

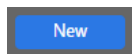
Create a Work Order

A Phase will need to be added to a Work Order under several circumstances. It may be the first Phase on the Work Order, or an additional shop may need to do work on the Work Order.

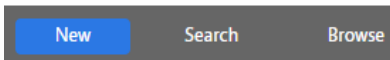
1. From the menu, under **Work Management**, select **Work Order**

(Alternatively, you can click **+** to go right to the Work Order entry screen.)

2. Click



AiM Work Order



3. You will get the new Work Order screen.

The screenshot displays the 'AiM Work Order' entry screen. At the top left, there are 'Save' and 'Cancel' buttons. The main content area is divided into several sections. On the left is a sidebar with a 'View' menu and options like 'Extra Description', 'Reference Data', 'Account Setup', 'Budget Change Order', 'Cost Analysis', 'Received Email', 'Notes Log', 'User Defined Fields', 'Status History', and 'Related Documents'. The central part of the screen features a yellow header bar with the work order ID 'W2000100' and creation/editing information. Below this is a large, empty text box for the description. Further down are input fields for 'Organization', 'Region', 'Requestor', 'Facility', and 'Property'. To the right of these are search fields for 'Status', 'Project', 'Desired Date', 'Budget', 'Problem Code', 'Type', 'Category', and 'Job Priority'. At the bottom, there is a 'Phase' section with a table header and 'Remove' and 'Add' buttons.

4. Add the following required fields:

- a. **Description**
- b. **Region, Facility and Property**
- c. **Type and Category** (this will fill in the initial Status for you)
- d. Other fields as needed.

The screenshot shows the 'AiM Work Order' interface. At the top, there are 'Save' and 'Cancel' buttons. The main form is divided into several sections:

- Header:** 'W2000100' (ID), 'Created By SCOTT LLOYD On 10/5/22 8:57 AM', and 'Last Edited by SCOTT LLOYD On 10/5/22 8:57 AM'. Status is 'OPEN'.
- Description:** 'THIS IS A TEST DESCRIPTION'.
- Organization/Requestor/Contact:** Fields for Organization, Requestor, Contact, Contact Phone, and Contact Email.
- Region/Facility/Property:** Region is 'UCB', Facility is 'MAIN CAMP', and Property is '224'. The property name is 'CRISTOL CHEMISTRY & BIOCHEMISTRY BUILDING'.
- Metadata:** Project, Desired Date, Budget (\$0.00), Problem Code, Type ('UNPLANNED'), Category ('CUSTOMER REQ'), and Job Priority.
- Phase Table:** A table with columns: Phase, Description, Location, Shop, Work Code, Priority, Asset, Status. It has 'Remove' and 'Add' buttons.

5. You can then add one (or more) Phases to the Work Order. (See WM Adding a Phase to a Work Order.)

6. Click: 