Prints completed work orders that meet the criteria

The screenshot shows the 'Completed Work Order Report' interface in the New World ERP system. The header includes the logo and 'New World ERP' text, along with a search bar. Below the header is a navigation bar with links for 'myFavorites', 'Financial Management', 'Human Resources', 'Utility Management', 'Community Development', and 'Maintenance'. The main title 'Completed Work Order Report' is displayed in a blue bar. The form contains several sections: 'Load Saved Report' and 'Override Report Title' (both dropdown menus); 'Distribution Group' and 'Email Group' (dropdown menus with icons); 'Requesting Employee' and 'Account Number' (dropdown menus with icons); 'Completion State' (dropdown menu); 'Meter Number' (dropdown menu); 'Completion' section with 'From Date' (05/01/2024) and 'To Date' (05/31/2024) (calendar icons); 'Request' section with 'From Date' and 'To Date' (calendar icons); 'Available Work Order Type(s): 20' (list of work order types); and 'Selected Work Order Type(s): 0' (empty list). At the bottom, there are buttons for 'Print', 'Reset', 'Save', 'Save As', and 'Delete'.

New World ERP Search

myFavorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance

Completed Work Order Report

Load Saved Report Distribution Group

Override Report Title Email Group

Requesting Employee Completion State

Account Number Meter Number

Completion

From Date

To Date

Request

From Date

To Date

Available Work Order Type(s): 20

- BILL MISC - Miscellaneous information
- CHECK METER - SEE COMMENTS
- DELINQ TURN OFF - TURN OFF FOR DELINQUENCY
- EXCHANGE METER - INSTALL NEW METER AND RF
- FINAL - SEE COMMENTS
- INSTALL NEW - INSTALL NEW METER AND RF
- INSTALL RF - INSTALL RADIO DEVICE
- LOW PRESSURE - LOW PRESSURE - CHECK METER
- REMOVE METER - REMOVE METER FOR DEMO
- REREAD - REREAD METER
- TARGET AREA - INSTALL NEW METR & RF

Selected Work Order Type(s): 0

Print **Reset** **Save** **Save As** **Delete**

Output

Completed Work Orders - Google Chrome

nwerplab1.tylertech.com/nwerp/LogosSuite/SQLReports/SQLReportViewer.aspx?ReportGUID=f58a8292-0589-4972-9b43-f31

1 of 1 Find | Next

New World ERP

Completed Work Orders

Completion Date Range 05/01/24 - 05/31/24

Account Number	Address	Work Order	Completion Date	Completed Successfully	Completed By	Result Code
30160440-003	678 W Luther ST, Troy, MI 48084	2024-00000141	05/10/2024	Yes		
31111111-001	291 W Richards ST, Troy, MI 48085	2024-00000140	05/10/2024	Yes		COMP

Completed Work Orders Grand Totals Work Orders 2

Run by NWS on 05/10/2024 05:48:02 AM

Page 1 of 1



Adding Charges to Work Orders

Work Order Charges

The Charges tab allows your organization to bill for services that are tied to a work order.

Billing items are optional for all work order types.

1. Select the Create Charges check box to create charges when a work order of this type is completed.
2. Select the Allow Edits in Work Order Processing check box if users should be able to edit the billing item charges on the Work Orders Results page.
3. Select the billing items that should create charges when a work order of this type is completed. The billing items will display in the following locations:
 - a) Work Order Type Listing.
 - b) Work Order Results page.
 - c) Customer Service > Billing Items.
 - d) Customer Service > Work Orders > Billing Items section.

Adding Charges to Work Orders

Work Order Type List
Work Order Type - Install Meter

Description

Work Order Type:

Description:

Service Class:

Activity:

Characteristics

Standard Time:

Default Priority:

Default Read Type:

Default Completion Date:

Export Through Work Order Interface:

Employees | **Charges**


Create Charges

Allow Edits in Work Order Processing

Available Billing Items: 27

- \$1.00 Charitable Contribution
- \$10.00 Charitable Contribution
- \$2.00 Charitable Contribution
- \$5.00 Charitable Contribution
- alot
- Amortization of past due balance
- Bad Check Charge
- Credit
- Disconnect Charge
- Ext Sanitation Pickup
- Extra Sanitation Pickup
- Final Read

