

Work Order Workbench

Mainpac EAM User Guide

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About this Document

This document describes the new Work Order Workbench functionality for the Mainpac EAM application. It is assumed that users have the necessary knowledge and skills to undertake all suggested tasks.

This document relates to Mainpac EAM products, version 3.18 and higher, and remains current until superseded.

Overview

Mainpac EAM now provides the capability to schedule Work Orders using a visual tool.

The Work Order Workbench (WOWB) is used to perform planning and scheduling changes to Work Orders. The view can be selected to focus on the Work Order or Labour Resource information within the WOWB.

There are three distinct phases to the WOWB functionality:

1. Planning phase – Work Order View

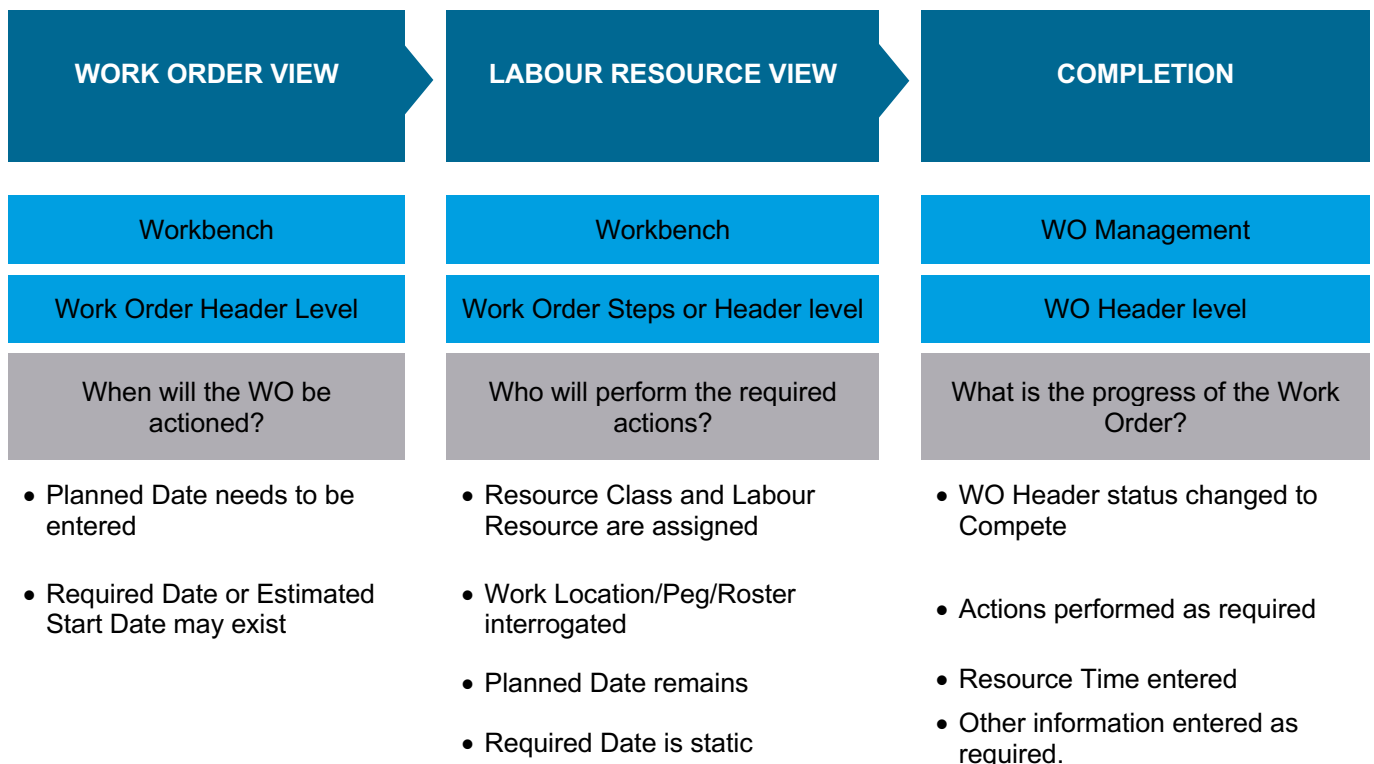
This occurs using the Work Order Workbench and changes are made at the Work Order Header level

2. Modification phase – Labour Resource View

This occurs using the Work Order Workbench and changes are made at the Work Order Step or Work Order Header level

3. Completion phase

This occurs using Work Order Management module and changes are made at the Work Order Header level, as the steps are undertaken and completed.



