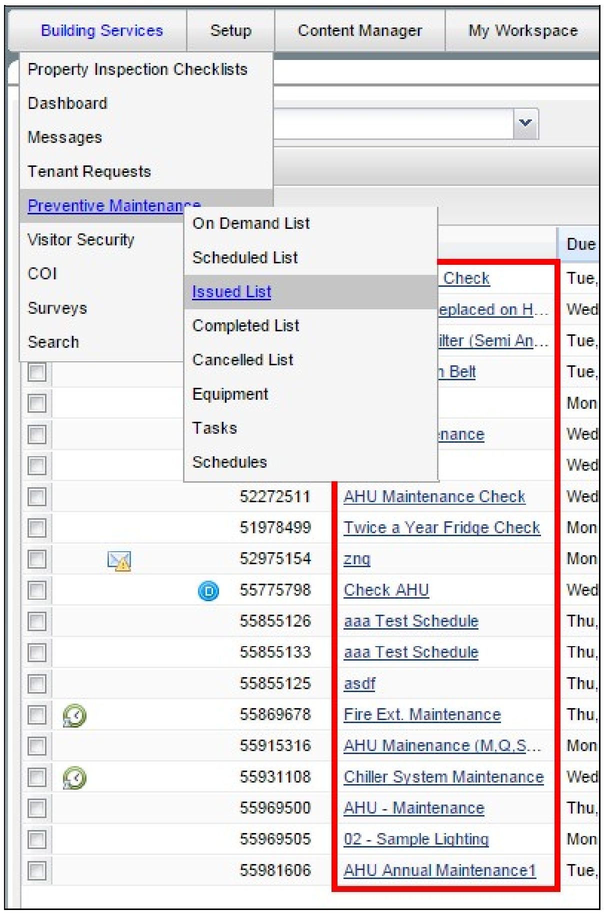
Work Order Details Overview

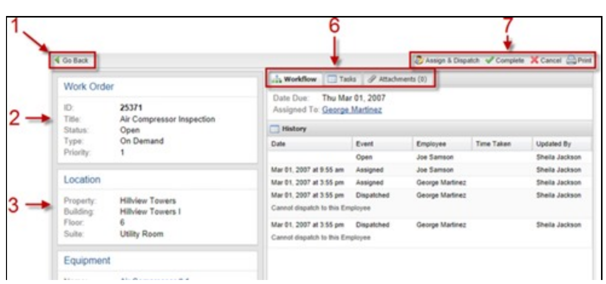
Work Order Details Overview:

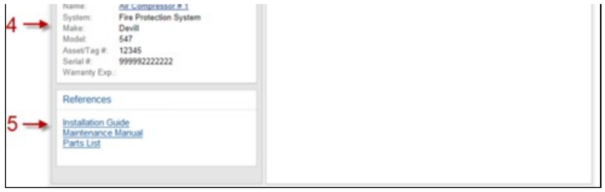
This topic provides a general overview of the functions available in the Work Order Details screen. Users can access this screen from any of the work order lists and clicking on the title of the work order they want to view or work with.



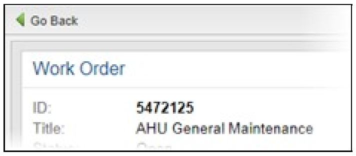
The Work Order Details screen displays all information related to the work order, including basic work order and equipment information, task details and any additional attachments or online references that are applicable to the work order.

Basic, commonly referenced information is displayed as a series of virtual cards on the left side of the work order details. Editable cards are highlighted in blue when moused over. Clicking on a card opens a window which allows users to edit this information.

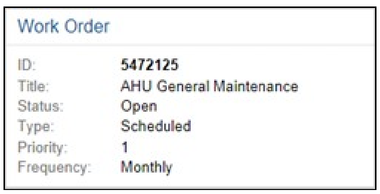




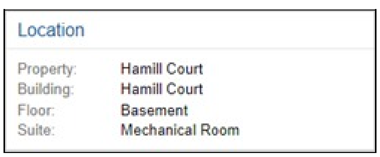
1. The **Go Back** button returns to the previous screen.



2. The Work Order card displays basic information about the work order: ID, Title, Status, Type, Priority, and Frequency.

