

We are currently updating our site; thank you for your patience.

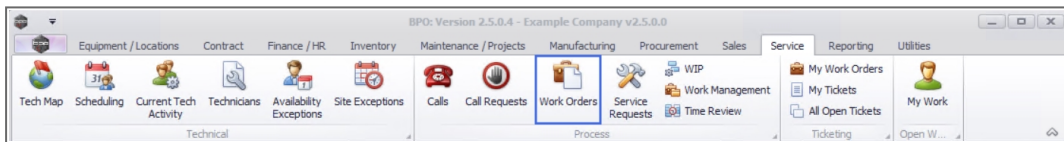
SERVICE

WORK ORDERS – TASK INSTRUCTIONS

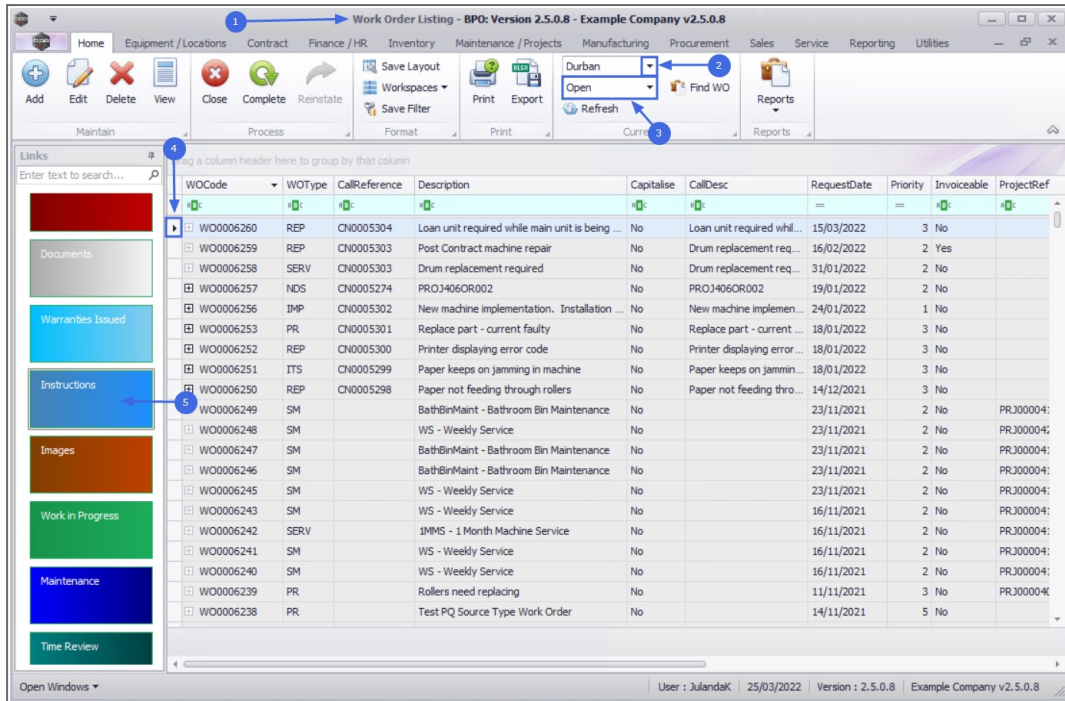
Instructions are 'Work Instructions' to the person performing the required work. One (or more) Instruction(s) are linked to [Tasks](#).

Instructions will only display if the work order was generated via Maintenance Planning: [Maintenance Radar](#) or [Generate Tasks](#).

Ribbon Access: Service > Work Orders



1. The **Work Order Listing** screen will be displayed.
2. Select the **Site** where the work order was issued.
 - The example has **Durban** selected.
3. Set the **Status** to **Open**.
4. Click on the **row** of the **work order** you wish to maintain the **task instructions** for.
5. Click on the **Instructions** tile.



