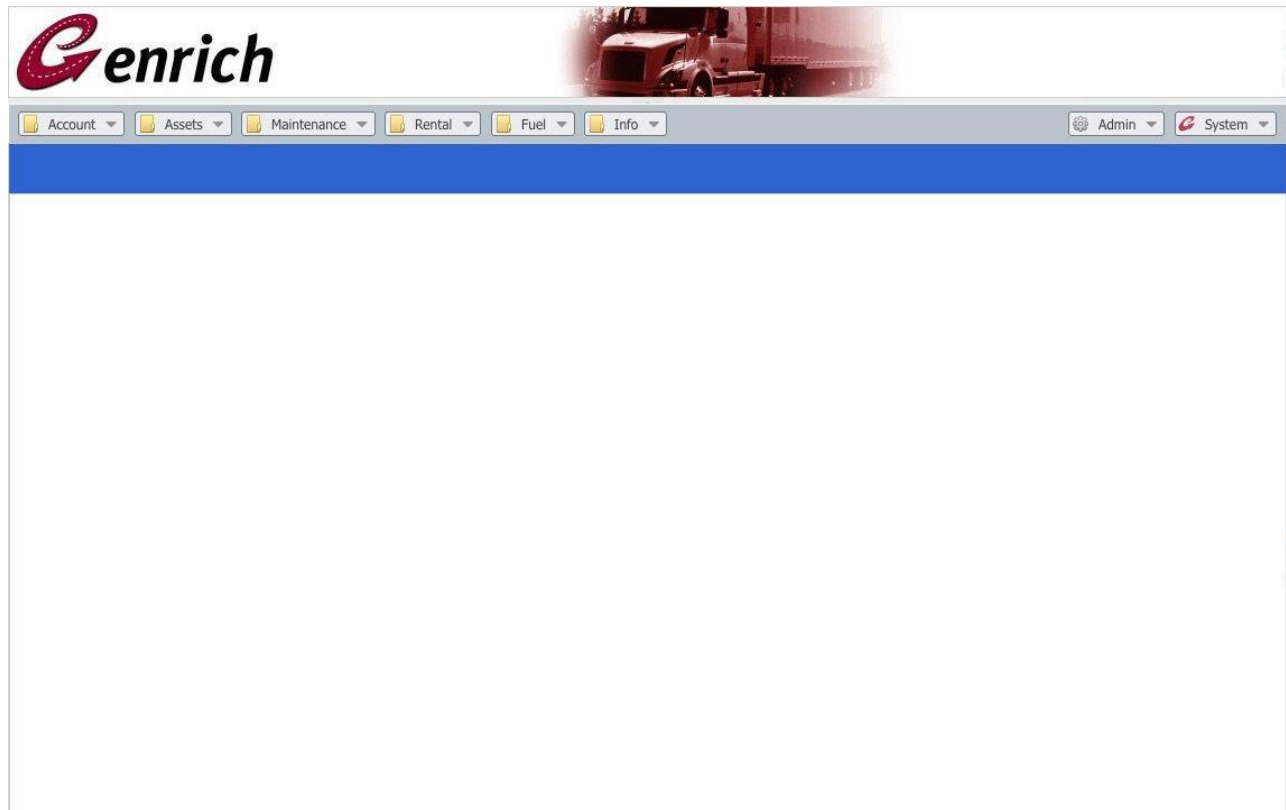# FLEET MANAGEMENT
FOR PROFIT

CUSTOMER WEB ACCESS
(CWA) USER REFERENCE

Introduction

The Customer Web Access (CWA) module provides online access to information about your equipment units. You will find information in some or all of the following areas: Account, Asset, Maintenance, Rental, Fuel, and Information.

When you log in to CWA, a screen similar to this will appear:
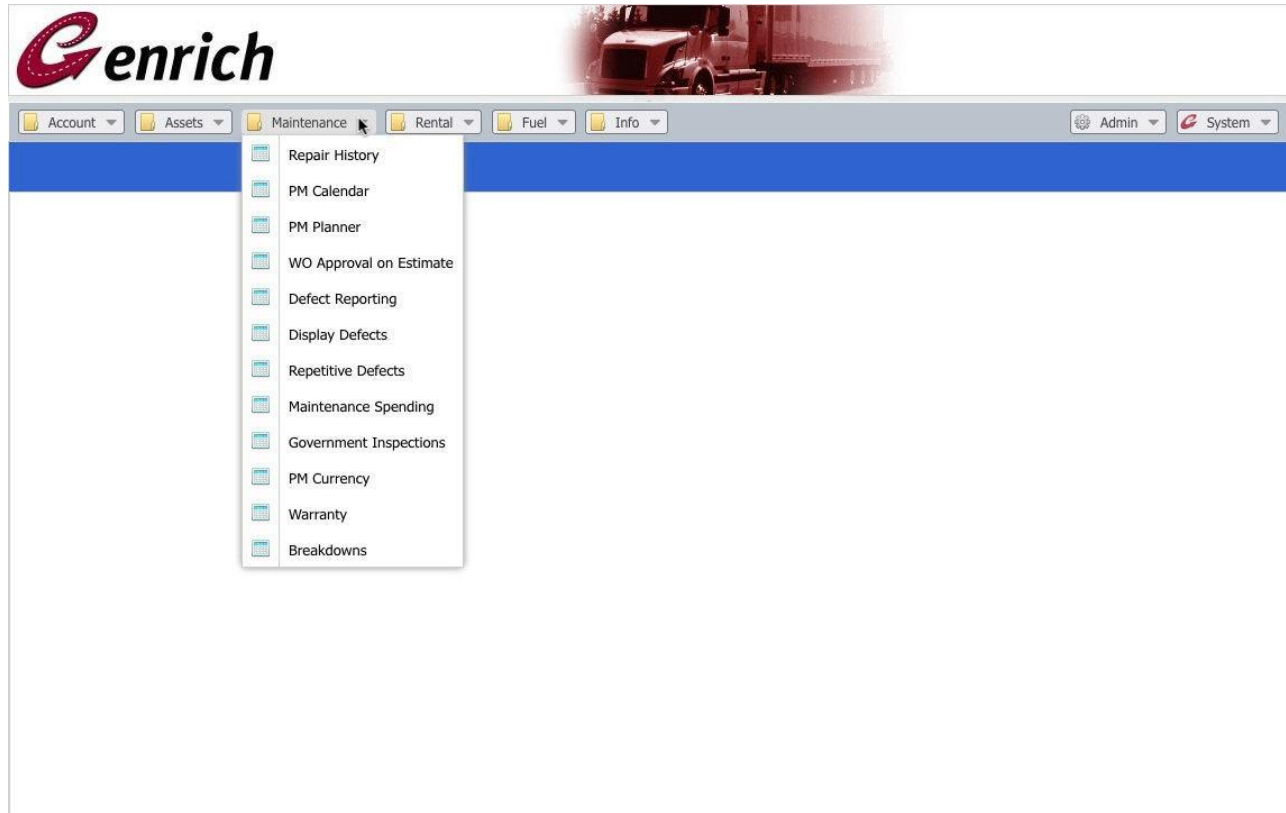

All standard Internet browser options work as usual.
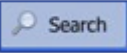
When you click on a menu option,

a drop-down list of selections will appear. Click on the selection you want to access the appropriate screen. *Note: the names of some options may vary on your system.*

Most reports will load initial data based on defaults that have been pre-set; it may take a few seconds

for the results to appear. Some may not load data until you click on the Search button that will appear in the top right section of the report screen. Some reports may not have search criteria for you to use.

