eTurns Work Orders Help documentation



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A Work Order is used to pull items for internal working of the organization. A work order consists of list of items grouped together to be pulled by user having relevant authorization.

Guidelines

a. Open Work Orders:

To open work order, user may either select Work order from Consume dropdown or simply click the Work order icon listed under Consume on Dashboard.

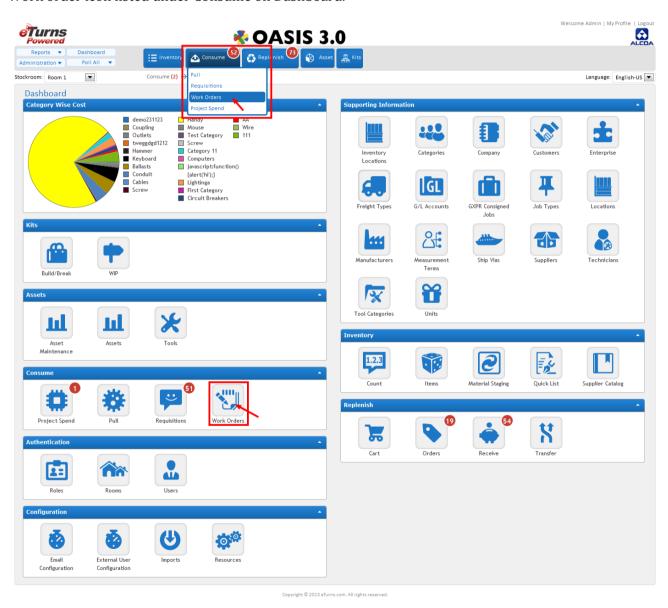
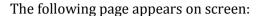


Figure 1





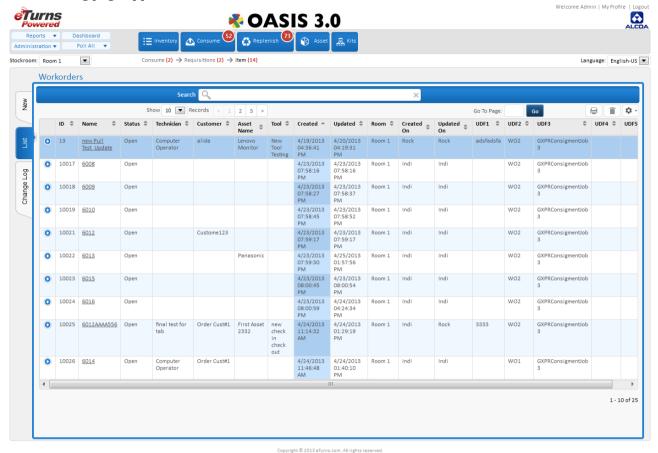


Figure 2

b. Add new Work Order:

To add new Work order, click on the New tab on left hand side of the panel or right click and select 'New' from the list.

• Enter the particulars and hit "Save" button, then click on "New Item" button and a pop up appears on screen, displaying Add Items to Work order grid on screen, to add new items to the order.