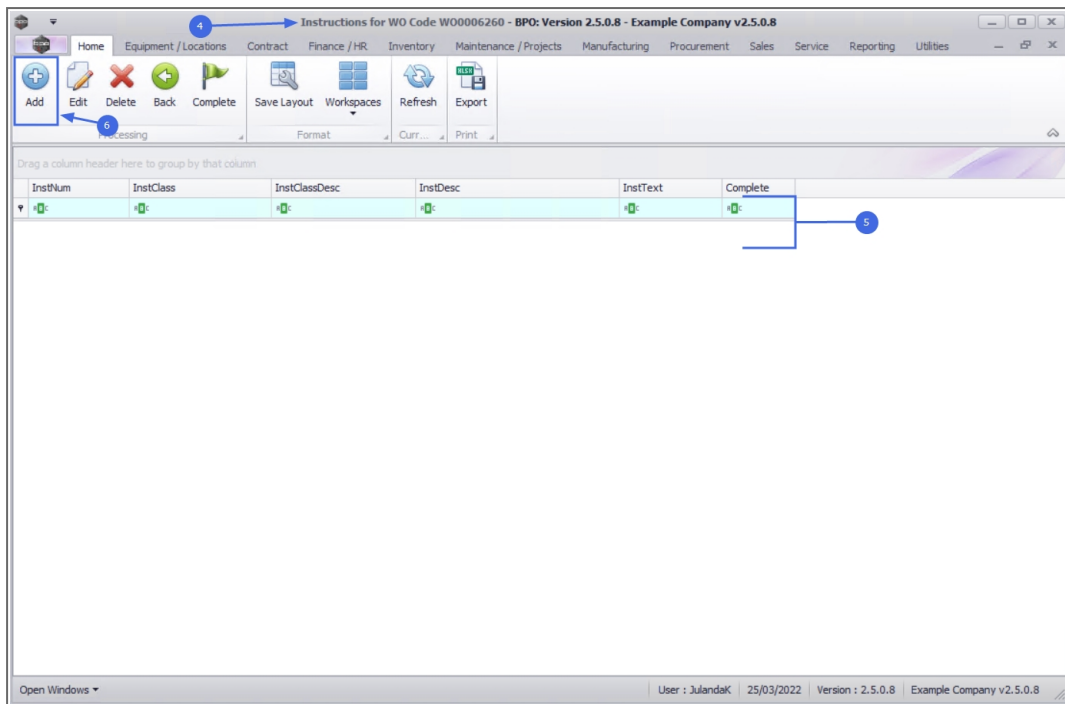
4. The **Instructions for WO Code** [work order code] screen will be displayed.
5. Instructions that have already been issued on the work order will be displayed in the data grid.

ADD INSTRUCTIONS

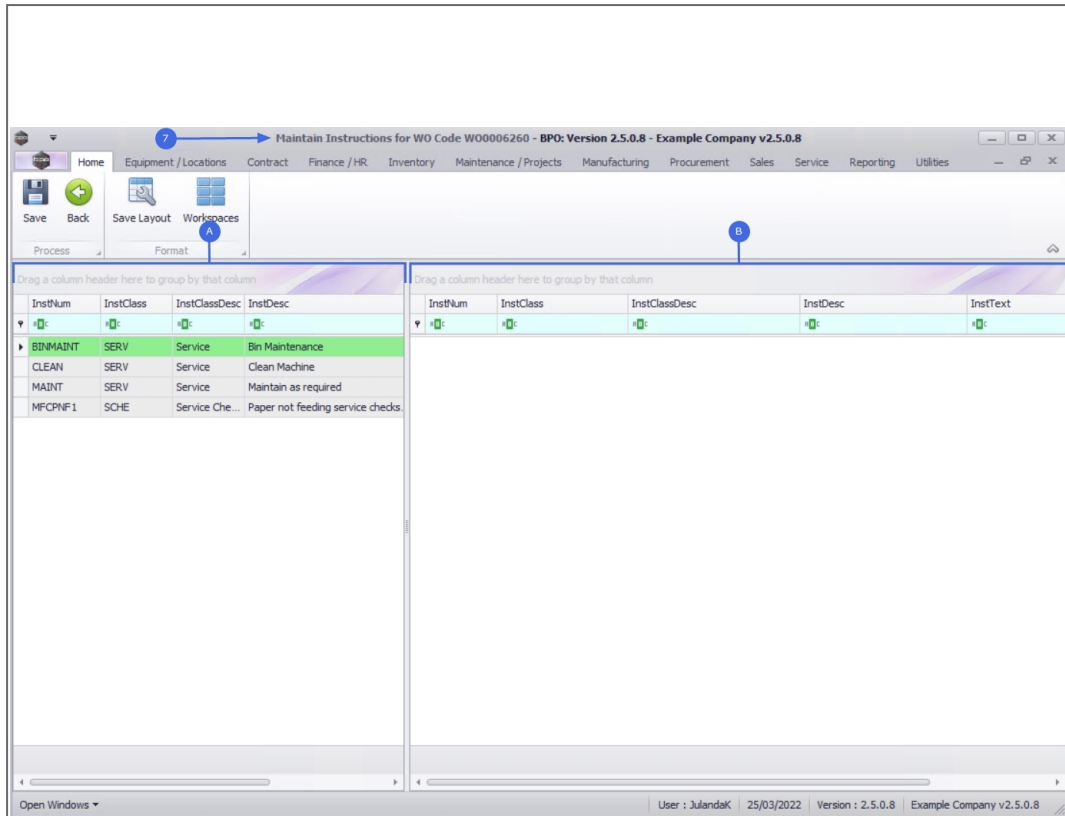
6. Click on **Add**.