Information

Many screens have an information button at the bottom right that you can click on to find out more about the particular panel you are on.

Selection Fields/Filters

The top of the report screen may or may not show a number of selection fields (filters) you can use to tailor the report results.


The number of possible selection fields will vary by report. Use the scroll bar to the right of the fields to view more, if available. You can use as many or as few filters as required to obtain the report you need.

Beside the field names, a column of selectable fields appears where you can identify what you want to see in the report. Many fields will have multiple levels of options for you to choose from. The options available will depend on the particular field.

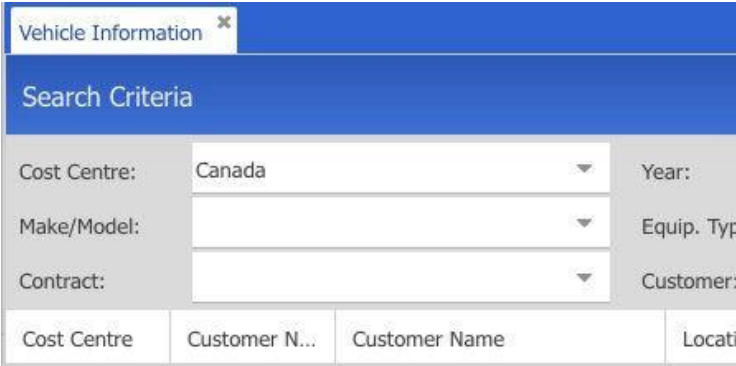The Cost Center field shows Corporate as the initial choice.
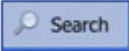
4 | P a g e

Clicking on the arrow shows more specific options:
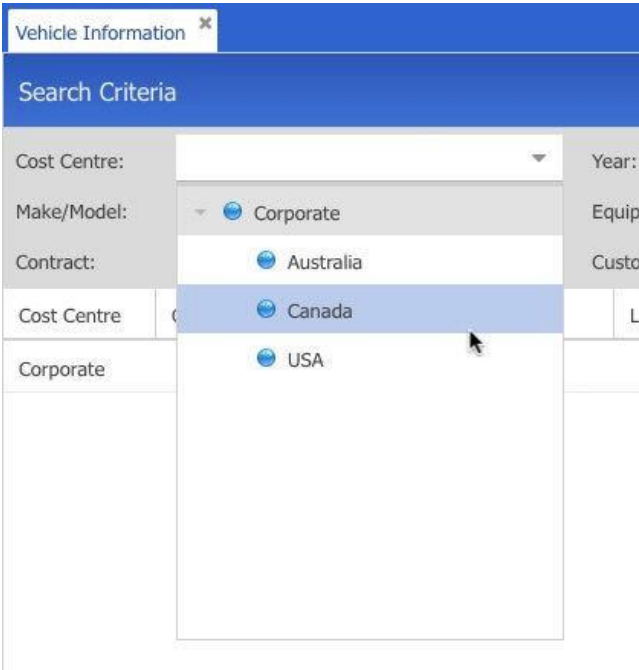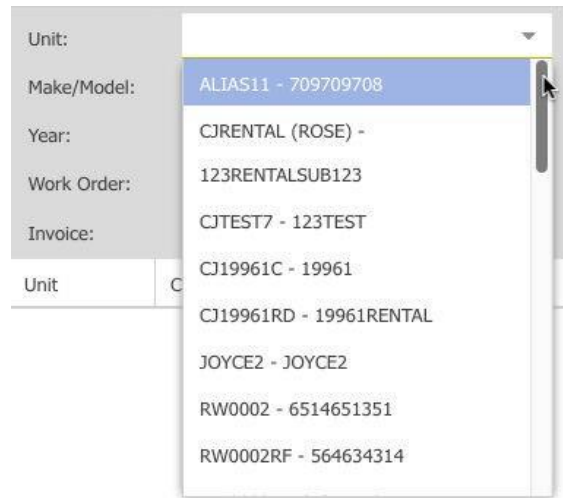

There may be multiple levels to choose from.

To make a selection, click on the item you want.

In order to have your new filter selections applied to the report, you must click on the [Search] Search button at the far right of the filter section. The system will then (re)load the report using the new filter values.

Selection Lists

Some filters will provide a list of valid values, and some of these lists may be long. Use the scroll bar to locate the item you want.

Click on the value you want to select it.

Text Entry

Some fields will not allow for a selection; instead, they will require you to enter text and/or numbers:

Dates

Date filters may have 2 input fields to allow you to enter a range of dates.

Date filters that require a full date will allow you to select from calendars:

When 2 calendars appear, you can choose a range of dates. If you want a single day, click on that date on both calendars.

You can use the left and right arrows beside the month to change months. Use the down arrow beside the year to change the year. Click on the actual date you wish to select. Click on the Today button if you want to select the current date. Click on the Reset button to return both calendars to the default (usually the current date).

To finalize your selection, click anywhere outside the date boxes; the dates you selected will be filled in.

The date picker

The date picker allows for selection of absolute dates, relative dates, and/or periods.

The relative and period selection options may take a little experimentation and practice to understand, but they provide a great deal of flexibility in your reporting. Reading the descriptions of your selections on the date pickers along with the dates that have actually been selected will help to speed up the learning process.

When you are picking a date range, the available combinations are:
- Absolute and Absolute
- Absolute and Relative
- Absolute and Period
- Absolute and Unbounded
- Relative and Period
- Relative and Unbounded
- Unbounded and Unbounded

Period and Period is not a valid option since a period needs to be relative to something.

