Work orders

Overview

A work order records maintenance on one piece of equipment. It holds detail lines for labor, equipment, parts and outside services. When the work is done, you post the work order to maintenance history.

This page covers how to:

- Create a work order and add detail lines to it.
- Identify the required and read-only fields and their limits.
- Post work orders so their detail lines move into equipment maintenance history, readings and PM schedules are updated, and completed work orders are closed.
- Control which work orders a post affects by using the grid filter.
- Maintain the tasks that detail lines use.

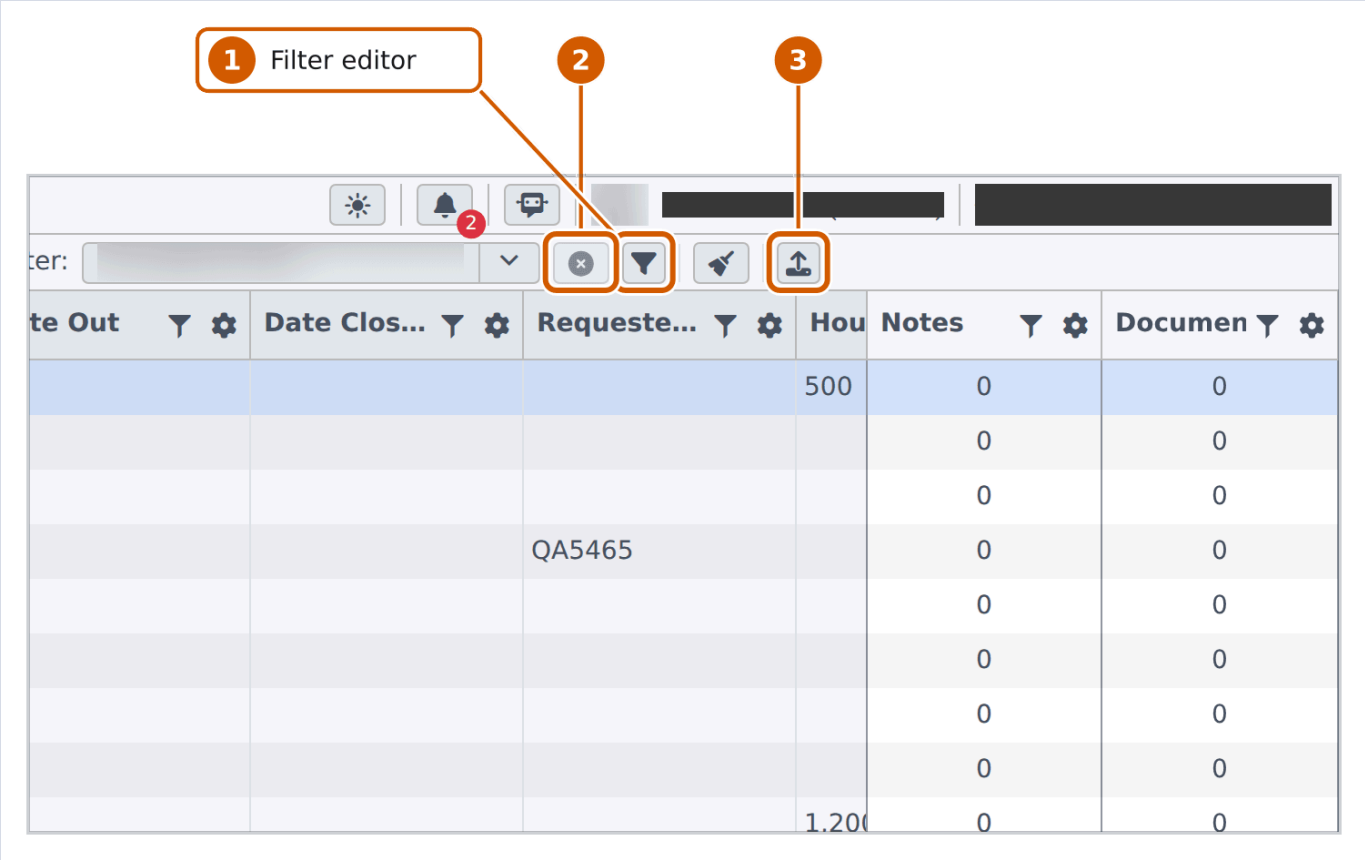
Before you begin

- Sign in to IRIS10 and open the Work Order screen. See Navigating portals and pages.
- Make sure you have access to the Work Order screen. Posting needs access level 4 on that screen. See Security Administration: access levels by user.
- Know how to add, edit and filter records in the shared data grid. See Grid viewing and editing, Grid filters and Data grid overview and basics.
- Set up tasks on the EMS Task screen. See Add a task.
- Assign PM policies to equipment if posting should advance PM schedules. See Equipment tools: depreciation, policies and parts.