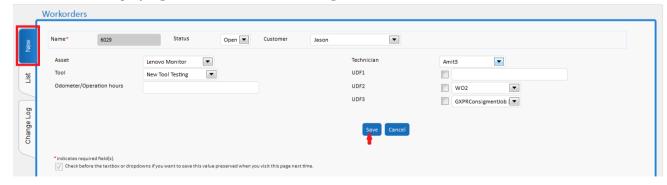


Figure 3



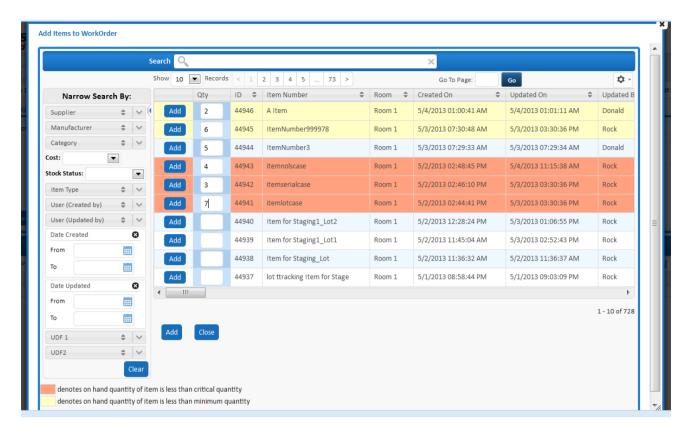


Figure 4

- The "New Item" button opens a pop up, for user to enter required quantity of item in Quantity box in front of it and then click "Add". The user may also enter various quantities together and then hit the "Add All" button at the bottom of the page. To close the selection, hit "Close".
- The items to be added in the project can be filtered by:
- a. <u>Supplier</u>: This filter contains list of all suppliers. Check/uncheck the name of supplier to be displayed on screen.
- b. <u>Manufacturer</u>: This filter contains list of all manufacturers. Check/uncheck the name of manufacturer to be displayed on screen.
- c. <u>Category</u>: This filter lists all the categories items are termed under. To select a particular category to be displayed on page, check the checkbox in front of it. Uncheck the check box to view all the categories on screen. User may check number of categories.
- d. <u>Cost</u>: This dropdown allows user to filter the items on basis of their cost, i.e., items of particular cost range are only displayed for user convenience. User may check/uncheck the filter to be implemented.
- e. <u>Stock Status</u>: This dropdown allows user to filter items to be included in list based on their present status of stock. User may check/uncheck the filter to be implemented.
- f. <u>Item Type</u>: This filter allows filtering the type of item to be entered in the cart. User may check/uncheck Item, Quick list, Kit or Labor to be displayed on screen.
- Once the Close button is hit, only then the entries from the pop up grid are entered in the main New Items grid. The grid can also be closed by click on sicon.
 - **Note**: Work order provides an option to preserve the values entered next time user visits the page, by checking the check box provided at end of new work order page. REFER Figure 3

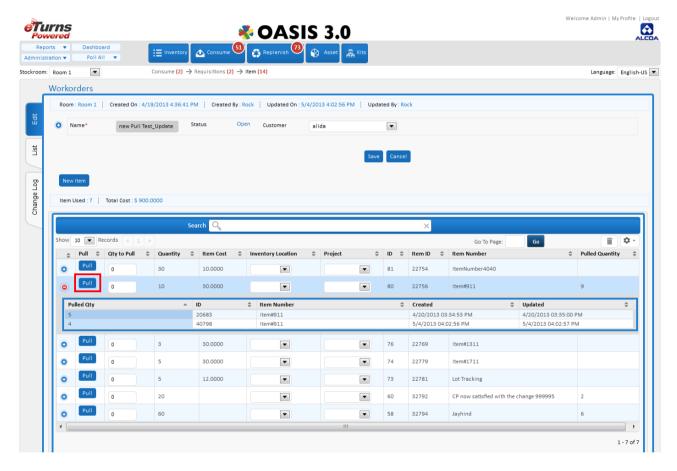


c. Edit/Update Work order:

To edit an existing work order record, click on the Work order name and new screen appears on screen. The quantity limit of item may be updated; also new items can be added to project as well as deleted. To edit any item in list the user must have the required authorization.

d. Pull item from Work order:

To pull an item from a work order, click on Name of the work order in List tab. The following screen appears:



- Enter the quantity to be pulled in the "Quantity to Pull" text box and other particulars. Click "Pull" button in front of the record.
- The quantity gets pulled and is reflected in the 'Pulled Quantity' column.
- To view the details of particular item, click on expand icon, and the log of pull for that item is displayed in view only mode.
- Once all the items from a work order are pulled the work order closes and is removed from List tab.
- 'Quantity to Pull' and 'Inventory Location' are mandatory fields to enter to pull any item.



e. Delete a Work Order:

To delete a work order, select the record and then click on Delete icon or press Delete key on your keyboard. The user may also delete the selected or multiple records. A pop up verifies your selection and then deletes the selected records.