The Date Picker will look like this when you first open it:
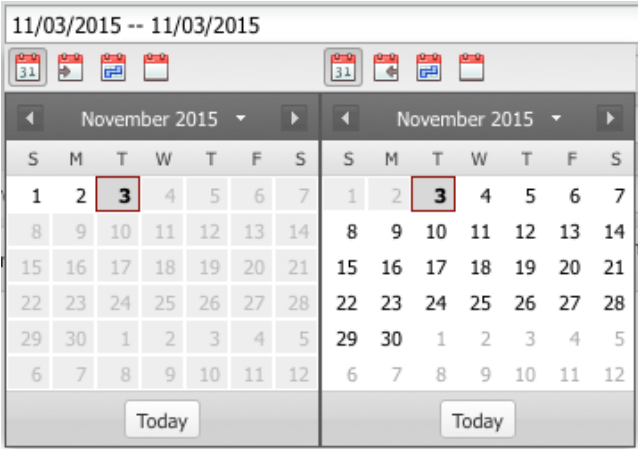
This is the Absolute date range picker. It allows you to pick specific dates.

The calendar on the left picks the start of the range and the calendar on the right picks the end of the range.

You can click on the left, right, and down arrows beside the month and year in each calendar to view and select from different months and years.

To select a relative date, click on for a relative beginning date or for a relative end date, or both for relative beginning and end dates.

Relative beginning date with absolute end date:
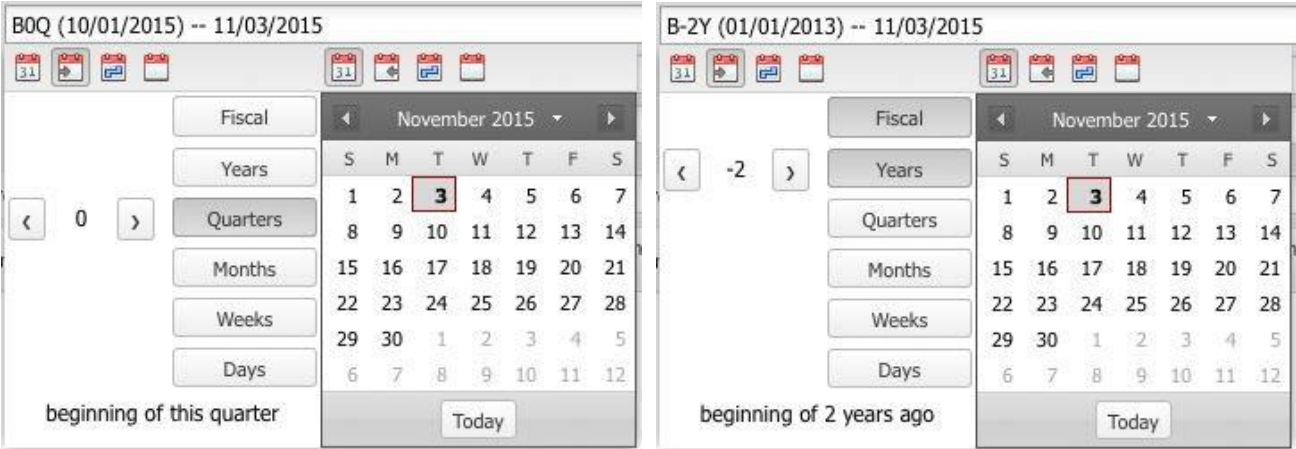
Relative ending date with absolute beginning date:

or Relative beginning and relative ending dates:

When choosing a range of relative dates, the relative date on the left is relative-to-beginning, the relative date on the right is relative-to-end.

With a range of dates, either the beginning date or the ending date can be a period, with the other date being either absolute or relative. A period may have any combination of Years, Months, Weeks, and Days. The only restriction is that the entire period must end up being positive.

To select a period, click on for either the beginning or ending of the range.

Period as the beginning date choice:

The period defaults to 0 years, 0 months, 0 weeks, 0 days, which is an invalid selection (shown by the date range box being pink).

Changing one or more of the zeros should adjust the selection to a valid one:

Now the beginning of the range is a period of 1 year and 3 weeks prior to the date selected as the end of the range, a valid selection.

Period as the ending date choice:

Again, the period defaults to zero, which is an invalid selection.

Now, we're going to report starting at the beginning of last quarter for a period of 5 months, a valid selection.

On the top line of the date picker, B0M means Beginning of current (0) Month. B-1W would be Beginning of last (-1) Week, E2Q would be End of 2 Quarters from now. P0D means Period of 0 Days.

The Unbounded option allows you to effectively select "any date within 24 months" as the beginning and/or ending date. The Unbounded date can be combined with an absolute date or a relative date, but not a period.

To select an unbounded date, click on [calendar icon] for an unbounded beginning or end date, or for both unbounded beginning and end dates.

Unbounded beginning date:
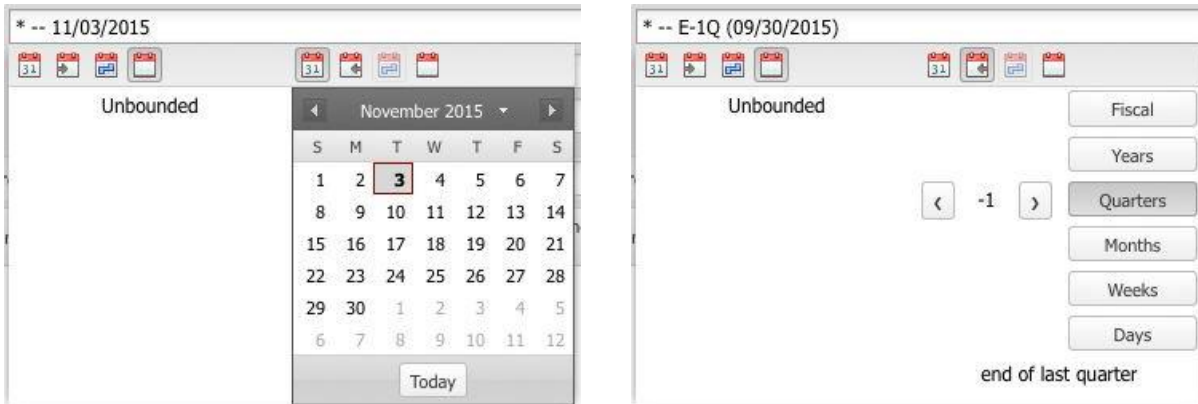
Unbounded ending date:
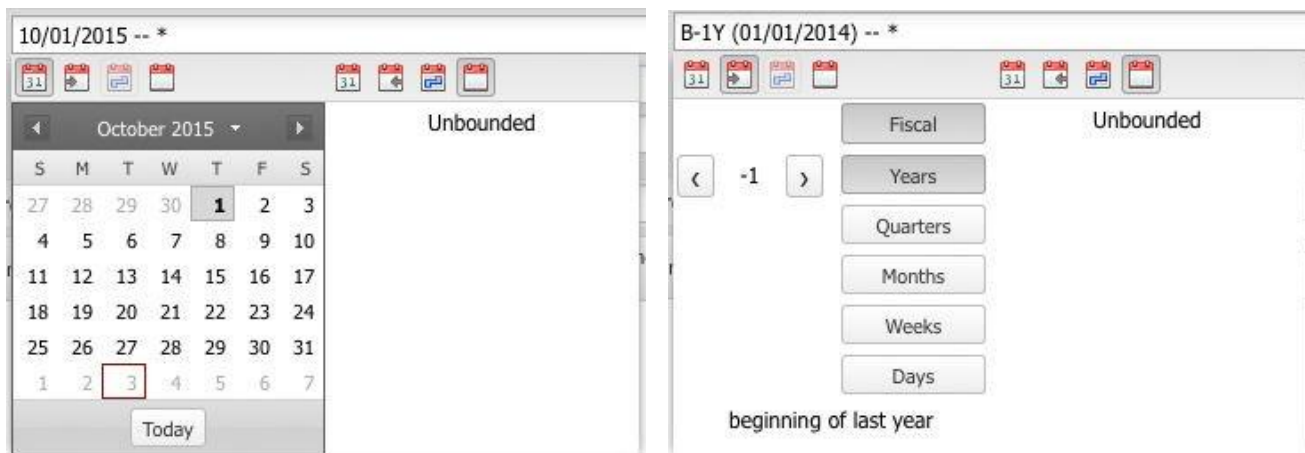
Unbounded beginning and ending dates (Note that this is the same as entering no dates, and therefore would not normally be used.):
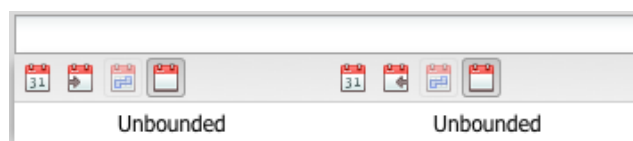
And don't forget, in order to have your date filter selections applied to the report, you must click on the

