

# WORK MANAGEMENT

## Creating a Work Order from Work Planning

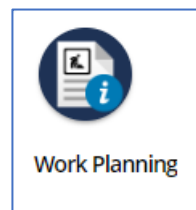
### Overview

A Work Order:

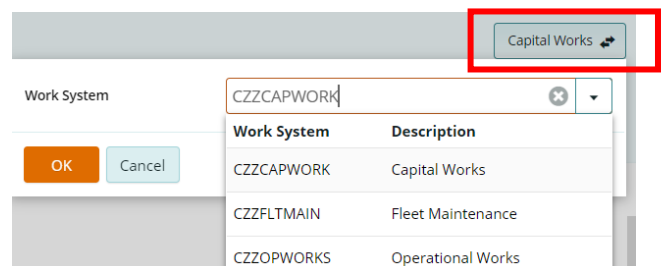
- Is a way to capture costs, manage resources, record time etc.
- Is the main point of reference for all information relating to the 'work to be done' i.e. work instructions, scheduled dates, transactions and a way for time to be recorded
- Is created from a Work Order template.
- Links directly to a 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

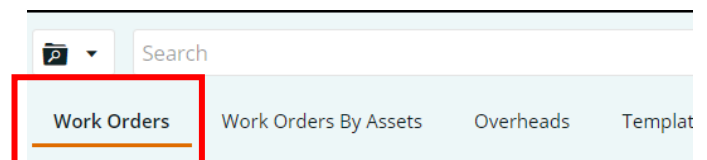
- 1 Launch function:  
Enterprise Search: **Work Planning** or
  - Go to **Work Management**
  - Select **Work Planning**



- 2 Select or confirm the correct **Work System** is showing in the selector at top right of page (i.e. Operational Works, Capital Works, Fleet Maintenance).

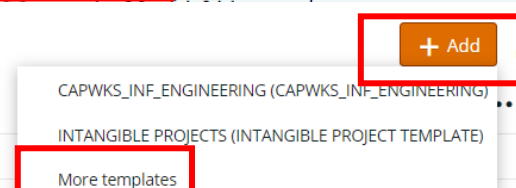


- 3 Make sure the 'Work Orders' tab is underlined.



Click the **+Add** icon to:

- a) **Select from a known template** or
- b) Click '**More templates**' to view and search for others.



Templates most frequently used will show over time for quick access.

#### 4 Complete the mandatory fields (indicated by the red Asterix \*) in the Work Order form.

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

Consult the Project Manager to confirm if other sections/fields require completing i.e. Crew Name, Works Trade, Planning and Completion.

Depending on the chosen Work System, different fields may show as mandatory and or be available to select from.

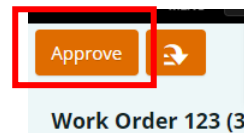
Enter the information as required to create the Work Order.

- **Description\***
- **Details\***
- **Priority\***
- **Work Type\***
- **Type\***
- **Responsible Person** (the person who will oversee or undertake 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.
- The Work Order can stay in a DRAFT state until required with Assets, Labour and Attachments etc. added at any time prior to it being 'Completed Financially'.

- 6 a) Click **'Save'**, and  
b) Click **'Approve'** if ready to proceed.



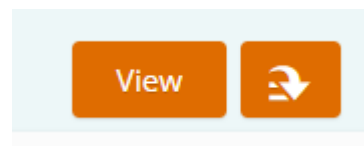
#### Note:

- Some edits can be made to an approved Work Order but you cannot change the Activity selection.
- You must **cancel the Work Order before** transactions are assigned in this case.
- Once Cancelled the Work Order is no longer available for Transaction entries.

- 7 Once Saved, select the back arrow to return to the Work Order list.



- 8 A Work Order can be viewed and edited at any time. Click on the Work Order in the list and select 'View'.



The 'Action/Down Arrow' will always provide additional options and actions i.e. View transactions and commitments, Record time, View Project etc.