

# SERVICE

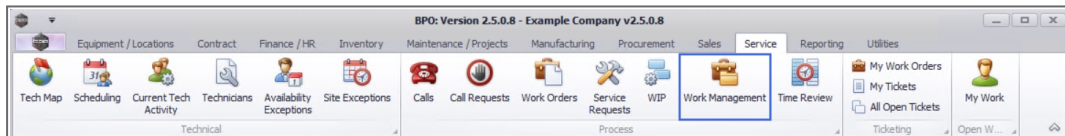
## WORK MANAGEMENT – VIEW OPEN WORK ORDERS

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

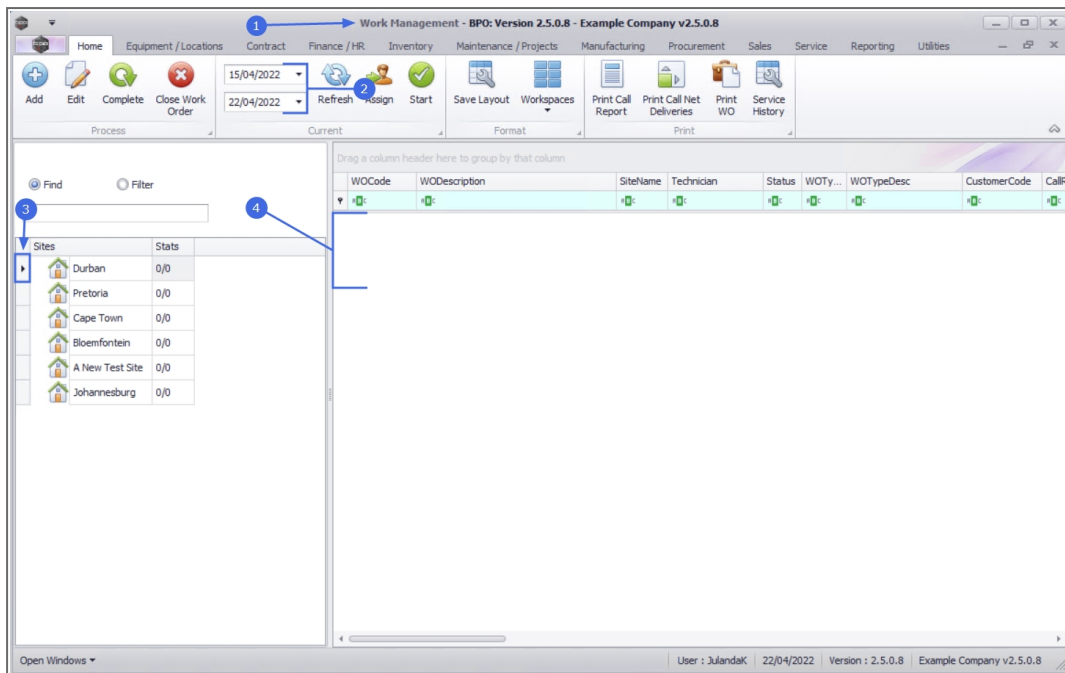
The Work Orders displayed are those that have [time records](#) linked to them.

Each Work Order can be Viewed, [Assigned](#), [Edited](#), **Started**, [Completed](#) and [Closed](#) from here.

**Ribbon Access:** *Service > Work Management*



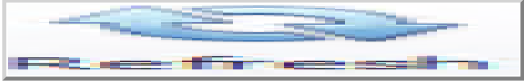
1. The **Work Management** screen will be displayed.
2. The **date range** fields will auto populate with an **8** day range up to and including the current date.
3. The **row indicator** in the **Site** frame will auto select the first site in the list.
4. The Work Orders listed in the Work Orders data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

