

SERVICE

WORK ORDERS - EDIT WORK ORDER

Details may need to be **added** or **removed** from the work order <u>after</u> it has been created.

Ribbon Access: Service > Work Orders



- 1. The *Work Order Listing* screen will be displayed.
- 2. Select the *Site*.
 - The example has *Durban* selected.
- 3. Select the Status.
 - Only work orders with an *Open*, *Deleted* or *Completed* status can be edited.

If you are not sure of the *site* or *status* of the work order you require, use the <u>Find</u>
WO feature to search for it.

- 4. Click on the *row* of the work order you wish to edit.
- 5. Click on *Edit*.

Short cut key: *Right click* to display the *All groups* menu list. Click on *Edit*.



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		PR	CN0005301	Replace part - current faulty	No	Replace part - current	18/01/2022	3	No	
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Third Party Services	E WO0006251	ITS	CN0005299	Paper keeps on jamming in machine	No	Paper keeps on jammin	18/01/2022	3	No	
		REP	CN0005298	Paper not feeding through rollers	No	Paper not feeding thro	14/12/2021	3	No	
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	· WO0006246	SM		BathBinMaint - Bathroom Bin Maintenance	No		23/11/2021	2	No	PRJ00004
	· WO0006245	SM		WS - Weekly Service	No		23/11/2021	2	No	PR.300004
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	· WO0006242	SERV		1MMS - 1 Month Machine Service	No		16/11/2021	2	No	PR.300004
	· WO0006241	SM		WS - Weekly Service	No		16/11/2021	2	No	PRJ00004
Swap Outs	· WO0006240	SM		WS - Weekly Service	No		16/11/2021	2	No	PR.300004
	· WO0006238	PR		Test PQ Source Type Work Order	No		14/11/2021	5	No	
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- 6. The *Maintain WO Ref [work order number]* screen will be displayed.
- 7. Note that the *Functions* tiles are available from this screen to link and update the functions related to the work order.
- 8. Use the "Links Frame" on page 7 to link the work order to a *Call* or *Project*.



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ASSIGN REQUIRED CRAFT

The crafts required for the work that needs to be done on the work order can be *added* or *edited* on the Required Crafts tab.

Crafts are skills or job title(s) **linked to employees**. Work Order schedule 'Required Crafts' details need to be configured on each work order.

- 9. Click on the *Required Crafts* tab to *expand* the *Required Crafts* docking panel.
- 10. The crafts required for this work order will to display in the data grid.

Note that t he default craft assigned to a work order is based on the primary craft of the <u>Assigned To</u> person for that work order.

11. Click in the *field* of the existing craft to make the required changes.



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ADD A REQUIRED CRAFT

- 12. To add craft(s) required by the person responsible for carrying out the Work Order,
- 13. *Right click* on the next available row in the *Required Crafts* data grid to display the *Process* menu.
- 14. Click on **Add** Add a new craft.



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- 15. The *Select a craft* screen will display.
- 16. Click on the *row* of the *craft* you wish to *add* to the work order.
- 17. Click on *OK*.

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- 18. The *Craft Name* column will populate with the selected craft.
- 19. Either *type in* or use the *directional arrows* to select the *Estimated*

Labour Hours and Crew Size of the newly added craft.

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SCHEDULE

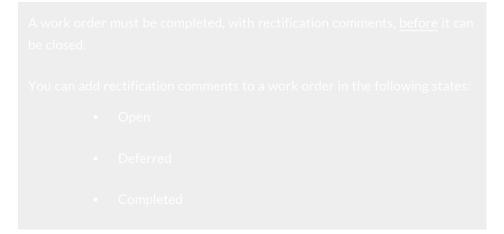
20. Schedule: Update and complete the required *Scheduled Start* and *End* Dates, the *Actual Start* and *End* Dates and *Delay Comments* as required.

RECTIFICATION COMMENTS

Rectification comments are work resolution comments, created on successful completion of the work.

If the work order is linked to a call, this information will pull through to the call closure comments.





- 21. Click on the down *arrow* in the *Rectification Code* field to display the *Rectification Type* menu.
- 22. Select the *Rectification Type* relevant to the work order.

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- 23. Type in the relevant *comment* in the *Rectification Comments* text box.
- 24. **Completion Date:** Type in or use the *arrow* to select the completion date for the work order using the calendar function.
- 25. When you have finished making the required changes, click on *Save*.



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