Procedure

The Work Order screen

The Work Order grid shows columns such as Equipment, Status, Work Order Number, Location, Date In, Date Out and Date Closed. Each work order row has a child Work Order Detail grid. The toolbar includes **Filter editor**, **Clear filter** and **Post work order(s)**.



The Work Order screen. Use Filter editor to choose which work orders a post includes, then Post work order(s).

1. **Filter editor** – The filter sets which work orders are posted.
2. **Clear filter**
3. **Post work order(s)**

Create a work order

1. Open the Work Order screen. The work order grid shows columns such as Equipment, Status, Work Order Number, Location, Date In, Date Out and Date Closed.
2. Add a new record using the grid's add function, either inline or in the pop-out editor. The Work Order editor opens with the Work Order Info section.
3. Select the **Equipment** the work is for. Equipment is required. You cannot save the work order without it.
4. Leave **Work Order Number** as it is. It is read-only and shows the placeholder `Generated on save`. The number is assigned when you save the work order.
5. Fill in the other work order fields as needed, for example **Status**, **Location**, **Date In**, **Date Out**, **Requested By**, **Hours At Service**, **Miles At Service**, **Description** and the user-defined fields.
6. Save the work order. The message "The work order was saved. Please add the first work order detail record." appears.

7. Click **OK** on the message. The work order row expands and a new row opens in its Work Order Detail grid. This does not happen if you are using save-and-add-new, or if the new work order is on a different grid page.

