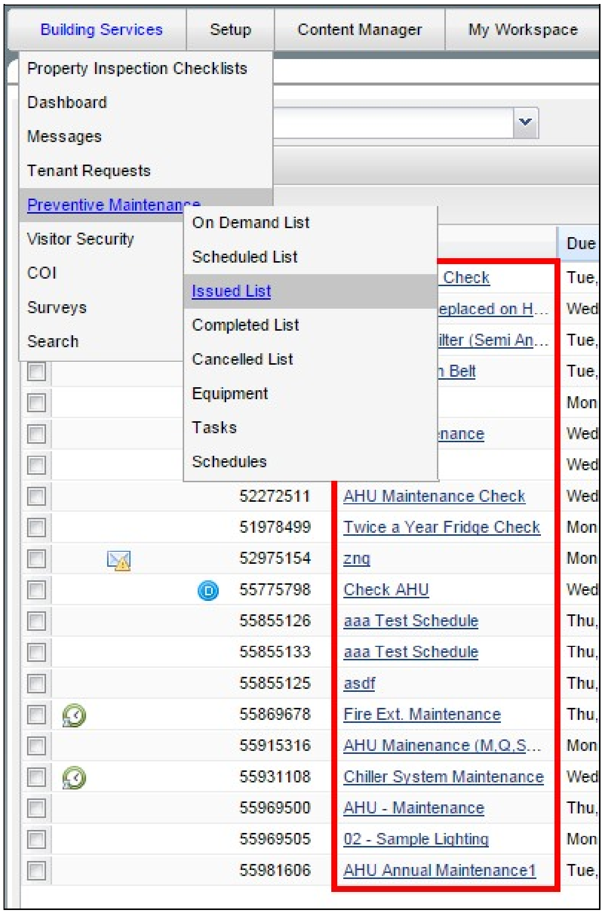
Work Order Details Overview

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.

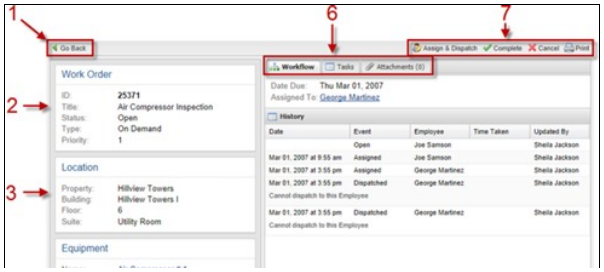


Building Services
Setup
Content Manager
My Workspace
Property Inspection Checklists
Dashboard
Messages
Tenant Requests
Preventive Maintenance
Visitor Security
COI
Surveys
Search
On Demand List
Scheduled List
Issued List
Completed List
Cancelled List
Equipment
Tasks
Schedules

		Due
	Check	Tue,
	eplaced on H…	Wed
	ilter (Semi An…	Tue,
	n Belt	Tue,
		Mon
	nance	Wed
		Wed
52272511	AHU Maintenance Check	Wed
51978499	Twice a Year Fridge Check	Mon
52975154	znq	Mon
55775798	Check AHU	Wed
55855126	aaa Test Schedule	Thu,
55855133	aaa Test Schedule	Thu,
55855125	asdf	Thu,
55869678	Fire Ext. Maintenance	Thu,
55915316	AHU Mainenance (M,Q,S…	Mon
55931108	Chiller System Maintenance	Wed
55969500	AHU - Maintenance	Thu,
55969505	02 - Sample Lighting	Mon
55981606	AHU Annual Maintenance1	Tue,

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.