Work Order Workbench (Plan)

Step 1. Select which Work Orders are to be displayed


Use the Work Order Workbench to display the required Work Orders.

The Workbench will update the Work Orders displayed in the Workbench on your first log in of the day, or when selections are changed.


Navigate to the following menu:

- [Work Orders Management > Workbench](#)


To set the Focus Date:

1. Select the  **Focus Date** icon to display the pop up calendar, then select the required Date.
2. The **Focus Date** is the middle point of the period displayed.
3. For example, when one weeks' worth of Work Orders is displayed on the Timeline, the focus date will be roughly Day 4 of the 7-day week.

To set Timeline view:

1. Select the  **Timeline View** icon to display the drop down list.
2. Select the menu item as required:
 - i. 24 Hours
 - ii. 48 Hours
 - iii. Week
 - iv. 1 Month
 - v. 3 Months
3. Once selected, the period length of the Timeline is updated.

To set Filter:


1. Select the  **Work Order Status Filter** icon (ON or OFF) to display the drop down list
2. Select the menu item as required:
 - i. Filters
 - i. Without Planned Date
 - ii. Without Resource Requirements
 - ii. Statuses & Events
 - i. Requested
 - ii. Planned
 - iii. Issued

- iv. Completed
 - v. Closed
 - vi. Forecast
 - vii. Cancelled
- iii. Priorities
 - i. Weekly Service
 - ii. 2 Week
 - iii. Week
 - iv. Urgent
 - v. Same Day
- 3. Once selected, the types of Work Orders displayed in the timeline are changed.

To remove the Filter:

1. Select the  **Work Order Status Filter** icon (ON) to display the drop down list
2. De-select the menu item as required:

To set Grouping of the Work Orders:



1. Select the  **Group By** icon to display the drop down list
2. Select the menu item as required:
 - i. Operational Asset
 - ii. Work Location
 - iii. Status
 - iv. Priority
 - v. PEG
 - vi. Task
 - vii. Template
 - viii. Operational View
 - ix. Work Type
 - x. Resource
 - xi. Labour Resource
 - xii. None
3. Once selected, the Work Orders are grouped on the timeline.

To set the Labour Resource Filter:



1. Select the  **Labour Resource Filter** icon to display the pop up list
2. Select the **name(s)** of the Labour Resource to be displayed.

3. Select the  **Confirm** button.

To change the selections in the Labour Resource Filter:

1. Select the  **Labour Resource Filter** icon to display the pop up list.
2. De-select the name(s) of the Labour Resource that is no longer required.
3. Select the name(s) of the required Labour Resource and select the  **Confirm** button.

To remove the Labour Resource Filter:

1. Select the  **Labour Resource Filter** icon to display the pop up list
2. De-select the name(s) of the Labour Resource, and select the  **Confirm** button.

Work Order Workbench (Plan)

Step 2. Select how the Work Orders are to be displayed

The type of Work Orders on the Workbench has been set in Step 1.

Now you can set the appearance and content of the Work Order information.

The Workbench will update the Work Orders displayed in the Workbench on your first log in of the day, or when selections are changed.

Navigate to the following menu:


- **Work Orders Management > Workbench**

To view the Detail Cards:

Select the  **Details Card (OFF)** icon to display the Details Cards.


The **Detail Cards** display the WO Number, WO Description and Status.

To turn off the Detail Cards:


Select the  **Details Card (ON)** icon to turn off the Details Cards.

The WO Number and Status are displayed.