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



7. The **Maintain Instructions for WO Code** [work order code] screen will be displayed.
8. The screen is divided into two data grid areas.
 - **Grid A** lists all the instructions that can be issued for the Work Order;
 - **Grid B** will display the instructions that have been issued for the Work Order.



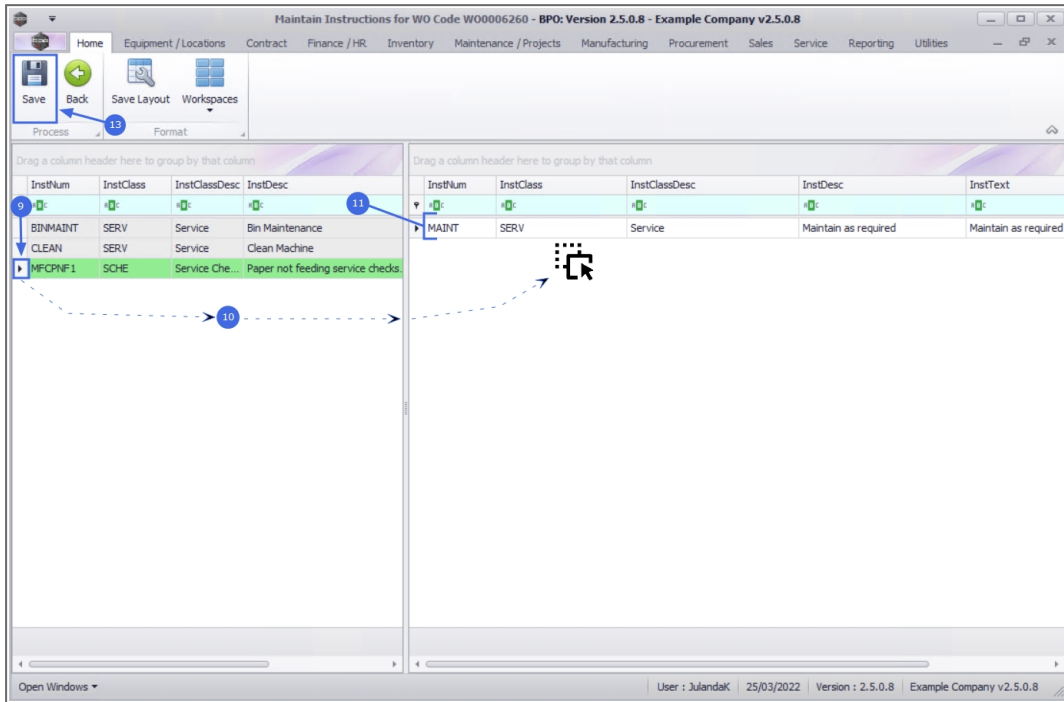
9. To issue an instruction to the work order, click on the **row**, in **Grid Area A**, to select the instruction.
10. **Click** and **hold down** the mouse button on the instruction and **drag** the instruction from **Grid A** and drop it in **Grid B**.
11. As you **drop** the instruction, the screen will be updated with the selection.
12. Continue issuing instructions to the work order as required.

REMOVE INSTRUCTION

To **remove** an Instruction that has incorrectly been issued to Grid B, **click** and **hold down** the mouse button on the instruction and **drag** the item back to Grid A.