[Search button] button at the top right of the filter section.

The system will then reload the report using the new dates.

Change Report Appearance

You can change the order of the columns by clicking and dragging the column heading to the position you want it in. As you drag, arrows will appear to show you where the column will be if you release the mouse button.

You can change the width of a column. Rest your cursor on the line between the column you wish to change the size of and the column immediately to the right of that column. The cursor will change to two bars with arrows on either side. Click and hold the mouse button while you drag in the direction of change; i.e. if you wish to expand the column, drag to the right; if you wish to decrease the width of the column, drag to the left. Release the mouse button when the column reaches the desired size.


Note: that some columns may have a minimum width defined; you will not be able to drag them smaller.

You can choose to remove columns from the report. Place the cursor on a column heading; an arrow will appear on the right side of that heading. Click on the arrow to see the options; click on the Columns option.

Each column in the report will appear on the list. Click on a column's checkmark to remove it, and that column will no longer appear on your report.

You can re-add a column by clicking on the column's blank box on the list to add the checkmark back in.

Downloading Reports

Once you have a report showing the information you need, you may be able to download it to Excel or to a CSV format. (Note that this option may not be available for all reports.)

To download a report, click on the Download Excel button or the Download CSV button at the top right of the screen. The file will be prepared, and you will see the following screen:
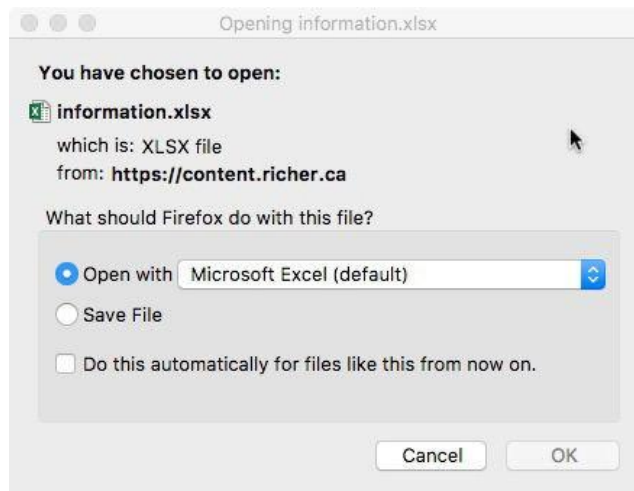
You can choose to open the file immediately in Excel (if you have Excel installed), or to save the file.

NOTE: If you are having trouble viewing Excel downloads and you are using IE 7 and Excel 2000 on Windows XP, you should follow the instructions here http://support.microsoft.com/kb/162059 to resolve the issue. The issue may impact other versions of the software as well, but it is a confirmed issue on XP/ IE7/Office2000.

Invoices

Invoice Rollup

Purpose: Invoice Rollup allows you to view a summary of outstanding, overdue, and unapplied payments. You can also access detailed information from this screen.

How To Get Here:

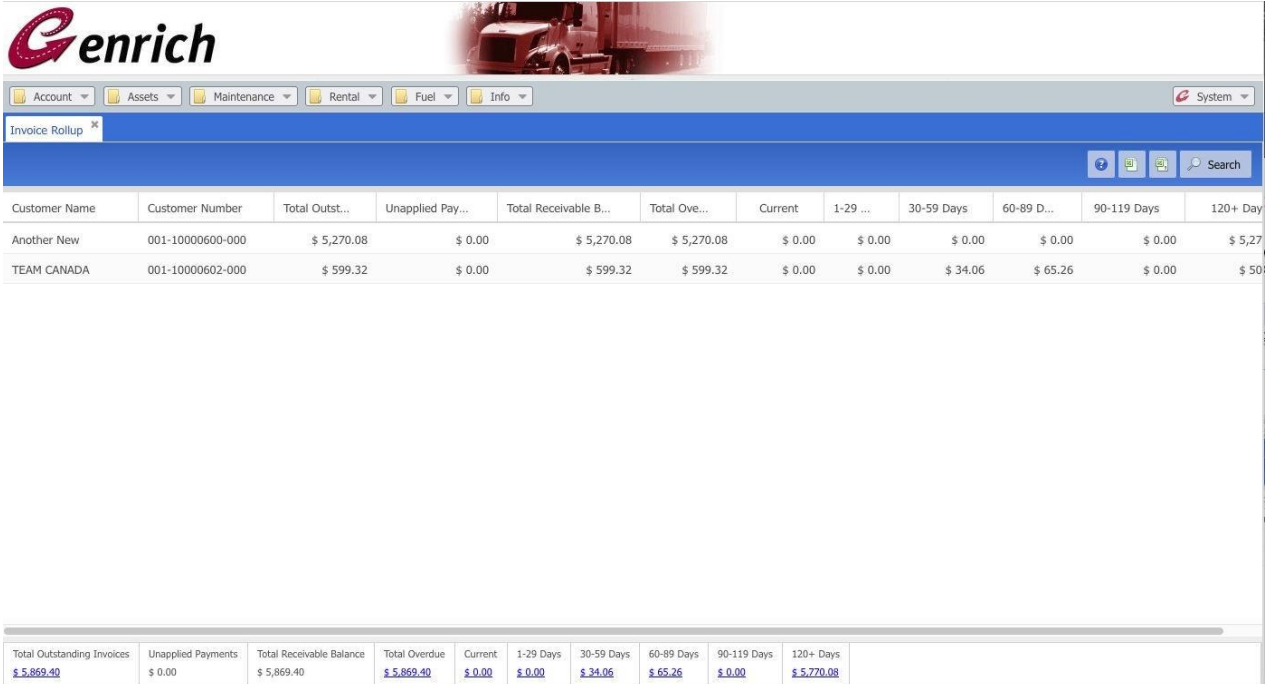| Start	Action		Result
From the CWA menu	Select	Account | Invoice Rollup	The Invoice Rollup tab appears

