

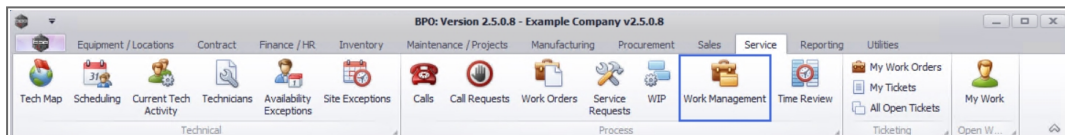
SERVICE

WORK MANAGEMENT – EDIT WORK ORDER

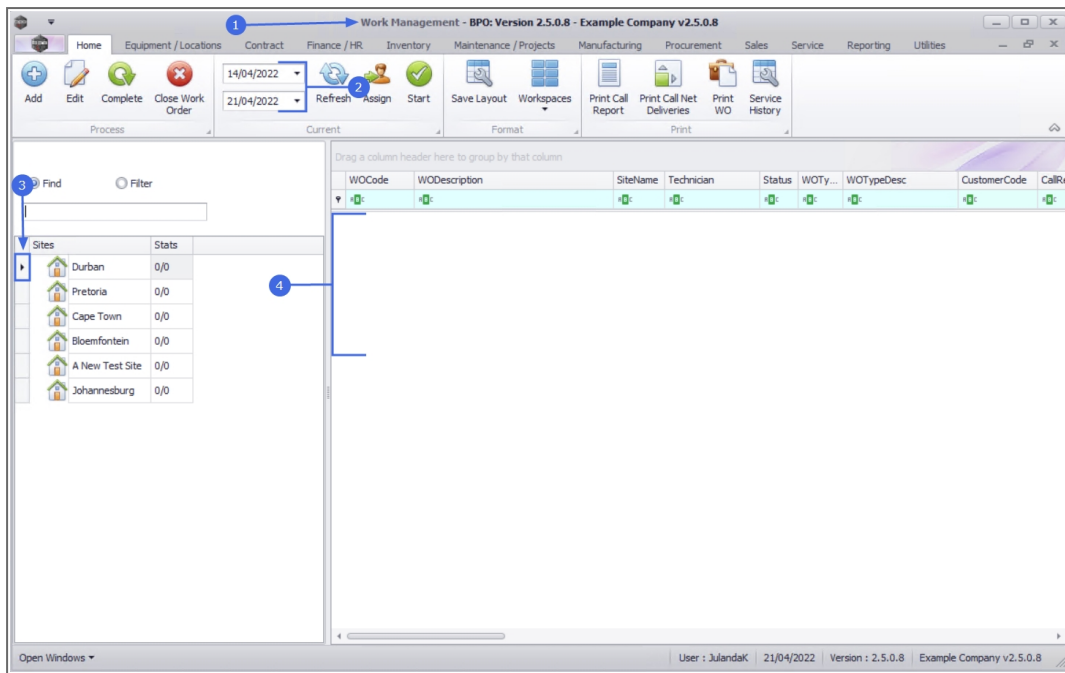
The **Work Management** screen lists all work orders dependant on the employee **hierarchy**.

Each work order can be Viewed, Assigned, Edited, **Started**, Completed and Closed from here.

Ribbon Access: *Service > Work Management*



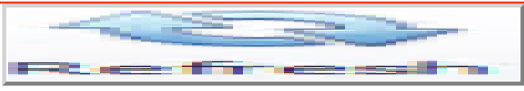
1. The **Work Management** screen will be displayed.
2. The **date range** fields will auto populate with an **8** day range up to and including the current date.
3. The **row indicator** in the **Site** frame will auto select the first site in the list.
4. The Work Orders listed in the Work Orders data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

