TMT Fleet Maintenance-SQL
TINA (TMT Fleet Maintenance Interactive), Mechanics Workstation, Parts Workstation and Time Card Editor User Guide
How to Contact TMT Fleet Maintenance Customer Support

If you have a technical question about TMT Fleet Maintenance, refer to the printed documentation that is available at http://www.tmwcare.com. You can also find late-breaking updates and technical information in the Readme file. If you still have a question, TMW Systems offers customer support and services ranging from no-cost online documentation to direct assistance.

Four ways to contact your Support Team

The TMT Fleet Maintenance Support Team now has 4 convenient ways for you to get information about TMT Fleet Maintenance TMW NetSuite Customer Care Center, Email, Phone and the Client Center.

- **TMW NetSuite Customer Care Center** - The TMW Customer Care Center allows you to create new troubleshooting cases or update and review existing ones, just go to http://www.netsuite.com. This site requires that you have an account set up before you can access it. To have an account set up or have any questions answered about this website contact your Support Team.

- **Email** - By emailing transmansupport@tmwsystems.com a NetSuite case will automatically be opened for you. You will be emailed the case number and any notes that a Support Team member puts in the case.

- **Phone** - Call 919.493.4433 select option 6 then option 3 and talk directly to your Support Team representative. They are available Monday through Friday 8:00 AM to 6:00 PM. Fax 919.294.6623

- **Client Center** - The Client Center is your source for Upgrades, Installs and documentation for TMT Fleet Maintenance. The Client Center is available at http://www.tmwcare.com and requires a user id and password which you can get by contacting your Support Team.
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Chapter 1: Transman INterActive - Overview

How This Book is Organized

This operational guide is separated into four sections:

• Mechanic Workstation - This section describes the Transman INterActive Mechanic Workstation, a software application that follows the workflow process for a mechanic. This illustrates the daily workflow for a mechanic and demonstrates how to use the Mechanic Workstation.

• Shop Planner - The second section explains Shop Planner. It is designed for the service manager or shop foreman. This function consists of opening and assigning repair orders for the shop. It also provides information on the setup and use of work standards within Shop Planner. For more information, see “Transman INterActive - Shop Planner” on page 47.

• Time Card Editor - The third section details the advanced Time Card Editor features in Shop Planner and how to use them in daily operations. For more information, see “Transman INterActive - Time Card Editor” on page 69.

• Parts Workstation - The fourth section describes the Parts Workstation. This program enables mechanics to request parts using Mechanic Workstation while working on repair orders. The parts department uses the program to expedite the ordering and distribution of the requested parts.

Introduction

The Transman INterActive (TINA) Module is a software tool that is used with a touch screen monitor to collect direct labor and direct materials charges for unit repairs. No typing is required to use the touch screen interface. The design and flow of the workstation is “smart” and tracks the mechanic’s process and prompts for the proper information at the right time. It is easy to use and provides necessary information to the technician performing the job.

Mechanic time is tracked by “logging on” and “logging off” repair order sections that are assigned by the service manager. The mechanic can also add sections and even create a new repair order if needed. This is controlled by the security features in Transman/SQL and is set by a control flag within the database.

Transman INterActive is a real time interactive workstation. It supports bar-coded part entry, eliminates the need for batch repair processing, improves shop efficiency, and reduces administrative costs. TINA tracks all mechanic time and provides a detailed time sheet that can be printed and signed at the end of each work shift. A visual representation of the shop process is shown in Advanced Features on page 2.

All of the TINA programs - Mechanic Workstation, Shop Planner, TINA Edit, and Parts Workstation - can be run at the same time on the same workstation. However, in a normal environment, not all of the programs will be installed on the same workstation. For example, the TINA Edit program should not be available on the
same workstations that are accessed by mechanics, since this program is used to change time card entries.

Security

The Mechanic Workstation is designed to be used in secure mode, which requires each user to enter a password when logging on or performing various functions. This prevents other users from making unauthorized entries to a repair order by using another person’s user name, or from changing time card entries for another user.

It is strongly recommended that the password feature is enabled and that everyone who uses Transman INterActive maintains and uses a password.

Advanced Features

Transman INterActive includes advanced features such as the ability to track indirect as well as direct time to provide a complete shift timecard.

Also, Transman INterActive gives the mechanics the ability to look up Detailed Repair Order History (DROH) information for any unit in the fleet as well as the unit that the mechanic is logged on to.

Parts, services, and comments can be added to the repair order from the workstation interface.

The job logon screen allows a mechanic to help another mechanic by logging in to the same repair order at the same time. PM’s, work pending, and all other OPEN repairs can be accessed through the workstation.

Mechanics can log on and create a PM repair easily and quickly and begin repairs.

Standard work times can be created and assigned to each job. This time is displayed next to each job assigned and is used to track work productivity.
Chapter 2: Installing and Configuring Transman Interactive

This section explains how to install and configure Transman INterActive.

Transman INterActive is a suite of programs, including Mechanic Workstation, Shop Planner, Tina Time Card Editor, and Parts Workstation. You can choose to include all or some of these components during the installation procedure.

Installing Transman INterActive

See the Transman/SQL Installation and Administration Guide for information on installing Transman INterActive and its components.

You can install the program from the Transman/SQL product CD, or by downloading and using the installation programs provided on TMT Software’s website. For more information and help with the installation using the programs on the website, contact TMT Software Customer Support.

For security reasons, the TINA Editor program, which is used to change time card entries, should not be installed on the same computer that is accessed by mechanics, since access is not restricted.

Transman INterActive must be set up before it can be used. To enter global values for all TINA users, in Transman/SQL, go to SysMgr ▶ Options and click on Tina. For more information, see Chapter 4 in the Transman/SQL Installation and Administration Guide.

If you plan to print the mechanic’s sign-off sheet, be aware that this feature now uses the TMT Crystal Report Viewer, which is not dependent on a specific version of Crystal Reports software. If you upgrade to the current version of Mechanic Workstation (version 8.0 or later) and set up a Crystal report for the Mechanic Sign Off Sheet, the TMT Crystal Viewer must be used.

Transman/SQL Options for Transman INterActive

Transman/SQL has several options for Transman INterActive that can be enabled or disabled. These options determine how Mechanic Workstation works and how some of the screens are displayed, along with permitting or denying mechanics the ability to use some functions.

To set up options at the shop level, go to Masters ▶ Shops ▶ Options ▶ Tina. Setting options at the shop level overrides global options; different options can be applied to each shop. To set up global options that affect all shops (except for specific shops where global options are overridden by shop options), go to SysMgr ▶ Options ▶ Tina tab.
Enforce Shift Times - If this option is checked, an employee cannot log into Mechanic Workstation outside his shift without entering an authorization code from a supervisor. This option also enables buffer time and maximum allowable shift times.

Use Parts Workstation for Parts Requests - If this option is checked, the Parts Workstation module is turned on in Transman/SQL. If Parts Workstation is enabled, the system also prompts to add parts on pick lists to the Parts Workstation requisitions for the repair shop and repair order. The prompt can be disabled, which causes the parts to be added automatically to the Parts Workstation requisition without any prompt if the Repair Order option Show Pick List Prompt is disabled. This repair order option will only be visible if Parts Workstation is in use. The Parts Workstation program will be used to fill all parts requests.

Print warranty part tags - If this option is checked, the mechanic is given the option to print a warranty tag when a part is added to the repair order. The label contains the repair order number, purchase order number, unit ID, shop ID, part number, date, meter, and component code.

Auto Create Shop Plans - If this option is checked, when a repair order is created, a corresponding plan is also created. If it is not checked, when a repair order is created, a plan is not created. The default value is checked. This option is available at the global and shop levels.

Create Plans when plan w/out RO exists for a Single Unit - If this option is checked, a plan is always created automatically when a new repair order is created for a single unit. If it is not checked and a plan exists for a unit without an associated repair order, new plans are not automatically created when a new repair order is created for that unit. This option works only if the Auto Create Shop Plans option is checked.

Go to the Mechanic WS tab.
Installing and Configuring Transman Interactive:

Require passwords at login - If this option is checked, a password is required to log into Mechanic Workstation. Passwords are established on the TINA tab of the Employee master.

Allow RO creation from within TINA - If this option is checked, an employee can create a repair order from within Mechanic Workstation. The Allow Section creation within TINA option is automatically checked and disabled. If this option is not checked, then Allow Section creation within TINA can be checked or unchecked. This applies to global and shop levels options.

Allow Section creation within TINA - If this option is checked, an employee can create a repair order section from within Mechanic Workstation. This option works in conjunction with Allow RO creation from within TINA.

Allow PayGrade selection within TINA - If this option is checked, when the mechanic charges labor in TINA, he can select the paygrade to be applied to the labor hours: standard, overtime, weekend, or holiday.

Show line item monetary amounts - If this option is checked, monetary amounts are displayed in TINA for repair orders.

Print TimeCards at logout - If this option is checked, the employee’s time card is printed automatically when the employee logs out of TINA.

Allow Overriding of Estimated Times - If this option is not checked, the mechanic cannot change the estimated time for a jobcode within Mechanic Workstation (regardless of the User Changeable setting for the jobcode). If it is checked, the mechanic is able to change the estimated time for a jobcode that is checked as User Changeable. The default setting is checked.

Require Cause and Correction Codes - If this option is checked, the mechanic must supply at least one cause code and at least one correction code before logging out of a repair order as Complete or Incomplete. This option can be used at global or shop levels.

Only Allow Access to RO Assigned to Emp - If this option is checked, the ALL tab is disabled in Mechanic Workstation. This prevents a mechanic from see-
ing any orders other than the ones assigned to him. This option can be set at global or shop levels.

