Work Order Status

Work Order Status report has been removed in Reports menu and was included in Consumption Site Search screen > Work Orders tab. The search screen can be used to view the list of work orders detail and its current status.

Here is how to use and view this report.

1. Open the Consumption Site Search screen and navigate to Work Orderstab. Customer work order details will be listed on the grid.

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0	Consumption Sites Op	en Orders Work	Order Leak/Gas	Check Inactive Sites Find all the	Toms								
C) Open Selected 🛛 🕞 Ex	iport • 🔲 Colum	ins • 88 View •									1 m	ecord (1 selected)
C	Customer Numb 🗠	Contains	~	(+) Add Filter									× Clear Filters
	Customer Number	Customer Name	Site Number	Description	Work Order No.	Work Status	Category	Performer	Location	Created Date	Scheduled Date	Closed Date	Close Reason
~	000000020	Meredith Grey	0001	Test Site	216	Open	Leak Check	Jeff the Driver	0001-Fort Wayne	01/03/2019	01/01/2018		

2. Filter specific records using the Advance Filter (magnifying glass icon) to list the records needed for the report. Additional parameters can be also done by clicking the **+** Add Filter button.



3. Select the record on grid and click Export button. The report can be exported and viewed via CSV, Text, Excel or PDF file.

	🕞 Export 🗸		Colum									
	CSV (Comm	a Delim	ited)									
	Text (Tab De	elimited	i)									
	Excel											
	PDF											
4.	Below is the pr	eview of	the repo	rt as exp	orted v	ia PDF:						
	Consumption Sites											iRely LLC Wednesday, January 9, 2019
	Customer Number Customer Nam 00000000000 Meredith Grey	e Site Number 0001	Description Test Site	Work Order No.	Work Status 216 Open	Category Leak Check	Performer Jeff the Driver	Location 0001-Fort Wayne	Created Date 03/01/2019 12:00:00	Scheduled Date 01/01/2018 12:00:00 AM	Closed Date	Close Reason

A Note

Work Order Status report has been obsoleted in 15.4 and higher version. Information that is being displayed by the report can be filtered in Consumption Site search screen > Work Orders tab.

Use this report to view a list of work orders and its current status.

Here is how to use and preview this report.

1. Open Report Parameters screen of Work Order Status report.

Remove 🔠 Layout	Q Filter Records (F	F3)			Report Options	
Field Name	Condition	From	То	Join	Description	Арр
Status	Equal To			And		
Date Scheduled	Between			And		
Date Created	Between			And		
Performer ID	Between			And		
Location	Between			And		
					Sort Options	
					× Remove Filter:	
					Sort Field Name	Sort Direction
						Ascending

- 2. Fill out Selection Criteria section. Below are the available criteria.
 - Status Use this to filter report by the current status of work order. You can select a status from the combo box list, or type one in.
 Date Scheduled Use this to filter data by date entered in Date Scheduled field of work order. You can select a date from the date picker, or type one in.
 - Date Created Use this to filter data by date indicated on Date Entered field of work order. You can select a date from the date picker, or type one in.
 - Performer Use this to filter report by the performer indicated on work order. You can select a performer ID from the combo box list, or type one in.
 - Location Use this to filter the report by consumption sites' location number. User can select from the combo box list, or manually type it on. If field is left blank, the report includes all locations.

3. Click Preview toolbar button. Preview Task List form will display.

Preview Task List			^ X
🗙 Remove 🗋 Archive 🔠 Layout 🔾	Filter Recor	ds (F3)	
Report Name	Status	Download	Details
Work Order Status	503	$\frac{1}{1}$	

Work Order Status

i21 Demo Setup Company(Source)

Monday, April 25, 2016 04:32:25 PM Location Customer Number Consumption Site Number Name Address Description 0001 -Fort Wayne 0001005078 Customer A 0001 1234 Main St., Fort Wayne, IN, 46801 Tank A Date Scheduled: 4/19/2016 Date Created: 04/25/2016 Work Order Number: 00005 Performer: 0001005080 Customer C To Do Items: LABOR; Date Closed: 04/20/2016 Close Reason: WORK COMPLETED

	Pa	arameters		
Status	From		То	
Date Scheduled	From	04/01/2016	То	04/30/2016
Date Created	From		То	
Performer ID	From		То	
Location	From		То	

Note

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Use this report to view a list of work orders and its current status.

Here is how to use and preview this report.

1. Open Report Parameters screen of Work Order Status report.

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Prev	iew Defaults Save	Close					
0	Remove 💡 Filter Reco	ords (F3)				Report Options	
	Field Name	Condition	From	То	Join	Description	Apply
	Status	Equal To			And		
	Date Scheduled	Between			And		
	Date Created	Between			And		
	Performer ID	Between			And		
	Location	Between			And		
						Sort Options	
						Remove Filter:	
						Sort Field Name	Sort Direction
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3. Click Preview toolbar button. Preview Task List form will display.

Previe	ew Task L	ISL						
🔵 Rem	ove 📄	Archive	Filter:			×		
Rep	ort Name				Status	Dov	vnload	Details
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