

Work Order Lifecycle

About Work Orders

Work orders are the central unit of action and have several defining characteristics:

- They define work that needs to be done, comprising one or more tasks.
- They are usually assigned to a single resource whose job it is to do the work.
- They are usually expected to be completed in a single work session.

All of the information contained in a work order can be viewed on the Work Order Details page.

Work Order # ABCD0163		Type: Basic	Save Send/Print Close		
Status: New		Pick Up Start Attention On-Hold Complete Cancel ReOpen			
Customer Information .CCT20					
Customer:	Bob Johnson	Contact:	Bobo Dent	Contact At: (231) 231-2134	
Location:	201	Address: 200 Davey Glen Road Belmont, GA 94001			
Work Description Add Delete Move					
Asset	Task	Description			
Blinds	Blinds are missing.		Requires Subcontractor		
Electrical Outlet, Interior	Extinguish the electrical fire		-- Not Selected --		
Cabinet	Drawer cannot be opened		-- Not Selected --		
Assignment and Scheduling Update Workflow Settings					
Priority:	Emergency	Specialty:	General Maintenance	Assigned To: J.K., Smith	
Schedule Start:		Appointment:	Call First	Due By: 9/30/2005 02:00 PM	
Duration:	0 hrs 00 mins	Invoice:	<input checked="" type="radio"/> No <input type="radio"/> Yes	Not to Exceed: \$0	
P.O. Number:					
Service History Attachments Notes Logs/Lists Add'l Fields Financial					
Location Work Orders Asset Work Orders Refrigerant Transactions					
Filter Blinds					
WO #	Type	Status	Work Description	Assigned To	Priority
ABCD0163	B	New(09/14/05)	Multi-item: General Maintenance	J.K., Smith	Emergency

** Service requests are requests created through the request wizard on behalf of a customer. Service requests become work orders in the system. The only difference between a service request and a work order is the point of origin of the request.*

Work Order Life Cycle

Work orders are generated in two ways:

- Manually by dispatchers, customers (via service requests), and service technicians
- Automatically through preventive maintenance schedules

Once a work order has been created, it passes through several stages before being completed or closed.

Many of the actions listed below result in a change in the work order's status. Status is important because it determines what actions are enabled at any stage for the work order.

1. **Creation:** A work order is created and assigned a type. There are four default work order types: basic, request, PM/RM, and turn.
2. **Assignment:** Each work order is assigned to a service technician, either automatically or manually. The technician is notified that a new work order has been assigned to him or her.
3. **Pick up:** The technician picks up the new work order when he or she is ready to take responsibility for it.
4. **Updating:** While the work specified in the work order is being done, additional data may be collected and added to the work order.
5. **Completion:** When the work specified in the work order has been done, the work order is marked as completed.
6. **Invoicing:** Generating and approving invoices for work orders that are to be billed back to the customer, and approving invoices for work orders completed by outside vendor

Action:	Resulting Status:	Notes:
<i>Create a work order</i>	New	You can configure the work flow preferences so that new work orders have a status of either New or Needs Attention.
<i>Pick Up a work order</i>	Open	Pick up a work order when you are ready to take responsibility for it.
<i>Start a work order</i>	Open: In-Progress	Start a work order when you begin actually doing the work.
<i>Pause a work order</i>	Open: Paused	You can pause any started work order then start the work order again to resume work.
Placing Work On-Hold	On-Hold	You might put a work order on hold while waiting for parts or customer approval.
Call <i>Attention</i> to a work order	Needs Attention	You can configure work flow preferences to set all new work orders to Needs Attention, for example if approval is required.
<i>Complete a work order</i>	Completed	Any open, on-hold, or needs-attention work orders can be completed.
<i>Cancel a work order</i>	Cancelled	Work orders of any status can be canceled.