**Allow Meter Edit w/in Mechanic Workstation** - If this option is NOT checked, the mechanic cannot edit or replace a meter within Mechanic Workstation.

**Allow Parts Requests** - If this option is checked, a mechanic logged into Mechanic Workstation can enter parts requests for the repair order he is logged into.

**Allow Job Pause** - If this option is checked, a mechanic logged into Mechanic Workstation can use the Pause button to pause a job to work on something else without logging out of that job. When the mechanic returns to work and logs back into Mechanic Workstation, he is prompted to add the paused time to a new repair order, to an existing repair order, or to an indirect charge. The time then resumes on the job he was working on before using the Pause feature. If it is not checked, the Pause button is not displayed.

**All Labor Lines via TINA only** - If this option is checked, labor lines can only be entered on a repair order through Mechanic Workstation, the labor lines can only be edited using TINA Edit, and labor lines cannot be deleted from the repair order through Transman.

**Allow closing of Repair Orders** - If this option is checked, the mechanic has the ability to close a repair order he is logged into when he logs out of the repair order by clicking a Close button. If it is not checked, the close button is not displayed.

**Allow Vendor Lines within TINA** - If this option is not checked, a mechanic is prevented from entering vendor-supplied parts and services when the section has a specified vendor.

**Section Comments: Read Only** - If this option is checked, section comments can be viewed but cannot be added or modified within Mechanic Workstation. This option can be set at global or shop levels.

**Require Comments Line to Complete RO** - If this option is checked, a mechanic must enter at least one comment line on the section before he can exit the repair order as either Complete or Incomplete. This option can be set at global or shop levels.

**Require Signoff on Checkoff List** - If this option is checked and changes are made to the checkoff list, the mechanic is required to enter a password confirming that he made the change when he logs off the section. If no changes are made, a password is not required to log off the section. This option can be set at global or shop levels.

**NOTE:** *This option works only if Require Passwords at Login is checked.*

**Print Mechanic Sign Off Sheet** - This feature utilizes the TMT Crystal Report Viewer, which is Crystal version independent. This viewer must be installed for Transman/SQL version 8 or later.

To use this feature,
1. Save the signoff sheet.rpt file to the local workstation.
2. Open the report in Crystal Reports and use the **Database ▶ Set Location** option to point to your Transman database using the ODBC driver set up for the SQL database. (Note: The ODBC driver must be set to use Windows authentication.)

3. Go to **Transman ▶ SysMgr ▶ Options** (or **User Options**) and select the TINA tab. Enter the path to the report (for example, E:\Crystal Reports\Signoff Sheet.rpt). Replace E:\Crystal Reports with the correct path to the report.

When a repair order is closed that has at least one part charge, a prompt is displayed to print the report. The mechanic must choose Yes or No.

**NOTE:** *This option works in conjunction with the TINA option Allow Closing of ROs.*

Go to the **Parts WS** tab.

**Allow items to be moved to Pending Orders** - This option works differently depending on the status of other options.

If this option is not checked, the repair order status and section status cannot be changed when parts are on order or on request.

If this option is checked, the repair order can be closed if parts are on order, but not if the parts are on request. When the repair order is closed, a section warning dialog is displayed indicating that there are parts on order. You can move the section to a Work Pending or to abort closing the repair order. If a pending order has parts on order, all sections on that pending order do not appear in the Work Pending/PMs Due list or be automatically created on a new repair order for the unit (Repair Order option Auto-create Sections is checked) until the parts on order are received. After the parts are received for the pending order, the pending section can be selected or will be automatically created on a new repair order for the unit but ONLY in the repair shop for the shop that had the part. This applies to all sections on that pending repair order.

If this option is checked and the Mechanic WS option Allow Closing of Repair Orders is checked, if there are items on order, the repair order can be closed and the items on order can be moved to a pending repair order. If there are items on request, the repair order cannot be closed.
**NOTE:**  
*This option can also be set at the Company or Shop level.*

**Print pending tags upon item receipt** - If this option is checked, the system prints a Reserved Part Tag when receiving items that are associated with a pending order. This option works in conjunction with *Allow Items to be Moved to Pending Orders.*

**Disallow Purchase Order Access** - If this option is checked, the user will not be able to access the New PO form or the PO Search from within Parts Workstation. This is a global and shop level option.

**NOTE:**  
*Since the New PO and PO Search icons are available on the Parts Workstation toolbar without a Parts Department screen with a shop selected, the global option should be checked and the individual shops should be unchecked to prevent unauthorized access.*

**Options in Employee Master**

![Employee Master screenshot](image)

**RO Enabled** - An employee marked as RO Enabled can be selected to create a labor line on a repair order; otherwise, the Employee ID cannot be used to create a labor line.

**Allow Mechanic to go Remote** - This feature enables a mechanic to work remotely from within Mechanic Workstation, which will synchronize the mechanic to a Palm handheld device. After returning to the shop, the mechanic must synch the Palm device back to the Mechanic Workstation to upload the data.

**NOTE:**  
*This option is available only if the Advanced Barcode module is installed.*

For more information about using handheld (Palm) devices with Transman InterActive, see “Using Handheld Devices with Transman InterActive” on page 15.

**Allow Charging of Parts from MWS** - If this option is checked, the employee can charge parts in Mechanic Workstation. If the option is not checked, the Parts Charge button in Mechanic Workstation is disabled.
**TINA - Password** - The password a mechanic uses to log onto Transman INterActive is entered here. Passwords are displayed in normal text and are not encrypted in this view.

**TINA - Language DLL** - This field indicates the language file to be used when the mechanic logs onto Transman INterActive.

**Options in SysMgr ▶ Options ▶ Repairs**

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**Labor entry via start/end times** - If this section is checked, labor charges are entered by the beginning and ending times of the operation. If it is not checked, labor times are entered by the total number of decimal hours. If this option is checked and Mechanic Workstation is used, the program selects the correct pay-grade (Standard, Overtime, or Weekend) based on the date and the start time entered. The *Allow Paygrade Selection* option must be enabled for this feature to work.
Options in SysMgr ▶ Options ▶ Repairs ▶ Jobcodes

Allow Employee Assignment without a Job Code - If this option is checked, an employee assignment can be made without entering a jobcode. This also applies to Mechanic Workstation. This option can be set globally or at the shop level. For this option to work correctly when checked, the options Auto Default Jobcode and Auto Create Jobcode must be unchecked.

Setting Up Mechanic Workstation

To start the Mechanic Workstation program, go to Start ▶ Programs ▶ Transman for Windows ▶ TINA. Two screens are used to set defaults. The Default Settings - General screen is displayed when you start Transman Interactive. Click on the GUI button at the top of the screen to switch to the Default Settings - GUI screen. Information on the screens defaults to the same values as were displayed when you last used Mechanic Workstation.
Default Settings - General

You can change the values displayed on this screen, or accept the defaults.

**Shop** - Select the appropriate shop location (REQUIRED). The shop location should coincide with the workstation location. The workstation will show ONLY those mechanics that are assigned to this shop. You can use the Down Arrow to select the shop from a list of shops. The Select Shop screen is displayed. Touch on a shop name to select the shop, then touch Post.
Other selections include:

**Allow Auto-creation of Pending/PMs** - If **Yes** is selected, sections are automatically created for units that have pending work orders or PMs due at the time a repair order is created within TINA. The default is **No**.

**Goto Order Activities upon login** - If you want Transman’s *Order Activities* screen to be displayed when you log in to a repair order, choose **Yes**. The default is **No**.

**Check for open ROs when creating new ROs** - If **Yes** is selected and the unit already has existing ROs is entered, the Select Repair Order screen is displayed listing all the repair orders that are open for the selected unit. If one of these repair orders is selected and Post is pressed, the New Section screen is displayed. If ESC is pressed on the Select Repair Order screen, you will be able to create a new repair order for the selected unit. On the New Section screen for the existing repair order, if data is entered for the new section and Post is pressed, the mechanic is assigned to that section and Mechanic Workstation returns to the Assigned tab on the Job Logon screen. If ESC is pressed on the New Section screen, Mechanic Workstation returns to the Assigned tab on the Job Logon screen without creating any work assignments. The default is **No**.

**Use physical shop location (not domicile) for PMs** - Repair orders for preventative maintenance are normally assigned through the domicile shop location. If you want to use the physical shop location instead of the domicile shop location, choose **Yes**. If **Yes** is selected, all unit PMs due on the PM tab (regardless of the shop they are assigned to) are displayed. The default is **No**.

**Display Component description instead of Codes** - If **Yes** is selected, the description of the ATA/VMRS codes is displayed instead of the code itself. The default is **No**.

**Close Orders with COMPLETE status instead of CLOSED** - If **Yes** is selected, the status of a closed order is changed to COMPLETE. This is used in accordance with an interface to other programs where the status of Closed prevents other functionality within that program. The default is **No**.

**Select PMs due and Pending orders to create sections** - If the option **Allow Auto-Creation of Pending/PMs** is **No**, this option will be disabled. If **Select PMs due and Pending orders to create sections** is **Yes**, when a new repair order is created for a unit with due PMs or work pendings, the *Select PMs and Pending Orders* screen is displayed. Put a check mark in the first column on this screen to indicate each section you want to select. When Post is pressed, the selected sections are added to the new repair order when the *New Repair Order* screen is posted.

**Assign Auto Created Sections** - If this option is checked, when an employee creates a repair order and selects a PM or Pending order to create the section, an RO assignment is created for that employee. If this option is not checked, no assignment is created.
Default Settings - GUI

You can change the values displayed on this screen, or accept the defaults.