SAVE INSTRUCTION

13. When you have finished updating the screen, click on **Save**.

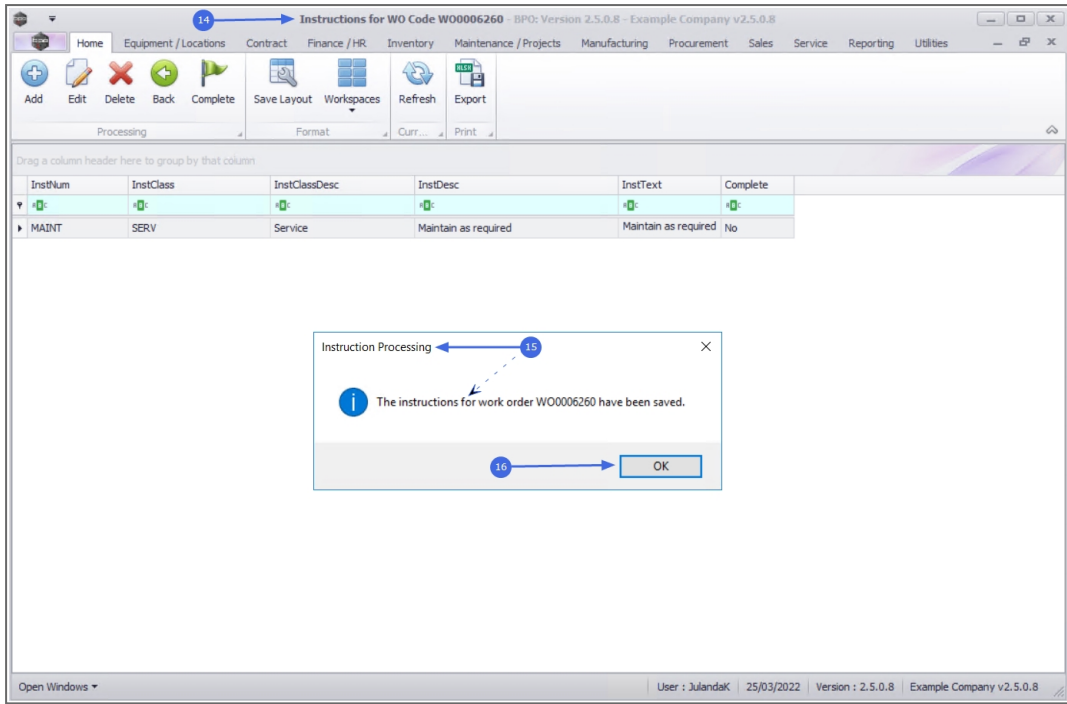


14. You will return to the **Instruction for WO Code** screen

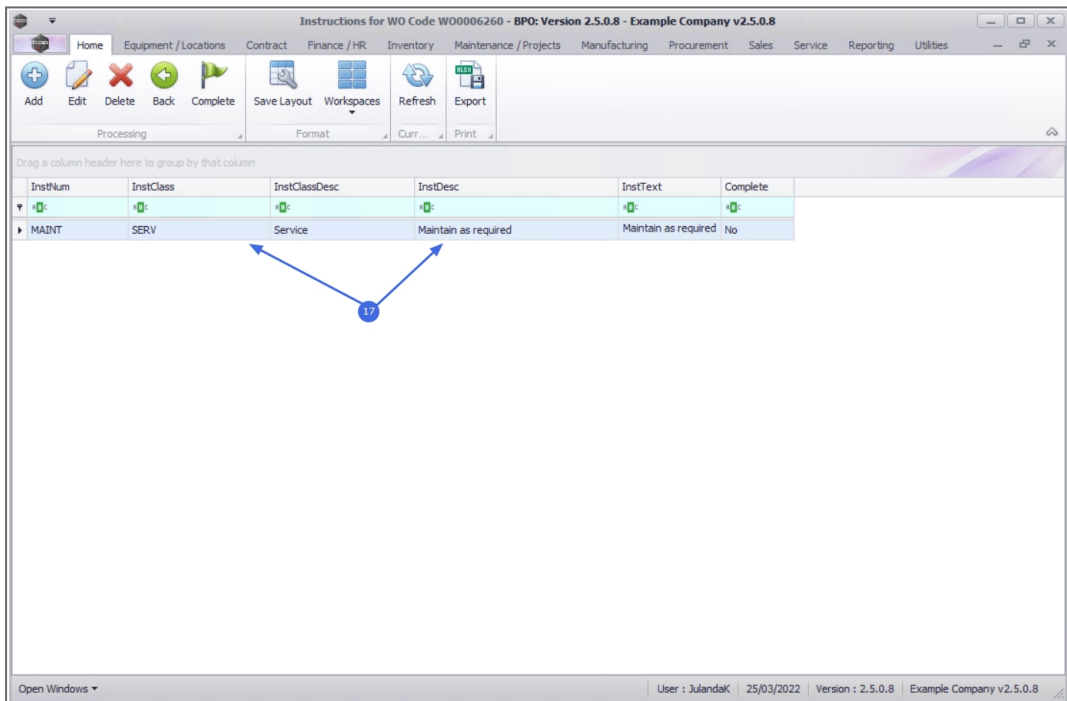
15. When you receive the **Instruction Processing** message to confirm;

