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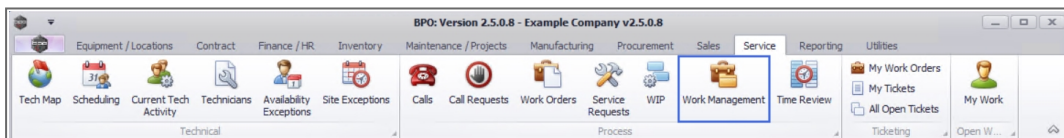
SERVICE

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>, **Started**, <u>Completed</u> and <u>Closed</u> from here.

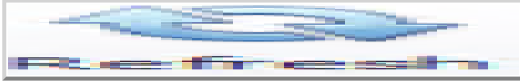---

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.
4. 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.
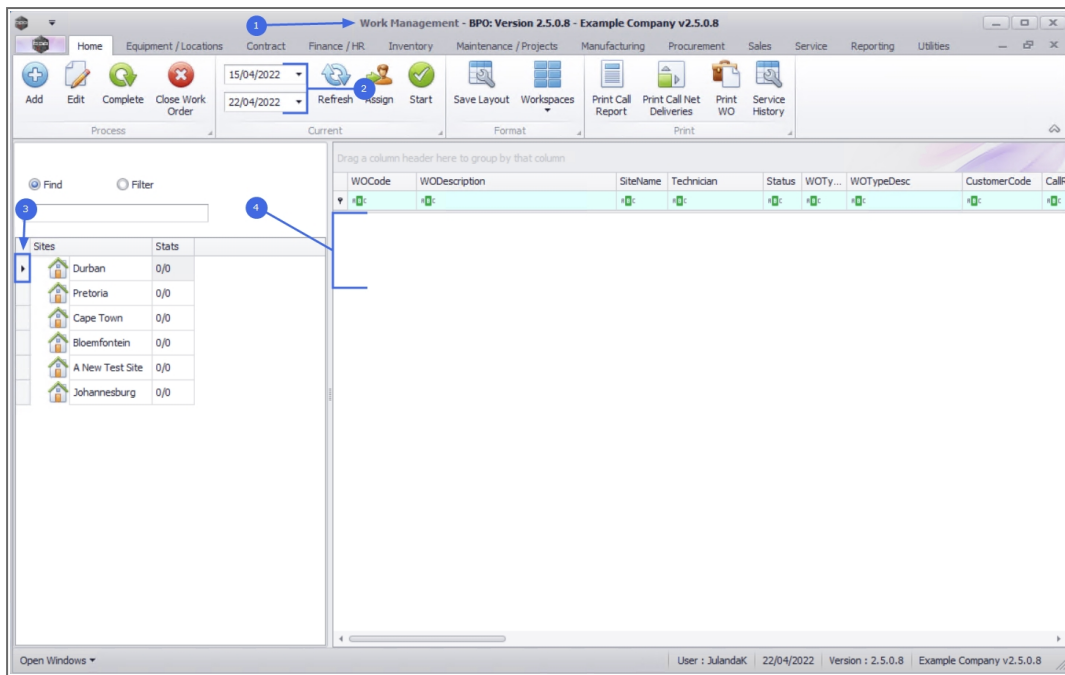
ADJUST DATE RANGE

If the Work Order you wish to view is not listed, you can change the date range, or use the 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.
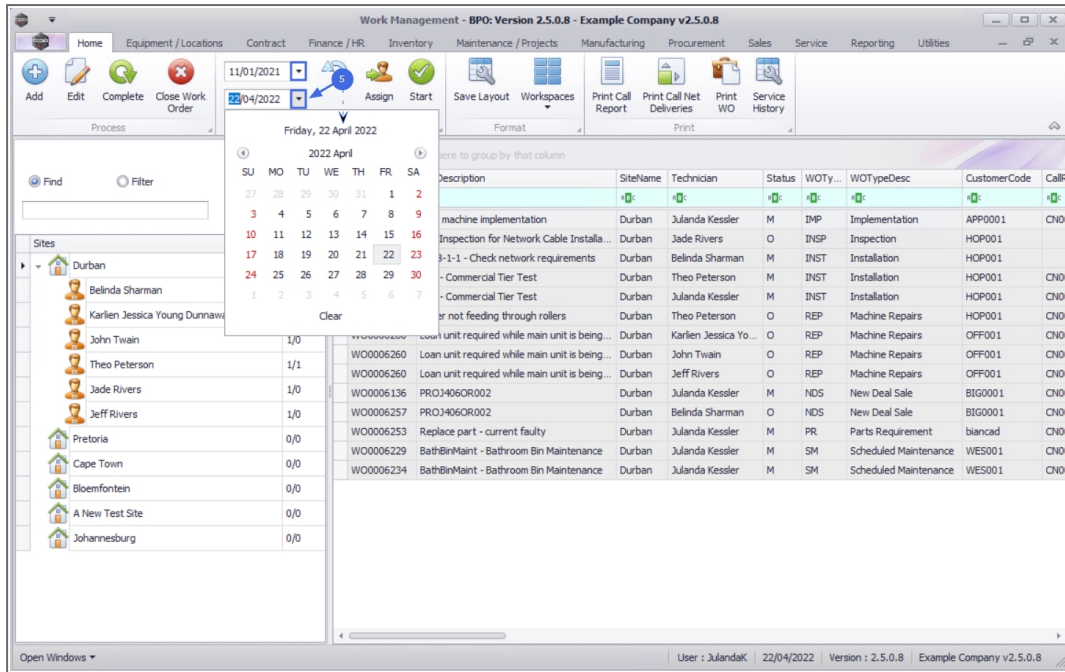
SITES FRAME