**Timer Settings - Refresh “Status” screen interval** - Set the refresh status in minutes. This refresh rate is the time delay in minutes before the system refreshes the data shown on the screen. *Do not enter a zero.*

**Timer Settings - Keyboard inactivity timeout** - The keyboard time-out is the amount of minutes the system will wait before logging you out of a repair order and going back to the main screen. If you forget to log off of the terminal, the screen in this example will wait ten minutes and then go back to the main logon screen.

**Touch Screen Settings - Adjust scrollbar width** - You can adjust the scrollbar width on the touch screen if you want to change it. Using a wider scroll bar is useful if you have difficulty “grabbing” it with your fingertip. Choose *Yes* to allow the scrollbar to be changed, then use the slider to make the scrollbar wider. A preview pane displays your changes. Click on *No* to set the scrollbar at the width you selected and to prevent it from being changed. The default is *No.*
Default Settings - Printer

You can change the values displayed on this screen, or accept the defaults.

**Printer Settings**

**Preview employee workcard report when checking out** - Select Yes to preview the work card when work is completed, or No to exit without viewing the workcard.

**Default printer for Mechanic Workstation** - The printers displayed in this field are the printers you have already set up on your workstation. To add a new printer, use the normal Add Printer wizard available in Windows. Use the Up Arrow and Down Arrow to scroll through your list of printers.

**Default label printer for Mechanic Workstation** - If you have label printers installed on your workstation (or available to your workstation on a network), they are displayed in this field. Use the Up Arrow and Down Arrow to scroll through the list.
Using Handheld Devices with Transman INterActive

Transman INterActive is designed to work with remote handheld devices like a Palm device.

The Allow Mechanic to Go Remote option is used to enable this feature.

Additional setup steps are required. For example, a [Tina for Palm] section is added to TRANSMAN.INI; this section describes filepath information for the programs, version checking routines, and so forth. Mechanic Workstation creates a file in the location specified by this section of the INI file.

The setup steps are described in the Transman/SQL Installation and Administration Guide and the Transman/SQL Workbook.

Using Repair Order Templates

You can create templates for repair orders. A template can have fields holding data that is specific to your company. A template has sections, parts, labor, services, and comment lines, and can be a Vendor RO or a Standard RO. After a template is created, repair orders can be created for a single unit or multiple units from the right-click menu options RO Template Single Unit or RO Template Multi Unit on the RO Template Query or Repair Order Query.

To access the Repair Order Template functions, go to Orders ► Repair Order Templates. The Repair Order Templates screen is displayed.

The Repair Order Templates screen is used to create new repair order templates, view or edit existing repair order templates, make repair order templates inactive, delete templates, and create repair orders from an existing template.

Repair order templates are used to create repair orders for one or many units at one time. A repair order template could be created for PMs, truck washes, or any repair that needs to be applied across many units at one time.

Use the Template button on the log-on screen in Mechanic Workstation to display a list of templates. When using templates, keep in mind that: the list is filtered by Shop ID (selected when logging on to Mechanic Workstation), the template status for the repair order created is OPEN, there are no labor lines on any section of the
template, the template type is for a standard repair order, and the template is active.

Select a template and press Post. The unit query is displayed. Select a unit and press Post. If there are any errors such as insufficient quantity for a part, they are displayed for the mechanic. The mechanic is then logged onto the first section of the repair order.

For more information on using repair order templates, see Chapter 5 of the Transman/SQL Workbook.
Chapter 3: Transman Interactive - Mechanic Workstation

This section explains how to use the Mechanic Workstation.

The Mechanic Workstation is designed to be installed on a touch-screen computer. It can also be run on a computer that does not have a touch screen, using the keyboard and mouse.

Overview of Mechanic Workstation

The graphic on the next page provides a conceptual overview of how the Mechanic Workstation integrates into shop operations. This view shows a very basic method of using Mechanic Workstation; you can also use many advanced functions.
Starting Mechanic Workstation

Touch the **Post** key on the keypad and the main logon screen is displayed. This is the screen that is shown each time someone goes to the workstation to log on.

**NOTE:** *The settings you specify are maintained between sessions in Transman INTERActive.*

Normally, when you open Mechanic Workstation after the initial setup, you can just touch **Post** to start working.

Starting Mechanic Workstation When the Computer is Started

You can use a command line parameter to start Mechanic Workstation without displaying the Start-up Options screen. The start-up options screen is skipped and the mechanic will see the Work Status screen when logging in. The command line parameter to add is **NoDefaultsForm**. The command line parameter is case insensitive. For example:

```
"c:\Program Files\TMTSoftware\Tina.EXE" NoDefaultsForm
```

To force Mechanic Workstation to default to a specific shop using the command line parameter, enter a Shop ID immediately after the NoDefaultsForm. For example:

```
"c:\Program Files\TMTSoftware\Tina.EXE" NoDefaultsForm SHOP01
```

If the Shop ID has a space in it, you must enclose the Shop ID within quotes. For example:

```
"c:\Program Files\TMTSoftware\Tina.EXE" NoDefaultsForm "Shop 01"
```

**NOTE:** *You can set up start-up options as necessary and save them in the TINAAPP.INI file. This file is persistent and is not removed when you upgrade Transman/SQL or Transman INTERActive.*

Operating the Mechanic Workstation

The first step in the operation of the Mechanic Workstation is to **Clock In**. This starts the shift for the mechanic. The last steps at the end of the day are to **Clock Out**, print (optional), and sign the timecard. During the day, the mechanic **logs on** and **logs off** various repair order sections as he works. A simplified process overview is shown below.
This process workflow illustrates a typical day for a mechanic and how and when the mechanic uses the Mechanic Workstation. There are several advanced features that are discussed in detail in later sections.

**NOTE:** The steps indicated in this section refer to the numbered steps in the diagram.
Transman Interactive - Mechanic Workstation:

Workflow

Process

Step 1 – Clock In

If a number of mechanics are assigned to a shop, you can click on Toggle View to display a list of mechanics without the large icons. You can sort this list by Employee, Unit ID, Order Number, Section, or Description. Click on the column header to sort using criteria for that column.

The first step at the beginning of each shift is to Clock In. In the Employee Work Status box, the system shows all users that are clocked in. You must clock in at the beginning of each shift and clock out at the end of each work shift for the system to function properly. Use the keypad to clock in to begin the shift:

- Enter your mechanic ID, or click on the Employee icon.
- Touch the Tab button to move the cursor to the Password field (if this feature is enabled, the Password field is white; if the feature is not enabled, as in the example above, the Password field is grey).
- Enter your password.
- Then touch Post on the keypad.
NOTE: You can clock in only on one workstation at a time. To change to a different workstation, clock out on the first workstation and clock in on the new one.

Step 2 – Determine the Next Job

The first screen that is displayed is the Job Logon screen. This screen is displayed anytime that the system needs you to log on to a job. It is the first screen that is displayed when you clock in.

This screen is different depending on your status when you last logged out. If you paused a job, or if you logged out on an incomplete job, Mechanic Workstation opens with the appropriate screen displayed so that you can resume working. If you were not assigned to or actively working on a job when you last logged out, the screen prompts you to select a repair order that you want to work on.

By default, this screen displays all of the tasks assigned to this mechanic ID. You can select a subset of repair orders that are assigned, completed, or that have pending or PM sections.

When you sign on for the day, you must choose the job you want to start working on. You can log on using one of these options:

<table>
<thead>
<tr>
<th>Task</th>
<th>Option</th>
</tr>
</thead>
<tbody>
<tr>
<td>Repair Order</td>
<td>Displays all the repair orders that are open. You can sort the lists using the five different tabs:</td>
</tr>
<tr>
<td></td>
<td><strong>Assigned Tab</strong> - Displays all repair order sections that are assigned to you that have not been completed.</td>
</tr>
<tr>
<td></td>
<td><strong>Complete Tab</strong> - Displays all repair orders assigned to you that have been marked Complete.</td>
</tr>
<tr>
<td></td>
<td><strong>All Tab</strong> - Displays all repair order sections on open repair orders.</td>
</tr>
<tr>
<td></td>
<td><strong>Pending Tab</strong> - Displays all repair order sections on pending repair orders.</td>
</tr>
<tr>
<td></td>
<td><strong>PMs Tab</strong> - Displays all PM levels that are currently due for which no repair orders have been started.</td>
</tr>
<tr>
<td>Indirect</td>
<td>Allows the mechanic to select an indirect order.</td>
</tr>
<tr>
<td>Other</td>
<td>Allows the mechanic to go on a lunch or break, or to clock out.</td>
</tr>
</tbody>
</table>
Remember, you clock in and clock out of the TINA system at the beginning and end of each day. You log on and log off of repair order sections, indirect charges, or for lunch or breaks while you are clocked in to TINA.

**Step 3 – Log On To a Job**

To log on to a repair order, touch the Job (Repair Order Section) you want to start. It will fill in the Order and Section information at the top of the form and the line is highlighted (displayed in yellow). Then choose the Post button.

The system returns to the Work Status screen.

Notice that Greg Johnson is now clocked in and working on (logged on) a repair. This screen shows all the mechanics that are logged on and the status of each.
The icon that is displayed for each mechanic represents the status of that particular mechanic.