- **The instructions for work order [work order code] have been saved.**

16. Click on **OK**.



17. You can now view the instruction issued for the Work Order.



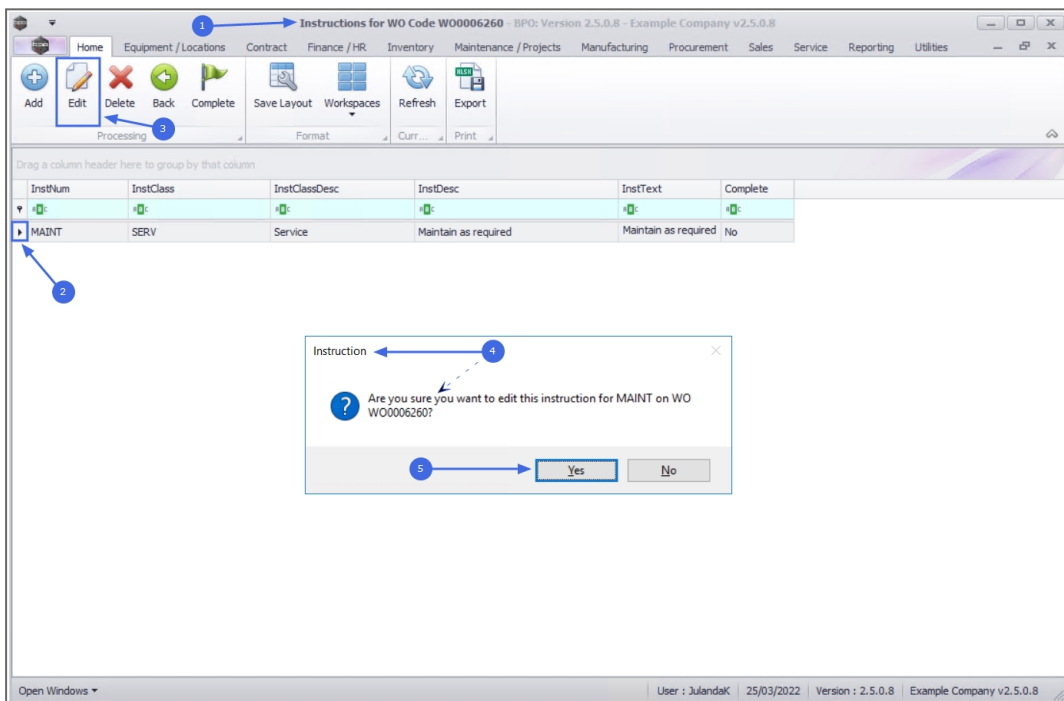
EDIT INSTRUCTIONS

1. From the **Instructions for WO Code** [work order code] screen,
2. Click on the **row** of the instruction you wish to edit.
3. Click on **Edit**.