What You Can Do From Here:

Function	Action	Result	Refer To
To **download** the summary to an Excel file	Click the [Download Excel button icon] Download Excel button at the top right of the screen	The summary will be downloaded and, if you have MS Excel installed on your desktop, it will open the file in Excel for viewing	
	NOTE: If you are having trouble viewing Excel downloads and you are using IE 7 and Excel 2000 on Windows XP, you should follow the instructions here http://support.microsoft.com/kb/162059 to resolve the issue. The issue may impact other versions of the software as well, but it is a confirmed issue on XP/IE7/Office2000.		
To **download** the summary to a comma-separated values (CSV) file	Click the [Download CSV button icon] Download CSV button at the top right of the screen	The results will be downloaded and, if you have MS Excel installed on your desktop, it will open the file in Excel for viewing	
To view **details** about total outstanding, total overdue, current, or any of the bucket amounts	Click on the appropriate amount hyperlink at the bottom of the screen	The appropriate tab appears	

Invoice and Payments

Purpose: Invoice and Payments allows you to view your monthly lease and variable invoices and any payments made against them. The billing information is displayed in either a single invoice or broken amongst suffixes where required. If there is an invoice that has payment applied against it from two different cheques, it will show up on two lines.

How To Get Here:

Start	Action	Result
From the CWA menu	Select *Account	Invoice and Payments*	The *Invoice and Payments* tab appears, with data based on the default search criteria

Search Criteria on This Screen Are:

Field	Description
cost center	view invoices for a specific cost center
invoice date	view invoices for a range of invoice dates
due date	view invoices for a range of payment due dates
unit	view invoices for a specific unit
location	view invoices for a specific location
contract	view invoices for a specific contract
status	view invoices for a specific status; choices are Open or Fully Paid
invoice type	view invoices of a specific type; e.g. lease, rental, fuel, etc.
invoice	allows entry of a specific invoice number to view
check number	view the invoices applied to a specific check

What You Can Do From Here:

Function	Action	Result
To perform a **search and view the results** at the bottom of the page	Enter or change search criteria, then click the ⌕ Search button	The search will be performed and the search criteria you enter will be remembered for the duration of your session
To **reset the search criteria elements** to their default values, or to the previously saved search values	Click on the Reset button ⟲ Reset	
To view an **invoice's details**	Click on the hyperlink in the *invoice* column	The *Invoice Details* tab appears
To **download** the report to an Excel file	Click the [Excel icon] Download Excel button on the top right of the screen	The report will be downloaded and, if you have MS Excel installed on your desktop, it will open the file in Excel for viewing
	NOTE: If you are having trouble viewing Excel downloads and you are using IE 7 and Excel 2000 on Windows XP, you should follow the instructions here http://support.microsoft.com/kb/162059 to resolve the issue. The issue may impact other versions of the software as well, but it is a confirmed issue on XP/IE7/Office2000.	

Assets

Vehicle Status

Purpose: The vehicle status option lists your vehicle fleet with some basic information about each vehicle. Key data elements shown include Status and Estimated Available Time, which indicates the status of the vehicle at this moment in time: active, in garage, breakdown, etc. If the vehicle is not in service, then the current work order(s) keeping the vehicle in the garage or breakdown are displayed and can be viewed.
You can also view further vehicle information by clicking on the unit number.

How To Get Here:

Start	Action	Result
At the CWA menu	Select *Assets | Vehicle Status*	The *Vehicle Status* tab appears, with data based on the default search criteria

The search criteria on this screen are:

Field	Definition
cost center	view vehicles for a specific cost center
unit	view a specific unit
make/model	view vehicle with a specific and model
contract	view vehicles for a specific contract
status	view vehicles with a specific status e.g. in garage, operational, etc.
equipment type	currently not in use

customer	view vehicles for a specific customer
location	view vehicles for a specific location

What you can do from here:

Function	Action	Result
To perform a **search**	Enter or change search criteria, then click the [🔍 Search] Search button	The search will be performed and the search criteria you enter will be remembered for the duration of your session
To **reset** the search criteria elements to their default values, or to the previously saved search values	Click on the Reset button [🔄 Reset]	
To view a **unit's details**	Click on the hyperlink in the *unit number* column	The *Unit Details* tab appears
To view the **work order** a unit is on	Click on the hyperlink in the *work order* column	The *Work Order* tab appears
To **download** the report to an Excel file	Click the [📊] Download Excel button on the top right of the screen	The report will be downloaded and, if you have MS Excel installed on your desktop, it will open the file in Excel for viewing
	NOTE: If you are having trouble viewing Excel downloads and you are using IE 7 and Excel 2000 on Windows XP, you should follow the instructions here http://support.microsoft.com/kb/162059 to resolve the issue. The issue may impact other versions of the software as well, but it is a confirmed issue on XP/IE7/Office2000.	

Vehicle Information

Purpose: The Vehicle Information option allows you to view all stored information about your units. This includes things like feature codes, PM regime, licensing, and meter readings.

How To Get Here:

Start	Action	Result
At the CWA menu	Select *Assets | Vehicle Information*	The *Vehicle Information* tab appears, with data based on the default search criteria

The search criteria on this screen are:

Field	Definition
cost center	view vehicles for a specific cost center
year	view vehicles for a specific range of years
unit	view a specific unit
make/model	view vehicle with a specific and model
equipment type	currently not in use
feature	currently not in use
contract	view vehicles for a specific contract
customer	view vehicles for a specific customer
location	view vehicles for a specific location

What you can do from here:

Function	Action	Result
To perform a **search**	Enter or change search criteria, then click the [Search] Search button	The search will be performed and the search criteria you enter will be remembered for the duration of your session
To **reset** the search criteria elements to their default values, or to the previously saved search values	Click on the Reset button [Reset]	
To view a **unit's details**	Click on the hyperlink in the *unit number* column	The *Unit Details* tab appears
To view a **contract**	Click on the hyperlink in the *contract* column	The *Unit Details* tab appears
To **download** the report to an Excel file	Click the [ ] Download Excel button on the top right of the screen	The report will be downloaded and, if you have MS Excel installed on your desktop, it will open the file in Excel for viewing
	NOTE: If you are having trouble viewing Excel downloads and you are using IE 7 and Excel 2000 on Windows XP, you should follow the instructions here http://support.microsoft.com/kb/162059 to resolve the issue. The issue may impact other versions of the software as well, but it is a confirmed issue on XP/IE7/Office2000.	