To view the Work Order relative to its end date:

Select the  **Size Cell to End Date (OFF)** icon to locate the Work Order with the boundary on the end date.

To view the Work Order rearranged and point to its end date:

Select the  **Size Cell to End Date (ON)** icon to display the Work Order with a dot and line pointing to the end date.





Work Order Job Board (Schedule)

Step 3. Schedule the Work Orders within teams


The appearance and content of the Work Order information has been set in Step 2.

The Timeline allows you to move the Work Orders using drag and drop, or by viewing in the Detail panel and editing.



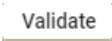

This chapter shows you how to add a Resource Class to each Step of a Work Order.

1. Navigate to the following menu:
 - **Work Order Management > Workbench >**
2. Set up the Timeline using the [Workbench \(Plan\)](#) chapter.
3. Ensure the **Details Card** icon is ON, if not:
4. Select the  **Details Card (OFF)** icon to display the Details Cards.
The **Detail Cards** display the Resource Class, Labour Resource, WO Number and Step (where the resource is allocated).
5. Select the  **View Mode: Resource View Mode** icon, the icon then changes appearance to the  **View Mode: Work Order Resource Requirement** icon.
6. Each Resource Class is represented on the Timeline by a different colour.
7. Select the  **Size Cell to End Date (ON)** to increase the information that is visible on the Workbench.




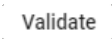

To Open the Work Order for editing:

8. Click in the Work Order to be edited, to display the **Detail** panel.
9. Select the  **Edit Work Order** icon to display the **Edit Work Order** pop up screen.
OR
10. Ensure the **Detail panel** is minimised
11. Right click in the Work Order to be edited and select the **Edit** menu item to display the **Edit Work Order** pop up screen

To Add the Resource Class:

12. On the **Edit Work Order** pop up screen.
13. Select the Step to be updated, the step information is displayed
14. Select the  **Add Resources** icon to display the Lookup > Resource pop up screen.
15. Select the  **select** button against the required Resource.
16. Select the  **Validate** button to confirm the details are correct
Any Errors will prevent the changes from being saved.
17. Select the  **Save** button to update the Work Order.

To Delete the Resource Class:

18. On the **Edit Work Order** pop up screen.
19. Select the Step to be updated, the step information is displayed
20. Select the  **Delete** icon against the **Resource** name to delete the selection.
21. Select the  **select** button against the required Resource.
22. Select the  **OK** button to remove the Resource information.
23. Select the  **Validate** button to confirm the details are correct
Any Errors will prevent the changes from being saved.
24. Select the  **Save** button to update the Work Order.

Work Order Job Board (Assign)


Step 4. Assign the Work Order Steps to individuals

The appearance and content of the Work Order information has been set in Step 2.

The Timeline allows you to move the Work Orders using drag and drop, or by viewing in the Detail panel and editing.


This chapter shows you how to add a Labour Resource to each Step of a Work Order.

To Open the Work Order for editing:


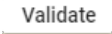

1. Click in the Work Order to be edited, to display the **Detail** panel.
2. Select the  **Edit Work Order** icon to display the **Edit Work Order** pop up screen.
OR
3. Ensure the **Detail panel** is minimised
4. Right click in the Work Order to be edited and select the **Edit** menu item to display the **Edit Work Order** pop up screen

To Add the Labour Resource:

If no Resource Class is assigned, follow the instruction in [To Add a Resource Class](#), as above.




5. On the **Edit Work Order** pop up screen.
6. Select the **Step** to be updated, the step information is displayed
7. Select the **Resource Class** assigned to the step i.e. Admin
8. Select the  **Unallocated** icon to display the Lookup > Labour Resource popup.



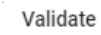

This will list only those Labour Resources that are in the Resource Class

9. Select the  **select** button against the required Labour Resource
10. Select the  **Validate** button to confirm the details are correct
Any Errors will prevent the changes from being saved.
11. Select the  **Save** button to update the Work Order.


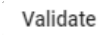

To Delete the Labour Resource:

There are two icons on the Labour Resource icon to remove it.