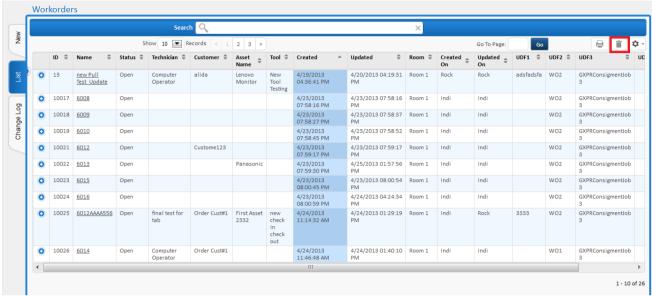


Figure 5

f. Export the page:

Export functionality enables user to export the page. Click on the Export icon on top right of the screen and then user may choose to export the page through any of the following mediums:

- a) Print: It prints the selected page.
- b) Excel: It converts the page to excel sheet.
- c) CSV: It converts the page to CSV sheet.
- d) PDF: It converts the page to PDF document.
- e) Copy: It copies the page to Clipboard.

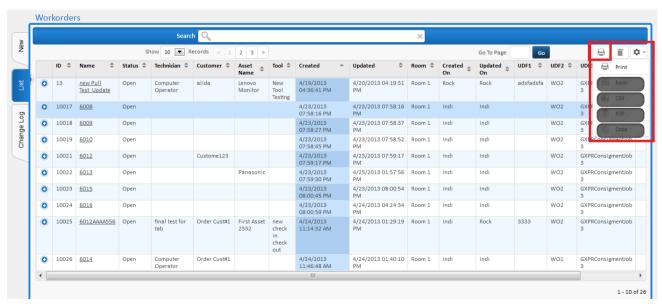


Figure 6



g. View change log:

To view the updated history of a work order, select the work order and click on Change log tab. It displays when the work order was created and the number of times it was updated.

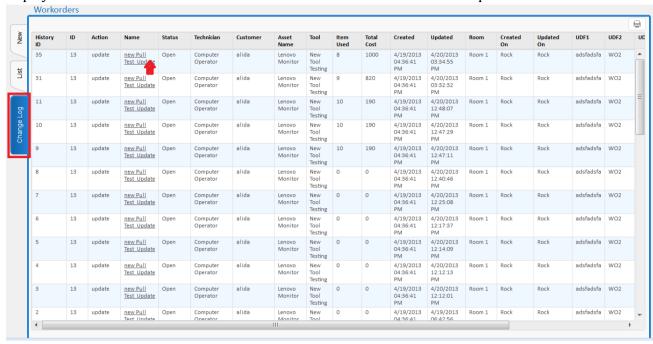


Figure 7

To view the log for individual items of the work order, click on item name and items change log is displayed in a pop up.

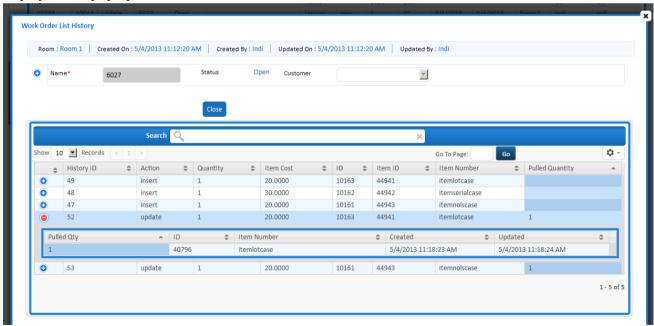


Figure 8

Note: The Change log is displayed in View only mode.



h. Search Work order for keyword:

There are two types of search available to look for any keyword or filter the content of the module:

i. Main Search: To search the document for any particular keyword, the Main search is used. Enter the keyword in the search box on top of screen and the keyword gets highlighted on the screen.