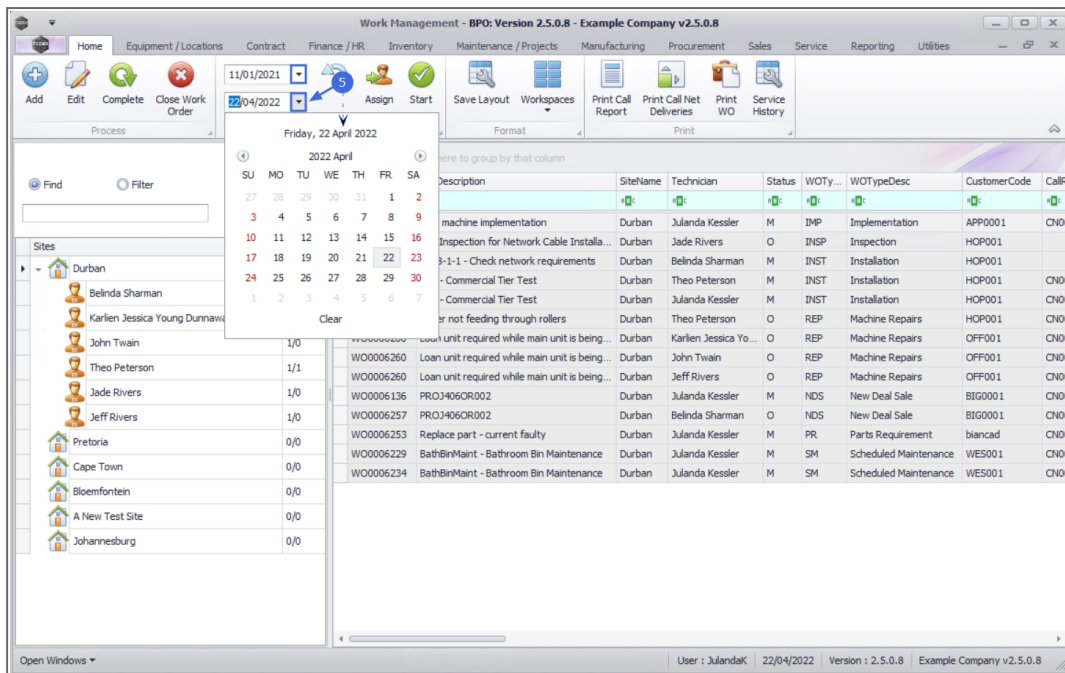


## ADJUST DATE RANGE

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

5. 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.

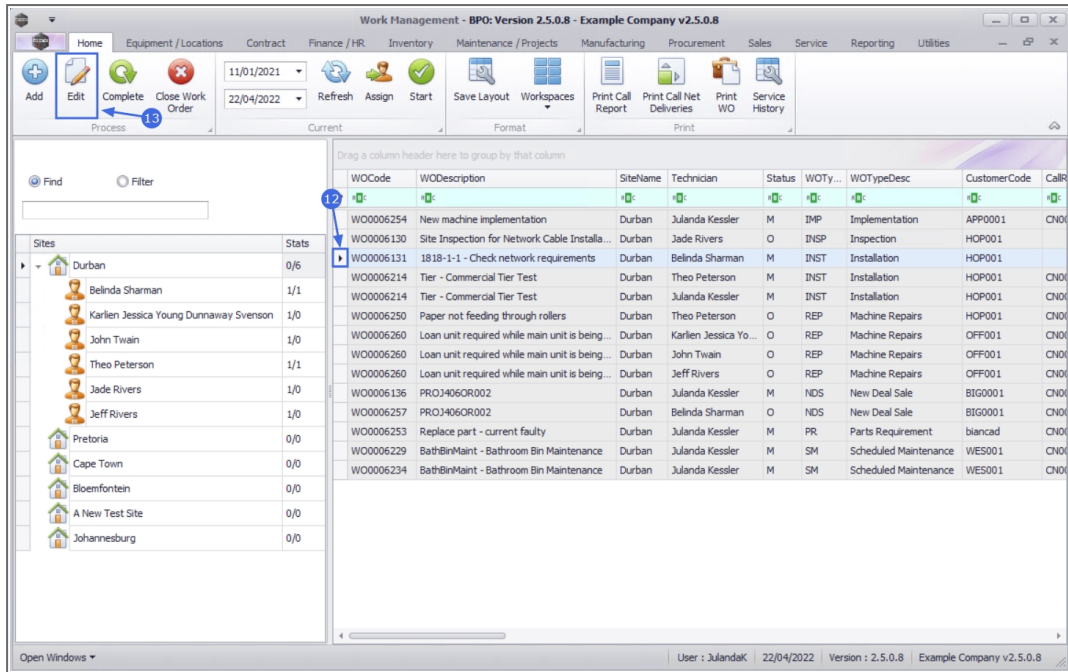
The screenshot shows the 'Work Management - BPO: Version 2.5.0.8 - Example Company v2.5.0.8' application. The interface includes a top navigation bar with various menu items like Home, Equipment / Locations, Contract, Finance / HR, Inventory, Maintenance / Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below this is a toolbar with icons for Add, Edit, Complete, Close Work Order, Refresh, Assign, Start, Save Layout, Workspaces, Print Call Report, Print Call Net Deliveries, Print WO, and Service History. The main area is divided into a left sidebar and a central data grid. The sidebar has a 'Find' and 'Filter' section, and a 'Sites' list with a 'Stats' column. The data grid has columns for WOCode, WODescription, SiteName, Technician, Status, WOTy..., WOTypeDesc, CustomerCode, and CallR. A blue circle '8' points to the 'Find' field, '9' points to the 'Stats' column, '10' points to the 'Technician' column, and '11' points to a row in the data grid.