- The  **Rubbish Bin** icon removes only the assigned **Labour Resource**.
 - The  **Delete** icon removes both the **Resource Class** and the **Labour Resource**.
12. Select the  **Delete** icon against the **Resource** name to delete the selection, and display the Lookup > Labour Resource popup.

13. Select the  **select** button against the required Resource.
14. Select the  **OK** button to remove the Resource information.
15. Select the  **Validate** button to confirm the details are correct
Any Errors will prevent the changes from being saved.
16. Select the  **Save** button to update the Work Order.




To Change the Labour Resource:

17. Select the **Labour Resource** icon to display the display the Lookup > Labour Resource popup. This will list only those Labour Resources that are in the Resource Class
18. Select the  **select** button against the required Resource.
19. This will replace the existing Labour Resource.
20. Select the  **Validate** button to confirm the details are correct
Any Errors will prevent the changes from being saved.
21. Select the  **Save** button to update the Work Order.

To increase the number of Labour Resources:

22. Select the  **Add Count** icon to increase the number of **Labour Resources** required for this step.
23. Each increase in **Count** will populate an Unallocated icon.
24. Update Hours if required, these hours are per Labour Resource.
25. Follow the instruction in [To Add a Labour Resource](#) , as above.
26. Select the  **Validate** button to confirm the details are correct
Any Errors will prevent the changes from being saved.
27. Select the  **Save** button to update the Work Order.

To reduce the number of Labour Resources:

28. Select the **Resource** icon to display the **Labour Resource/Unallocated** icons.
29. Select the  **Delete** icon against the **Labour Resource/Unallocated** icon to delete the selection
30. The **Count** will reduce on each deletion.
31. Update the **Hours** if required, these hours are per Labour Resource.
32. Follow the instruction in [To Add a Labour Resource](#) , as above.
33. Select the  **Validate** button to confirm the details are correct
Any Errors will prevent the changes from being saved.
34. Select the  **Save** button to update the Work Order.

Work Order Workbench (Searching)


Step 5. Using the Search panel to locate Work Orders

Use the Work Order Workbench to search for Work Orders.

Running a Search provides results which can be dragged and dropped onto the Timeline, as well as updated using the [Batch Process](#).


1. Navigate to the following menu:
 - [Work Order Management > Workbench >](#)
2. Set up the Timeline using the [Workbench \(Plan\)](#) chapter.
3. Select the **Work Order** panel
4. There are two tabs to use to Search:
 - i. Timeline Search
 - ii. Saved Search

To use the Timeline Search:



1. Select the **Timeline** tab
2. Enter the search term in the **Search** field, then select the  **Search** icon.
3. The results are returned from the Work Orders listed in the current Timeline period, ignoring any **Timeline** filters.
4. **Search** results contain:
 - i. WO Number
 - ii. WO Description
 - iii. Operational Asset
 - iv. Status
 - v. Planned Date
 - vi. Priority
5. Any results that do not include the following, are highlighted:
 - i. Planned Date
 - ii. Estimated Duration.
6. Work Orders within the search results, can be dragged and dropped onto the Timeline.
7. Go to the below [Editing a Work Order from the Search results](#).

To use the Saved Search:

1. Select the **Saved Search** tab
2. To re-run a saved Search, select the ▼ **Saved Searches** drop down arrow and select from the list.

3. To refine the search results, enter the search term in the **Search** field, then select the  **Search** icon.
4. The results ignore the current **Timeline** period and filters.
5. Any results that do not include the following, are highlighted:
 - i. Planned Date
 - ii. Estimated Duration.
6. Work Orders within the search results, can be dragged and dropped onto the Timeline.
7. Go to the below [Editing a Work Order from the Search results](#).