Assigned Billing Items: 0



Creating Billing Items

Maintenance > Utility Management > Rates > Billing Item

Billing Item List page displays all billing items defined in the system

NWERP 2021.1		Search			
myFavorites Financial Management Human Resources Utility Management Community Development Maintenance					
Billing Item List					
Active	Billing Item	Description	Quantity	Rate	No. of Time to Apply
✓	Credit	Credit	1	(\$5.00)	999
✓	AMORTIZATION	Amortization of past due balance	1	(\$1.25)	1
✓	Meter Test Chg	Meter Test Charge	1	\$0.00	1
✓	Shop Fees	Shop Fees	1	\$0.00	1
✓	T1 FLOW VIOL FEE	Flow Violation Tier 1 Admin Fee	1	\$0.00	1
✓	WATER CREDIT	Water Credit	1	\$0.00	1
✓	Opt in for Kids	\$1.00 Charitable Contribution	1	\$1.00	9999
✓	Opt in for Kids,	\$2.00 Charitable Contribution	1	\$2.50	9999
✓	Opt in for Kids.	\$5.00 Charitable Contribution	1	\$5.00	9999
✓	JOURNAL TEST	Journal test billing item	1	\$10.00	1
✓	Opt-in for Kids	\$10.00 Charitable Contribution	1	\$10.00	9999
✓	Recycling Bin	Recycling Bin Delivery	1	\$10.00	1
✓	METER ACC TEST	METER ACCURACY TEST	1	\$15.00	1
✓	Recycling	Recycling Bin Pickup	1	\$20.00	1
✓	Bad Check Chg	Bad Check Charge	1	\$30.00	1
✓	Ext San Pickup	Ext Sanitation Pickup	1	\$30.00	1

The screenshot shows a navigation menu for the 'Maintenance' module. The menu items are: new world ERP Suite, Financial Management, Human Resources, Utility Management, Community Development, and About new world ERP. The 'Utility Management' item is expanded, showing sub-items: UM Settings, Service Class, Charge Category, Billing Calendar, Rates, Device Type, Non-Metered Type, G/L Distribution Profiles, Delinquent Events, Degree Day, and Miscellaneous Definitions. The 'Rates' item is further expanded, showing sub-items: Rate, Billing Item, and Cost Adjustment. The 'Billing Item' sub-item is highlighted in blue.

Creating Billing Items

New World ERP Search

myFavorites | Financial Management | Human Resources | Utility Management | Com

Work Order Type List

Billing Item - TCSewer, Turn on charge sewer side

Billing Item:

Description:

Active:

Effective Date: - < Open >

Start Date:

Charge Category:

Charitable Donation:

Calculation Type:

Default Quantity:

Default Rate:

No. of Times to Apply:



New World ERP Search

myFavorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance

Work Order Type List

Work Order Type - TURN ON

Description

Work Order Type:

Description:

Service Class:

Activity:

Applies To:

Employees | **Charges**

Create Charges:

Allow Edits in Work Order Processing:

Available Billing Items: 23

- add sewer EPA compliance
- Charge to mail additional bill
- Chargeback fee (CC declined)
- City Trash pickup
- credit account for PRV install
- Damaged Meter
- Distro After Hours Call Out
- failure to sign up timely
- Industrial Surcharge
- Miscellaneous Charge
- NUISANCE TRASH PICKUP
- remove sewer EPA

Assigned Billing Items: 1

- Turn on fee water side

Customer Service

- 31111111-001 - Active
- Laprise
- 291 W Richards ST
- Transactions
- Services
- Fireline Flat (Pending Activation) ✗
- Storm Water ✗
- Trash collection ✗
- Water & Sewer ✗
- Associated Customers (0)
- Work Orders (1 open)
- User Defined ✓

Number	Type	Priority	Request Date	Scheduled Date	Complete Date	Meter Number	Account Number	Requested By
9701659	ZConversion		04/17/1997	04/17/1997	04/17/1997		31111111-001	
9300020	ZConversion		07/01/1993	07/01/1993	07/01/1993		31111111-001	
2024-00000139	TURN ON		05/10/2024		Open	0042579201	31111111-001	NWS

New
Delete
Refresh



Customer Service

Customer Service

- 31111111-001 - Active
- Laprise
- 291 W Richards ST
- Transactions
- Services
- Fireline Flat (Pending Activation) ✗
- Storm Water ✗
- Trash collection ✗
- Water & Sewer ✗
- Associated Customers (0)
- Work Orders (0 open)
- User Defined ✓
- Bank Drafting
- Billing Items (1)
- Payment Plan