Meter Management

Purpose: This option lists the current reading values for meters on your vehicle fleet. New readings may be added.

How To Get Here:

Start	Action	Result
At the CWA menu	Select *Assets	Meter Management*	The *Meter Management* tab appears, with data based on the default search criteria

This report is a list of all the readings for all of your company's units. It contains a row for each reading for the units matching the search criteria.

The search criteria on this screen are:

Field	Definition
cost center	view readings for a specific cost center
date	view readings for a specific range of dates
unit	view readings for a specific unit
meter type	view readings for a specific meter type
equipment type	currently not in use
location	view readings for a specific location
default date	view readings for specific date

What you can do from here:

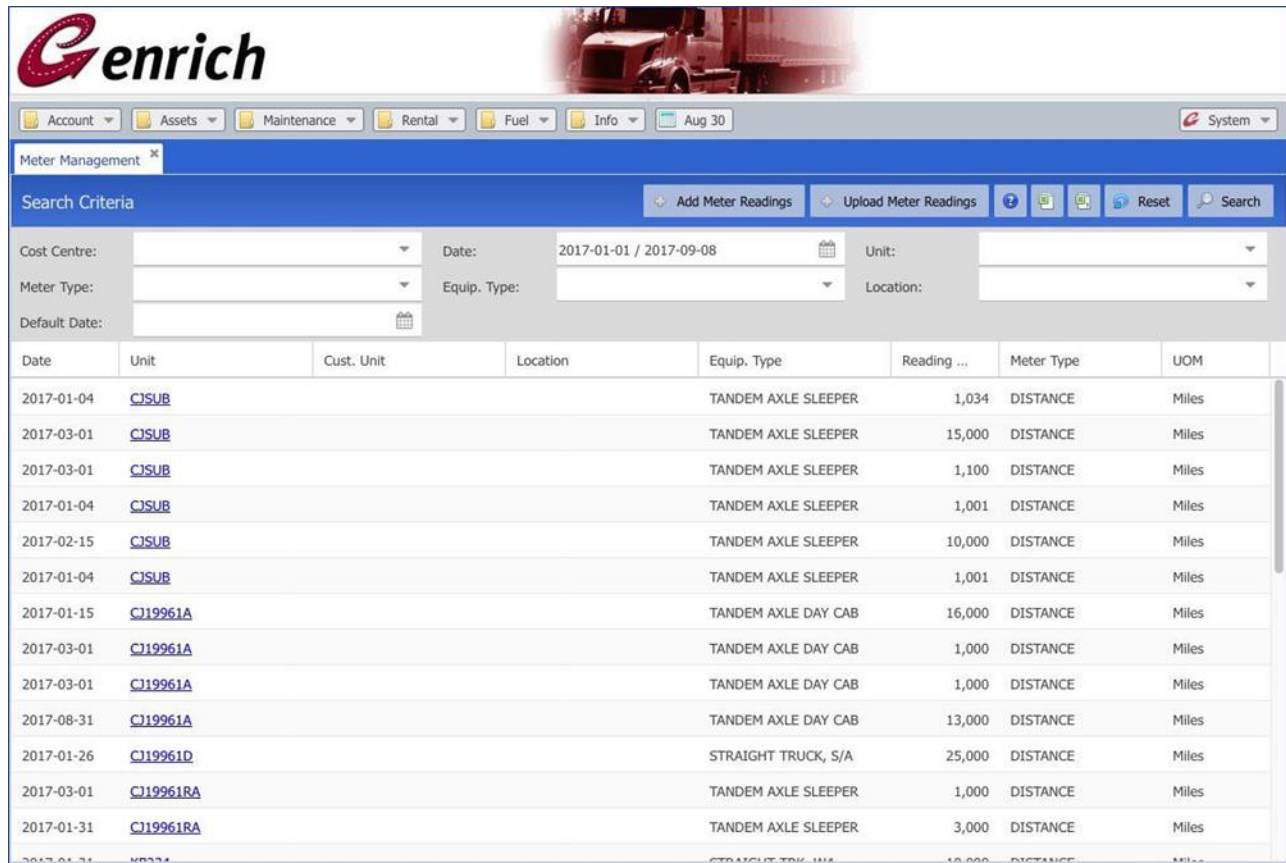| Function	Action	Result
To perform a **search**	Enter or change search criteria, then click the [Search] rch button	The search will be performed and the search criteria you enter will be remembered for the duration of your session
To **reset** the search criteria elements to their default values, or to the previously saved search values	Click on the Reset button [Reset]	
To **add** meter readings	Click on [Add Meter Readings]	The *Add Meter Readings* tab appears
To **upload** meter readings	Click on [Upload Meter Readings]	The *Unit Details* tab appears
To view a **unit's details**	Click on the hyperlink in the *unit number* column	The *Unit Details* tab appears
To **download** the report to an Excel file	Click the [icon] Download Excel button on the top right of the screen	The report will be downloaded and, if you have MS Excel installed on your desktop, it will open the file in Excel for viewing
	NOTE: If you are having trouble viewing Excel downloads and you are using IE 7 and Excel 2000 on Windows XP, you should follow the instructions here http://support.microsoft.com/kb/162059 to resolve the issue. The issue may impact other versions of the software as well, but it is a confirmed issue on XP/ IE7/Office2000.	

Add Meter Reading

Purpose: This option allows you to enter meter readings.

How To Get Here:

Start	Action	Result
At the CWA menu	Select *Assets	Meter Management*	The *Meter Management* tab appears
	Click on [Add Meter Readings]	The *Add Meter Readings* tab appears

What you can do from here:
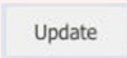
Function	Action	Result
To **add** meter readings	Click on the *reading value* field for the unit	An input field will appear

Function	Action	Result
	Fill in the new *reading value* and, if necessary, change the *reading date*	
	Press **Enter** or click the Update button	The new readings will be validated, and the results of the validation will appear in the *message* column. The possible values are: • Blank - no reading has been entered so no validation was performed. • **OK** - the reading has been validated and accepted. • **Reading must increase** - the reading entered is less than the value of the previous reading. • **Increase is too large** - the reading entered is larger than the tolerance specified in the system.
	When all readings have been entered, click Submit	The new readings will be submitted

Upload Meter Readings
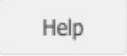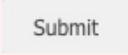
Purpose: This option allows you to upload a meter readings file to the system.

