

SERVICE

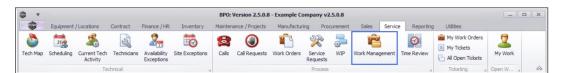
WORK MANAGEMENT - VIEW OPEN WORK ORDERS

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

The Work Orders displayed are those that have <u>time records</u> linked to them.

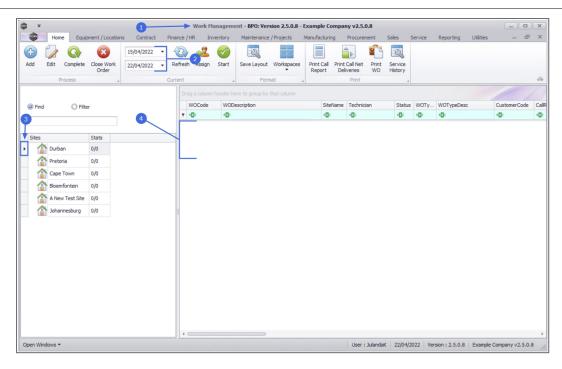
Each Work Order can be Viewed, <u>Assigned</u>, <u>Edited</u>, <u>Started</u>, <u>Completed</u> and <u>Closed</u> from here.

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.
- The Work Orders listed in the Work Orders data grid will only be the ones included in that <u>date range</u>, within the selected <u>site</u>, 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 <u>find</u> or <u>filter</u> 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.





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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.
- 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.
- A Work Order that has been assigned to <u>more than one</u> employee, that has a <u>time record</u> 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.

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- 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*.



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

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