Billing Items

Account Number	31111111-001	Billing Profile	Monthly (Zones 1-3)
Service Address	291 W Richards ST Troy MI 48085-153	Account Type	Residential
Name	Laprise	Class	
Phone		Date Moved In	01/01/2000
		Number of Units	1

Billing Item	Billed Amount	Billed Date	Times to Apply	Times Applied	Work Order Number	Description	Quantity	Amount
TCWater	\$25.00		1	0	2024-00000140		1	\$25.00

Best Practices



Advance Work Order Search

Advance Work Order Search great for having more options for your search

Small Magnifying Glass in the top left corner of the search pane

Search by Employee, Account Number, scheduled and complete range dates

The screenshot displays the 'New World ERP' interface. At the top, there is a navigation bar with 'myFavorites | Financial Management | Human Resources | Utility Management | Community Development | M'. Below this is a 'Work Order Results' section. A search pane is visible, featuring a magnifying glass icon in the top left corner, a search input field, and filters for 'Employee' (set to '<All>'), 'Work Order', 'Scheduled Date', and 'Third Party Only'. There are 'Go', 'Reset', and 'New' buttons. Below the search pane is a list of work orders:

Work Orders	
2021-00003035	(TURN OFF)
2021-00004644	(DELINQ TURN OFF)
2021-00004847	(FINAL)
2022-00003158	(FINAL)
2022-00003380	(TURN ON)
2022-00003580	(REREAD)
2022-00003904	(FINAL)
2022-00004863	(FINAL)
2023-00000313	(VERIFY)
(FINAL)	
2023-00003042	(FINAL)
2023-00003053	(BILL MISC)

An 'Advanced Work Order Search' dialog box is open, showing search criteria: 'Type' (dropdown), 'Employee' (set to '<All>'), 'Work Order Number', and 'Account Number'. It includes sections for 'Scheduled Range' and 'Completed Range', each with 'From' and 'To' date pickers. There is a checkbox for 'Show Work Order Detail in Results List' and 'OK'/'Cancel' buttons at the bottom.

Work Orders & Meters

Meters must exist and be attached to the account before creating a Work order!

This screenshot shows the background interface of the New World ERP system. The top navigation bar includes the company logo, a search field, and menu items for myFavorites, Financial Management, Human Resources, Utility Management, Community Development, and Maintenance. The main heading is "Work Orders", with a dropdown for "Employee" set to "<All>". Below this are tabs for "General" and "Routes". The "Work Order" form is partially visible, showing fields for "Work Order Number", "Requested" (From/Through dates), "Scheduled" (From/Through dates), "Account", "Type", "Meter", "Request Date", "Priority", "Scheduled Date", "Employee", and "Comments". A table at the bottom lists work orders with columns for "Work Order Num..." and "Account Num...".

Work Order Num...	Account Num...
> Contains...	> Contains...
20771535-00	20771535-00
30190830-00	30190830-00
2021-00003035	30110830-00
2021-00004644	21010205-00
2021-00004647	10610465-00
2022-00003158	30190220-00
2022-00003380	21050310-00
2022-00003580	30250605-00

This screenshot shows the foreground "Work Order" form, which is a modal window. It features the same top navigation as the background. The form is titled "Work Order" and contains the following fields:

- Account:** 21191425-001
- Type:** INSTALL NEW - INSTALL NEW METER AND RF
- Request Date:** 05/10/2024
- Scheduled:** Priority, Scheduled Date, Employee
- Comments:** A text area for notes.

Buttons for "OK" and "Cancel" are located at the bottom right of the form. A "Reset" button is also visible in the background interface.

Reprinting Work Orders

Once the work order has been printed, you must select this check box if you want to print it again.

my-favorites | Financial Management | Human Resources | Utility Management | Community Dev

Print Work Order

Load Saved Report Distribution
Override Report Title Email

From Scheduled Date From Requested Date
To Scheduled Date To Requested Date
Employee Priority
Work Order Number

Include Reprints
 Include Completed

Work Order Types | Routes

Available Work Order Type(s): 20
BILL MISC - Miscellaneous information
CHECK METER - SEE COMMENTS
DELINQ TURN OFF - TURN OFF FOR DELINQUENCY