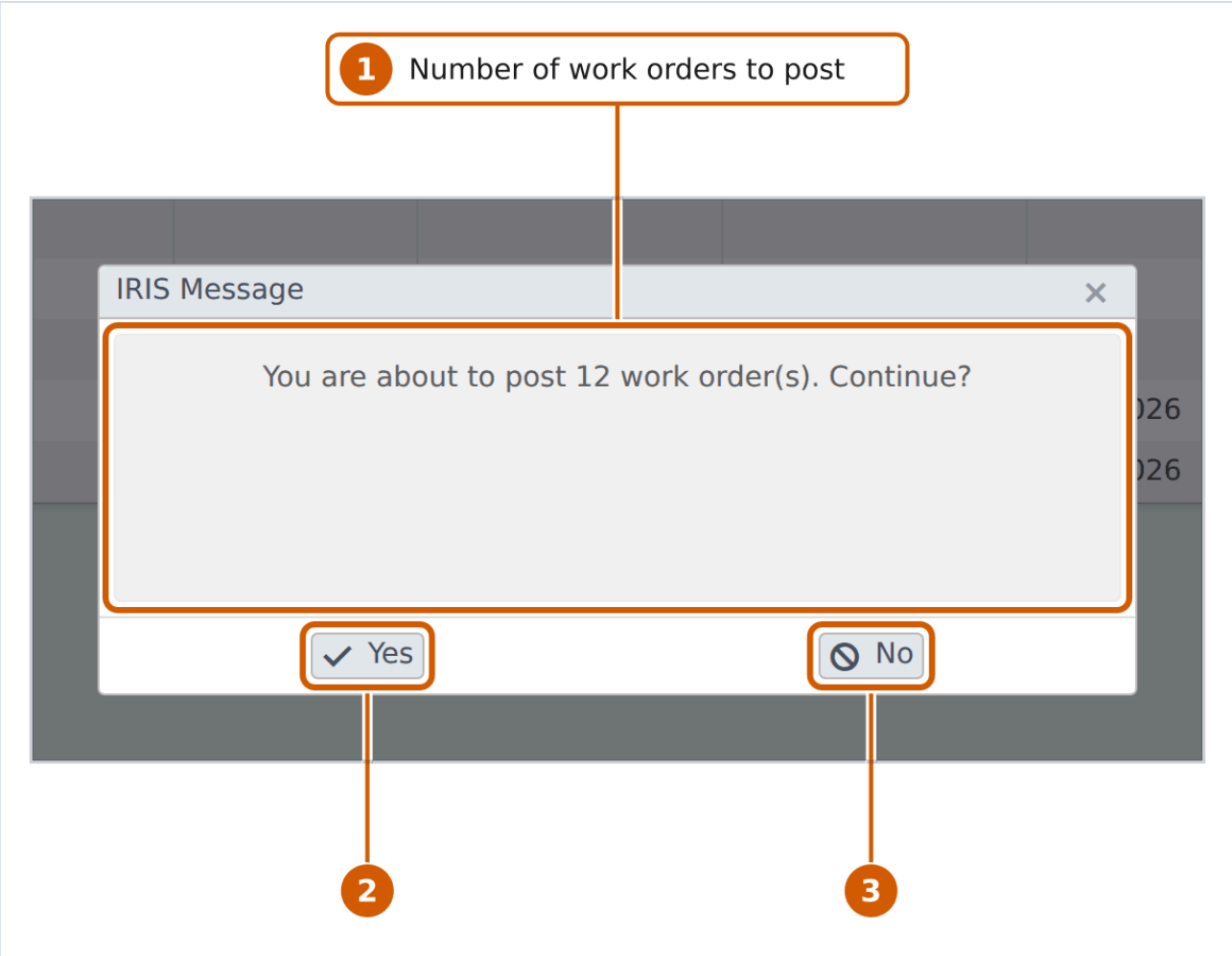
Add work order detail lines

1. Expand the work order row to show its Work Order Detail grid, then add a detail line. The Work Order Detail editor opens with the Work Order Detail Info section.
2. Select the **Task**. Task is required on every detail line.
3. Enter the **Task Date** and **Employee**.
4. Select a **Policy** if the work satisfies a PM policy. When the line is posted, a policy on the line can advance the equipment's PM schedule.
5. Enter costs and quantities as needed: **Labor Quantity** and **Labor Unit Cost**; **Equipment**, **Equipment Quantity** and **Equipment Unit Cost**; **Part**, **Part Quantity**, **Part Description**, **Part Cost** and **Part UOM**; **Outside Service Quantity**, **Description** and **Cost**. Cost fields accept values from 0 to 999999999999999.
6. Enter a **Service Description**, and set **Complete** and **PM Method** if you use them.
7. Leave **Posted To Maintenance History** cleared for a new line. Posting picks up only the lines where this checkbox is cleared, and checks it when it posts them.
8. Save the detail line.
9. Repeat for each further task, part or service on the work order.

Post work orders

1. On the Work Order screen, click **Filter editor** and filter the grid so that it shows only the work orders you want to post. The grid lists only the matching work orders. Posting uses this filter and any search filter, across all pages, not the rows you have selected.
2. Click **Post work order(s)** on the toolbar (tooltip "Click to post work order records."). An IRIS Message window asks "You are about to post N work order(s). Continue?", where N is every work order in the current filtered result.

> **Note:** Posting requires access level 4 on the Work Order screen.



The posting confirmation shows how many work orders in the current filter will be posted. Click No to cancel.