Editing a Work Order from the Search results

8. When a work Order has been dragged and dropped onto the Timeline, the **Edit Work Order** popup screen is displayed for editing.
9. Make changes as required within the Edit Work Order popup screen:
 - i. Work Location
 - ii. Planned Date and Time
 - iii. Step Description
 - iv. Step Work Location
 - v. Step Start Date and Time
 - vi. Resource Classes
 - vii. Labour Resources
 - viii. Resource Count
 - ix. Resources Hours
 - x. Add or Remove Steps.
10. Select the  **Validate** button to confirm the details are correct
Any Errors will prevent the changes from being saved.
11. Select the  **Save** button to update the Work Order.

Work Order Workbench (Utilisation panel)

Step 6. Use the Utilisation panel to monitor Labour Resource allocations

Use the Utilisation panel to view Allocation and Available Hours for Labour Resources and Resource Classes.

1. Navigate to the following menu:
 - **Work Order Management > Workbench >**
2. Set up the Timeline using the Workbench (Plan) chapter.
3. Select the  **View Mode: Resource View Mode** icon, the icon then changes appearance to the  **View Mode: Work Order Resource Requirement** icon.
4. Select the **Utilisation** Panel to maximize it.
5. The **Resource Classes** are listed with allocation graphs displayed by individual Resource Class.
6. Select a **Resource Class** to view further detail.
7. There are three Views available within the Resource Class detail (the default view is Chart):
 - i. Chart
 - ii. Calendar
 - iii. Labour Resource

Using the Chart View

8. The graphs are split into three periods:
 - i. Extra time before
 - ii. Timeline period
 - iii. Extra time after.
9. Hovering the mouse over the graphs reveals further details.
10. Red graphs identify over scheduled Labour Resources, whilst Blue graphs show Allocated Hours that are within the rostering limits.
11. Selecting any of the graphs may move the Timeline to that time period.

Using the Calendar View

12. Each day during the period is displayed separately and contain the following information:
 - i. Available hours
 - ii. Allocated Hours
 - iii. Qty assigned Labour Resource
 - iv. Percentage of Allocated Time to Available Time.
13. Selecting the day moves the Timeline to display that day.


14. Red graphs identify over scheduled Labour Resources, whilst Blue graphs show Allocated Hours that are within the rostering limits.
15. Selecting any of the graphs may move the Timeline to that time period.

Using the Labour Resource View

16. The Labour Resources that fall under the Resource Class are displayed here with an Labour Resource Card.
17. Each Labour Resource Card contains the following information:
 - i. Photo
 - ii. Name
 - iii. Available hours
 - iv. Allocated Hours
 - v. Peg
 - vi. Operational View.
18. There are two view options available to toggle on and off:
 - i. With Allocated Hours
 1. Shows only those Labour Resource who have some or all of their time allocated to a Work Order during the period
 - ii. With Available Hours
 1. Shows only those Labour Resources who have hours that have not been allocated to a Work Order during the period.
19. Search for a Labour Resources by entering a search term in the **Search** field and selecting the **Search** button.
20. Clear the search field and select the **Search** button to view all available results.

To increase the search range beyond the Timeline selections:

The time period in the Utilisation panel matches the Timeline. Extra time can be added either side of the Workbench period, using the panel Settings.

21. Within the **Utilisation** panel, select the  **Settings** icon.
22. Ensure the **Utilisation** menu item is selected (in bold).
23. In the **Before** section, select the Period of extension
 - i. Not Set
 - ii. Day
 - iii. Week
 - iv. Month
 - v. Year
24. Enter the quantity of the extension (eg 1 Day, 2 Months).
25. In the **After** section, select the Period of extension
 - i. Not Set

- ii. Day
 - iii. Week
 - iv. Month
 - v. Year
26. Enter the quantity of the extension.
27. Select the **Save** button.
- The **Utilisation** Panel period will update, however the Timeline will not update.


Work Order Workbench (Other Edits)

Step 7. Other items to be edited in the Edit Work Order screen

The **Edit Work Order** popup screen is accessible through the Workbench, two ways, from:

- the **Detail panel**
 - the **Search Results**.
1. Navigate to the following menu:
 - **Work Order Management > Workbench >**

Using the Details panel to edit the work order.