Selected Work Order Type(s): 0

Miscellaneous Tips

- ❖ Same billing items can be used on multiple work orders with no issue.
- ❖ When printing open work orders use the requested from and through dates as some work orders may not be scheduled.
- ❖ Malfunction Work Orders can be used to correct wrong consumption

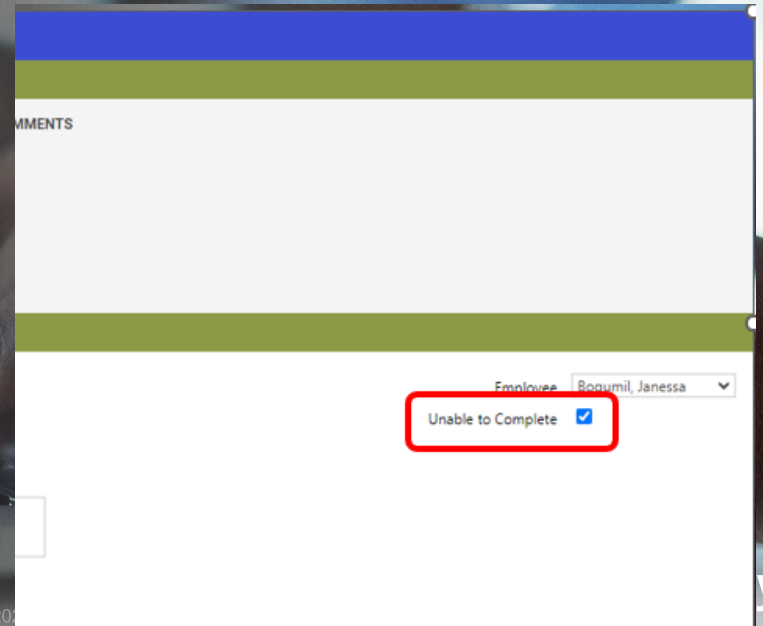
Trouble Shooting / Common Issues

Delete Work Orders

The following errors have occurred:

- This Work Order cannot be deleted. It has either been completed, assigned to an employee, or printed.

Cannot Delete Work Orders Once they are assigned. Use 'Unable to Complete'



MENTS

Employee Rogumil, Janessa

Unable to Complete

Cannot Complete Work Order

Check Unable to Complete Work Orders

Work Order Results

Employee: <All> (dropdown)
Work Order Number: (input field)
Scheduled Date: (calendar icon)
Third Party Only:
Go **Reset** **New**

Work Orders
2024-0000143 (FINAL)

Work Order 2024-0000143

Account Number: 30349312-001 Work Order Type: SEE COMMENTS
Name: Helker, Tanya Scheduled Date:
Address: 495 W Piute AVE Priority:

Request Information

Work Order Type: SEE COMMENTS (pencil icon) Employee: Rogumil, Janessa (dropdown)
Work Completion Date: 05/10/2024 (calendar icon) **Unable to Complete**

Result: (dropdown)
Comments: (text area)

Complete **Complete/Next** **Reset**

Why did a Work Order not apply a charge to an account?

More than likely the 'create charges' box was left unchecked

Work Order - 2024-00000141 (Completed on 05/10/2024)

Work Order

Account Number	30160440-003	Work Order Type	Miscellaneous information
Name	Wirfs, Josue	Scheduled Date	
Address	678 W Luther ST	Priority	
Employee			

Request Information

Request Date	05/10/2024	Requested By	NWS
Comments			

Results

Result
Comments Forgot the charges?

OK

Work Order Type List
Work Order Type - BILL MISC

Description

Work Order Type: BILL MISC
Description: Miscellaneous information
Service Class: Water & Sewer - Water & Sewer
Activity: Miscellaneous

Employees | **Charges**

Create Charges

Allow Edits in Work Order Processing

Available Billing Items: 23

- add sewer EPA compliance
- Charge to mail additional bill
- Chargeback fee (CC declined)
- City Trash pickup
- credit account for PRV install
- Damaged Meter
- Distro After Hours Call Out
- failure to sign up timely
- Industrial Surcharge
- Miscellaneous Charge
- NUISANCE TRASH PICKUP
- remove sewer EPA

