

SERVICE

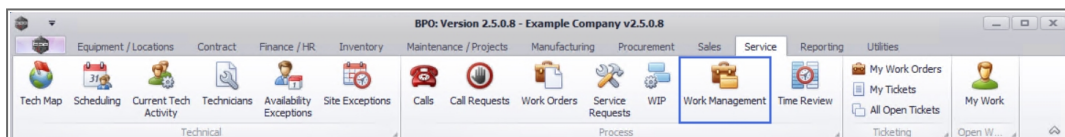
WORK MANAGEMENT – VIEW OPEN WORK ORDERS

The **Work Management** screen lists all Work Orders dependant on the employee **hierarchy**.

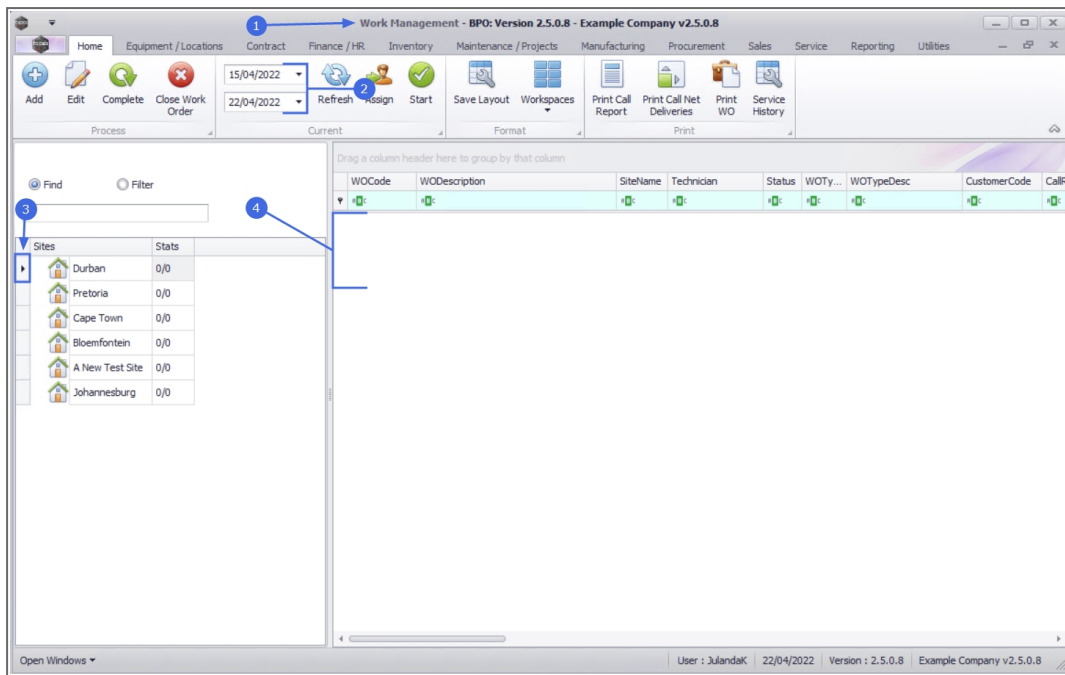
The Work Orders displayed are those that have time records linked to them.

Each Work Order can be Viewed, Assigned, Edited, **Started**, Completed and Closed from here.

Ribbon Access: *Service > Work Management*



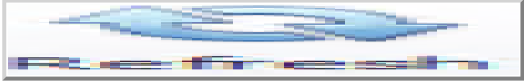
1. The **Work Management** screen will be displayed.
2. The **date range** fields will auto populate with an **8** day range up to and including the current date.
3. The **row indicator** in the **Site** frame will auto select the first site in the list.
4. The Work Orders listed in the Work Orders data grid will only be the ones included in that date range, within the selected site, that have **labour / time records** logged against it.