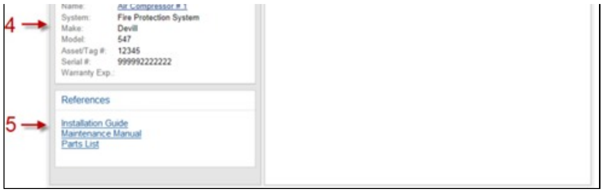
1
2
3
6
7
Go Back
Assign & Dispatch
Complete
Cancel
Print
Workflow
Tasks
Attachments (0)
Work Order
Location
Equipment
History

ID: 25371
Title: Air Compressor Inspection
Status: Open
Type: On Demand
Priority: 1

Property: Hillview Towers
Building: Hillview Towers I
Floor: 6
Suite: Utility Room

Date Due: Thu Mar 01, 2007
Assigned To: George Martinez

Date	Event	Employee	Time Taken	Updated By
	Open	Joe Samson		Sheila Jackson
Mar 01, 2007 at 9:55 am	Assigned	Joe Samson		Sheila Jackson
Mar 01, 2007 at 3:55 pm	Assigned	George Martinez		Sheila Jackson
Mar 01, 2007 at 3:55 pm Cannot dispatch to this Employee	Dispatched	George Martinez		Sheila Jackson
Mar 01, 2007 at 3:55 pm Cannot dispatch to this Employee	Dispatched	George Martinez		Sheila Jackson

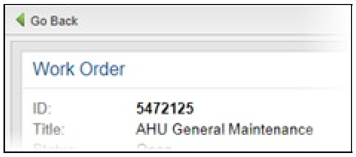


Name: Air Compressor # 1
System: Fire Protection System
Make: Devill
Model: 547
Asset/Tag #: 12345
Serial #: 999992222222
Warranty Exp.:

References

Installation Guide
Maintenance Manual
Parts List

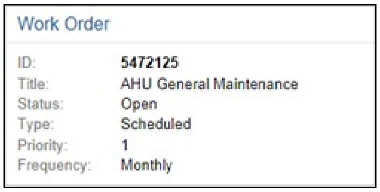
1. The **Go Back** button returns to the previous screen.



Work Order

ID: 5472125
Title: AHU General Maintenance

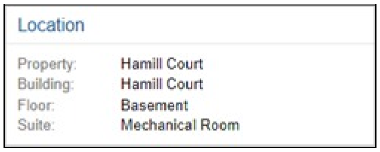
2. The Work Order card displays basic information about the work order: ID, Title, Status, Type, Priority, and Frequency.



Work Order

ID: 5472125
Title: AHU General Maintenance
Status: Open
Type: Scheduled
Priority: 1
Frequency: Monthly

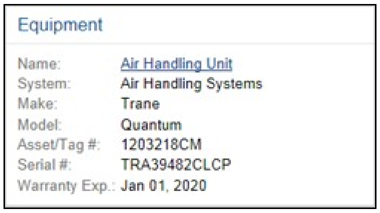
3. The Location card indicates the location where the work is to take place: Property, Building, Floor, and Suite.



Location

Property: Hamill Court
Building: Hamill Court
Floor: Basement
Suite: Mechanical Room

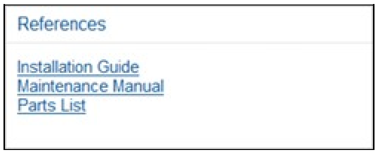
4. The Equipment card displays general information concerning the equipment on which the work is to be performed: Name, System, Make, Model, Asset/Tag #, Serial #, and Warranty Expiry.
    - Users can click on the equipment's name to view additional information on the Equipment Details screen.



Equipment

Name: Air Handling Unit
System: Air Handling Systems
Make: Trane
Model: Quantum
Asset/Tag #: 1203218CM
Serial #: TRA39482CLCP
Warranty Exp.: Jan 01, 2020

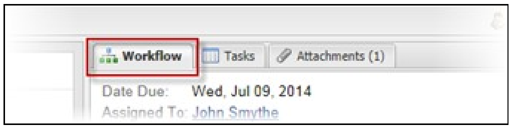
5. The References card contains external links (hyperlinks/URLs) related to the equipment being worked on, such as installation guides or maintenance manuals.
    - Clicking on a link will open the URL in a new browser window.