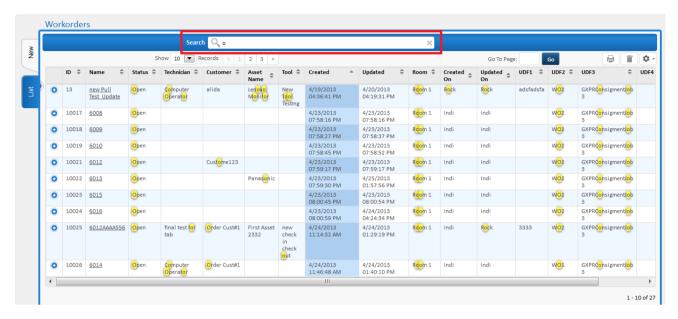


Figure 9

- ii. Narrow Search by: As the name suggests this function is used to filter or narrow down the scope of search for user convenience. It is an alternate search to the Search functionality and much detailed one.
- To open Narrow search, click on the small Triangular icon on the top left corner of the screen.
- The following screen appears:

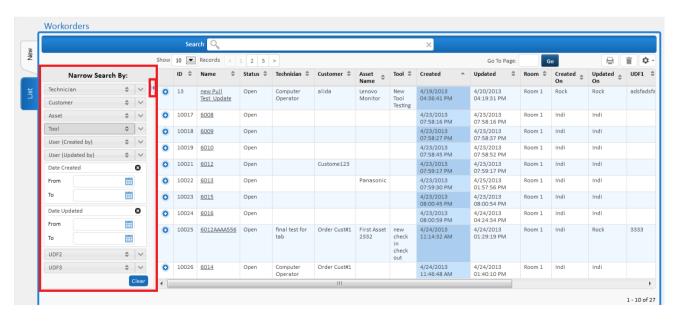
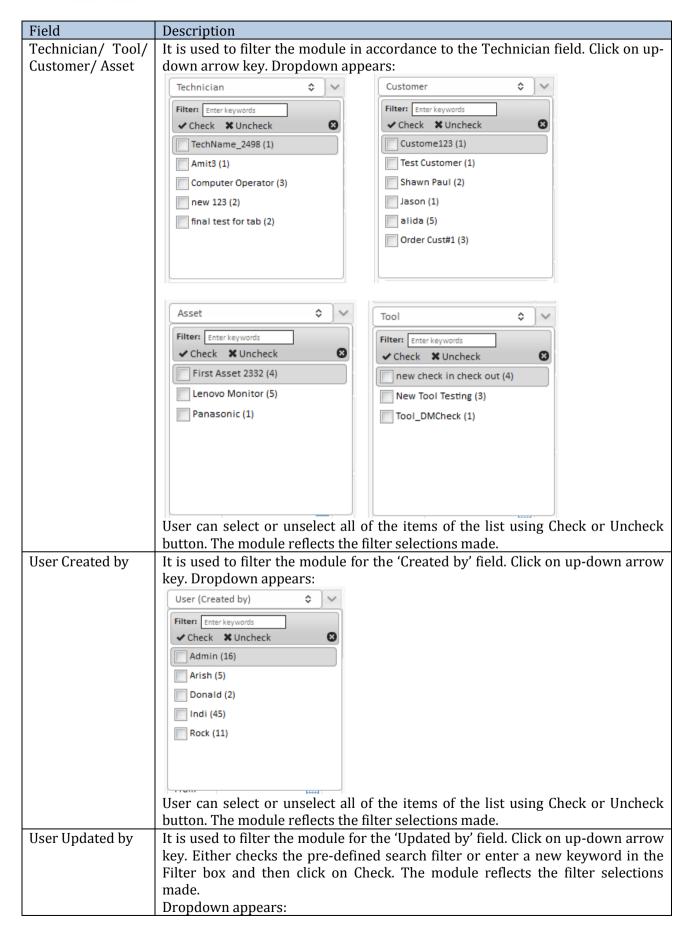
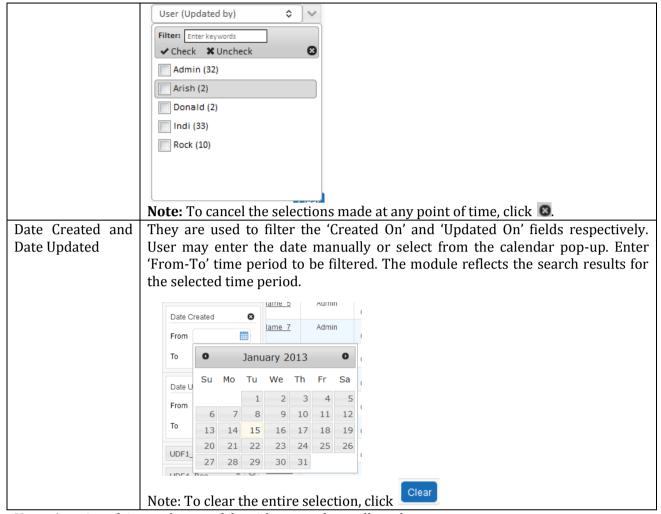