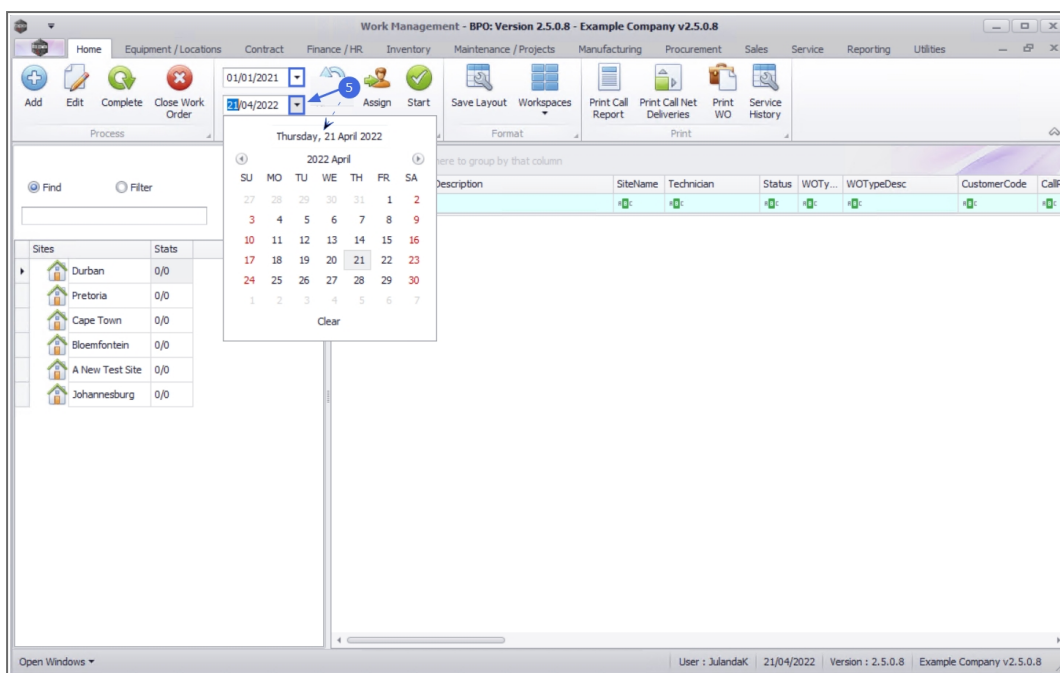


ADJUST DATE RANGE

If the Work Order you wish to edit does not display, you may need to 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  to refresh and update the screen with the Work Orders for the selected date range.



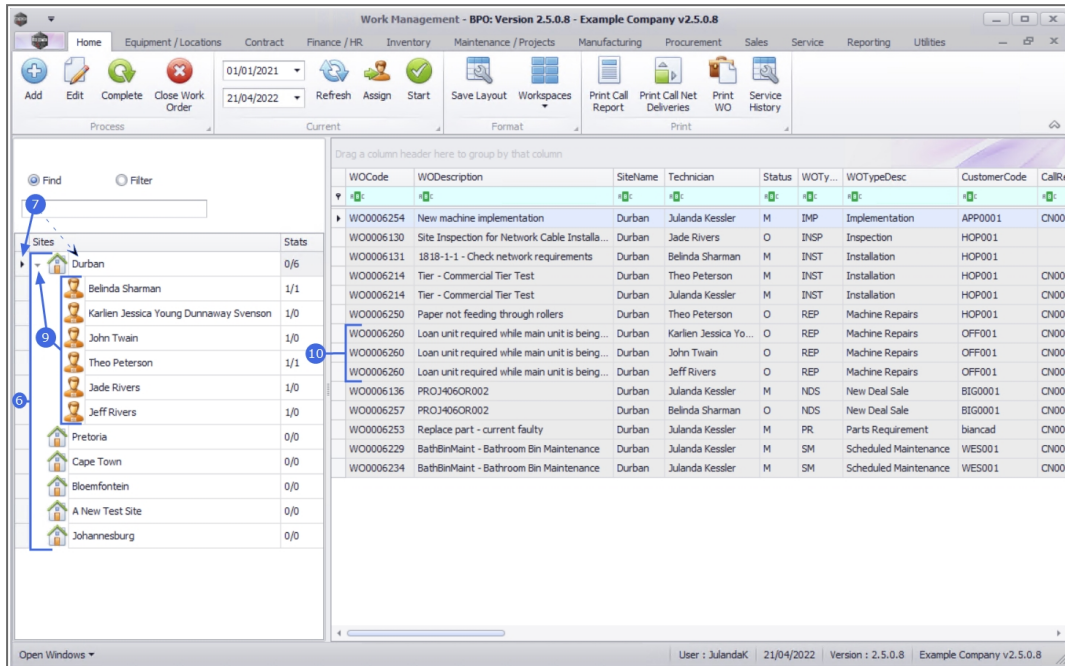
SITES FRAME

If the screen is not displaying the Work Order you wish to edit, you may need to select an alternative site and expand it.