References

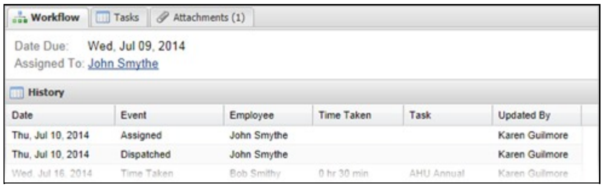
Installation Guide
Maintenance Manual
Parts List

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



Date Due: Wed, Jul 09, 2014
Assigned To: John Smythe

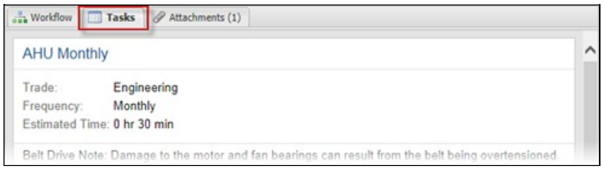
- The Workflow tab is displayed by default. It displays the following information: Date Due, Assigned To, and the work order's History.
    - Clicking on the name displayed in the Assigned To field displays a popup with the assignee's contact information.
    - The history section lists events in chronological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



Date Due: Wed, Jul 09, 2014
Assigned To: John Smythe

Date	Event	Employee	Time Taken	Task	Updated By
Thu, Jul 10, 2014	Assigned	John Smythe			Karen Guilmore
Thu, Jul 10, 2014	Dispatched	John Smythe			Karen Guilmore
Wed, Jul 16, 2014	Time Taken	Bob Smithy	0 hr 30 min	AHU Annual	Karen Guilmore

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



AHU Monthly

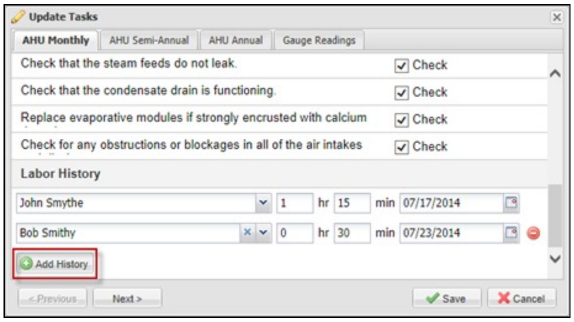
Trade: Engineering
Frequency: Monthly
Estimated Time: 0 hr 30 min

Belt Drive Note: Damage to the motor and fan bearings can result from the belt being overtensioned

    - 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.

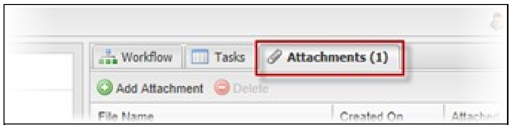


Check that the steam feeds do not leak.	☑ Check
Check that the condensate drain is functioning.	☑ Check
Replace evaporative modules if strongly encrusted with calcium	☑ Check
Check for any obstructions or blockages in all of the air intakes	☑ Check

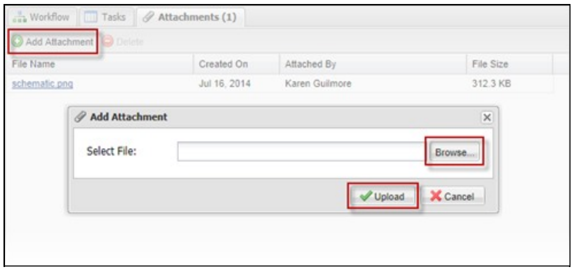
Labor History

John Smythe 1 hr 15 min 07/17/2014
Bob Smithy 0 hr 30 min 07/23/2014

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


Workflow
Tasks
Attachments (1)
Add Attachment
Delete
File Name
Created On

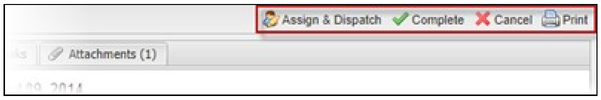
  - Click on a file name to download it; if the file is in a format which can be displayed within a web browser, then it will be displayed in a separate browser window.
  - Users can remove an attachment by selecting an attachment and clicking **Delete**.
  - Users can upload an attachment by clicking **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.


Workflow
Tasks
Attachments (1)
Add Attachment
Delete
Add Attachment
Browse...
Upload
Cancel

File Name	Created On	Attached By	File Size
schematic.png	Jul 16, 2014	Karen Guilmore	312.3 KB

Select File:

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


Assign & Dispatch
Complete
Cancel
Print
Attachments (1)

- 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.