How To Get Here:

Start	Action	Result
At the CWA menu	Select _Assets| Meter Management_	The _Meter Management_ tab appears
	Click on [⊕ Upload Meter Readings]	The _Upload Meter Readings_ panel appears

What you can do from here:

Function	Action	Result
To **create** the file	Click on the [Help] button to find and download the template file; it will be in the format detailed on the next page	
	Create the data file using the template and save it as a CSV after removing all headings	
To **upload** the file	Fill in or select the file name, then click the [Submit] button	The system will perform some validation, ensuring that a file name was entered and that it is a genuine file

It will also check to make sure the unit is on an active contract in order to upload to billing; otherwise it just uploads to EMMS

You will return to the *Meter Management* tab where a confirmation message that the upload was successful will display

The uploaded file must be in the following format:

Field #	Description	Format	Data Type	Max Length	M/O	Comment
1	Reading Date	YYMMDD or MMDDYY or DDMMYY	Numeric	6	mandatory	Format depends on the date format on the iSeries server
2	Reading Time	HHMM	Numeric	4	mandatory	
3	Unit Number		alpha	10	mandatory	*enrich* unit number
4	Metric Type		alpha	6	mandatory	
5	Reading	99999999	numeric	8.0	mandatory	The reading. Whether it is current or LTD is defined on the interface definition record
6	UOM		alpha	3	mandatory	
7	State From		alpha	2	optional	The from state. Must be valid if entered. Only used for the interface to Fuel Tax
8	State To		alpha	2	optional	The to state. Must be valid if entered. Only used for the interface to Fuel Tax

Maintenance

Repair History

Purpose: Repair history allows you to view all work order activity for a particular vehicle. Initially, it displays a summary of each work order line and has links to view work order details, invoice details and. where appropriate, an electronic document of the actual work order completed on the shop floor.

How To Get Here:

Start	Action	Result
At the CWA menu	Select *Maintenance	Repair History*	The *Repair History* tab appears, with data based on the default search criteria

The search criteria on this screen are:

Field	Definition
cost center	view repairs for a specific cost center
invoice date	view repairs for a specific invoice date(s)
task	view repairs for a specific task type
component	view repairs for a specific sub-system component
reason(s)	view repairs for a specific VMRS reason; select is to include or exclude
open date	view repairs for specific work order open dates
close date	view repairs for specific work order close dates

contract	view repairs for specific contracts
assignments	If checked, identifies that without an assignment are to be excluded
unit	view repairs for a specific unit
make/mode	view repairs for specific makes and models
year	view repairs for specific year models
work order	is a free-form text entry field that allows you to select a specific work order to view
invoice	is a free-form text entry field that allows you to view repairs for a specific invoice

What you can do from here:

Function	Action	Result
To perform a **search**	Enter or change search criteria, then click the [Search] Search button	The search will be performed and the search criteria you enter will be remembered for the duration of your session
To **reset** the search criteria elements to their default values, or to the previously saved search values	Click on the Reset button [Reset]	
To view a **unit's details**	Click on the hyperlink in the *unit number* column	The *Unit Details* tab appears
To view an **invoice's details**	Click on the hyperlink in the *invoice* column	The *Invoice Details* tab appears
To view the **work order details**	Click on the hyperlink in the *work order* column	The *Work Order* tab appears
To **download** the report to an Excel file	Click the [Excel] Download Excel button on the top right of the screen	The report will be downloaded and, if you have MS Excel installed on your desktop, it will open the file in Excel for viewing
	NOTE: If you are having trouble viewing Excel downloads and you are using IE 7 and Excel 2000 on Windows XP, you should follow the instructions here http://support.microsoft.com/kb/162059 to resolve the issue. The issue may impact other versions of the software as well, but it is a confirmed issue on XP/ IE7/Office2000.	
To view a **pie chart** of the result set	Click on the graph) [pie icon] (view pie button	The Repair History Pie Chart tab appears
To view a **bar chart** of the result set	Click on the graph) [bar icon] (view bar button	The Repair History Bar Chart tab will appear

Repair History Pie Chart

Purpose: Repair history allows you to view all work order activity for a particular vehicle. Initially, it displays a summary of each work order line and has links to view work order details, invoice details and. where appropriate, an electronic document of the actual work order completed on the shop floor. This option allows you to view a pie chart of the repair history data.

How To Get Here:

Start	Action	Result
At the CWA menu	Select _Maintenance | Repair History_	The _Repair History_ tab appears, with data based on the default search criteria
	Click on the ![icon] (View Pie Graph) button	The _Repair History Pie Chart_ tab appears

What you can do from here:

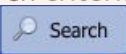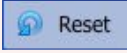| Function	Action	Result
To **change the grouping** of the information that is being graphed	Enter or change the Grouping selection in the search criteria, then click the ![Search] button	The graph changes, e.g. from showing a pie slice for each unit to showing one slice per Location or one slice per Task or one slice per VMRS or one slice per Cost Centre
To **reset** the search criteria elements to their default values, or to the previously saved search values	Click on the ![Reset] button	

Repair History Bar Chart

Purpose: Repair history allows you to view all work order activity for a particular vehicle. Initially, it displays a summary of each work order line and has links to view work order details, invoice details and. where appropriate, an electronic document of the actual work order completed on the shop floor. This option allows you to view a bar chart of the repair history data.

How To Get Here:

Start	Action	Result
At the CWA menu	Select *Maintenance	Repair History*	The *Repair History* tab appears, with data based on the default search criteria
	Click on the [icon] (View Bar Graph) button	The *Repair History Bar Chart* tab appears

What you can do from here:

