

# How to View Open Work Orders

The Open Work Orders Search screen display the lists of active sites with open work orders.

Here is how to use and view this report.

1. Open Consumption Site screen. Consumption Site Search screen will display focusing on the default tab - Site.
2. Navigate to **Open Work Orders tab**. This tab will display all the sites with open work orders.

Consumption Sites											
Open Refresh Export +											
Consumption Sites Open Call Entries Work Order Leak/Gas Check Find all the Toms											
View Filter Records (F3) 12 record(s)											
Customer Number	Customer Name	Site Number	Description	Work Order No.	Work Status	Category	Performer	Location	Created Date	Scheduled Date	Close Reason
0000000020	Meredith Grey	0001	Test Site	11	Open	Leak Check	Jeff the Driver	0001 - Fort Wayne	1/3/2017	1/1/2016	
1005234	Customer B	0001	Tank B	13	Open	Leak Check	Jeff the Driver	0001 - Fort Wayne	1/5/2017	1/1/2017	
1005233	Customer A	0001	Tank A	12	Open	Tank Set	Jeff the Driver	0001 - Fort Wayne	1/5/2017	1/1/2017	

3. Opening a specific work order will automatically opens the site focusing in work orders tab.

Consumption Sites											
Open Refresh Export +											
Consumption Sites Open Call Entries Work Order Leak/Gas Check Find all the Toms											
View Filter Records (F3) 2 record(s) (1 selected)											
X Scheduled Date Between 1/1/2017 and 1/31/2017 X Work Status Contains Open											
Customer Number	Customer Name	Site Number	Description	Work Order No.	Work Status	Category	Performer	Location	Created Date	Scheduled Date	Close Reason
1005234	Customer B	0001	Tank B	13	Open	Leak Check	Jeff the Driver	0001 - Fort Wayne	1/5/2017	1/1/2017	
1005233	Customer A	0001	Tank A	12	Open	Tank Set	Jeff the Driver	0001 - Fort Wayne	1/5/2017	1/1/2017	

Consumption Sites - 1005234

New Save Search Undo Attach Device Site Action Print Call Entry Remove Call Entry Dispatch Contract Customer Create Event Summary List Work Order Close

Customer: Customer B Customer No: 1005234 Current: 0.00 Email: customerB@test.com

Address: Princeton Avenue Fort Wayne, IN 46808 Terms: Net 15 Total Past Due: 0.00 Credit Note:

Phone: (300) 000-0000 Regular Credit: 0.00 Budget Amt Due: 0.00

Credit Limit: 0.00 Prepaid Balance: 0.00

Showing 1 Consumption Site

Address Description

Princeton Avenue Tank B

Site Detail Devices Associated Sites Appliances Call Entry Delivery History Event History Work Orders(1) Attachment(0) Aud

View Filter Records (F3)

Status Work Order No. Close Reason Date Scheduled Date Closed Entered By Date Created

Status: Open

Open 13 1/1/2017 irelyadmin 1/5/2017

Details Attachment(0)

To Do Items

Q Open X Remove

Completed

Items

LEAK CHECK

Work Order Details

Work Order No: 13 Category: Leak Check Status: Open

Date Scheduled: 1/1/2017 Performer: Jeff the Driver

Additional Info: work order for tank B

Entered By: irelyadmin Date Created: 1/5/2017

Date Closed: Close Reason

Comments:

4. Showing of Open Work Orders details can be customized by right clicking any of the **Column Header > Columns**. Select/Deselect from the column lists the details you want to display on the search screen.

Category	Performer	Loc
Sort Ascending		
Sort Descending		
Filter		
Group By		
Clear Group By		
Columns	<input checked="" type="checkbox"/> Customer Number <input checked="" type="checkbox"/> Customer Name <input checked="" type="checkbox"/> Site Number <input checked="" type="checkbox"/> Description <input checked="" type="checkbox"/> Work Order No. <input checked="" type="checkbox"/> Work Status <input checked="" type="checkbox"/> Category <input checked="" type="checkbox"/> Performer <input checked="" type="checkbox"/> Location <input checked="" type="checkbox"/> Created Date <input checked="" type="checkbox"/> Scheduled Date <input type="checkbox"/> Closed Date <input checked="" type="checkbox"/> Close Reason <input type="checkbox"/> Entered By <input type="checkbox"/> Comments <input type="checkbox"/> Additional Info <input type="checkbox"/> Item No <input type="checkbox"/> Item Description <input type="checkbox"/> Customer ID <input type="checkbox"/> Site ID	
Hide Column		

- The search screen can be also filtered, exported and printed like a report. Click on the **Advanced Filter icon** (magnifying glass) and select/enter specific filters. Click the same icon to add more filters.
- Hit the **Enter Key** to apply the filters and display the results.

