



Optimize Fleet Productivity

## Utilizing Job Standards

Frequent repair jobs can be standardized with parts, coding and/or notes and can be defined as Job Standards. Standards can be applied to repairs as needed.

The purpose of Job Standards in CFAWin8 is two-fold:

1. **Reduce manual data entry.** Frequent repair services, such as PM Services, Brake Services, Transmission Services, etc. are stored as a Job Standard. The Job Standard consists of the System Codes required to complete the service, including repair coding, notes, parts, etc.
2. **Internal performance standard.** Budgeted hours for each job may be set in the Job Standard and can be compared to actual technician hours required to complete the job. Reporting is available to compare budgeted vs. actual hours for jobs added to a Repair Order as part of a Job Standard.

Additional benefits of Job Standards include:

- **Improved inventory management.** Part requirements known for planned jobs.
- **Improved labor management.** Budgeted workload identifies mechanic scheduling.
- **Improved customer service.** Budgeted resources (i.e. techs, bays, etc.) increases appointment efficiency with user departments.
- **Improved needs assessment.** Reporting enables proof of need when scheduled workload and unplanned events exceed the shops labor and physical capacity.

## Job Standards Setup

There are new tables in System Setup -> Setup Tables to define Job Standards. Users must have Admin or System Ops access to update these tables. Users with stored Equipment Table or Repair Order Entry grid layouts may need to Reset Grid Layouts to view new fields.

### Equipment Tab Tables

**Equipment Class:** Defines groups of equipment with similar characteristics, maintenance, and parts. The Equipment Class codes are assigned to Equipment in the Equipment Table and are linked to Job Class codes via the Equipment Job Class Table.

Equipment Class	
Id	Description
CONVEYORS	Conveyor Belts
DUMPS	Dump Trucks
FIRE-ENGINE	Fire Engine
FORD-EXP	Ford Explorer
FORKS	Forklifts
LDPICKUPS	Light-Duty Pickups
SEDANS	Sedans
VACS	Leaf Vacs
▶ WASTE-FL	Waste Front Loader



**Note:** Id 20-character max length and Description 40-character max length.

**Job Class:** Defines available services to be assigned to Job Standards. Job Class codes are assigned to Job Standards in the Job Standards -> Job Standard – Master and are linked to Equipment Class Codes via the Equipment Job Class Table.

Job Class	
Id	Description
CONVPM	Conveyor PM Service
FIREACCESSORY	Fire Unit Accessory
FIREBRAKES	Fire Unit Brakes
FIREPM	Fire Unit PM
LDPUACCESSORY	LD Pickup Accessory
LDPUBRAKES	LD Pickup Brakes
LDPUPM	LD Pickup PM
PATROLACCESSORY	PD Patrol Accessory
PATROLPM	PD Patrol PM
PATROLBRAKES	PD Patrol Brakes



**Note:** Id 20-character max length and Description 40-character max length.

**Equipment Job Class:** Defines valid Job Class code links per Equipment Class codes. Equipment Classes and Job classes must be setup before assigning in the Equipment Job Class Table. Assign Equipment Class Groups to Job Class Groups from the drop-down menus.

Equipment Job Class	
Equip Class Group	Job Class Group
CONVEYORS	CONVPM
FIRE-ENGINE	FIREACCESSORY
FIRE-ENGINE	FIREBRAKES
FIRE-ENGINE	FIREPM
FORD-EXP	PATROLPM
FORD-EXP	PATROLBRAKES
FORD-EXP	PATROLACCESSORY
LDPICKUPS	LDPUPM
LDPICKUPS	LDPUBRAKES
LDPICKUPS	LDPUACCESSORY

**Job Parts Kit Tab**

**Job Standard - Parts Kit Master:** Lists the part kits available for assignment to Job Standards. A single kit may contain multiple parts from any stockroom, including non-stocked parts. Stocked parts must be setup in the Inventory Table before kit assignment. The 'Is Active?' checkbox determines if the kit is available for Job Standards use.

Job Standard - Parts Kit Master					
Id	Desc	Is Active?	Changed By	Changed On	
BRAKE-FORDEXPKIT	BRAKE SERVICE FORD EXPLORER	<input checked="" type="checkbox"/>	USER	10/27/2017 11:09	
PMA-FORDEXPKIT	LOF & INSPECTION FORD EXPLORER	<input checked="" type="checkbox"/>	USER	10/27/2017 11:09	
PMA-VACSKIT	LOF & INSPECTION LEAF VACS	<input checked="" type="checkbox"/>	USER	10/27/2017 11:10	
TRANS-FORDEXPKIT	TRANSMISSION SERVICE FORD EXPLO	<input checked="" type="checkbox"/>	USER	10/27/2017 11:09	
*		<input type="checkbox"/>			



**Note:** Id 20-character max length and Desc 40-character max length.

**Job Standard – Parts Kit:** Defines the parts used within the Job Standard - Parts Kit Master. Parts can be added, updated, and deleted. The 'Is Active?' checkbox determines if the part will populate on repair orders when the kit is used.