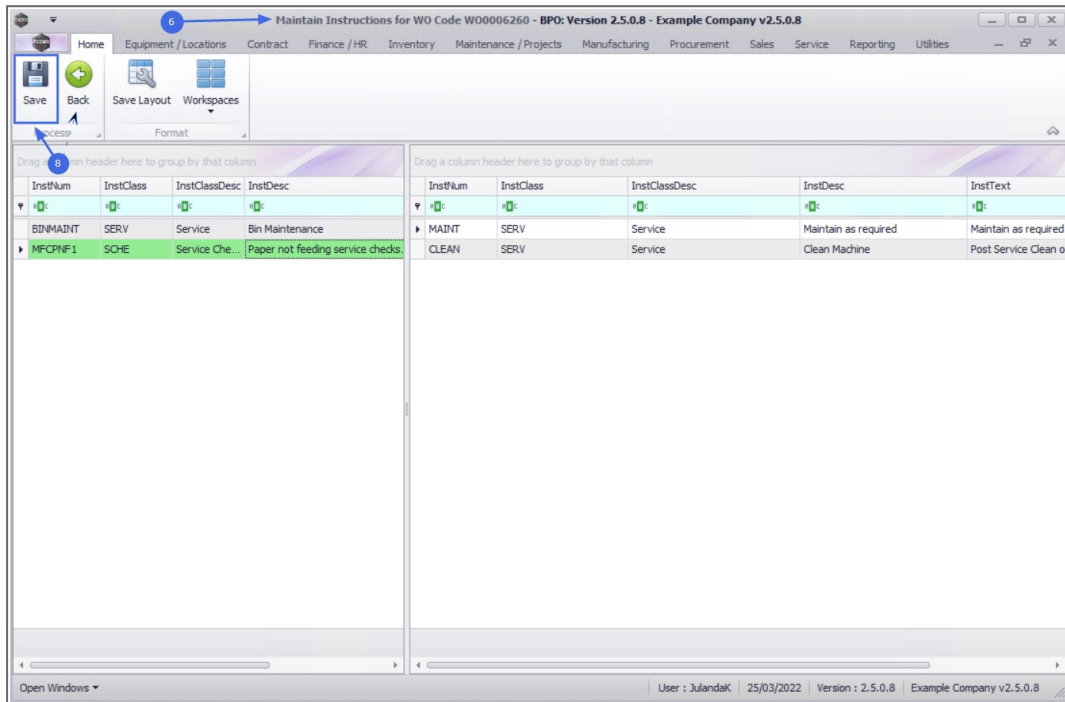
Short cut key: Right click to display the Process menu list. Click on Edit.

4. When you receive the **Instruction** message to confirm;
 - **Are you sure you want to edit this instruction for** [instruction number] **on WO** [work order code]?
5. Click on **Yes**.



6. The **Maintain Instructions for WO Code** [work order code] screen will be displayed.
7. Make the necessary changes to the Instructions for the Work Order:-
 - **Add** an additional instruction, by dragging the item from Grid A to Grid B.

- **Remove** an instruction, by dragging the item from Grid B to Grid A.
8. Click on **Save** to save the changes, or
- Click on **Back** to return to the Instructions for Work Order screen without saving.



DELETE INSTRUCTIONS

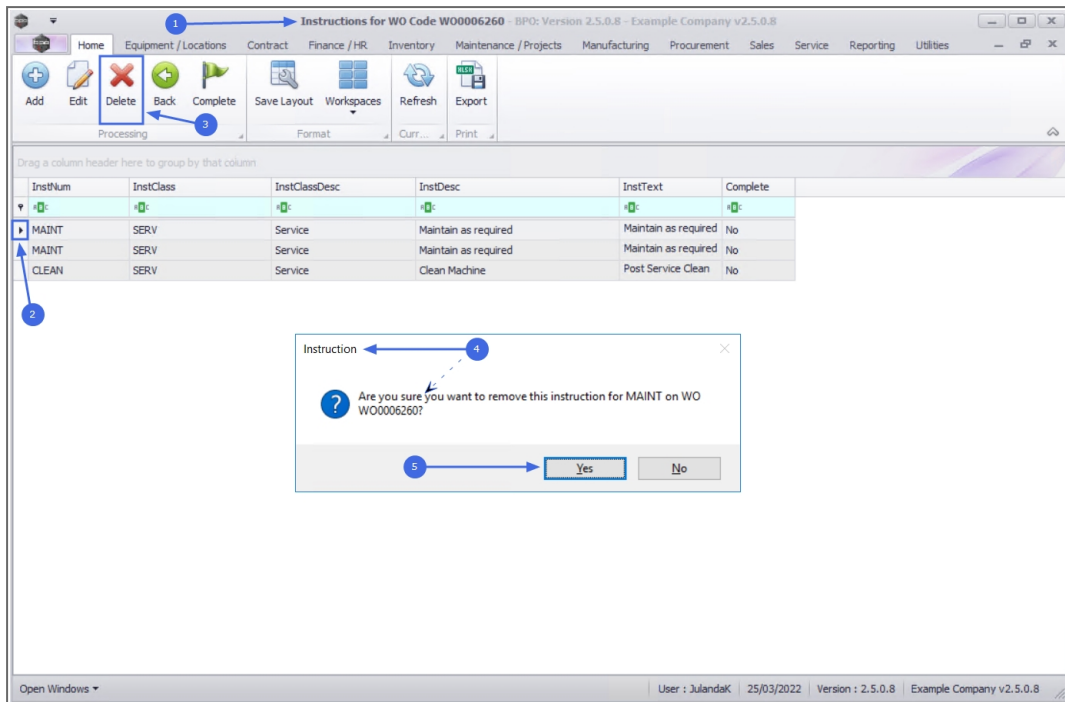
1. From the **Instructions for WO Code** [work order code] screen,
2. Click on the **row** of the instruction you wish to remove from the Work Order.
3. Click on **Delete**.