Consumption Sites
Open Refresh Export

Consumption Sites Open Call Entries Work Order Leak/Gas Check Find all the Tools

View Filter Records (7) 2 records

X Scheduled Date Between 1/1/2017 and 1/31/2017  
X Work Status Contains Open

Customer Number	Customer Name	Site Number	Description	Work Order No.	Work Status	Category	Performer	Location	Created Date	Scheduled Date	Close Reason
1005234	Customer B	0001	Tank B	13	Open	Leak Check	Jeff the Driver	0001 - Fort Wayne	1/5/2017	1/1/2017	
1005233	Customer A	0001	Tank A	12	Open	Tank Set	Jeff the Driver	0001 - Fort Wayne	1/5/2017	1/1/2017	

- The results can be exported via **Export button** on the following format:

Export

Excel  
PDF  
Text  
CSV

- Exporting the records will be downloaded from the browser. Opening the downloaded exported file will open another browser tab if PDF file while the rest opens on the specific applications available on your computer.

Here's the sample exported records on different format:

#### PDF

Work Order

Customer Number	Customer Name	Site Number	Description	Work Order No.	Work Status	Category	Performer	Location	Created Date	Scheduled Date	Close Reason
1005234	Customer B	0001	Tank B	13	Open	Leak Check	Jeff the Driver	0001 - Fort Wayne	01/05/2017	01/01/2017	
1005233	Customer A	0001	Tank A	12	Open	Tank Set	Jeff the Driver	0001 - Fort Wayne	01/05/2017	01/01/2017	

Filter by:  
Scheduled Date is greater than or equal to '01/01/2017'  
Scheduled Date is less than or equal to '01/31/2017'  
Work Status contains 'Open'

1/5/2017, 5:26:16 PM

#### Text

Work Order

Customer Number	Customer Name	Site Number	Description	Work Order No.	Work Status	Category	Performer	Location	Created Date	Scheduled Date	Close Reason
1005234	Customer B	0001	Tank B 13	Open	Leak Check	Jeff the Driver 0001 - Fort Wayne	01/05/2017	01/01/2017			
1005233	Customer A	0001	Tank A 12	Open	Tank Set	Jeff the Driver 0001 - Fort Wayne	01/05/2017	01/01/2017			

Filter by:

Scheduled Date is greater than or equal to '01/01/2017'

Scheduled Date is less than or equal to '01/31/2017'

Work Status contains 'Open'

1/5/2017, 5:29:07 PM

CSV

Work Order

Customer Number	Customer Name	Site Number	Description	Work Order No.	Work Status	Category	Performer	Location	Created Date	Scheduled Date	Close Reason
1005234	Customer B	0001	Tank B 13	Open	Leak Check	Jeff the Driver 0001 - Fort Wayne	1/5/2017 12:00:00 AM	1/1/2017 12:00:00 AM			
1005233	Customer A	0001	Tank A 12	Open	Tank Set	Jeff the Driver 0001 - Fort Wayne	1/5/2017 12:00:00 AM	1/1/2017 12:00:00 AM			

Filter by:

Scheduled Date is greater than or equal to '01/01/2017'

Scheduled Date is less than or equal to '01/31/2017'

Work Status contains 'Open'

1/5/2017, 5:29:32 PM

Excel

Work Order

iRely LLC

Created: 1/5/2017, 5:29:38 PM

Customer Number	Customer Name	Site Number	Description	Work Order No.	Work Status	Category
1005234	Customer B	0001	Tank B	13	Open	Leak Check
1005233	Customer A	0001	Tank A	12	Open	Tank Set

Filter by:

Scheduled Date is greater than or equal to 01/01/2017, Scheduled Date is less than or equal to 01/31/2017, Work Status contains Open

Work Order

iRely LLC

Created: 1/5/2017, 5:29:28 PM

Performer	Location	Created Date	Scheduled Date	Close Reason
Jeff the Driver	0001 - Fort Wayne	01/05/2017	01/01/2017	
Jeff the Driver	0001 - Fort Wayne	01/05/2017	01/01/2017	

Filter by:

Scheduled Date is greater than or equal to 01/01/2017, Scheduled Date is less than or equal to 01/31/2017, Work Status contains Open

9. Print the report.