2. Set up the **Timeline** as required using the [Workbench \(Plan\)](#) chapter.
3. Select the required **Work Order** from within the Workbench
4. The Work Order information is displayed in the **Detail** panel
5. Select the  **Edit WO** icon on the **Detail** panel, to display the **Edit Work Order** popup screen.
6. Go to the below [Editing a Work Order](#).

Using the Search Results to edit the work order.

2. Set up the Timeline as required using the [Workbench \(Plan\)](#) chapter.
3. Select the required Search tab in the **Work Order** panel
4. Drag and drop the selected Work Order onto the Timeline
5. The **Edit Work Order** popup screen is displayed.
6. Go to the below [Editing a Work Order](#).

Editing a Work Order

7. On the **Edit Work Order** popup screen.
8. Make changes as required:
 - i. Work Location
 - ii. Planned Date and Time
 - iii. Step Description
 - iv. Step Work Location
 - v. Step Start Date and Time
 - vi. Resource Classes
 - vii. Labour Resources
 - viii. Resource Count
 - ix. Resources Hours

- x. Add or Remove Steps.
9. Select the  **Validate** button to confirm the details are correct
Any Errors will prevent the changes from being saved.
 10. Select the  **Save** button to update the Work Order.

Work Order Workbench (Batch Updates)

Step 8. Items to be edited using Batch Updates in the Work Order panel


The **Work Order** panel enables search results to be selected and updated using the batch process, such as:

- Update Fields
- Change Status
- Suppress Forecast Work Orders
- Estimate Costs
- Send Email
- Work order Report
- Delete Items.

1. Navigate to the following menu:

- **Work Order Management > Workbench >**

Using the Search Results to edit the work order.

2. Set up the Timeline as required using the [Workbench \(Plan\)](#) chapter.
3. Select the required Search tab in the **Work Order** panel.
4. Place a tick in the checkbox against the Work Order(s) to be edited.
5. Select the  **Batch Process** icon.
6. Select the **Action** in the **Batch Process** menu list.

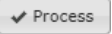
Editing a Work Order

7. Select the **Update Fields** action from the Batch Process menu list.
8. Place a tick in the checkbox against the Field(s) to be edited:
 - i. Actual Labour Hours
 - ii. Cause of Fault
 - iii. Claim Number
 - iv. Description
 - v. Email on Issue
 - vi. Estimated Duration (Hrs)
 - vii. Estimated Labour Hours
 - viii. Estimated Start
 - ix. Estimated Start (Time)
 - x. Issued to


- xi. Labour Cost
- xii. Labour Estimate
- xiii. Maintenance type
- xiv. Material Cost
- xv. Material Estimate
- xvi. Other Cost
- xvii. Other Estimate
- xviii. Outside Cost
- xix. Outside Estimate
- xx. PEG
- xxi. Percent Complete
- xxii. Planned
- xxiii. Planned (Time)
- xxiv. Planning Status
- xxv. Priority
- xxvi. Reported
- xxvii. Required
- xxviii. Required (Time)
- xxix. Responsibility
- xxx. Service Type
- xxxi. Started
- xxxii. Status of Fault
- xxxiii. Sundry Estimate
- xxxiv. System
- xxxv. Work Location
- xxxvi. Work Plan
- xxxvii. Work Program
- xxxviii. Workshop Only

9. Complete the Field update:

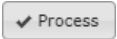
- i. Select from the Lookup
- ii. Enter the Text
- iii. Select the Date
- iv. Enter the Time
- v. Tick the Checkbox

10. Select the  **Process** button to run the Batch Process
11. Any errors will be displayed and prevent the update from occurring.
12. Select the **Close** button to close the popup.

