

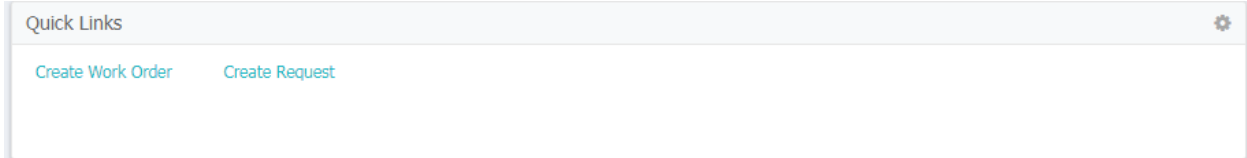
# Skilled Worker & Site Lead Guide for Work Order Management

## Contents

Dashboard.....	2
Work Orders.....	3
Work Order List View.....	3
Work Order Management.....	4
Processing a Work Order.....	5
Adding Parts.....	6

## Dashboard

### Quick Links



The Quick Links widget is a light blue rectangular box with a title bar 'Quick Links' and a gear icon on the right. Below the title bar, there are two buttons: 'Create Work Order' and 'Create Request', both in a teal color.

Create Work Order – easily create work orders, useful for work that you’re going to perform

Create Request – easily create requests for work orders that will be performed by someone else

### Work Center



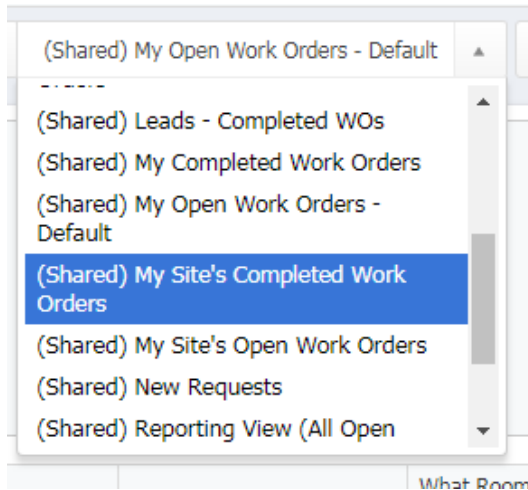
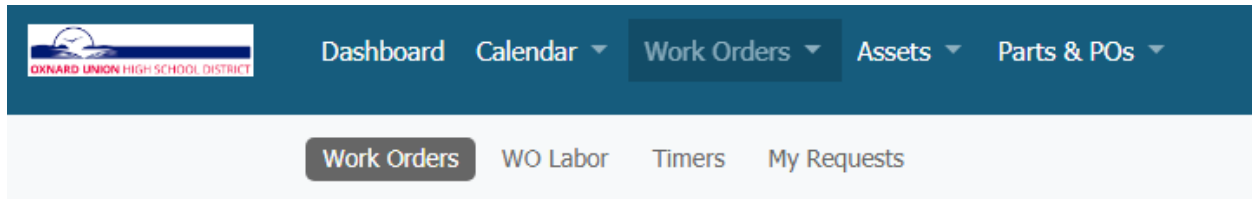
The Work Center widget is a light blue rectangular box with a title bar 'Work Center' and a gear icon on the right. It displays several metrics in a grid-like format:

- My active Work Orders (today / overall)**
  - PM: 0 / 0
  - Non-PM: 0 / 1
  - Overdue: 0
- Site's active Work Orders**
  - PM: 0
  - Non-PM: 4
  - Overdue: 0
- Request to approve (site-specific / no site)**: 0 / 0
- Needs assignment or status change (site-specific / no site)**: 2 / 0

The dashboard gives you quick access to your active work orders or active work orders at your site. The numbers are interactive and can be clicked on, taking you directly to the work order list.

# Skilled Worker & Site Lead Guide for Work Order Management

## Work Orders



Commonly used and most important views:

**My Completed Work Orders** – displays all of your completed work orders if your name is populated in the assigned to box. This box can be displayed by clicking on Advanced Filters and then adding yourself to the box.