<table>
<thead>
<tr>
<th>Graphic</th>
<th>Work Status Indicator</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1.png" alt="Graphic" /></td>
<td>The mechanic is currently logged on to a Repair Order. Direct labor hours are being recorded.</td>
</tr>
<tr>
<td><img src="image2.png" alt="Graphic" /></td>
<td>The mechanic was logged in to a Repair Order and has paused the job. No labor hours are being calculated. When the Mechanic logs in to Mechanic Workstation again, the paused activity is automatically selected.</td>
</tr>
<tr>
<td><img src="image3.png" alt="Graphic" /></td>
<td>The mechanic is currently logged on to an Indirect Charge Order. Indirect labor hours are being recorded.</td>
</tr>
<tr>
<td><img src="image4.png" alt="Graphic" /></td>
<td>The mechanic has selected the Lunch/Break activity within Transman INterActive. Labor hours are not calculated during this activity.</td>
</tr>
<tr>
<td><img src="image5.png" alt="Graphic" /></td>
<td>The mechanic has clocked in to Transman INterActive (that is, he is currently working a shift), but is not performing any work. Idle time is being calculated while the mechanic is in this status.</td>
</tr>
</tbody>
</table>

**Repair Order Color Scheme**

Within Transman INterActive’s repair order functions, a set of colors is used to indicate the status of a repair order section:

<table>
<thead>
<tr>
<th>Graphic</th>
<th>Work Status Indicator</th>
</tr>
</thead>
<tbody>
<tr>
<td>Red</td>
<td>The repair order section is assigned to the employee logged into Transman INterActive and the section status is OPEN.</td>
</tr>
<tr>
<td>Blue</td>
<td>The repair order section is assigned to an employee other than the employee logged into Transman INterActive and the section status is OPEN.</td>
</tr>
<tr>
<td>Green</td>
<td>The repair order section has not been assigned to an employee and the section status is OPEN.</td>
</tr>
<tr>
<td>Black</td>
<td>The repair order section is complete and the section status is CLOSED. Mechanic assignment is not considered. NOTE: Completed sections can only be re-opened by selecting the closed section to perform work within Transman INterActive.</td>
</tr>
</tbody>
</table>
Step 4 - Log On to Indirect Labor

In Step 2 you determined what type of job to log on to. Step 4 and Step 5 are used to log on to the Indirect Labor and Lunch/Break sections.

To log on to Indirect Labor from the main screen, touch Indirect.

Select the type of indirect work you will be performing, then choose Post.

Step 4 loops directly back to the job logon screens (see the Work Flow Process diagram on page 19).
In this example, Jenna Jones is working on an Indirect charge (Shop Cleaning) and Greg Johnson is working on a repair order.

After completing the indirect work, go to the mechanic workstation and log back on. When you do, Transman/SQL automatically displays the Order Activities screen. From here you can charge parts or services and log off of this indirect work order as complete (which closes the indirect order) or incomplete (which leaves the indirect order open). After doing so the system will display the Job Logon screen.

**Step 5 - Other Tasks**

Mechanic Workstation also automatically tracks breaks and lunch, and those times when you are performing indirect labor (tasks such as shop maintenance, going to pick up parts, and so forth). These tasks are not charged to a repair order.

**Lunch/Breaks**

If you are going on a break or to lunch, in the Other section, select Lunch/Break, then choose Post. The Job Logon screen is displayed.
Do not select CLOCK OUT - this will sign you out for the day. (See “Step 10 and Step 11 – Clock Out and Print Timecard” on page 32 to clock out for the day.)

Step 5 loops directly back to the job logon screens (see the Work Flow Process diagram on page 19). After completing the lunch or break, go to the mechanic workstation and log back on. When you do, Transman/SQL automatically terminates the lunch or break, and the Job Logon screen is displayed.

Indirect Charges
Indirect charges are charges that cannot be directly assigned to a unit on a repair order. Most indirect charges are labor-related, but indirect charges can be parts and services as well. Examples of indirect charges are: shop cleanup, moving equipment, safety meetings, training, and so forth.
Touch the appropriate task to select it, then touch Post. The Job Logon screen is displayed again.

**NOTE:** If a mechanic is logged in to an indirect charge, the charge can be opened in Transman and charges added to it. However, the indirect charge’s status cannot be changed, and open TINA items cannot be deleted. The charge must be closed before it can be deleted in Transman.

**Step 6 – Charging Parts to Repair Orders**

After Step 3, assuming the mechanic has chosen a repair order job to log on to, he will perform the job as described in the repair order that was created and assigned to him. During the repair, parts will probably need to be charged to the repair. If parts are retrieved from the parts room and added to the unit being repaired, the mechanic must go to the mechanic workstation and log on, go to Parts Request, and charge the parts to the job. To do this the mechanic logs on using his mechanic ID and password.

**NOTE:** If Parts Workstation is installed and being used, the Charge Parts button is disabled, and all parts must be ordered using a parts request. For more information, see “Parts Workstation Setup” on page 81.
From this screen, you can charge parts, initiate a parts request, enter information about services, or enter comments. The screen header displays information about the repair order number, the Unit ID, and the repair order section number.

You can also pause work on this repair order by touching or clicking Pause. When the Mechanic returns to Mechanic Workstation after a Pause, he must specify why he paused the RO (available selections include work on Indirect Labor, work on the existing RO, or create a new RO).

When returning to the repair order from a pause, Incomplete or Complete must be selected. A repair order that is paused cannot be closed. A repair order with parts on order or parts on request cannot be closed and must be logged out as INCOMPLETE until the parts are received.

If the Transman/SQL program option **Allow RO Creation from Within TINA** is turned off (not checked), the New Repair Order button is disabled when a mechanic returns from a paused job. The job that was paused must be completed (or left in Incomplete status) before the mechanic can begin working on a new repair order.
NOTE: More options are available than when logged on to an indirect order. These advanced items are discussed in a later section.

Choose the Charge Parts button under the Charge section on the form. The Part Line screen is displayed. This form is designed especially for bar-coded part entry.

When the part is scanned the quantity defaults to one (1) and all information is automatically inserted. Update the quantity if necessary, then choose the Post button to complete the charge. The screen will go blank and is ready for another part charge. If there are no more parts to enter, touch Esc and the Section Status screen is displayed again.

Requesting Out-of-Stock Parts
You can request parts that are not in stock from within Mechanic Workstation. For more information, see “Request Parts” on page 39.

If Parts Workstation is installed, parts can be automatically ordered and tracked. For more information, see “Transman INterActive - Parts Workstation” on page 81.

Returning Parts to Inventory
If a part that was ordered is not used in a repair, the part can be returned to inventory by entering a negative number for the part. For example, to request a part, a mechanic would enter a quantity of 1. To credit the part back to inventory, enter -1.

Step 7 and Step 8 - Log Off Complete/Incomplete
The job is either complete or you still need to work on this job. If the job is complete, choose the Complete button in the Section Status section. If you need to return to the repair order you were logged on to, touch the Incomplete button. If you touch Esc the status defaults to Incomplete and you will still be logged on to the repair order. If you touch Complete, the system will prompt you for cause and correction codes to complete the repair order section.

If the warranty status for the unit is No Warranty, you can sign off as Complete without providing cause and correction codes.
After selecting a cause and a correction code by choosing the correct term in the list, touch the Post button. The Job Logon screen is displayed again.

**Step 9 – Adding a New Section**

If you determine that another system on the unit needs repair, you can add a section to a repair order job that is assigned to you. At the Job Logon screen, highlight the repair order job that needs a new section. Then choose the Add Sec button at the top of the screen.

The Add Section screen is displayed.
Enter the appropriate information by using the touch screen monitor and the keyboard on the right. When all information is entered, choose the Post button.

This will take you back to the Job Logon screen and you will see the section that was added. To log on to the section, choose the section to highlight it and choose the Post button.

If the Repair Order option Check for Open ROs when creating a new RO is on, when a new RO is being created and a unit that has already existing repair orders entered, the Select Repair Order screen is displayed listing all repair orders that are open for the selected unit. If one of these repair orders is selected and Post is pressed, the New Section form is displayed. If ESC is pressed on the Select Repair Order screen, you can create a new repair order for the selected unit. On the New Section screen for the existing repair order, if data is entered for the new section and Post is pressed, the mechanic is assigned to that section and you will return to the Assigned tab on the Job Logon screen in Mechanic Workstation. If ESC is pressed on the New Section screen, you are returned to the Assigned tab on the Job Logon screen in Mechanic Workstation (but no mechanic is assigned).

**Step 10 and Step 11 – Clock Out and Print Timecard**

After the shift is complete you must log off of all repair orders that you are currently working on.

At the Job Logon screen, select CLOCK OUT from the other section and choose Post. This prints the timecard and signs the mechanic out for the day.

**NOTE:** You must clock out at the end of each work shift or you will not be able to clock in the next day.
Using Mechanic Workstation

This section contains information about performing specific tasks using Mechanic Workstation.

Using the Keypad

The Mechanic Workstation uses a touch screen to enter information. (You can also click on an item using a mouse.) The keypad performs several functions.
Key | Function
---|---
Delete | Clears data entered into fields.
Post | The equivalent of F6 (Post) in Transman, or the Enter key on some screens.
Tab | The equivalent of the Tab key on a keyboard.
Time Card | Allows the mechanic to review his current time card. See “Review Time Card” on page 41 for more information.
Esc | The equivalent of touching the Esc (Escape) key on a keyboard. Usually displays the previous screen.
Unit RO Inq | Allows you to perform the Unit RO Inquiry function. You can enter a Unit ID and see the closed repair orders, open and pending repair orders, PM information, and specs for the selected unit. See “Unit Repair Inquiries” on page 42 for more information.

Used to enter numeric data.
Hotkeys

A Hotkey is a function key on the computer keyboard that is active on the current screen.

Hotkeys available in Mechanic Workstation are:

<table>
<thead>
<tr>
<th>Hot Key</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>F1</td>
<td>Displays the Help screen for the current Mechanic Workstation screen. This is the same as clicking on the Help button at the top of the screen.</td>
</tr>
<tr>
<td>F3</td>
<td>Displays the System Information dialog box.</td>
</tr>
<tr>
<td>F6</td>
<td>Posts the current item. This is the same as touching the Post key.</td>
</tr>
<tr>
<td>Enter</td>
<td>On the Work Status screen, used to accept the Employee ID of the highlighted employee’s icon. This works the same as clicking on a highlighted Employee name.</td>
</tr>
<tr>
<td>Esc</td>
<td>Cancels any current activities and returns to the previous screen.</td>
</tr>
</tbody>
</table>
Using the Virtual Keyboard

Mechanic Workstation provides a virtual keyboard that is used to enter alphanumeric data when a touch screen is available. To display the keyboard, touch the Virtual Keyboard button on the keypad. See “Using the Keypad” on page 33 for more information.