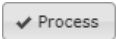
To perform a Batch Update:

1. Select either the **Timeline** or **Saved Search** tab
2. Perform Searches as listed above.
3. The results are displayed within the **Search** panel.
4. Select the **Work Orders** that are to be updated, by placing a tick in the checkbox of each required Work Order.
5. Select the  **Batch Process** icon to display the Choose Action popup screen.
6. Select the required action from the list:
 - i. [Update Fields](#)
 - ii. [Change Status](#)
 - iii. [Suppress Forecast Work Orders](#)
 - iv. [Estimate Costs](#)
 - v. [Send Email](#)
 - vi. [Work Order Report](#) (selectable only with 'Issued' Work Orders)
 - vii. [Delete Items](#)

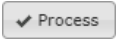
To perform a Batch Update of Update Fields:

7. Select the **Field** to be updated by placing a tick in the checkbox.
8. Enter the information as required in the appropriate field.
9. Enter any **Remarks** (if required)
10. Select the  **Process** button to run the update.
11. Select the **Close** button to return to the Search results.

To perform a Batch Update of Change Status:

12. Select the **Status** from the drop down list
13. Enter any **Remarks** (if required)
14. Select the  **Process** button to run the update.
15. Select the **Close** button to return to the Search results.

To perform a Batch Update of Suppress Forecast Work Orders:

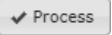
16. Select the  **Process** button to run the update.
17. Select the **Close** button to return to the Search results.

To perform a Batch Update of Estimate Costs:

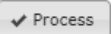
18. Select the  **Process** button to run the update.

19. Select the **Close** button to return to the Search results.

To perform a Batch Update of Send Email:

20. Enter or select the **Recipient** from the **Lookup Email Address** popup.
21. Enter the Subject line in the **Subject** field.
22. Enter other information as required in the appropriate field.
23. Select the  **Process** button to send the Email.
24. Select the **Close** button to return to the Search results.

To perform a Batch Update of Work Order Report:

25. Work Orders must have a status of Issued for this option to be selectable.
26. Ensure pop ups are not blocked on the browser for the Report to generate
27. Select the  **Process** button to run the update.
28. Select the **Close** button to return to the Search results.
29. Review the report in **PDF**, right click, and then select the **Print** menu item. Print as per normal process.

To perform a Batch Update of Delete Items:

30. Select either the **Show items** or **Delete items** link.
31. Select the **Close** button to return to the Search results.

Work Order Workbench (Timeline Settings)

Step 9. Timeline settings

The **Timeline settings** panel enables users to control how and which information is displayed, such as:

- Timeline Cards
- Work Order Selector incl Searches
- Utilisation

1. Navigate to the following menu:

- **Work Order Management > Workbench >**

Using the Timeline Settings

2. Set up the Timeline as required using the [Workbench \(Plan\)](#) chapter.

3. Select the required Search tab in the **Work Order** panel.

4. Place a tick in the checkbox against the Work Order(s) to be edited.

5. Select the  **Batch Process** icon.

6. Select the **Action** in the **Batch Process** menu list.

Permissions for Work Order Workbench

There are no new Permissions required to use the Work Order Workbench functionality, however the user must have the existing Work Order Management permission.

Settings to access the Workbench

7. Navigate to the following menu:

- **Administration > Global Settings > Server Settings**

The 'Use Angular Work Order Workbench' server settings needs to be set to 'Yes' on the drop down list.

Permission for the User to access the Workbench

8. Navigate to the following menu:

- **Administration > Profile Item > Utilities**

To be able to edit Work Orders using the Workbench, the user must have the Edit Work Order permissions applied to their profile.

Permission for the Operational View to automatically update Work Orders

9. Navigate to the following menu:


- **Administration > Operational Settings > Work Orders > Rules & Defaults**

To allow for the automatic update of fields, the Operational View settings must be set to Yes for:


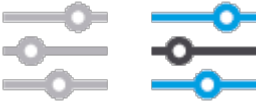




- i. Update Estimated Labour Hours from Work Order Steps
- ii. Update Estimated Duration from Work Order Steps
- iii. Update Actual Labour Hours from Transactions
- iv. Auto Update Percent Complete
- v. Update Work Order Steps when Planned Date is Changed.