Assigned Billing Items: 1

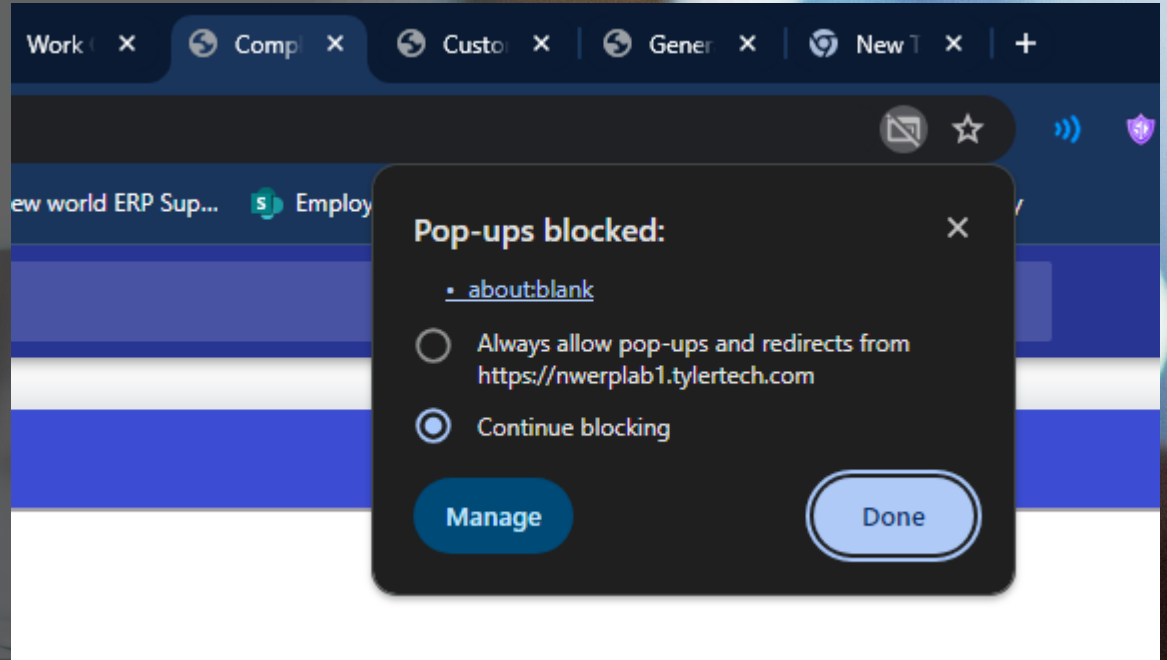
- Turn on fee water side

Save Save/New Delete Reset

Completed Work Order Report is missing?

Ensure you are selecting the correct criteria.

Check your browser settings and make sure Ad block is allowing the report to come through.



We updated our Work Order form but its still using the old one?

Change the form under UM Settings > General Tab

myFavorites | Financial Management | Human Resources | Utility Management | Community Development | Maintenance

UM Settings

General ▾ | Work Flow ▾ | Accounts ▾ | Consumption ▾ | Bills ▾ | Receipts ▾ | Delinquencies ▾ | Adjustments ▾ | Work Orders ▾ | Deposits ▾ | Counters ▾

Miscellaneous

Company: NWERP 2021.1 ▾

Utility Department: FIN_CSC - Finance.Customer Service ▾

Aging Balances Report Threshold: 250,000

Usage Charges Report Threshold: 255,000

Form Types

Bill: SSRS BILL - SSRS BILL ▾

Work Order: Standard SSRS - Standard SSRS ▾

Exception Bill: SSRS BILL - SSRS BILL ▾

Aggregate Bill: AGGREGATE BILL - AGGREGATE BILL ▾

Transaction Statement: SSRS TRANSACTION STATEMENT - SSRS Tf ▾

Consumption Trend Report: CONSUMPTION STATEMENT - CONSUMPT ▾

Route

Route Level 1: Route

Route Level 2:

Route Level 3:

Remittance Address

Remit to: Utility Billing

Address: 123 Main St

Zip Code: 49682


City: SUTTONS BAY

State: MI - Michigan ▾

Initial Set Up

Enforce Maintenance Rules

Save Reset



Recent Fixes (2023.1.10 - 2023.1.17)

The Requested By user changed to the current user when a work order was opened or completed. (Utility Management > Work Orders > Results)

NWERP-70722 - 2023.1.17

The Work Order Import did not import/add billing items to a work order. (Utility Management > Work Orders > Work Order Import)

NWERP-69984 - 2023.1.12

Questions

Thank You!

Contact Info

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