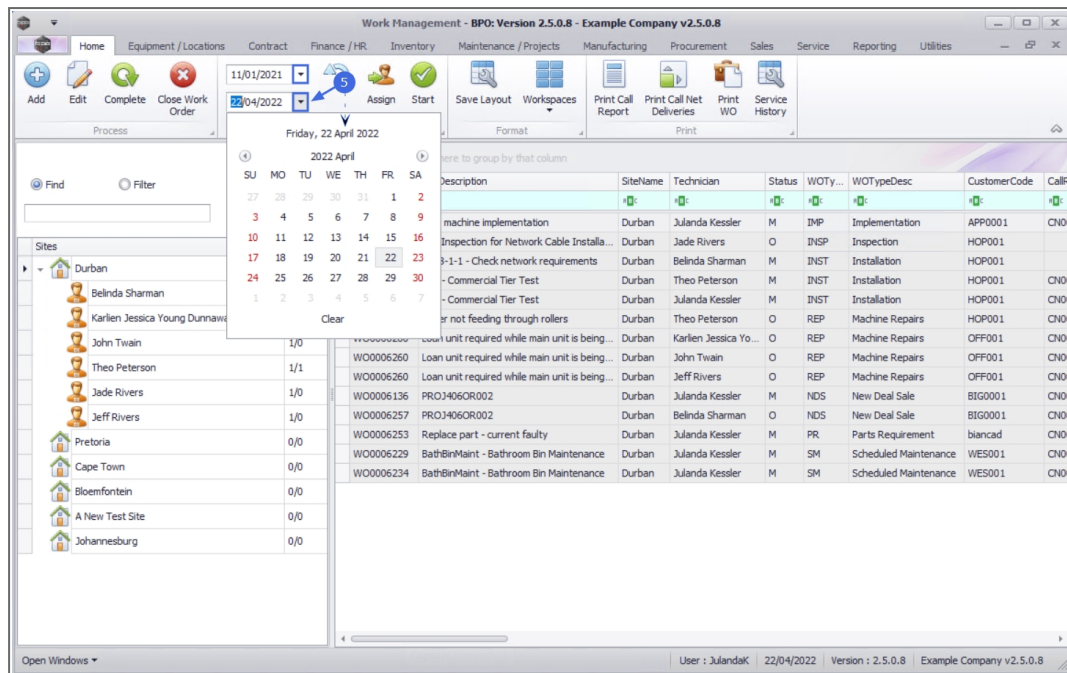


ADJUST DATE RANGE

If the Work Order you wish to view is not listed, you can change the date range, or use the [find](#) or [filter](#) functions.

- Set the date range, by clicking and typing the required date in the date fields, or click on the down **arrow** to adjust each **date field** using the calendar function.

Click on the **Refresh** button  refresh and update the screen with the Work Orders for the selected date range.



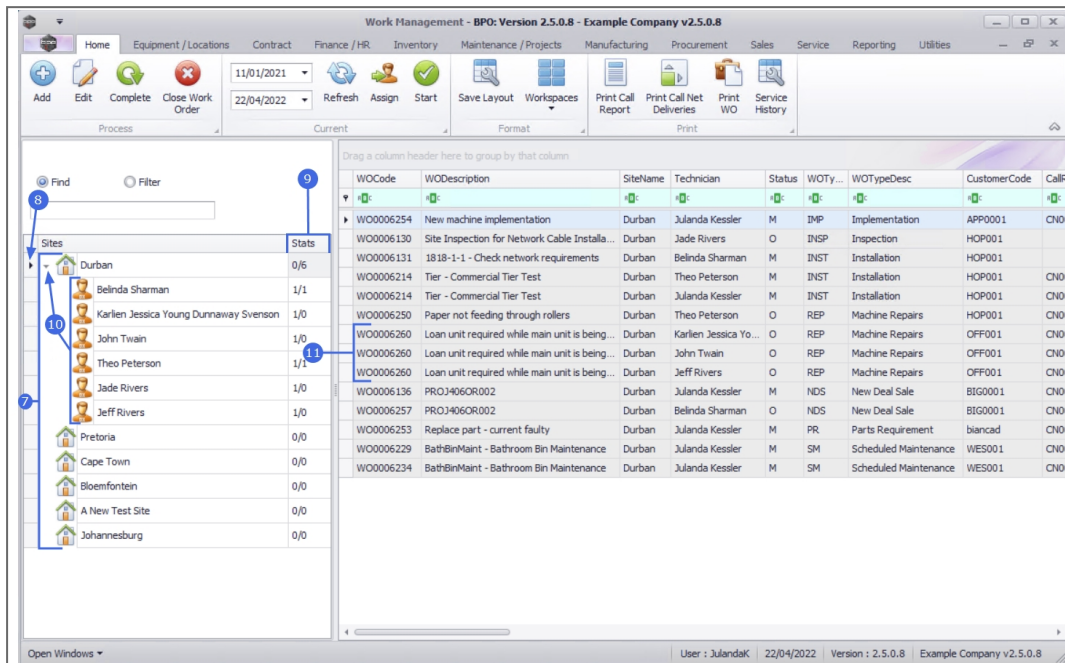
SITES FRAME

If the Work Order that you wish to view does not display, you may need to select an alternative site and expand it.