Set up activities required










The following configuration items will need to be recorded so they can be used in EAM:







- License
- Permissions
- Default Workshop defined
- Default Workshop has operating hours (including Non Work Time)
- Work Week Start day
- Work Over allocation percentage
- Workshop free time percentage
- Roster has been created
- Labour Resources are assigned to a Roster
- Settings  icon in toolbar

Glossary

Terminology	Meaning
Planner	The user who forecasts work orders, potentially defining a done by date and then planning the wo to be completed in a timeframe such as “this week” or “this month”
Scheduler	Uses the planned Work Orders and assigns resources to them.
Location	Where the scheduler and resources are located either a workshop or specific geographic location
Workshop	A location.
Work Week Start Day	Roster information: The day on which the Roster work week cycle begins.
Group By menu 	Group the results on the Timeline by selections within the menu.
Filter (on/off) 	Refine the results displayed in the Workbench by selecting filtering options, such as Status or Urgency. grey is switched off, coloured is switched on
Timeline View 	Determine the length of the period of time to display on the Timeline.
Refresh 	Refresh the screen back to last saved details.
Date/Calendar 	Open the Calendar to select a date.
Sort by 	Use the blue and grey triangles to select the Sort menu item. Refine the search results displayed in the Timeline and Saved Search tabs, by selecting the Sort options from the menu. Examples are; Number, Estimated Start Date, Planned Date, Required Date and Priority. Then use the Black arrow to sort by ascending or descending.

Terminology	Meaning
Alerts 	Are errors or warnings that occur on validation of the Work Order from the Edit Work Order pop up screen.
Settings 	Settings across the Timeline and panels. Examples are; Timeline Cards, Work Order Selector, Utilisation and Searching.
Search 	Select to run a search.
Focus Date 	The day from which Work Orders are displayed, as the middle of the period selected
Detail (off/on) 	Detail off shows limited WO information. Detail on shows an increased amount of WO information.
Minimise (panel) 	Reduce the panel.
Pin (panel) 	Pin the panel so it stays in place.
WO View Mode 	WO View Mode changes the Timeline display to
View Mode: WO Resource Requirements 	Changes the View to include Resourcing information. Works best with the Details (On) and Size Cell to End Date (Off).
Settings 	Specific Timeline Settings only. Used to define Styling Rules to set colours for Work Order backgrounds. Examples include; Planned date, Done by ID and Estimated Duration.

Terminology	Meaning
Work Order Details 	The basic Work Order details.
Edit WO 	Located in the Details panel and opens the Edit Work Order pop up screen.
Batch process 	<p>Perform a process on multiple Work Orders from within the Search results.</p> <p>Examples include; Update Fields, Change Status, Send Email and Delete items.</p>
Size Cell to End Date (off/on) 	<p>Size Cell to End Date (on) depicts the Work Orders on the timeline with the end border in line with the end date (and time).</p> <p>This can make it hard to view the Work Order information.</p> <p>Size Cell to End Date (off) depicts the Work Orders on the timeline with a line and a dot pointed to the end date (and time).</p> <p>This allows space between the Work Orders.</p>
Labour Resource Filter (off/on) 	<p>Labour Resource Filter (off) filters the Work Orders by the selected Labour Resource.</p> <p>Labour Resource Filter (off) does not filter by Labour Resource.</p> <p>The Grey icon is switched off, the coloured icon is switched on</p>
Time 	Use the clock face to set the time.
Add (Step, Resource) 	<p>Add a new Step to the Work Order.</p> <p>Add a new Resource Class to a Step.</p>
Delete (Step) 	Remove a Step from the Work Order.
Operational Asset 	The Operational Asset for the Work Order.

Terminology	Meaning
Delete Resource Class 	Remove the Resource Class from the Step.
Delete Resource Class and Labour Resource 	Remove both the Resource Class and Labour Resource from the Step in one action.
Ok button 	Accepts the entry/selection and updates accordingly.
Cancel button 	Ignores the entry/selection and no items are updated.
Validate button 	Verifies the information in the Work Order against the validation errors and warnings.
Add Count icon 	<p>Increase the number of Resources required.</p> <p>For example, two people belonging to the Resource Class may be required to work together, so the Count would be 2.</p>

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