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



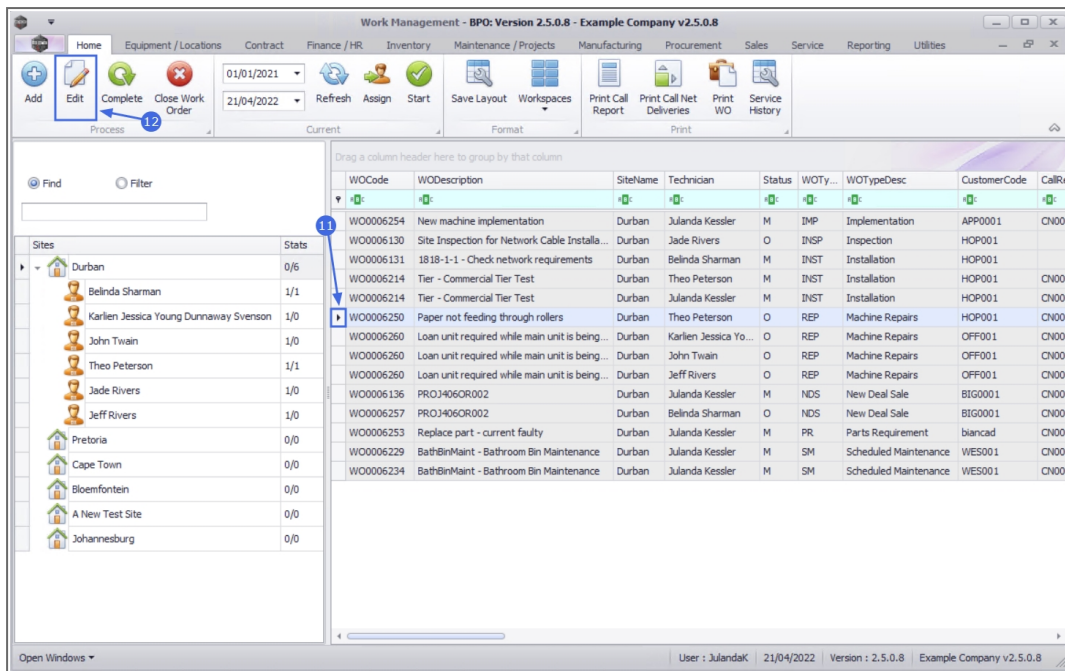
Note that the Technician column in the data grid is not the **Assigned to** person but the employee that has a **labour / time record** linked to the Work Order.



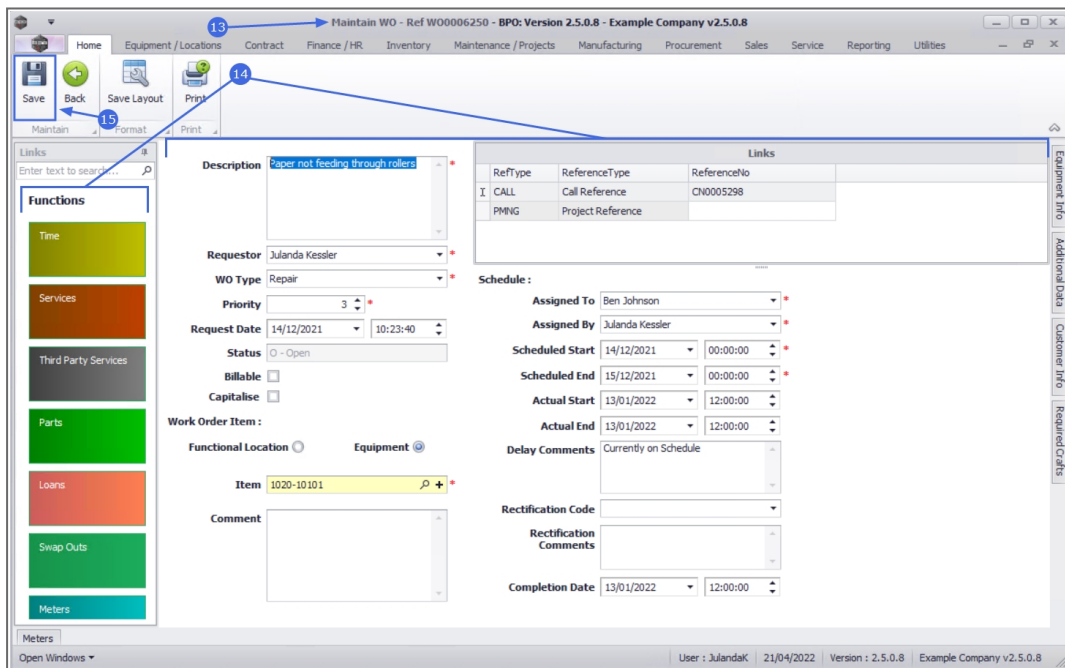
11. Click on the **row** of the work order you wish to edit.
12. Click on **Edit**.



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



13. The Maintain WO - Ref [work order number] screen will be displayed.
14. Update the work order details as required or add information to the work order using the relevant Work Order "Function Tiles" on page 7.
15. When you have finished editing the work order, click on **Save**.



The edited work order details will be ***saved*** and you will return to the ***Work Management*** screen.

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