

# S03 — WOT Reports (Work Order & Task Reports) — Screen Spec (MVP)

Status: Draft (locked decisions captured; refine during build)

Last updated: 2026-02-15

Depends on: S01 Faults & Defects (F&D;), S02 Tasks & Work Orders (T&WO;)

Feeds: Reports & History, VOS counters, Notifications

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## 1) Purpose

A single, engineer-first place to:

- Clear the **S02 “Closed — Report Pending”** backlog (work is done, report still required).
- Capture a **structured record** of what was done (time/parts/cost/outcome) with minimal typing.
- Store the final record to **Reports & History** (long-term).
- Maintain “management-style” **routine progress checklists** (daily/weekly/monthly etc.) that prove the work is being done.

Engineer-first intent:

- **Prefill everything** (so reporting is quick).
- Keep **fail-safes** (nothing leaves active workflow until reported).
- Keep **traceability across multiple attempts** (unresolved → new linked WO → final resolved report).

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## 2) Inputs (what the user captures here)

### A) WO report (from S02 Closed — Report Pending)

Auto-pulled (prefilled):

- WO ID, title, priority, source (F&D; / PM / Manual)
- Linked equipment + location
- Planned vs Unplanned, work type (repair/service/replace/etc.)
- Execution notes, attachments, labour time entries
- Parts consumed + requisition references

User-entered (MVP required):

- **Work summary** (what was done)
- **Outcome:** Resolved / Mitigated (temporary) / Not resolved
- **Tests / verification:** checklist + notes (simple)
- **Submitter** (user) + timestamp

Optional:

- Root cause (dropdown + notes)
- Downtime
- Contractor used + cost
- Misc costs

## **B) PM reminder field (only when source = PM)**

If the WO was triggered from a PM schedule (days/weeks/months/hours):

- Display **Next due** (date or meter hours) at report time.
- On submit, confirm the PM system was updated and display:

- "Next due now set to: \_\_\_\_" (system-wide).

## **C) Routine checklist tabs (daily/weekly/biweekly/monthly/etc.)**

These are "checkbox report forms" tied to predefined titles, stored for long-term audit.

For each routine checklist item:

- Checkbox complete (Yes/No)
- Optional note + photo
- Completed by + timestamp

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# **3) Outputs (what it creates/updates elsewhere)**

## **A) WO reporting outputs**

On **Submit Report**:

- Create a **WOT Report record** (immutable snapshot) stored in **Reports & History**.
  - Update WO lifecycle:
- If **Outcome = Resolved** → WO moves out of active lists (archived into Reports & History).

- If **Outcome = Mitigated** → optional follow-up task suggestion (MVP) and store report.
- If **Outcome = Not resolved** → see “Unresolved chaining” rule below.

## B) VOS counters (MVP)

- When a report is submitted for a WO in **Closed — Report Pending**:
  - Decrement **VOS “Closed — Report Pending”** by 1.

## C) Defect closure outputs (when WO originated from S01)

- If the WO source is **F&D**; and outcome is **Resolved**:
  - Mark the defect as **Rectified via WO** and store in Reports & History.
- If outcome is **Not resolved**:
  - Defect remains active / monitoring until final resolution chain completes.

## D) Routine checklist outputs

- Store routine checklist completion logs in **Reports & History** (audit trail).
- Feed VOS / Notifications counters for overdue routine checklists (see escalation rules).

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# 4) Tabs / sections / subviews (layout)

## A) Top-level tabs

- 1) **Pending WO Reports** (default landing)
- 2) **Routine Checklists**
- 3) **Recently Submitted** (quick access; archive lives in Reports & History)

## B) Pending WO Reports — list view

Row fields:

- WO ID + title
- Equipment/location
- Priority
- Closed date
- Age since closed (days pending)

Filters:

- Priority, equipment, source, older-than

CTA:

- **Write Report**

## **C) WO Report form — single page (collapsible sections)**

- 1) Snapshot (read-only + links to WO, equipment, defect)
- 2) Work performed (summary + pulled notes)
- 3) Time & parts (auto-pulled, editable)
- 4) Testing / verification checklist
- 5) Outcome (Resolved / Mitigated / Not resolved)
- 6) PM “Next due” (only when source = PM)
- 7) Follow-up (create task / add PM note)
- 8) Submit (sticky footer)

## **D) Routine Checklists — sub-tabs by frequency**

Sub-tabs:

- **Daily**
- **Weekly**
- **Biweekly**
- **Monthly**
- **Quarterly** \*(optional for MVP)\*
- **Annual** \*(optional for MVP)\*

Each sub-tab shows a list of titled checklist items (e.g., “Daily ER Walkthrough”, “Weekly Safety Checks”):

- Checkbox “Done”
- Optional note
- Optional photo
- Completed by + timestamp
- Shows “Last completed” + “Due again” (simple)

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## **5) Rules & behaviors (automations + triggers)**

## F) Recently Submitted is not the archive

- Recently Submitted shows a short rolling window (e.g., last 30 days) for quick access.
- Full search, filters, and export live in **Reports & History**.

## A) Core rule: “Closed — Report Pending” cannot disappear without WOT report

- S02 allows **WO Closed (Report Pending)**.
- Only S03 submission can clear it and move to long-term storage.

## B) PM next-due reminder + system update

If report source is PM-triggered:

- S03 must display **Next due** and confirm it was updated system-wide on submit.

## C) Routine checklist escalation (like unreviewed defects)

- If routine checklist items are not completed by their due window:
  - Escalate visibility daily (badge + notification).
- Mute/snooze allowed but requires:
  - **Override password**
  - **Reason**
  - Audit log (who/when/why)

## D) Unresolved chaining (multi-report traceability)

If Outcome = **Not resolved**:

- On submit, store the **Unresolved WOT report** to Reports & History.
- Automatically create a **new linked WO** in S02:
  - Status: **WO Requested**
  - Linked to the unresolved report + original WO chain
- When the follow-up WO is completed, it becomes **Closed — Report Pending** again.
- A new WOT report can then be submitted as **Resolved**, linked back to:
  - The original unresolved report
  - The original WO chain

This creates a truthful timeline of attempts and effort.

## E) Mitigated outcome rules

If Outcome = **Mitigated (temporary)**:

- Require a “limitations / monitoring note”
- Suggest follow-up task creation (MVP)

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## 6) Links to other screens (drill-down + create-from-here actions)

From a WOT report you can jump to:

- **S02 T&WO**; (WO detail; read-only after report submit)
- **S01 F&D**; (source defect, if applicable)
- **E&M**; (Equipment & Machinery detail)
- **Inventory & Requisitions** (parts + transactions)
- **Reports & History** (full archive & export; final stored record)
- **VOS / Notifications** (badges deep-link back to the relevant report or checklist item)

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## MVP notes (scope control)

- Routine checklist templates (titles + items) can be seeded with a few defaults and made editable later.
- Root cause library and full contractor workflows can expand post-MVP.