Touch the appropriate key to enter an alphanumeric character. To correct an error, touch the Backspace key on the keypad. To clear the entire screen, touch the Clear key.

When you are finished, touch Post to enter the information you typed into the field on the previous screen, or touch Esc to quit without saving the data.

Using the Job Logon Screen

The Job Logon screen lists all repair order sections for OPEN repair orders. The sections are color-coded to indicate status. For more information about color coding, see “Repair Order Color Scheme” on page 24.

<table>
<thead>
<tr>
<th>To accomplish this task</th>
<th>Perform this action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start work on a section regardless of status</td>
<td>Touch the RO section to reopen it for work and touch Post or touch F6.</td>
</tr>
<tr>
<td>Start a RO section via TINA RO search</td>
<td>Touch the flashlight icon and select an RO section from the TINA RO Search screen, then touch Post or touch F6.</td>
</tr>
<tr>
<td>To accomplish this task</td>
<td>Perform this action</td>
</tr>
<tr>
<td>---------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Create a new repair order</td>
<td>Touch the New RO button. Enter the header information and touch Post or F6. Enter the section information and touch Post or F6. The newly created repair order is displayed on the Assigned tab. Touch the Assigned tab, then touch the RO and touch Post or touch F6. For more information, see “Create a New Repair Order” on page 38.</td>
</tr>
<tr>
<td>Add a new section to an existing repair order</td>
<td>Touch one of the listed RO sections. The Add Sec button becomes enabled. Click the button and enter the section information, then touch Post or F6 to create the section. The section is displayed on the Assigned tab. Touch the Assigned tab, then select the appropriate RO section and touch Post or touch F6. For more information, see “Add New Section” on page 39.</td>
</tr>
</tbody>
</table>

### Searching Repair Orders

To search for a repair order, click on the Flashlight icon on the top of the Job Logon screen.

This displays the TINA RO Search screen.
This allows you to find a repair order to start work on within Transman. The search can be performed using the following fields:

- Repair Order
- Section
- Unit ID
- Component
- Shop ID
- Date Opened
- Date Closed

The default for Shop ID is the shop that Transman INterActive was logged into. Closed repair order sections are not displayed in the grid.

When searching for a repair order, any combination of these fields can be used to narrow the search. For example, to see all repair orders for shop 01 opened on 4/15/2003, enter “01” for Shop ID and “4/15/03” in the Date Opened From field. Only those repair orders that match these criteria are displayed in the grid.

Create a New Repair Order

On the Job Logon screen, touch the New RO button.

The Create New Order screen is displayed.

Enter the repair order header information on this screen to create a new repair order in Transman INterActive.
Unit ID and Meter Readings are the only required fields, and meter readings are only required if the meters on the unit are required on a repair order.

When you are finished, touch Post on the keypad to save the data and create the repair order.

**Add New Section**

On the Job Logon screen, touch the **Add Section** button.

The **Add New Section** screen is displayed.

Enter the section information to create a new section on a repair order. The required fields are:

- Component
- Complaint
- Repair Reason

The Employee ID of the person using Transman Interactive is automatically used in the Employee field.

Touch Post to save the data and add the new section.

**Request Parts**

If you need to obtain a part that is not in stock, from the Section Status screen, use the Parts Request button.

The Parts Request screen is displayed.
You can touch Description to enter a description (useful for parts that are not routinely stocked), touch PartID to order by the Part ID from the parts catalog, or touch Component to order parts by component type.

Touch View to display the RO section.

To search a list of parts on the PartID screen, touch the Search button. When you tab into or click on the Quantity field, the default quantity is automatically filled in if this default has been set up in the parts catalog. If the part is cataloged, the Description and Vendor ID fields are automatically completed. The Quantity field is validated; if you enter a number that is greater than the number of parts on hand, an error message is issued and the quantity will be changed to the quantity on hand. If you enter a zero, an error message is issued stating that the quantity cannot be zero. If you enter a negative amount, the amount entered is credited back to inventory.

When searching parts, you can enter any part of the description; the search text does not have to be the same as what is contained in the beginning of the Description field.

Touch the Post button to add the part to the repair order section.

**Add Services**

To add a service item to a repair order, from the Section Status screen, use the Services button.

A Line Item Edit screen is displayed.
Enter the Description, Amount, and Charge Category for the service.

If no description is entered, Transman INterActive supplies the generic description “TINA Service by Employee ID” where Employee ID is the name of the mechanic logged in to the repair order.

The current warranty status is indicated at the bottom of the screen. **Green** indicates that a warranty is in effect. **Red** indicates that the warranty has expired. **Grey** indicates that no warranty has been established.

The warranty levels are OEM, Extended, and After-Market.

**Vendor Parts**

Vendor services can only be entered on repair order sections that have a Vendor ID assigned to them. Indirect Charges cannot have vendor services charged to them.

**Review Time Card**

Touch the **Time Card** button on the Keypad to display the current time card.
Use this screen to review your time card during the day.

When you clock out of Transman INterActive, the time card prints to the default printer (if this has been set up by an administrator).

You can also select a printer other than your default printer.

**Unit Repair Inquiries**

Click on the Unit RO Inq button on the Keypad to display the Unit Repairs Inquiry screen.
By default, a list is displayed of closed repair orders for the unit you selected. To narrow the search, you can specify a component code. The program adheres to the RO Max Component Code level setting in Transman/SQL.

You can also display other lists:

- Touch the Open/Pending button to display a list of open and pending repair orders for the unit you selected.
- Touch the PM Info button to display a list of all the PMs that are due for the selected unit (shown in the top grid), as well as a PM history for this unit (shown in the bottom grid).
- Touch the Specs button to quickly view all the specs that have been set up for the selected unit.

On any grid, to view a repair order, double-click on that repair order line item and the repair order form is displayed.

**Indirect Labor**

Indirect codes are used to indicate paid time spent on tasks other than those associated directly with a repair order (for example, handling or picking up parts, shop cleaning, administrative, or supervisory tasks).

From the Job Logon screen, click on Indirect.
The Select Indirect Code screen is displayed. Each indirect code that was set up for your shop is displayed.

Specify Job Codes

You can create tasks and assign them to a jobcode. Some preliminary setup is required in Transman/SQL before you can use this feature in Mechanic Workstation.

In Transman/SQL, go to **SysMgr ➤ Repair Order Setup ➤ Jobcode Definitions**.

Click on the **Tasks** tab. This is the Tasks Master. You can add new tasks and existing tasks can be edited or deleted.
To add a task, press CTRL + INS. A blank line is added to the grid. Enter a task description. Check the check box in the appropriate column to make the task required, to make the task comment required, or to make a task inactive. If a task is required, it must be checked in Mechanic Workstation before the repair order can be marked complete. If a task comment is required, a comment must be entered for that task when the task is checked. If a task is marked inactive, it is not displayed on the Task Assignments tab.

To edit a task, click on the task and update it.

To delete a task, click on the task and press **Delete**.

After a task is added to the Tasks tab, click on the Task Assignments tab.

The Task Assignments tab is where tasks are assigned to a selected jobcode on the Jobcodes tab. Tasks that are active on the Tasks tab are displayed in the All Task Definitions list.
To add a task to a jobcode, ensure that the correct jobcode was selected in the Jobcodes screen, then highlight the task description in the list and use the Move Left or Move All Left buttons to add it to the Selected Task Definitions list.

<table>
<thead>
<tr>
<th>Move Button</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;</td>
<td>Add the highlighted task to the Selected Tasks list. (Move Left)</td>
</tr>
<tr>
<td>&lt;&lt;</td>
<td>Add all tasks to the Selected Tasks list. (Move All Left)</td>
</tr>
<tr>
<td>&gt;</td>
<td>Remove the highlighted task from the Selected Tasks list. (Move Right)</td>
</tr>
<tr>
<td>&gt;&gt;</td>
<td>Remove all tasks from the Selected Tasks list. (Move All Right)</td>
</tr>
</tbody>
</table>

To remove a task from the Selected Tasks list, highlight the task and use the Move Right or Move All Right buttons.

Close the window to update the Task and Task Assignment lists.

After you assign a task, the order in which they appear in Mechanic Workstation can be changed by dragging or dropping the tasks in the Selected Task Definitions list.
Chapter 4: Transman INterActive - Shop Planner

Introduction

The Shop Planner Module is a service writer workstation tool designed to help manage the shop workflow using the Transman INterActive Mechanic Workstation.

You can use Shop Planner to:

• Track incoming driver reports of unit problems
• Create Repair Orders from those reports
• Assign technicians to complete repairs
• Review and close Repair Orders as the work is completed

Shop Planner provides immediate visual access to Work Pending and PMs Due for all units. You can configure the display of Open Calls and Open Repair Orders to meet specific needs. Various grouping and sorting options are available using Windows point and click and drag and drop techniques.

NOTE: When using Shop Planner, complete all On-Line Repair Order work within the Shop Planner program.

You can track road calls in Shop Planner. For more information, see the Transman/SQL Road Calls User Guide.

Starting Shop Planner

Go to Start ► Programs ► Transman/SQL and click on Shop Planner. The Select Shop screen is displayed that prompts for your Shop ID.

Key in or select your Shop ID from the drop-down list box.