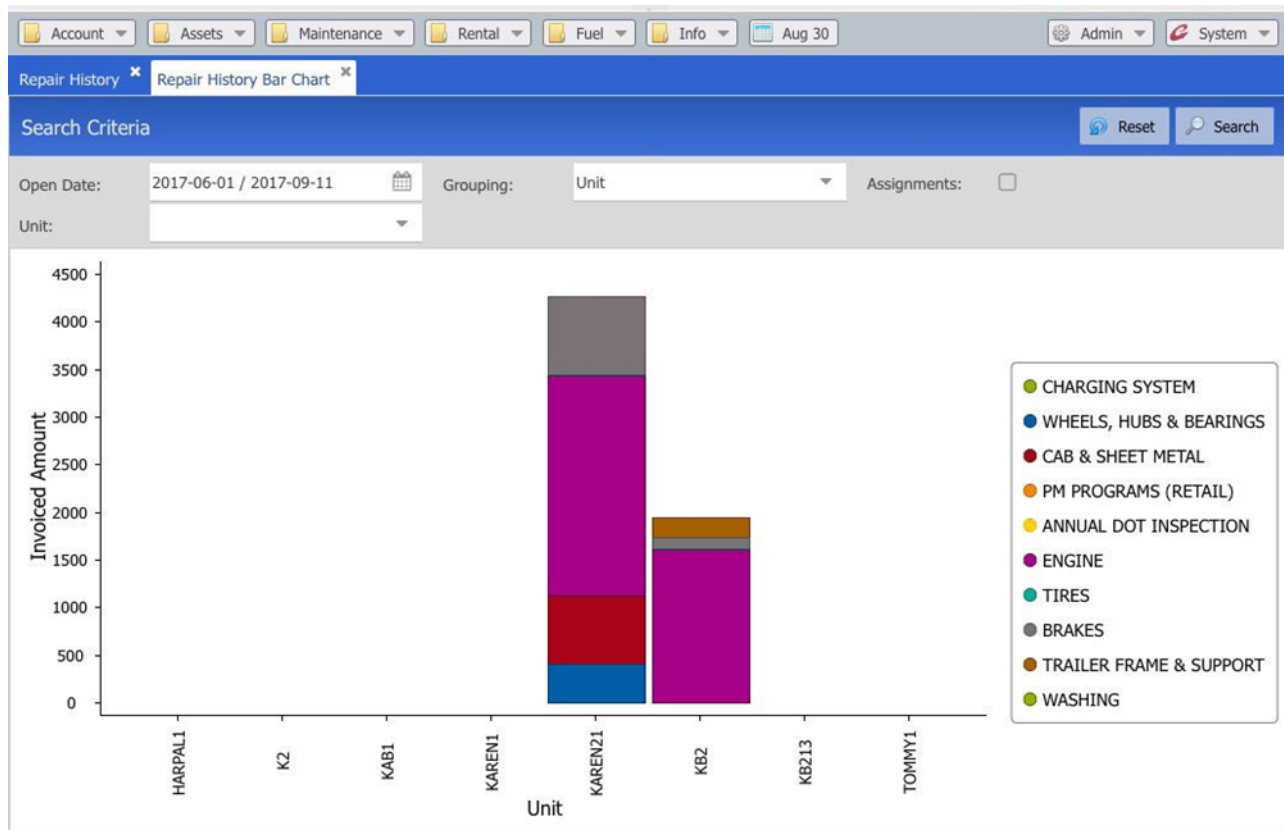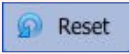| Function	Action	Result
To **change the grouping** of the information that is being graphed	Enter or change the Grouping selection in the search criteria, then click the [Search] button	The graph changes, e.g. from showing a bar for each unit to showing one bar per Location or one bar per Task or one bar per Cost Centre or one bar per VMRS
To **reset** the search criteria elements to their default values, or to the previously saved search values	Click on the [Reset] button	

Work Order Details

Purpose: This option allows you to view a work order's details. Note that this screen can be accessed from any work order hyperlink in the system. No information can be changed on this screen.

How To Get Here:

Start	Action	Result
At the CWA menu	Select *Maintenance	Repair History*	The *Repair History* tab appears, with data based on the default search criteria
	Click on the Work Order hyperlink	The *Work Order* details tab appears, displaying the header details and work order lines for that particular work order

What you can do from here:

Function	Action	Result
To **print** the work order	Click on the Print icon ![print] at the top right of the screen	The Print dialog for your web browser will appear

PM Calendar

Purpose: The PM Calendar shows when you are required to make your vehicles available for service in a calendar format. It will initially display a graphical view of future, outstanding, and booked PMs for the current month.

Each day indicator on the graphical view is color-coded to represent its particular status:

- Light green - In Progress - a work order exists,
- Dark green - In Progress (late) - the work order date is in the past compared to the current date,
- Light amber - Agreed - the work order has an agreed date,
- Dark amber - Agreed (late) - the work order agreed date is in the past compared to the current date,
- Light red - Scheduled - the work roster has an agreed date,
- Dark red - Scheduled (late) - the work roster date is in the past compared to the current date,
- Purple - Planned - a work roster exists, no work order exists, and the work roster has no agreed date

How To Get Here:

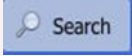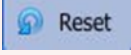| Start	Action	Result
At the CWA menu	Select *Maintenance	PM Calendar*	The *PM Calendar* tab appears, with data based on the default search criteria

The search criteria on this screen are:

Field	Definition
cost center	view PMs for a specific cost center
date	view PMs for a specific range of dates

unit	view PMs for a specific unit
status	view PMs in a specific status. Possible choices are Agreed, Valid, Overdue, In Progress, Due, and Open
location	view PMs for a specific location

What you can do from here:

Function	Action	Result
To perform a **search**	Enter or change search criteria, then click the [🔍 Search] Search button	The search will be performed and the search criteria you enter will be remembered for the duration of your session
To **reset** the search criteria elements to their default values, or to the previously saved search values	Click on the Reset button [🔄 Reset]	

PM Planner

Purpose: The PM Planner shows when you are required to make your vehicles available for service. A list of future, outstanding, and booked PMs is displayed.

How To Get Here:

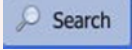| Start	Action	Result
At the CWA menu	Select *Maintenance	PM Planner*	The *PM Planner* tab appears, with data based on the default search criteria

The search criteria on this screen are:

Field	Definition
cost center	view PMs for a specific cost center
date	view PMs for a specific range of dates
unit	view PMs for a specific unit
status	Is a specific PM status to view PMs for. Possible statuses are: • In Progress - a work order exists • In Progress (late) - the work order date is in the past compared to the current date • Agreed - the work order has an agreed date • Agreed (late) - the work order agreed date is in the past compared to the current date • Scheduled - the work roster has an agreed date • Scheduled (late) - the work roster date is in the past compared to the current date • Planned - a work roster exists, no work order exists, and the work roster has no agreed date

location	view PMs for a specific location

What you can do from here:

Function	Action	Result
To perform a **search**	Enter or change search criteria, then click the [Search] Search button	The search will be performed and the search criteria you enter will be remembered for the duration of your session
To **reset** the search criteria elements to their default values, or to the previously saved search values	Click on the Reset button [Reset]	
To view a **unit's details**	Click on the hyperlink in the *unit number* column	The *Unit Details* tab appears
To view an **invoice's details**	Click on the hyperlink in the *invoice* column	The *Invoice Details* tab appears
To view the **work order details**	Click on the hyperlink in the *work order* column	The *Work Order* tab appears
To **download** the report to an Excel file	Click the [Excel icon] Download Excel button on the top right of the screen	The report will be downloaded and, if you have MS Excel installed on your desktop, it will open the file in Excel for viewing
	NOTE: If you are having trouble viewing Excel downloads and you are using IE 7 and Excel 2000 on Windows XP, you should follow the instructions here http://support.microsoft.com/kb/162059 to resolve the issue. The issue may impact other versions of the software as well, but it is a confirmed issue on XP/ IE7/Office2000.	