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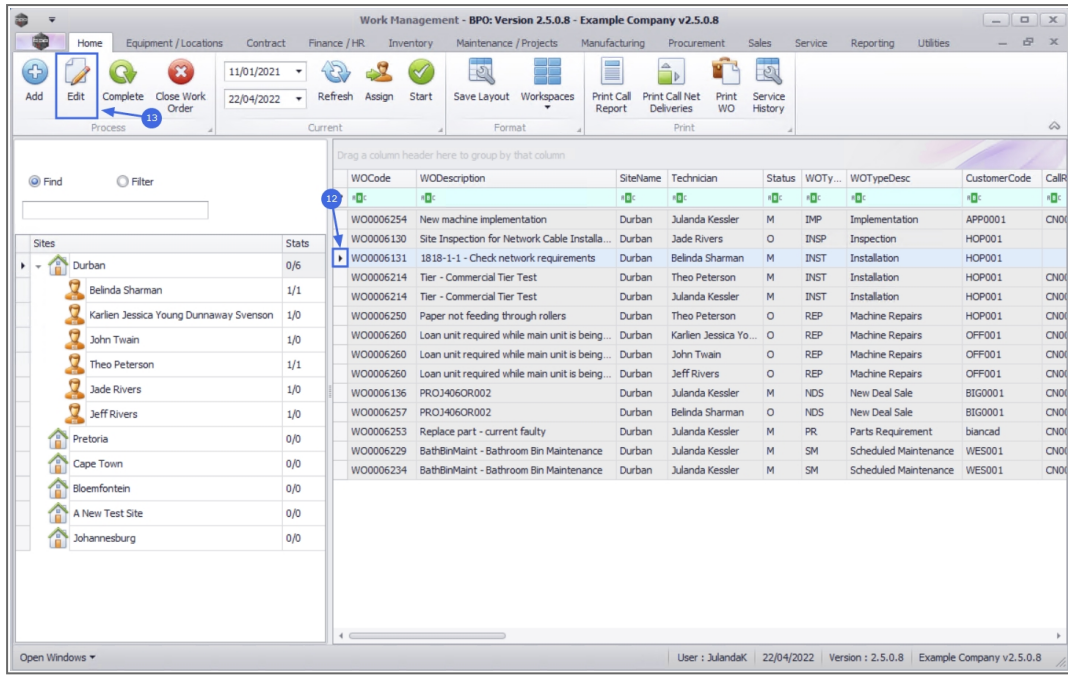
> ✎ **Note** that the Technician column in the data grid is not the Assigned to person but the employee that has a labour / time record linked to the Work Order.
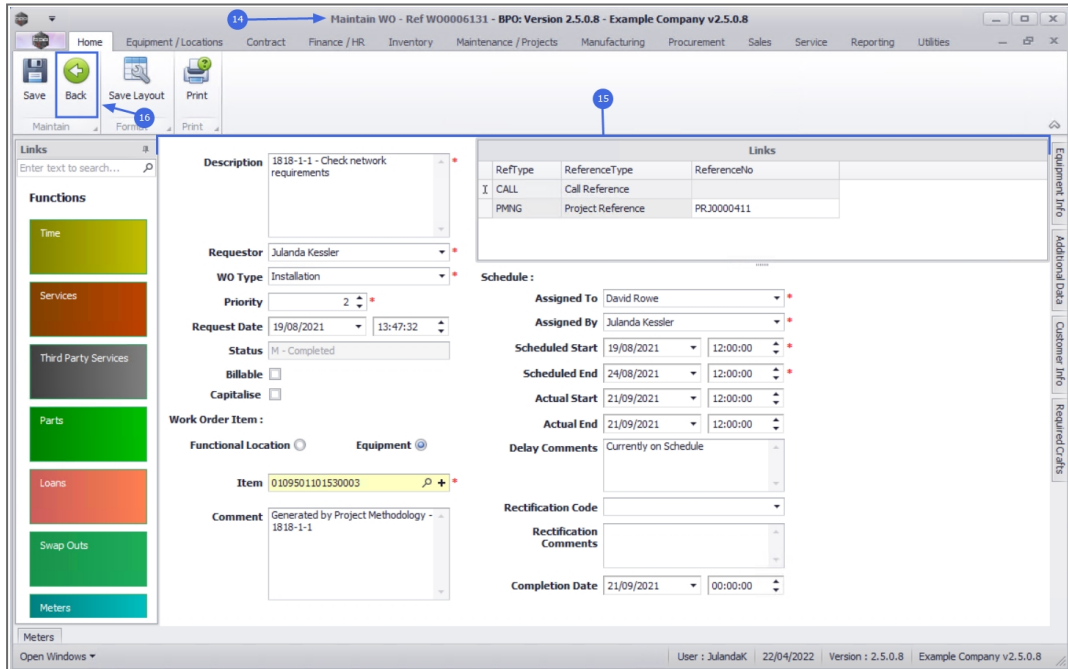

12. Click on the **row** of the work order you wish to view.

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. " on page 2** 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.

MNU.074.001