You can set the screen refresh time from this dialog box. Setting the refresh time to zero turns off the screen refresh function. The default is to refresh the screen every 5 minutes.

Click the OK button. The Shop Planner screen is displayed.
This screen displays *Plans* or reports from incoming drivers that document maintenance concerns about their units. The contents of the fields at the top of this form filter the calls that are displayed in the grid. The Shop Planner display can be filtered by Unit ID, Customer ID, Employee ID, Plan Status, and Date Range. The *Thru* date defaults to the system date on your computer (the current day).

**Shop Planner Toolbar**

The Shop Planner Toolbar contains icons that determine what data is displayed and how it is displayed.

### Key

<table>
<thead>
<tr>
<th>![Icon]</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Icon]</td>
<td>Selects the shop for which the shop plans (reports from incoming drivers) are displayed.</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Opens a new repair order.</td>
</tr>
</tbody>
</table>
Customize How Data is Displayed

You can easily change how data is displayed in Shop Planner. You can temporarily make changes and quickly restore the screen to the default display.

Sort by Fields

If you drag a column header up and drop it on the grouping bar above the columns, the display will be grouped by that column’s contents. In the example, the grid has been sorted by Unit ID.
Additional columns can be added to the bar to provide additional grouping.

**Change Column Order**

To change the order in which the columns are displayed, drag and drop a column header in the desired location.

Change the sort order by clicking on a column header. A small triangle beside the column header that points up indicates an ascending sort order; one that points down indicates descending sort order.

**Add Columns to Grid**

Additional columns can be added to the display by right-clicking in the grid and selecting *Customize* from the pop-up menu.
A list is displayed of available additional fields that can be dragged and dropped in the column header area, adding the information to the display.

Additional fields that can be added include those for non-company unit information, physical shop location, PO number, and RO number.

Remove Columns from Grid
To remove a column, drag and drop it on the Customize list.
Define Column Contents

The small black drop-down arrows beside the column headers enable you to select filtering criteria to define the content of the column. If a column is filtered, the drop-down arrow changes color. A status bar that appears below the grid displays the filter criteria with an X in the lower left corner. Clicking the X clears all filter criteria. You can define multiple filter criteria.

Customize the Grid Display

You can modify the grid display by clicking the **Customize Grid** icon on the toolbar, by right-clicking and selecting **Customize Grid** from the pop-up menu, or touching **F9**. This displays a list of additional fields that can be dragged and dropped on the header bar. To remove a field from the display, drag it to the Customize grid and drop it.
Sticky Notes

Transman’s sticky notes feature provides a way to enter reminders about items in the system. Sticky notes are enabled for certain fields; not every field can have a sticky note associated with it.

To **assign a sticky note**, right-click on an item and select **Sticky Note**. A blank note is displayed. Type the text into the note. When you are finished, click on the X on the upper right corner of the window to close the note. The next time that item is entered in the item field and the field is exited or scrolled through using the navigation bar, the sticky note is displayed.

To **delete a sticky note**, right-click on the note and select **Delete**.

To **close a sticky note**, click on the X in the upper right corner of the note window.

Sticky notes close automatically when you shift focus to a different field. To keep a sticky note open, right-click on the note and select **Keep Open**. The note will stay open until you close it.

The sticky note in the example is associated with the Unit ID field.
Sticky notes are available for the following items:

- Component Code
- Customer ID
- Employee ID
- Manufacturer/Make
- Order Numbers
- Part ID - Parts Catalog
- Part ID - Shop Inventory
- Shop ID
- Unit ID
- Vendor ID

**NOTE:** You can also view Employee Information by right-clicking on an field that contains an Employee ID and selecting Employee Information.

Create a New Plan

To create a new Plan, right-click to pop-up the menu and select **New Plan.**
The Plan - Inserting screen is displayed.

Identify the Unit, Location, Driver, Location, Date, Time, Component and a description of the problem.

The Misc tab provides Repair Order information relating to the unit after a repair order is opened.
Create a Repair Order

When a Plan has been created, a Transman Repair Order can be created for the unit by right-clicking to select the Plan and then selecting **Create RO** from the pop-up menu.

Open Orders Tab

Existing Open Repair Order sections are displayed on the Open Orders tab in Shop Planner. Modify the Open Orders display using the same techniques outlined for the Planner display. Use this display to get an overview of current work that is either in progress or waiting to come into the shop.

If you want to display closed repair orders in the list, put a check mark in the **Show Closed** check box.
To change the display, drag to the grouping bar the field you want to group by. To remove the field, drag it back to the grid column header bar and drop it between the two columns where you want to see it displayed. You can change the order of the fields in the display by dragging and dropping them in the desired position. You can place more than one field in the bar above the grid to create hierarchical groupings.

To organize the display by Employee, drag the Employee field to the grouping bar.
When the Employee field is used for grouping Repair Order Sections, any sections not assigned to an employee appear in the blank employee group. This group is displayed at the bottom of the list.

To change employee assignments, right-click on the desired section and select **Assign Employee** or **Unassign Employee**. For repair order sections where an employee is not already assigned, the Unassign Employee selection cannot be used.

Orders that are in Complete or Closed status are displayed highlighted in blue. You can create a new repair order, or print, view, edit, or close existing repair orders by right-clicking on this grid. You can also create a new invoice or open an
existing invoice. You can use repair order templates for single units or multiple units to simplify entering data for a number of units of the same type. You can also view parts, labor, and service lines for a repair order or view items on order (purchase requisitions).

When a vendor repair order is opened in Shop Planner, the purchase order search button is disabled and the purchase order number cannot be changed. (This function works the same way in Transman/SQL.)

You can include non-company units by right-clicking in the grid and selecting Customize. The non-company fields are listed in the Customize menu. If a non-company unit is selected, the Customer ID and price table fields become disabled on the estimate screen and must be changed from the non-company unit screen.

You can also view non-company unit information by right-clicking in the Unit ID field.

When you create a new repair order, the Work Card is printed when the OK button is pressed. The work card does not print if Post or Cancel are used.

**Printing**

You can right-click in the grid and select Print to print a work card, a section work card, a detail report, a section detail report, an attached purchase order, or a work card check-off list. You can also print the repair order listing.

To access print functions, right-click in the grid and select Print, then select the item you want to print.

**Estimates Tab**

The Estimates tab displays a list of estimates. An estimate is a description of the parts and labor required to complete a proposed repair.
To create a new estimate, right-click anywhere in the grid and select *New Estimate* from the pop-up menu. The *New Estimate* screen is displayed.

An estimate number is auto-entered in the field (you can overwrite this number if necessary). Select a unit. The Estimate Date defaults to the current date and the Status defaults to Open.

Enter a Customer ID if you want to associate the unit with a specific customer. Enter an appropriate choice in the price table field from the drop-down menu.

If the unit’s meter readings are being tracked, Odometer and Hour Meter fields are displayed in the Meter Readings box.
If you want to add, edit, or delete a tax or fee line, make sure the check box next to Tax Override and Fees is checked.

To add a new section, right-click in the Section grid and select New Section. The New Section screen is displayed.

Select a Component, Complaint, and Repair Reason, and add comments if necessary.

To create a repair order or plan from this tab, highlight an estimate in the list, then right-click to display a pop-up menu. Select **Create Repair Order/Plan**.

You can include non-company units by right-clicking in the grid and selecting Customize. The non-company (NC) fields are listed in the Customize menu.
The Inspection Tickets tab displays a list of inspection tickets.

To view an inspection ticket, double-click on the ticket in the list, or highlight the ticket you want to view and right-click, then select View/Edit Ticket.

If the Print Work Card option is selected and a repair order is created from an inspection ticket, the work card prints first, and then the repair order that was just created can be viewed.

Create a New Inspection Ticket
To create a new inspection ticket, right-click in the grid and select New Ticket.
A new Ticket Number is automatically created. Select the mechanic who will perform the inspection and the unit’s driver from the drop-down menus. The Inspected By field is required.

Right-click in the Units (lower) grid to select a unit.

**Work Pending Tab**

The Work Pending tab displays all pending repair order sections. Right-click on a pending section to create a new repair order or plan from the work pending section. Remember that if you create a new repair order for a unit that has work pending, Transman will create the pending section for you. The Work Pending tab display can be modified or customized in the same ways as the Open Orders tab (see “Open Orders Tab” on page 56).
**PM Tab**

The PM (Preventive Maintenance) tab displays all pending repair order sections that have PMs due, based on the percent due parameter provided in the Shop Master ► Options tab.

You can use the Options button to select Domicile or Physical Shop location when displaying PMs on the PM tab. Click Options, then select the type of display and click OK.

On the PM tab, right-click on a PM due to create a repair order for the unit or a Plan to bring the unit into the shop for work. Remember that if you create a new repair order for a unit that has a PM due, Transman will create the PM section for you. The PM tab display can be modified or customized in the same ways as the Open Orders tab (see “Open Orders Tab” on page 56).
Employees Tab

The Employees tab provides information about employee activities. You can review the current timecard or a historical list of timecards, review assignments, and view parts, labor, and services. You can also view or edit the repair order the employee is currently logged into.

On the Employees tab, right-click on an employee name to display a drop-down menu.
View Current Timecard

To view the current timecard, select **View Current Timecard** from the list. A printable version of the current timecard is displayed.

View Timecard History

To view a timecard history, select **Timecard History**. A list is displayed that shows all of the timecards for this employee from the Start Date you specify until the current date.
If the timecard is still open, you can edit it by right-clicking and selecting **Time Entry** from the drop-down menu. You can print any timecard by right-clicking and selecting **Print Timecard** from the drop-down menu.