WOCode	WODescription	SiteName	Technician	Status	WOTy...	WOTypeDesc	CustomerCode	CallR
W00006254	New machine implementation	Durban	Julanda Kessler	M	IMP	Implementation	APPO001	CND0
W00006130	Site Inspection for Network Cable Installa...	Durban	Jade Rivers	O	INSP	Inspection	HOP001	CND0
W00006131	1818-1-1 - Check network requirements	Durban	Belinda Sharman	M	INST	Installation	HOP001	CND0
W00006214	Tier - Commercial Tier Test	Durban	Theo Peterson	M	INST	Installation	HOP001	CND0
W00006214	Tier - Commercial Tier Test	Durban	Julanda Kessler	M	INST	Installation	HOP001	CND0
W00006250	Paper not feeding through rollers	Durban	Theo Peterson	O	REP	Machine Repairs	HOP001	CND0
W00006260	Loan unit required while main unit is being...	Durban	Karlien Jessica Yo...	O	REP	Machine Repairs	OFF001	CND0
W00006260	Loan unit required while main unit is being...	Durban	John Twain	O	REP	Machine Repairs	OFF001	CND0
W00006260	Loan unit required while main unit is being...	Durban	Jeff Rivers	O	REP	Machine Repairs	OFF001	CND0
W00006136	PROJ406OR002	Durban	Julanda Kessler	M	NDS	New Deal Sale	BIG0001	CND0
W00006257	PROJ406OR002	Durban	Belinda Sharman	O	NDS	New Deal Sale	BIG0001	CND0
W00006253	Replace part - current faulty	Durban	Julanda Kessler	M	PR	Parts Requirement	biancad	CND0
W00006229	BathBinMaint - Bathroom Bin Maintenance	Durban	Julanda Kessler	M	SM	Scheduled Maintenance	WES001	CND0
W00006234	BathBinMaint - Bathroom Bin Maintenance	Durban	Julanda Kessler	M	SM	Scheduled Maintenance	WES001	CND0

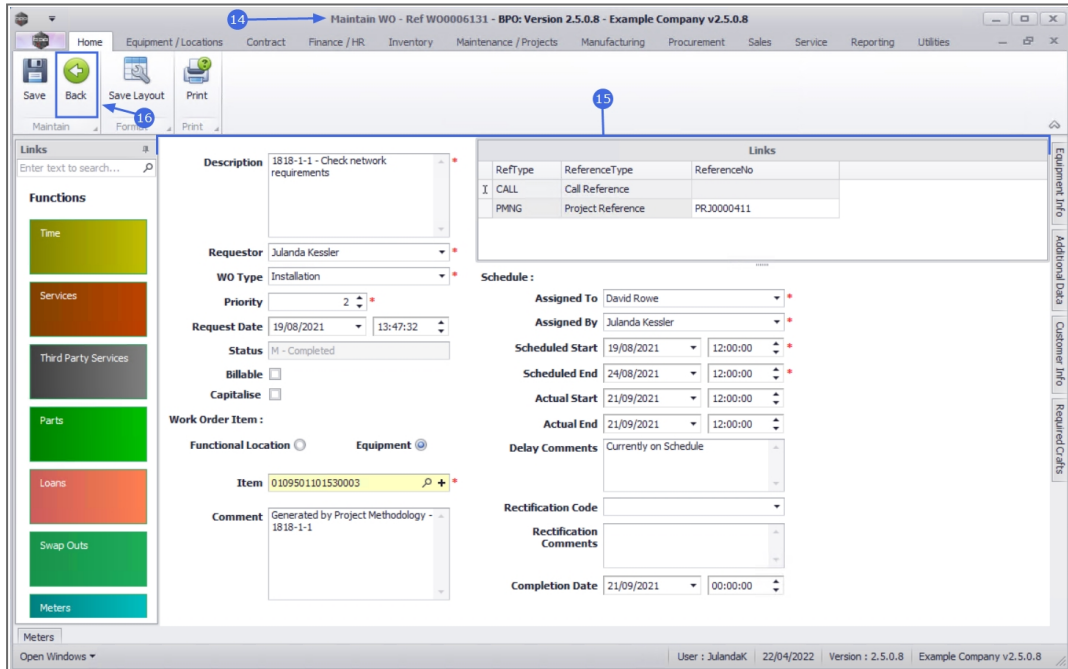
12. Click on the **row** of the work order you wish to view.
13. Click on **Edit**.



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



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.





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