Job Standard - Parts Kit									
	Stockroom	Part	Description	Qty	Inv Fail Code	Is Active?	Messages	Changed By	Changed On
	01	00009833	Filter Air	0.00	44	<input checked="" type="checkbox"/>		USER	10/27/2017 11:33
	01	02100050	Filter Oil	1.00	20	<input checked="" type="checkbox"/>		USER	10/27/2017 11:33
▶	FL	00005W30	Motor Oil 5W30	6.00		<input checked="" type="checkbox"/>		USER	10/27/2017 11:33
	0L	7D88C907	GASKET OIL PAN	1.00		<input checked="" type="checkbox"/>		USER	10/27/2017 12:25
*						<input type="checkbox"/>			



**Note:** Description pulls from the Inventory Table. Messages will display potential errors per part.

### Job Standards Tab

**Job Standard - Master Table:** Lists available fleet Job Standards. This table determines what Equipment Job Class Job Standards are available to equipment. Equipment Classes, Job Classes, and Equipment Job Classes must be setup before creating job standards. The 'Is Active?' checkbox determines if the Job Standard is available for equipment assignment.

Job Standard - Master								
	Id	Description	Job Class	Notes	Is Active?	Changed By	Changed On	
	CONVEYORPM1	CONVEYOR SEMIANNUAL PM	CONVPM		<input checked="" type="checkbox"/>	USER	10/27/2017 14:46	
	PATROLSVC1	PMA SQUADS	PATROLPM		<input checked="" type="checkbox"/>	USER	10/27/2017 14:46	
	PATROLSVC2	PMB SQUADS	PATROLPM		<input checked="" type="checkbox"/>	USER	10/27/2017 14:47	
	PATROLBRAKES	BRAKES SQUADS	PATROLBRAKES		<input checked="" type="checkbox"/>	USER	10/27/2017 14:47	
	PATROLUPFITLIGHTS	UPFIT SQUADS-LIGHTS	PATROLACCESSORY		<input checked="" type="checkbox"/>	USER	10/27/2017 14:47	
▶	PATROLUPFITPCS	UPFIT SQUADS-PCS	PATROLACCESSORY		<input checked="" type="checkbox"/>	USER	10/27/2017 14:48	
*					<input type="checkbox"/>			



**Note:** Id 20-character max length and Description 40-character max length. Notes can hold up to 4,000 characters.

**Job Standard - Job Settings:** Defines the repair jobs used within the Job Standard - Master Table. System codes, repair codes, notes, parts, etc. can be set for completing repair jobs. Repair jobs can be added, updated, and deleted any time. Job Parts Kits can be added to each repair job.

The more information populated in the Job Standard table the less to be entered on repair orders. Budget Hours are utilized on new reports but are not required. The 'Is Active?' checkbox determines if the repair job will populate on repair orders when the standard is used.

Job Standard - Job Settings													
	Group-System	Work Accomplish	Job Notes	Budget Hours	Repair Reason	Repair Site	Job Stat	Job Part Kit Id	Is Active?	Changed By	Changed On	Line Number	
▶	01-PMA	09	LUBE, OIL, FILTER	0.2500	08	01		PMA-FORDEXPKIT	<input checked="" type="checkbox"/>	USER	10/27/2017 15:34	1	
	01-PMD	12	52 POINT INSPECTION	0.2500	08	01			<input checked="" type="checkbox"/>	USER	10/27/2017 15:35	2	
	10-79	06	SAFETY DEVICES - INSPECT	0.2500	08	01			<input checked="" type="checkbox"/>	USER	10/27/2017 15:36	3	
	06-34	06	LIGHTS - INSPECT	0.2500	08	01			<input checked="" type="checkbox"/>	USER	10/27/2017 15:36	4	
*									<input type="checkbox"/>				

**Equipment Table Setup**

**Equipment Job Class:** The Equipment Classes defined in System Setup must be assigned to equipment records. An Equipment Job Class is selected in the associated field within the Assignments section of the Equipment Table. Users with Master Table access rights set to All can assign the classes. Class assignment determines the Job Standards available for use in repair order entry and PM Job Standard availability.

Equipment: 603, 2001 CHEVY, CAPRICE, 1FDYW90W5DVA19414 [Unlocked]

Identification		Makes, Models, Rollups					Assignments		
Equipment#	▲	Year	Chassis Make	Chassis Model	Chassis SerNo	Chassis SerNo (Last 8)	Misc	Equipment Job Class	Veh St
450		2002	MACK	RS686ST	1FDYW90WXDVA21324	DVA21324	SHELDON		Active
602		2001	FORD	EXPLORER	1FDYW90W5DVA19413	DVA19413	OHLINGER	FORD-EXP	At Mfg
603	▶	2001	CHEVY	CAPRICE	1FDYW90W5DVA19414	DVA19414	MAGEE	SEDANS	At Mfg
604		2001	CHEVY	S10	1FDYW90W5DVA19415	DVA19415	FIGEUROA	LDPICKUPS	At Mfg
605		2004	CHEVY	BLAZER	1FDYW90W5DVA19416	DVA19416	SACKIS		Receiv
606		2001	MACK	RS686ST	1FDYW90W7DVA19417	DVA19417	FARRINGTON		Active

**PM Job Standard:** Users can select one Job Standard per PM Level. All available PM Job Standards are based on the equipment's assigned Equipment Job Class. Creating a Repair Order through the hotlist will apply the entire Job Standard rather than just the PM Group-System code.