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

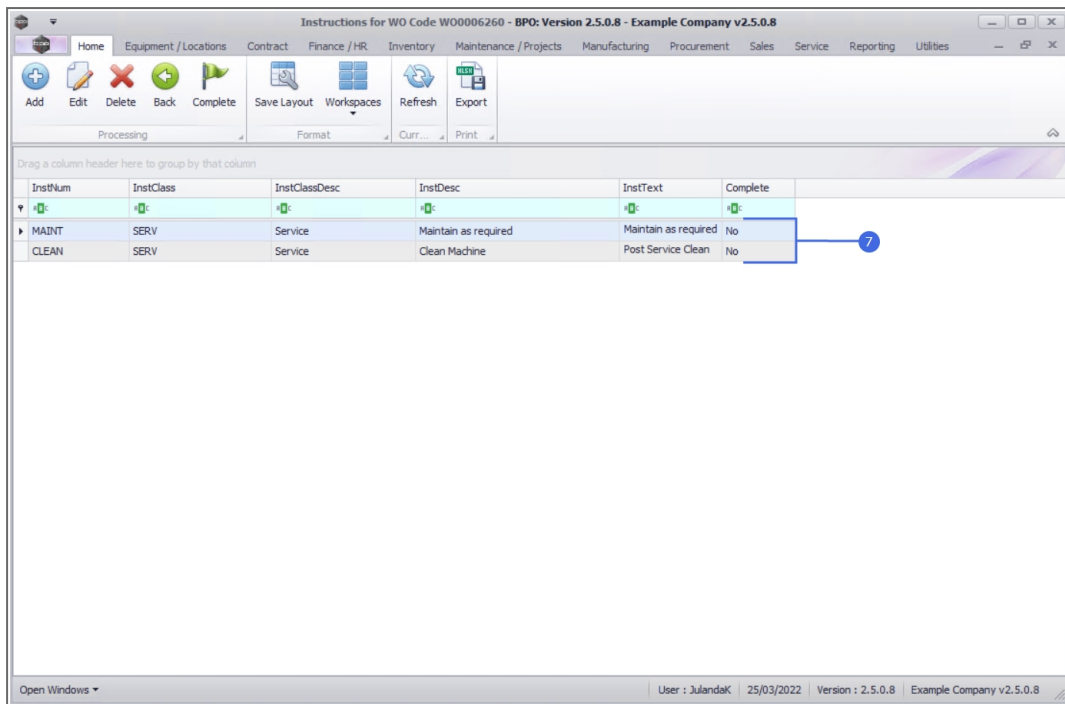
4. When you receive the **Instruction** message to confirm;
 - **Are you sure you want to remove this instruction for [instruction number] on WO [work order code]?**