Figure 10









Note: At point of time only one of the either searches will work.

i. View records and Go to specific page:

The user is enabled to view particular records on the page and go to any page number directly. These functionalities can be accessed simply selecting number of records from the drop down and entering the page number to be displayed and click "Go".

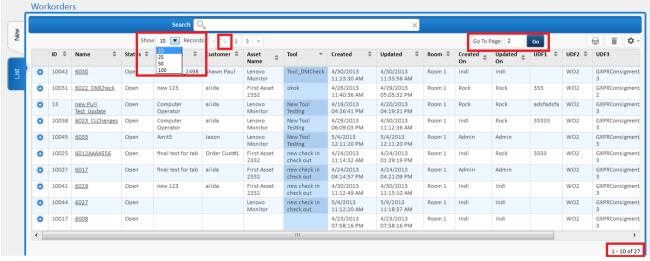


Figure 11



j. Implement various settings:

The user may choose from the below functionalities to be implemented on the module:

- a) Refresh: This option refreshes the module and displays the latest changes implemented.
- b) Auto Refresh: This option automatically refreshes the screen in specified time.
- c) Only Deleted: This option reflects only the deleted fields of the module on screen. To select it, check the checkbox in front of the option.
- d) Only Archived: This option reflects only the archived fields of the module on screen. To select it, check the checkbox in front of the option.
- e) Reorder: This option enables user to reorder the columns of the module.
 - User can also select which field to appear on screen and which remains to be hidden.
 - Check or uncheck the checkbox in front of the field to display or hide the fields respectively.
 - User may also drag and drop fields to be arranged in order of choice.
 - After the selection is completed, click "Reorder".

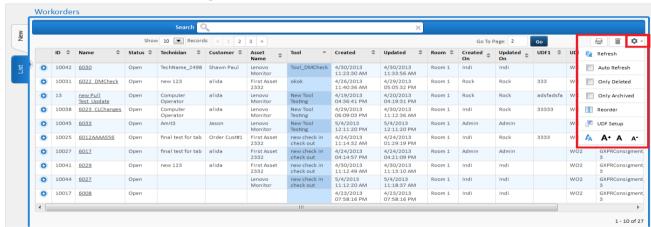


Figure 12

k. Miscellaneous settings:

Grid in History tab may have few of following functionality depends on requirements:

- 1) Resizing of columns
- 2) Re-ordering of columns using drag & drop of column header
- 3) Single column and multi column sorting (using shift key)
- 4) In-line editing

Multi selection of rows by clicking each row