**My Open Work Orders** – displays all open work orders assigned to you.

**My Site's Open Work Orders** – displays all open work orders at your site (more useful for site leads)

**My New Requests** – displays all new requests

## Work Order List View

Source Type:

Assigned To:   Waiting for approval only

Schedule:


Date Type:  Date Range:

<input type="checkbox"/>	Work Order #	Source Site	Source Location	Status Category	WO Status	Work Category	Work requested	Priority	Action Taken
<input type="checkbox"/>	0000000051	OHS	OHS - Unit J - Cafeteria & Kitchen	Request	New Request	Plumbing	Leak under the sink in the kitchen	Medium	
<input type="checkbox"/>	0000000010	DO	DO - Unit D	Assigned	In Progress	Heating/Ventilation/A Conditioning	Please turn on the AC	Medium	none
<input type="checkbox"/>	0000000007	CIHS		Assigned	In Progress		I need help opening this jar of pickles	Medium	
<input type="checkbox"/>	0000000008	DO		Request	New Request		Phone isn't able to dial out	Medium	
<input type="checkbox"/>	0000000006	DO	DO - Unit C	Completed	Completed	Heating/Ventilation/A Conditioning	It's too hot in my office, please fix the AC	Medium	Inspected AC, order Picked & replaced

## Work Order Management

▼ GENERAL

**WO Status: \***

**Work Order #: \*** 
**Originator: \***  

**Title:** 
**Source Type: \***

WO Status – displays the current work order status

Source Type - This section's title will vary depending on the Source Type selected from the General section. By default, Location will be displayed.

**Origin:** 
**Originated:**  HHMM:

**Priority: \*** 
**Assigned:**  HHMM:

**School Code:** 
**Expected:**  HHMM:

**Est Hrs:**  by: 
**Completed:**  HHMM:

Priority – Spare Time, Low, Medium, High, Critical

School Code – automatically assigned for the associated site/location

Est Hrs – estimated hours required to complete the work order

**Work Type:**

**Work Category: \***

**Problem:**

**Cause:**

Work Type – Specifies whether the work performed is related to events, improvements, inspections, preventative or reactive maintenance, storm damage, user education, or vandalism.


Work Category – Indicates what type of work is being done.


Problem – Indicates why the work the work order was created.

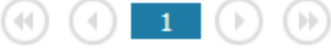
Cause – Explains what caused the problem

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▼ LOCATIONS \*



Select Location: 




	Name	Est Hrs
	OHS - Unit J - Cafeteria & Kitchen	0.00

Page 1 of 1 (1 items) 

Locations – displays the location and estimated hours required to completed the job.

▼ ASSIGNED TO

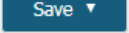
Select User:  Select Me: 

	User Index	Est Hrs	Start at: Days/HH/MM from Assigned date/time	Emp #	First Name	Last Name	Department
  	1	0.00	Day: 00 HH: 00 MM: 00		Test	Technician	

Assigned to – displays who the work order is assigned to

## Processing a Work Order

Initially, the work order will be in a status of New Request or In Progress. In this case, the WO Status is a

New Request, so change it to In Progress when starting the job and click  followed by save one more time.

Statuses:

New Request – a new request that has been assigned to you.

In Progress – used when starting a work order

On Hold – used when more information is required or approval is needed from the Maintenance Office

Parts on Order – used when parts need to be ordered or picked up to complete the work order

Complete – used when the work requested has been completed and parts have been entered.

Next, you'll want to enter actions taken.

Action Taken:


ABC ✓

replaced cracked pipe and cleaned the area.

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Add labor entries to the work order by clicking on **+ Employee Labor**. Enter the start and end time along with Reg/OT, verify the hours, and click save.

### Add-Edit Labor

Select User: Test Technician 

Start Date:  End Date:

Hours:  Wage:

Reg/OT:  Sub total(\$):

Cost Center:

Description:

Once actions taken and labor entries have been entered, save your changes. If you purchased parts to complete the work order, click on Save > Save & Add Parts.


### Adding Parts

Click on Add > Non-Inv Items

- Parts **005**
- All Location Parts
- All PM Parts **EX**
- Quick Part Entries
- Non-Inv Items

Enter the information as shown below.

**NEW**

Location	Part #	Name	Quantity	Date Used
 OHS - Unit J - Caf	Non-Inv	1/2" Plastic P-Trap	1.00	07/26/2018 09:21:41 AM

Usage Type	Use Current Price	Price	Unit	Location	Extended	Site	Description
Dispatch	<input type="checkbox"/>	7.390	each		7.390		Purchased from Lowes

Click on Save > Save. Now click on edit work order, change the status to complete, and save your changes.