Identification			Meter				Days				PM Job Standard	Update More Frequent
PM Level	▲	Description	Meter to Use	Last Reading	Usage Interval	Due at Reading	Last Completed On	Day Interval	Due On	Day D		<input type="checkbox"/>
01-PMA		Oil Change	Miles	33333	3000	36333	10/01/2017	90	10/31/2017		PATROLSVC1	<input checked="" type="checkbox"/>
01-PMB		Oil Change/TireRot	Miles	33333	6000	39333	09/10/2017	90	12/09/2017		PATROLSVC2	<input checked="" type="checkbox"/>

## Applying Job Standards



Apply Job Standard – Repair Order Entry:

1. Create a new Repair Order.
2. Select Equipment# and other header data per operational guidelines.
3. Select the Job Standard field.
4. Click the ellipsis button next to AddJob...

Repair Order#: 000000044

Repair Order#	Repair Order Status	Equipment#	Shop Loc	Rep Class	Repair Progress	Job Standard	Open Date/Time	Exped Date/T	Meter_01 Reading	Meter_02 Reading	Meter_03 Reading	Downtime Hours	Downtim Reasor
000000044	None Posted	602	01	02	No Jobs	Add Job ...	11/02/2017 14:04	00:0	34702	0	0	0.00	

  

Search Results

Job Standard - Master			
Id	Description	Job Class	Notes
PATROLBRAKES	BRAKES SQUADS	PATROLBRAKE	
<b>PATROLSVC1</b>	<b>PMA SQUADS</b>	<b>PATROLPM</b>	
PATROLSVC2	PMB SQUADS	PATROLPM	
PATROLUPFITLIGHTS	UPFIT SQUADS-LIGHTS	PATROLACCES	
PATROLUPFITPCS	UPFIT SQUADS-PCS	PATROLACCES	

  

Job Standard - Job Settings									
Group-System	Work Accomplish	Job Notes	Budget Hours	Repair Reason	Repair Site	Job Stat	Job Part Kit Id	Is Active?	Chan
01-FMA	09	<b>LUBE, OIL, FILTER</b>	0.2500	08	01		PMA-FDRDEXPKIT	<input checked="" type="checkbox"/>	USER
01-PMD	12	52 POINT INSPECTION	0.2500	08	01			<input checked="" type="checkbox"/>	USER
10-79	06	SAFETY DEVICES - INSPECT	0.2500	08	01			<input checked="" type="checkbox"/>	USER
06-34	06	LIGHTS - INSPECT	0.2500	08	01			<input checked="" type="checkbox"/>	USER

Select Cancel

5. Highlight the desired Job Standard in the Job Standard - Master window and click Select.
6. The Job Standard jobs, parts, notes, and budgets are added to the Repair Order.
7. Proceed with Repair Order Entry as usual.



Apply Job Standard – Equipment Hot List:

The process of creating Repair Orders from the Equipment Hot List is exactly the same even when Job Standards are involved. The difference is in the time saving potential when adding a PM repair job to a repair order. Any PMs with a PM Job Standard assigned in the Equipment Table will populate the appropriate Job Standard jobs, parts, notes, and budgets on the repair order.

## Reports

The Job Master Id List, Job Master Id List w/ Parts and Job Part Kit Master List provides information on the setup of job standards. These reports will denote any job standard, job, part kit, or part as Inactive when set as such in the setup tables. Any piece marked as Inactive will not populate on a repair order when the job standard is selected. The Repair Transaction – Budget vs. Actual Hours compares expected time to actual time needed to complete a job.

### Equipment Reports:

#### ***Job Master Id List (eqjida.rpt)***

- Listing of all Job Standards from the Job Standards setup table, including the Id, Description, Job Class, and Notes.
- Each job in the Job Standard is listed, including Group-System, Job Notes, and Budget Hours.

#### ***Job Master Id List w/ Parts (eqjldb.rpt)***

- Same layout and data listing as the Job Master Id List.
- Each job line now includes all designated parts to the assigned Job Part Kit including Part - Stockroom, Description, and Qty.

#### ***Repair Transaction – Budget vs. Actual Hours (eqrjbsta.rpt)***

- Lists repair transactions created from Job Standards, including Equipment, Repair Order, Rep Reason, Rep Site, Group System, Job Notes, Work Acc, and Mechanic/Vendor.
- Displays Budget Hours for each job and Actual Hours keyed for each job.
- The % of Budget calculates Actual Hours divided by Budget Hours.
- ***Only displays fully posted detail lines!***

### Inventory Reports:

#### ***Job Part Kit Master List (ptjlista.rpt)***

- Listing of all Job Part Kits, including Id and Desc.
- Parts assigned to each Job Part Kit are listed with the Part - Stockroom, Description, BinLoc, Fail Code, Qty Req'd, and On Hand Qty.