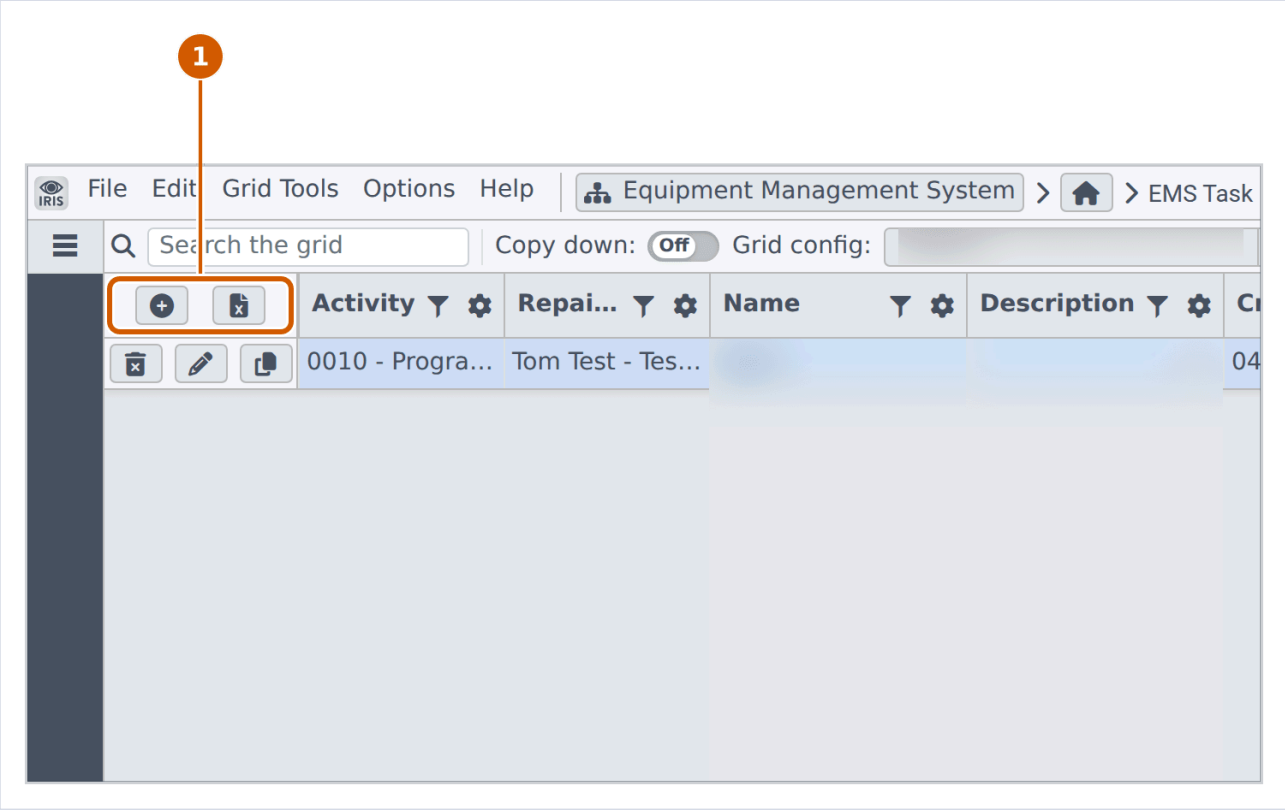
1. Number of work orders to post
2. Yes posts
3. No cancels

3. Check that the number in the message matches the number of work orders you mean to post.
4. If the number does not match, click **No**, then change the filter. **No** closes the message without posting anything.
5. If the number matches, click **Yes**. A loading indicator shows while posting runs. When it finishes, "Work orders posted successfully." appears and the work order grid reloads. If the server reports validation errors, they are shown in a message instead.
6. Review the results: posted detail lines have **Posted To Maintenance History** checked, and work orders with no unposted lines left show **Status** Closed and today's **Date Closed**. The posted work is now in the equipment's maintenance history. See Equipment maintenance history.

> **Important: Post work order(s)** posts every work order that matches the grid's current filter, across all pages, not just the rows you selected. Set the filter first and check the count in the confirmation before you click **Yes**.

Add a task

1. Open the EMS Task screen. A grid lists tasks with Activity, Repair Type, Name and Description columns.



The EMS Task screen lists the tasks used on work order detail lines.

    1. Task columns
2. Add a new record using the grid's add function. The Task editor opens with the Task Info section.
3. Select a **Repair Type**. Repair Type is required.
4. Enter a **Name** of up to 30 characters. Name is required.
5. Optionally select an **Activity** and enter a **Description** of up to 128 characters.
6. Save the task. The task is now available on work order detail lines.

Reference

Work Order toolbar

BUTTON	TOOLTIP	USE
Clear grid configuration	Click to clear grid configuration.	Reset the grid layout (disabled when nothing is saved).
Grid configuration editor	Click to open grid configuration editor.	Save or choose a grid layout.
Clear filter	Click to clear applied grid filter.	Remove the applied filter (disabled when no filter is applied).
Filter editor	Click to open grid filter editor.	Build the filter that also sets which work orders a post includes.
Bulk delete mode	Click to enter bulk delete mode.	Delete several records at once.
Post work order(s)	Click to post work order records.	Post every work order in the current filtered result (requires access level 4).

Work order fields

FIELD	NOTES
Equipment	Required.
Status	Posting sets it to Closed when no unposted detail lines remain.
Work Order Number	Read-only; generated on save (placeholder `Generated on save`); up to 20 characters.
Location, Date In, Date Out, Requested By, Description	Optional work order details. Description is copied to history on posting.
Date Closed	Set to the posting date when posting closes the work order.
Hours At Service, Miles At Service	Copied to history on posting; if either is entered, posting adds a reading-history row.
User-defined fields	Copied to each history row on posting.
Posted To Maintenance History	Read-only on the work order; set by posting.