5. Click on **Yes**.



6. The instruction has been removed from the Instructions for WO Code screen.

7. Click on **Back** to return to the **Work Order Listing** screen.



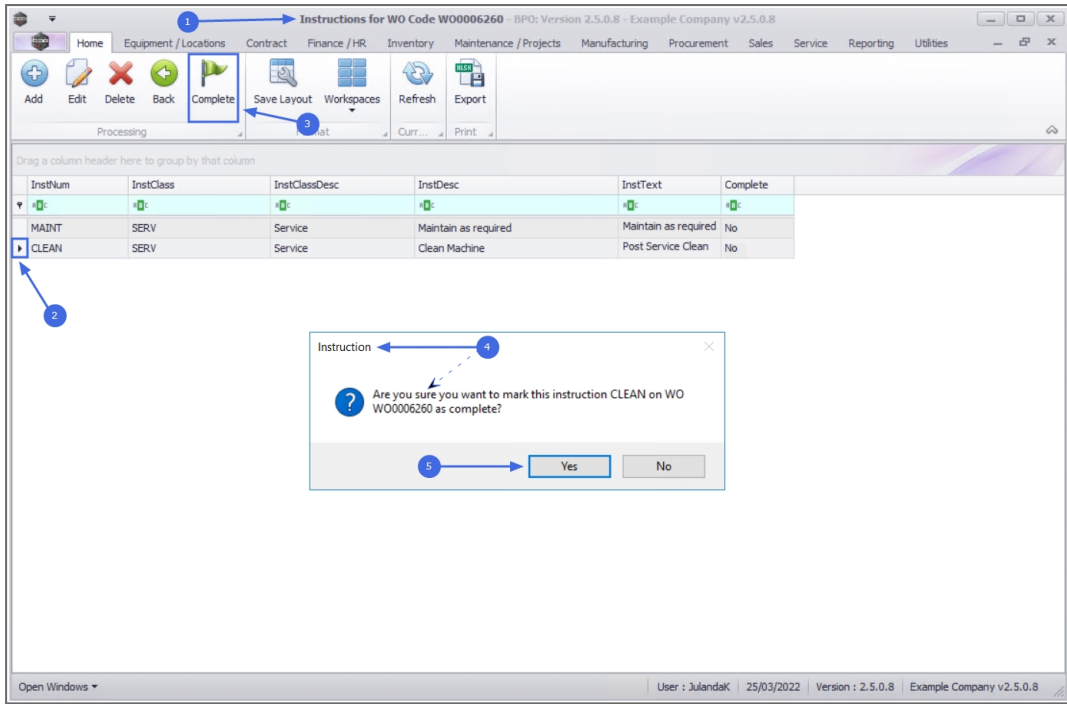
COMPLETE INSTRUCTION

1. From the **Instructions for WO Code** [work order code] screen,
2. Click on the **row** of the instruction that has been completed for the work order.
3. Click on **Complete**.



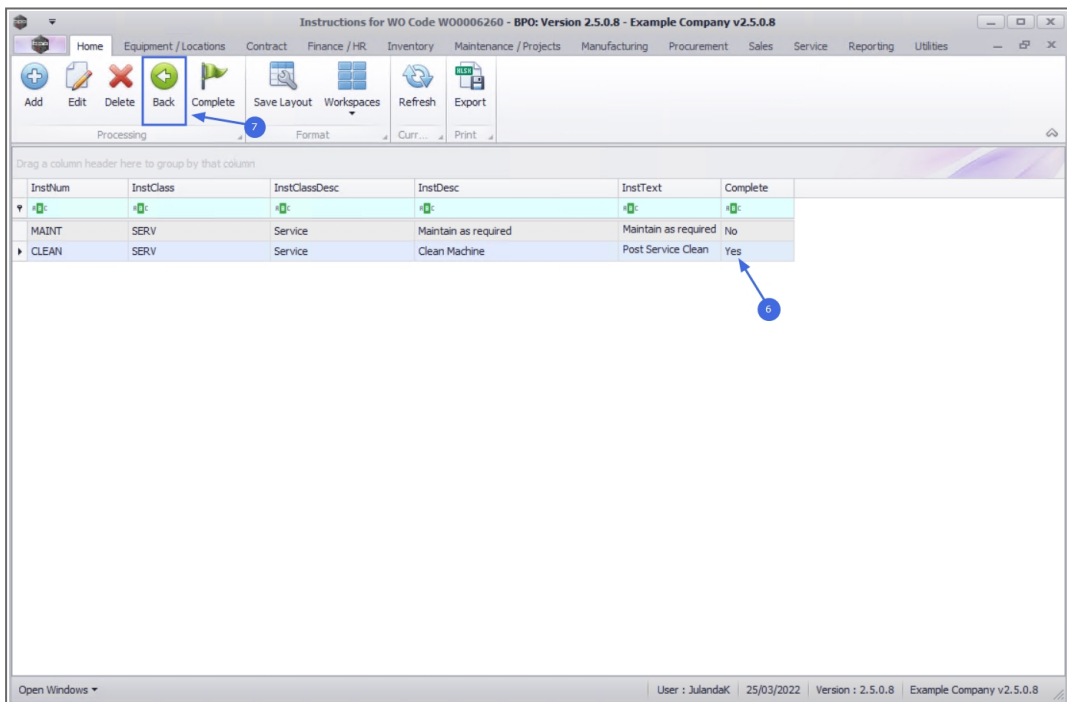
Short cut key: Right click to display the Process menu list. Click on Complete.

4. When you receive the **Instruction** message to confirm;
 - **Are you sure you want to mark this instruction** [Instruction number] **on WO** [work order code] **as complete?**
5. Click on **Yes**.



6. The **Status** for the instruction has been updated to **Yes** in the Complete column.

7. Click on **Back** to return to the **Work Order Listing** screen.





MNU.072.024