**View Employee Assignments**

To view employee assignments, highlight the employee name on the Employees tab and right-click to display the drop-down menu. Select **View Assignments**.
Create Invoice from Shop Planner

To create an invoice from within Shop Planner, the customer master for the customer on the repair order must have the option *Create Invoice from RO* checked in the Invoicing section on the Options tab.
Chapter 5: Transman INterActive - Time Card Editor

The Transman INterActive Time Card Editor program provides a tool for the Shop Manager to use to correct errors in time cards. **Note:** You should never edit a time card with an employee logged into TINA. Always have them log out and then make the edit. When the TINA Edit program is started, the *Employee Status Listing* screen is displayed.
Display Employee Time Card Records

Double-click on an Employee record to display existing Time Card records for that employee.

Right-click in the grid to display a menu that enables you to edit, insert, or delete a time card, to manually enter time card hours, to print a single or multiple time cards, to reset a remote employee or clear an employee handheld device.

Editing Time Card Records

To edit a Time Card record, double-click the record, or select the record you want to work with and right-click to display a pop-up menu. Select Edit Time Card.
Correcting Time Card Errors

Let's assume an employee failed to clock out for a lunch break and therefore has a long period of idle time. Several corrections must be made, and they must be done in a specific order to avoid conflicts:

- Change the start time for the idle time so that it begins after the lunch break.
- Add an entry for the lunch break.
- Correct the incorrect amount of time allocated for the idle time.

The instructions and screen examples that follow outline the process you would follow to make these corrections.

Adding Additional Time Lines

Click on the line you want to edit. If you add an additional time line to a time card, it will be added above the current (highlighted) line.

Then, right-click and select **Edit Line** from the pop-up menu.
The **Time Card Line** screen is displayed. The screen that is displayed depends on the type of time card to be edited:

When you insert a line, a dialog box is displayed so that you can select the appropriate shop. The **Time Card Line** screen contains fields appropriate to the type of charge to be edited. In the example, a time card line screen for a repair order is displayed.

Change the appropriate fields on the **Time Card Line** screen and click **OK** to save your changes.

**Adjusting Start or End Times**

In this example, the Start Time for this line must be adjusted to allow for the insertion of a lunch break.
Right-click on the line you want to edit and select **Edit Line**. The *Time Card Line* screen is displayed.

Make the appropriate changes, then click on **OK** to post this edit. The *Time Card Detail* screen is displayed again.
Inserting Additional Time Card Lines

Now you can insert the mechanic's lunch break. Right-click, select Insert Line, and click on Lunch/Break (unpaid) to insert a lunch break for which time the mechanic is not paid.

From the prompt that is displayed, select the appropriate Shop. The Time Card Line screen is displayed.
Correct the Incorrect Time Entries

In the example, the mechanic did not log off for a lunch break. He started moving equipment at 11:10 AM and completed the task at 1:15 PM. His lunch break started at 12:00 PM and ended at 12:45 PM. So far, we’ve adjusted his time line for moving equipment from 11:10 AM to 12:00 PM, when he started his lunch break. When he returned from lunch, he continued moving equipment until 1:15 PM, and this time period is not recorded on his time card because we changed the original time line. The time used for moving equipment from 12:45 PM when the mechanic returned from lunch to 1:15 PM must be added to his time card.

Right-click and select Insert Line. Select the type of charge (in this example, an Indirect charge). Provide the appropriate information about the work performed, then click on OK to post this edit.
Correcting Chronological Time Sequence

While the time card is now complete, one issue remains. Notice the two lines just before the Sign-Out record. There are lines out of chronological sequence.

When you click on **OK** to post the time card record, a warning dialog box is displayed.
Drag-and-Drop Time Lines

Time lines on a time card must be in correct chronological sequence. You can drag and drop the lines into the correct sequence.

Review the start and end times of all time lines to make sure they are in the correct sequence. When you click on OK, the time card will be saved and posted. The Time Card Listing screen is displayed again.
If no other time cards for this employee need to be edited, click on **OK** to return to the *Employee Listing* screen.

Edit the time card records for other employees as needed, or click on **Close** to exit the Transman INterActive Edit program.

**Deleting Time Cards**

To delete a time line from the Time Cards Listing screen, select the time line you want to delete, then right-click in the grid and select **Delete Time Card**.
Printing Time Cards

From the Employee Time Card Listing screen, highlight the time card entry you want to print, then right-click in the grid and select **Print ▶ Print Selected Timecards**.

To print multiple time cards, use Shift to select a range of records, or Ctrl to select specific records, then right-click and select **Print ▶ Print Selected Timecards**.

To print all time cards for the employee, no lines need to be selected. Right-click in the grid and select **Print ▶ Print All Timecards**.
Chapter 6: Transman INterActive - Parts Workstation

The Transman INterActive Parts Workstation program enables mechanics using TINA Mechanics Workstation to order parts based on repair order sections. This tool can be used by the Parts department to expedite the ordering and distribution of parts to be used on units awaiting repair.

Parts Workstation Setup

To set up Parts Workstation to track parts in Transman INterActive, start Transman/SQL, then go to SysMgr ▶ Options ▶ Tina and click Parts WS.

Ensure the Use Parts Workstation for Parts Requests check box is checked.

When Parts Workstation is used, the Charge Parts button is disabled. All parts must be obtained using a parts request.
Starting Parts Workstation

When the Parts Workstation program is started, the *Parts Department Defaults* dialog box is displayed.

Select the Shop from the drop-down list.

You can set the screen refresh time (or accept the default). A refresh time setting of 0 (zero) turns off the screen refresh feature; a setting other than zero causes the screen to refresh at the specified interval. This ensures that the screen always contains the most up-to-date information.

You can display part requests for specific employees or unit IDs. This is useful if your shop creates a large number of part requests.

Click **OK** to continue. The *Parts Department* screen is displayed with the *Requests* tab open.

From this screen you can:

- open individual part requests
- print pick lists for parts that are in a shop’s inventory
- view or edit a repair order
- view parts, labor, or services lines on the associated repair order
- view unit information
- print a listing of the part requests
- export part request data.

**Parts Workstation Toolbar**

The Parts Workstation Toolbar contains icons that determine what data is displayed and how it is displayed.

<table>
<thead>
<tr>
<th>Key</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Icon]</td>
<td>Displays the Parts Request screen for individual shops.</td>
</tr>
</tbody>
</table>
| ![Icon] | Displays unit information from the Units master file for the selected unit.  
**NOTE:** You can also view unit information by right-clicking in the Unit ID field. |
| ![Icon] | Displays the requisition list for the shop. |
| ![Icon] | Opens a new purchase order. |
| ![Icon] | Searches purchase orders. Criteria can be specified to narrow the search results. |
| ![Icon] | Displays the shop inventory master. |
| ![Icon] | Displays the parts catalog master. |
Working With Shops

The Show Parts Request button displays the Parts Department screen for individual shops. Shops that were previously selected in a session are displayed in windows underneath the currently-displayed shop’s Parts Department window. To access a window for a shop that was previously displayed, minimize the displayed windows until the correct shop’s parts request screen is displayed (the shop ID is shown on the Parts Department window).

<table>
<thead>
<tr>
<th>Key</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Display Vendor Master" /></td>
<td>Displays the vendor's master file.</td>
</tr>
<tr>
<td><img src="image" alt="Print Form" /></td>
<td>Prints the form currently displayed.</td>
</tr>
<tr>
<td><img src="image" alt="Send Form As Email" /></td>
<td>Sends the data in the currently displayed form as an e-mail.</td>
</tr>
<tr>
<td><img src="image" alt="Refresh Grid" /></td>
<td>Refresh the contents of the grid. Hotkey: F5</td>
</tr>
<tr>
<td><img src="image" alt="Show/Hide Grid Lines" /></td>
<td>Show or hide grid lines. Hotkey: F6</td>
</tr>
<tr>
<td><img src="image" alt="Expand All Nodes" /></td>
<td>Expands all nodes in the grid being displayed. Hotkey: F7</td>
</tr>
<tr>
<td><img src="image" alt="Collapse All Nodes" /></td>
<td>Collapses all nodes in the grid being displayed. Hotkey: F8</td>
</tr>
<tr>
<td><img src="image" alt="Set Auto-Width" /></td>
<td>Sets auto-width in the grid; enables you to change column widths to display minimized columns that contain no data.</td>
</tr>
<tr>
<td><img src="image" alt="Customize Grid" /></td>
<td>Customize grid displays a list of columns that can be added to or removed from the display. The list can also be displayed by right-clicking in the grid and selecting Customize. Hotkey: F9</td>
</tr>
<tr>
<td><img src="image" alt="Enable/Disable Group Summary" /></td>
<td>Enables or disables the group summary bar function. Selected (enabled) by default.</td>
</tr>
<tr>
<td><img src="image" alt="Help" /></td>
<td>Displays the help for the current screen (works the same as if F1 were touched).</td>
</tr>
</tbody>
</table>
When the Parts Department Defaults dialog box is displayed, it contains a list of available shops - but only those shops whose Parts Department windows have not been previously viewed in the current session.

If the shop you want to view is not in the list, it means that the shop’s Part Department window is already open and is covered by another shop’s window.

For this reason, it can be helpful to minimize open windows when opening a new shop’s Parts Department window to make them more accessible, or to close the window for a shop when you are finished accessing the Parts Department information.

In this example, windows for three shops are open. The two windows for previously-opened shops are minimized along the bottom of the screen.

**Customize How Data is Displayed**

You can customize how data is displayed in most of the Transman/SQL programs, including Parts Manager.

For more information on how to customize the way that data is displayed in Parts Manager, see “Customize How Data is Displayed” on page 49.

**Using Transman/SQL Functions**

You can access many Transman/SQL functions from within Parts Manager.