Work Order Detail fields

FIELD	REQUIRED	LIMITS AND NOTES
Task	Yes	Chosen from the EMS Task list.
Policy	No	On posting, advances the PM schedule if that policy is assigned to the equipment.
Employee, Task Date	No	Task Date becomes the maintenance date in history.

FIELD	REQUIRED	LIMITS AND NOTES
Labor Quantity, Labor Unit Cost	No	Cost 0 to 999999999999999.
Equipment, Equipment Quantity, Equipment Unit Cost	No	Cost 0 to 999999999999999.
Part, Part Quantity, Part Description, Part Cost, Part UOM	No	Part Description up to 100 characters; cost 0 to 999999999999999.
Outside Service Quantity, Description, Cost	No	Description up to 100 characters; cost 0 to 999999999999999.
Service Description	No	Up to 256 characters; copied to history.
Complete	No	Checkbox.
PM Method	No	Copied to history only; does not drive the PM schedule.
Posted To Maintenance History	Yes (checkbox)	Editable checkbox; posting checks it. Only lines where it is cleared are posted.

What posting changes

Posting moves every unposted detail line of each work order into maintenance history, records readings, updates the equipment's last readings and PM schedule, and marks the lines posted. A work order is set to Closed only when none of its lines remain unposted.

AREA	CHANGE
Maintenance history	Each unposted detail line becomes a history row marked as posted from a work order, with the work order's hours and miles at service, the line's task date, employee, policy and PM method, the task's repair type, the work order description, the line's service description and the user-defined fields.
Reading history	One reading row per work order, with source Work Order and dated the latest task date of its unposted lines, but only if Hours At Service or Miles At Service is entered.
Equipment last readings	Last reading date, hours and miles are updated from the equipment's most recent reading-history row.
PM schedule	For each line with a policy that is assigned to that equipment: Last PM is set using the policy's PM method (days: line's task date; hours: work order's hours; miles: work order's miles), Next PM Due = Last PM + the policy's PM frequency, and the last maintenance date is set to the most recent task date.
Detail lines	Posted To Maintenance History is checked.
Work order	When no unposted lines remain: Status is Closed, Date Closed is today, and Posted To Maintenance History is set.
Notifications	An EMS work order post notification is sent.
Cost Accounting	No transactions are created.

See Reading updates and Notifications.

EMS Task fields

FIELD	REQUIRED	LIMITS
Activity	No	
Repair Type	Yes	Copied to history when lines using this task are posted.
Name	Yes	Up to 30 characters.
Description	No	Up to 128 characters.

Messages

MESSAGE	WHEN	WHAT TO DO
The work order was saved. Please add the first work order detail record.	After saving a new work order.	Click **OK** and enter the first detail line.
You are about to post N work order(s). Continue?	After clicking **Post work order(s)**.	Check N. Click **Yes** to post or **No** to cancel.
Work orders posted successfully.	Posting finished.	Review the closed work orders and the history.
Unable to post EMS work order records due to a technical error. An email has been sent to support.	Posting failed with a technical error.	Contact your administrator before you try again.
No valid record keys provided.	Posting was started with no work orders to post.	Change the filter so that it includes work orders, then post again.
One or more work order keys not found for this tenant.	A work order in the post could not be found; nothing was posted.	Refresh the grid and post again.
Record has been modified by someone else since being queried from the database, refresh and try your update again.	Saving a detail line or task that another user changed after you loaded it.	Refresh the grid and make your change again.
Record List contains System Data which cannot be deleted.	Deleting system detail lines or tasks.	These records cannot be deleted.

Tips and notes

> **Note:** The PM schedule is advanced using the policy's PM method and PM frequency, not the PM Method on the detail line. The line's PM Method is only copied to history. Schedules change only where the policy is assigned to that equipment.

> **Tip:** Enter **Hours At Service** or **Miles At Service** on the work order if you want posting to record a meter reading for the equipment.

> **Note:** Posting creates no Cost Accounting transactions.

Note: The Options menu also has a **Post Work Order Record(s)** entry, but post from the **Post work order(s)** toolbar button.

Note: When you delete detail lines or tasks, their comments and documents are deleted too. A copy of each deleted record is kept in audit history.

Note: The EMS Task screen is a plain list of tasks. It has no post action.

Related topics

- Grid viewing and editing
- Grid filters
- Data grid overview and basics
- Equipment maintenance history
- Reading updates
- Maintenance entries
- Equipment tools: depreciation, policies and parts
- Notifications
- Security Administration: access levels by user
- User defined fields
- Navigating portals and pages