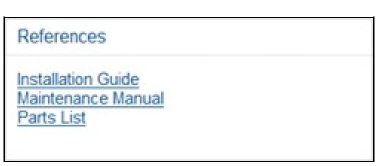


3. The Location card indicates the location where the work is to take place: Property, Building, Floor, and Suite.

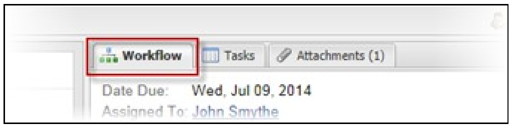


4. The Equipment card displays general information concerning the equipment on which the work is to be performed: Name, System, Make, Model, Asset/Tag #, Serial #, and Warranty Expiry.
   - Users can click on the equipment's name to view additional information on the Equipment Details screen.

5. The References card contains external links (hyperlinks/URLs) related to the equipment being worked on, such as installation guides or maintenance manuals.
   - Clicking on a link will open the URL in a new browser window.



6. The Workflow, Tasks and Attachments tabs. Additional details for each tab are provided below.



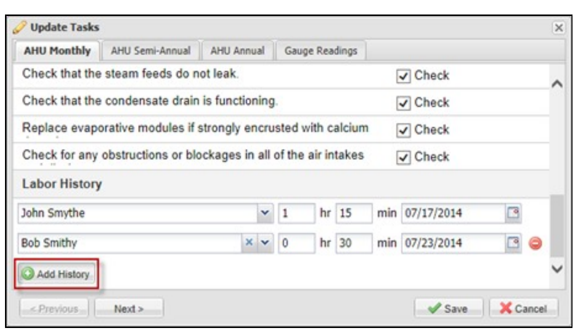
- The Workflow tab is displayed by default. It displays the following information: Date Due, Assigned To, and the work order's History.
  - Clicking on the name displayed in the Assigned To field displays a popup with the assignee's contact information.
  - The history section lists events in chronological order.
    - Notes appended to Cancelled and Closed history events can be edited by double-clicking on the entry.

- The Tasks tab shows a list of tasks which need to be performed.

  - Each task is displayed as a separate virtual card.
  - Clicking on a task card opens the Update Tasks interface, allowing the user to input labor history information (time taken to work on the task) by clicking the **Add History** button.
  - Users can add time taken for multiple employees as needed by clicking on the **Add History** button.

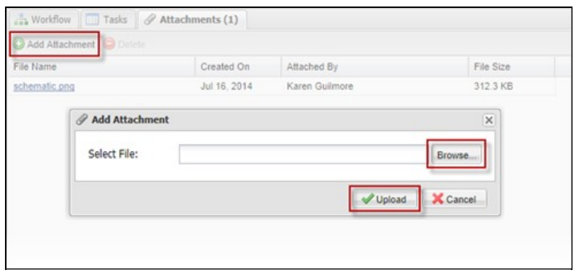
Note:

- Adding to the work history using this method **does not** mark the work order as completed; see Completing PM Work Orders for detailed information on completing work orders.



- The Attachments tab displays a list of any files (such as MS Word documents, pictures or PDF files).

    - Click on a file name to download it; if the file is in a format which can be displayed within a web browser, then it will be displayed in a separate browser window.
    - Users can remove an attachment by selecting an attachment and clicking **Delete**.
    - Users can upload an attachment by clicking **Add Attachment**.
        - In the window that opens, click **Browse...**
        - Select the file to upload in the file selection window that is displayed and click **Open**.
        - In the Add Attachment window, click **Upload** to complete the process.



7. The **Assign & Dispatch**, **Complete**, **Cancel** and **Print**, buttons are briefly explained below.

- Clicking the **Assign & Dispatch** button opens the Assign & Dispatch window, allowing users to assign (if currently unassigned) or re-assign and dispatch the work order.
    - See Assign and Dispatch Work Orders for additional details.
- Click the **Complete** button to mark the work order as completed.
    - In the window that opens, users will have the opportunity to enter any previously unrecorded information, such as task completion or gauge readings.
    - See Completing PM Work Orders for more detailed information.
- The **Cancel** button opens the Cancel Work Order window, allowing users to cancel a work order.
    - See Cancelling PM Work Orders for more information.
- Clicking the **Print** button allows users to print a copy of the work order.
    - Printed work orders can be used to complete work in situations where the assignee does not have direct access to the Internet; the information filled out in the form will need to be manually input in Axis Control Panel afterwards to properly document the work.