One Council
Quick Reference Guide

PROJECT MANAGEMENT
## Creating a Work Order from Projects

Overview

A Work Order:

- Is a way to capture costs, manage resources, record time etc.
- Is the main point of reference for all information relating to the 'work to be done' i.e. work instructions, scheduled dates, transactions and a way for time to be recorded
- Is created from a Work Order template.
- Links directly to a Project within a particular Work System (i.e. Capital Works, Operational Works, Fleet Management or Programme and Events).
  - All projects are created and mapped financially to your department and cost centre by the Finance Team

Creating a Work Order

1 Launch function:
Enterprise Search: **Projects** or
- Go to **Project Management**
- Select **Projects**

2 Use the filter or search to locate the project you wish to create a Work Order for. Click the link on the project to 'View'

3 Select the **Work Orders** section at left of screen once the project view displays.

Note: The Project must be in an APPROVED state to cost transactions to including time and labour.

4 Click **+Add** to commence creating a new Work Order.
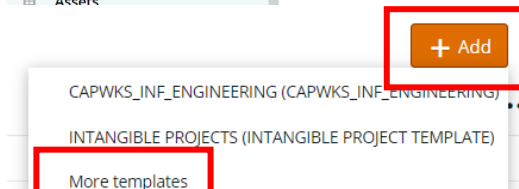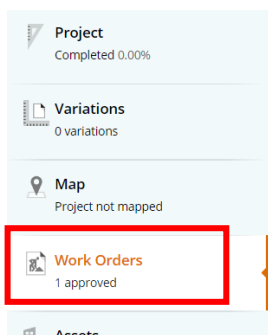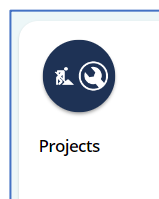
This provides the option to select from a known template or click 'More templates' to view and search for others.

The templates most frequently used will show over time for quick access.

5	**Complete the mandatory fields** (indicated by the red Asterix *) in the Work Order form.	Enter the information as required to create the Work Order.

Make selections and complete according to your department guidelines or standard naming convention.

Consult the Project Manager to confirm if other sections require completing i.e. Planning and Completion.

- **Description***
- **Details***
- **Priority***
- **Work Type***
- **Type***
- **Responsible Person** (the person who will <u>oversee or undertake</u> the required task/s outlined in the Details of the Work Order)
- **Project** (this will prefill if Work Order is created from the Project)
- **Activity** (select from the field drop down menu to choose the relevant activity)
- **Work Order Status***
- **Critical Path***

Note:
- Transactions can only be added to a Work Order in an APPROVED state.
- A Work Order cannot be approved without all required fields selected, including the Activity (although not showing as a mandatory field).
- You can only select ONE (1) Activity per Work Order.

6 Click **'Save'**, then if ready to proceed, click '**Approve**'. The Work Order can stay in a DRAFT state until required.
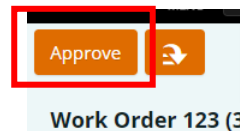
Assets, Labour and Attachments etc. can be added at any time to the Work Order prior to it being 'Completed Financially'.

Note:
- Once a Work Order is approved, you can make edits to some fields, but you cannot change the Activity selection made.
- You will need to **cancel the Work Order before** costs are assigned if this is no longer suitable.
- Once Cancelled the Work Order is no longer available for Transaction entries.

7 Once Saved, select the back arrow to return to the Project View Summary.

8 From the Project 'Natural' or 'Summary' view, the Work Order just created will show, along with others added over time.

The status of the Work order will also show (approved, draft etc.).