7. The **Sites** frame contains a list of the sites currently on the system.
8. The **row selector** indicates which **site** you are currently working in.
 - The example has **Durban** selected.
9. The **Stats** column in this frame indicated the number of **Open** and **Completed** assignments for the site.
10. Click on the **tree view chevron node** of the required site to **expanded** to display the **employees** within the site, with their **individual** work assignment stats.
11. A Work Order that has been assigned to more than one employee, that has a time record against that work order, will be listed for each employee.



Note that the Technician column in the data grid is not the **Assigned to** person but the employee that has a **labour / time record** linked to the Work Order.



12. Click on the **row** of the work order you wish to view.

13. Click on **Edit**.



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

WOCCode	WODescription	SiteName	Technician	Status	WOTy...	WOTyDesc	CustomerCode	Call
WO0006254	New machine implementation	Durban	Julanda Kessler	M	IMP	Implementation	APP0001	CNO
WO0006130	Site Inspection for Network Cable Installa...	Durban	Jade Rivers	O	INSP	Inspection	HOP001	CNO
WO0006131	1818-1-1 - Check network requirements	Durban	Belinda Sharman	M	INST	Installation	HOP001	CNO
WO0006214	Tier - Commercial Tier Test	Durban	Theo Peterson	M	INST	Installation	HOP001	CNO
WO0006214	Tier - Commercial Tier Test	Durban	Julanda Kessler	M	INST	Installation	HOP001	CNO
WO0006250	Paper not feeding through rollers	Durban	Theo Peterson	O	REP	Machine Repairs	HOP001	CNO
WO0006260	Loan unit required while main unit is being...	Durban	Karlen Jessica Yo...	O	REP	Machine Repairs	OFF001	CNO
WO0006260	Loan unit required while main unit is being...	Durban	John Twain	O	REP	Machine Repairs	OFF001	CNO
WO0006260	Loan unit required while main unit is being...	Durban	Jeff Rivers	O	REP	Machine Repairs	OFF001	CNO
WO0006136	PROJ406OR002	Durban	Julanda Kessler	M	NDS	New Deal Sale	BTG0001	CNO
WO0006257	PROJ406OR002	Durban	Belinda Sharman	O	NDS	New Deal Sale	BTG0001	CNO
WO0006253	Replace part - current faulty	Durban	Julanda Kessler	M	PR	Parts Requirement	biancad	CNO
WO0006229	BathBinMaint - Bathroom Bin Maintenance	Durban	Julanda Kessler	M	SM	Scheduled Maintenance	WES001	CNO
WO0006234	BathBinMaint - Bathroom Bin Maintenance	Durban	Julanda Kessler	M	SM	Scheduled Maintenance	WES001	CNO

14. The Maintain WO - Ref [work order number] screen will be displayed to view the work order information.
15. You can [Add](#) to or [Edit](#) the work order details here.
16. Click on **Back** to return to the Work management listing screen.

Maintain WO - Ref WO0006131 - BPO: Version 2.5.0.8 - Example Company v2.5.0.8

Description: 1818-1-1 - Check network requirements

Requestor: Julanda Kessler

WO Type: Installation

Priority: 2

Request Date: 19/08/2021 13:47:32

Status: M - Completed

Billable: ☐

Capitalise: ☐

Work Order Item:

Functional Location: ☐

Equipment: ☒

Item: 0109501101530003

Comment: Generated by Project Methodology - 1818-1-1

Links:

RefType	ReferenceType	ReferenceNo
CALL	Call Reference	
PMNG	Project Reference	PR30000411

Schedule:

Assigned To: David Rowe

Assigned By: Julanda Kessler

Scheduled Start: 19/08/2021 12:00:00

Scheduled End: 24/08/2021 12:00:00

Actual Start: 21/09/2021 12:00:00

Actual End: 21/09/2021 12:00:00

Delay Comments: Currently on Schedule

Rectification Code:

Rectification Comments:

Completion Date: 21/09/2021 00:00:00



MNU.074.001