<table>
<thead>
<tr>
<th>Menu</th>
<th>Sub-menu</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Masters</td>
<td>Shop Inventory</td>
<td>Access the shop inventory</td>
</tr>
<tr>
<td></td>
<td>Parts Catalog</td>
<td>Access the parts catalog</td>
</tr>
<tr>
<td></td>
<td>Vendors</td>
<td>Access the Vendors master file</td>
</tr>
</tbody>
</table>
### Parts Request Status

A parts request can have one of three status types.

<table>
<thead>
<tr>
<th>Status</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open</td>
<td>A part has been requested.</td>
</tr>
<tr>
<td>Ordered</td>
<td>A requested part has been ordered from a vendor. The status was changed when a purchase order was created.</td>
</tr>
<tr>
<td>Filled</td>
<td>A part was received from a purchase order and was made available to the mechanic.</td>
</tr>
</tbody>
</table>

### Ordering Parts in Transman INterActive

A mechanic uses the Mechanic Workstation program to order parts directly from a repair order. For more information on using Mechanic Workstation to request parts needed for repairs, see “Transman Interactive - Mechanic Workstation” on page 17.

After a part is ordered in Transman INterActive, the part request is displayed on the Parts Department screen in Parts Workstation.
Part Requests are displayed by repair order number and section.

You can double-click on a parts request to open it, or right-click and select Open Part Request from the menu.

The Part Request screen is displayed.
The Part Request window displays a list of all parts that have been ordered for this section of the repair order.

**NOTE:** To make it easier to view open and filled entries, slide the Req Status column header up into the Group area. The display will be sorted into Open and Filled categories.

Parts that have a request status of OPEN can have parts added or deleted, or you can look up part information from the parts catalog. Parts that have a request status of FILLED cannot access the part lookup feature, and the part cannot be deleted. You can add additional parts to a FILLED request.

When the associated repair order is closed, the parts request line is removed from this screen.

### Parts Lookup

To search a shop's inventory for a part, right-click on the part request and select **Lookup Part**

The Shop Inventory Search screen is displayed.
Complete the search fields as appropriate and click **Search**. Double-click the part you want to add. It will be added as a manual request.

The Autocross feature is enabled for parts searches in Parts Workstation. To use this feature, type a substitute part number, a component code, or manufacturer part number in the Part ID field.

**Adding Parts**

To add parts to a part request, right-click on the request and select Add Part from the menu.

The associated repair order is opened and displays a line type of Part.
Complete the part number and quantity and any other fields as required. Click OK. If the part is in the shop’s inventory, it is removed from inventory and listed as Filled on the Part Request screen.

If the part is not in the shop’s inventory, a message is issued indicating the quantity requested for the part exceeds the quantity in inventory and asks if you want to create a manual requisition for the quantity of the part that must be ordered. Click Yes to create the manual requisition or No to cancel the part request.

Deleting Parts

To delete parts from a part request, right-click on the request and select Delete Part from the menu.

A message is issued asking if you want to delete the part. Click Yes to delete the part, or No to cancel the delete request.
Filling Parts Requests

On the Parts Request screen, double-click an open part request.

The associated repair order is displayed.
The Quantity field is highlighted. Touch Tab to move the cursor out of the Quantity field, then click OK. The Part Request screen is displayed again, and the part is displayed in the Filled list.

**Serialized Parts**

If a part in Transman’s Parts Catalog has the Serialized Part check box checked in the RO Requirements section, when the part is charged out in Parts Workstation, a prompt is displayed for the new part’s and the old part’s serial numbers. The new part’s serial number is a required field.

**Open Orders Tab**

The Open Orders tab displays a list of all repair orders with parts requests. Repair orders in Closed status are shown highlighted in blue.
To view or edit a repair order, double-click on the RO in the list.

This grid can be sorted using column headers as sort criteria.

Right-click in the grid to display a menu that enables you to create a new repair order; view or edit a repair order; view parts, labor, or service lines; view unit information; view items on order (view items on pending orders or parts requests); add a new line for parts, labor, services, or comments, print a repair order or the listing screen, or customize the display.

Employees Tab

The Employees tab displays a list of employees assigned to the active shop.
Double-click on an employee in the listing to display a list of assignments for that employee.
Chapter 7: Using Palm Devices with Transman INterActive

Transman INterActive works with Palm devices. This enables a mechanic to go remote using a Palm device, make his repair order and parts request entries on the remote device, and then upload the data into Transman/SQL.

NOTE: Parts that are kits are not supported on the Palm device. If a kit is charged on the Palm, after the HotSync occurs, an error is issued that KITS are not supported and a different part can be selected.

Installation and Setup

There are installation and setup steps required to enable Palm devices in Transman INterActive. For information about installing and configuring, see the Transman/SQL Installation and Administration Guide.

Go to Masters ▶ Employees and display the employee information for the mechanic who will be using the Palm device. On the Misc tab, ensure that the check box for the Allow Mechanic to Go Remote option is checked.

Your TRANSMAN.INI file must contain an entry for Tina for Palm that provides the path information for the Palm files.

```
[Tina for Palm]
filepath=c:\tinapalm
```

Using Palm Devices with Transman INterActive

When the Tina for Palm programs are installed and the Allow Mechanic to Go Remote option is checked, when the Transman INterActive screen is displayed, a Remote button is added.
To enable the Palm device, click **Remote**.

Before the Palm device can be used, you must perform a hotsync. This must be done each time the mechanic logs in and wants to use the Palm device. The **Waiting for Hotsync** screen is displayed.

On the Palm device, on the **Home** screen, click on **Hotsync**.
The *Hotsync* screen is displayed.

Click the *Hotsync* icon to start the hotsync process and assign the Palm device to the mechanic.

The hotsync process can take several minutes, depending on how much data resides in your Transman/SQL database.

A connection message is displayed.
A Hotsync message is displayed.

![Hotsync message](image1)

When the hotsync is complete, the mechanic is automatically logged out of Transman INterActive and is logged onto the Palm device.

![Hotsync completion](image2)

Click on the **Home** button.

![Home button](image3)

The **Main Menu** is displayed. Click on the **TMT/Palm** icon.

![Main Menu](image4)
The *TMT Software* screen is displayed.

From this screen, you can access the Tina for Palm functions.

**Using Palm Devices to Enter TINA Data**

The screens used for the Palm device contain the same information as the standard Mechanic Workstation screens, although in a different format. The steps to complete a repair order, for example, are the same as if it was being done in Mechanic Workstation.

For more information on using Transman/SQL’s features, see the *Transman/SQL Workbook*.

From the *TMT Software* screen, click **Tina for Palm**.

A list of repair orders assigned to the employee is displayed. This screen is similar to the one initially displayed in Mechanic Workstation and provides many of the same functions.

You can also start a new repair order, edit a repair order, or add sections to repair orders. You can enter indirect, break, or lunch time.

RO Assignments are automatically downloaded to the Palm device and displayed when an employee goes remote to the Palm. Assignments are displayed as open repair orders. An employee can edit sections and add part lines, service lines, and comment lines.

**Create a New Repair Order**

Click **New RO**. The *TFP Repair Order* screen is displayed. Enter a Unit ID and click **Post**.
Select a component, complaint code and repair reason. Click **Post** to save the new repair order; click **Post and Log-In** to start working on the RO task.

The Tina for Palm screen is displayed again. The new repair order is added to the list of repair orders.

**Edit a Repair Order**
To edit an existing repair order, highlight the RO in the list to select it and click **Edit RO**. The **Add a Section** screen is displayed.

Click **Log In** to begin working on the repair, or **Add Section** to add an RO section.

**Add a Section**
To add a section to a repair order, highlight the repair order in the list and click **Add Section**. The **Add a Section** screen is displayed.

**Clock Out for Break, Lunch, or Indirect Charge**
To clock out for a break or lunch, click **Break** or **Lunch**. To clock out on an indirect charge, click **Indirect Charge**.
Troubleshooting

Use these procedures to troubleshoot problems with the Palm device and Transman INterActive.

Reset a Remote Employee

Occasionally a mechanic does not log out of the Palm device correctly, or the device stops working or shuts off prematurely. When the mechanic attempts to log on to the Palm device again, an error message is issued, or the Palm attempts to export its data into Transman/SQL, but the data might be corrupted. In this case, it is necessary to reset the employee and the Palm device before it can be used again.

When an employee goes remote to use the Palm device, a Remote record is created on his timecard.

To reset the employee, go into Tina Edit and select the employee. Click on the most recent timecard record.
Right-click the record and select **Remote ▶ Reset Remote Employee**. This clears the Remote record from the timecard.

Right-click the record again and select **Remote ▶ Clear Employee Handheld**. This resets the Palm device.

After these steps are complete, the mechanic should be able to log into the Palm device again.
Chapter 8: Transman INterActive Reports

Go to Masters ▶ Reports ▶ TINA Reports.

Two reports are available:

• TINA Employee Time Analysis
• TINA Employee Time Card Report

For more information on creating these reports, see the Transman/SQL Reports Manual.
The TINA Employee Time Analysis Report provides a detailed analysis for the labor time entered through Transman InterActive. It breaks down each employee’s labor time by Repair Order total, Indirect total, Lunch Break total, Idle Time total, Total Shift Time, and Total Paid Time. Time for each category is listed in hours:minutes and hours:hundredths format.

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Emp ID</th>
<th>Repair Order</th>
<th>Indirect</th>
<th>Break</th>
<th>Idle</th>
<th>Total Paid</th>
<th>LunchBreak</th>
<th>Total Shift</th>
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</tbody>
</table>

The **TINA Employee Time Card Report** displays information for each day in a date range the clock in/out time before lunch, the clock in/out time after lunch, the paid hours for the day, and a total running hours paid for the date range entered.