# OPEN WORK ORDERS

## Open Work Orders

Review and update your list of all open work orders. Create new work orders and dispatch technicians or contractors.

REPORTS · USER GUIDE

**IMPAK** allows you to quickly and easily review and update your list of all open work orders through the **Open Work Orders** page.

This page is a dynamic list of all work orders that grows in number as you receive or schedule new work orders, and that shrinks in number as you complete and close work orders. The Open Work Orders page reloads automatically every three minutes to ensure that you always see the most up-to-date information.

To access the **Open Work Orders** feature in **IMPAK**, locate and click on the **Work Order Management** link from your list of **IMPAK** main categories on the left-hand side of your screen. Next, locate and click on the **Open Work Orders** link (as shown in the image to the left).

You can filter work orders by selecting a property from the property selection dropdown menu located in the upper left corner as shown below, or you can select *All Properties* to view a complete list. You can also search for specific work orders by typing a key word into the **Search** field and clicking the 🔍 icon.

## OPEN WORK ORDERS

- All Properties

Add New Tenant Service Request    Add New Inspection Work Order

Search

| Work Order | Property | Due | Service Description | Assigned To | Status | Requestor | Options |
|---|---|---|---|---|---|---|---|
| 2131 7/11/2017 | Texas Central Property Department TefftNet, Inc. | 7/21/2017 | Inside Suite ** Doors ** Clean Glass<br>🖨 Print  ✉ Send  👁 Private Note  🔗 Attachments  🔔 Reminder  $ Job Quote | Doe, Jane | Scheduled ⏱ Timestamp | RWO | ✏ |
| 2130 7/7/2017 | Westchase Bldg 1 Westchase TefftNet, Inc. | 7/17/2017 | Electric meter bi-weekly reading ** Electric Meter #0101 *** Electric meter for suite 101<br>🖨 Print  ✉ Send  👁 Private Note  🔗 Attachments  🔔 Reminder  $ Job Quote | Doe, Jane Doe, John | Dispatched 7/13/2017 10:45:39 AM ⏱ Timestamp | APM | ✏ |
| 2129 7/7/2017 | IMPAK Office Building Texas | Immediate | 📞 101 ** Company ABC<br>Building Exterior ** Bee Hive / Swarm ** Help Bees!<br>🖨 Print  ✉ Send  👁 Private Note  🔗 Attachments ❶  🔔 Reminder  $ Job Quote  📄 Tenant Note | Doe, John Pest Control Contractor | Scheduled ⏱ Timestamp | Sam Smith | ✏ |

Records 1 To 100                    Page [1 ⌄] of 4                    317 Work Orders

The **Open Work Orders** page shows up to 100 open work orders per page. Scroll to the very bottom of the screen to see the total number of open work orders and use the page selector to jump to different pages.

You can create a new **TSR** by clicking the **Add New Tenant Service Request** button located near the top of the screen. *Please see the individual IMPAK User Guide for this for instructions on how to create a new TSR.*

You can create a new **IWO** by clicking the **Add New Inspection Work Order** button located near the top of the screen. *Please see the individual IMPAK User Guide for this for instructions on how to create a new IWO.*

The **Open Work Orders** page details the following information:

- **WO#** - This column displays the number assigned to the work order when it is created.  The Date the WO was received is shown below the WO #.
  If the WO has been marked Billable (to property or tenant) this information will be shown in red under the WO date.
- **Property** – This column displays the property the work order is for.
- **Due** – This column displays the work order's due date.
- **Service Description** – This column displays the details of the work order including the *Service Location, Job Type* and *Service Description*.  You will see a series of links under the service description of each work order. Each of these links have a unique function.



- □ **Print** –  This function allows you to print a printable version of the work order.

- □ **Send** – This function allows you to view the email history and send the WO to:  a specific email address, the assigned technician, property manager and even to send the tenant confirmation.

- □ **Private Note** – This function allows you to enter a private note on the work order to be seen by you or your staff. These notes are shown under the row of links in the service description column and have a blue background.
  *Private notes are not visible to your tenants. These notes can be edited within 5 minutes of the time you add them so long as you are in the same IMPAK session and do not close the screen. They cannot be deleted once they have been added.*

- □ **Attachments** – This function allows you to add or view attachments for each work order.  When attachments have been added to a work order, the number of attachments will be displayed here.

- □ **Reminder** – This function allows you to create a reminder in IMPAK for yourself and others. The system will send you an email notification on the day of the reminder.

- □ **Job Quote** – This function allows you to add or view existing job quotes through the Job Quote feature in IMPAK.

- □ **Tenant Note** – This function allows tenants and property management staff to communicate about work orders. This option is only present on **TSR** (**Tenant Service Request**) work orders. These notes are shown under the row of links in the service description column and have a yellow background.
  *If a tenant adds a note, the property management staff will receive a system notification that that the note has been added. If the property management staff adds a note for the tenant, it is emailed to the email address listed.*

- □ **Assigned To** – This column displays the technician or vendor/contractor that the work order has been assigned to.
- □ **Status** – This column displays the status of the work order and the **Timestamp** history of the work orders movement between statuses. The different WO statuses are: Received, Acknowledged, Scheduled, Dispatched, Accepted, In Progress, Pending, Complete and Closed.
- □ **Requestor** – This column displays the requestor of the WO. If the WO is an **APM**, **IWO**, or **RWO** those will be displayed as the requestor.
- □ **Options** – The icon in this column allows you to update or edit the work order.

The **Open Work Orders** page is pre-sorted by date, with new work orders displayed at the top of the list.

The different types of work orders are as follows:

- ▪ **Online Request/Tenant Service Request (TSR)** – These are reactive work orders that are related to a tenant. **TSR's** can be received from tenants who use IMPAK's **Tenant Service Center** to post a request, or when someone in the property management's firm creates a service request for a tenant based on an email, voicemail, telephone conversation, etc.

    The icon in front of the work order tells you how the **TSR** was received:

     Entered online by the tenant through the *Tenant Service Center*.

     Entered by property management staff – Request received in person.

     Entered by property management staff – Request received via telephone.

     Entered by property management staff – Request received via voicemail.

     Entered by property management staff – Request received via email.

- ▪ **Inspection Work Order (IWO)** – These are pro-active work orders that are created by property managers or building engineers to correct a property deficiency. These work orders allow management to identify and correct the property related problems before they become a tenant issue.

- ▪ **Preventive Maintenance (APM)** - These are work orders that are generated for routine maintenance on the property's equipment. These are generated based on the set schedule that is created for each piece of equipment through **IMPAK's Preventive Maintenance** feature.

- ▪ **Recurring Work Order (RWO)** – These work orders are like **APM's** in that they are based on a schedule, however **RWO's** do not relate to the equipment. These work orders can be scheduled for things like ground maintenance, pest control etc.
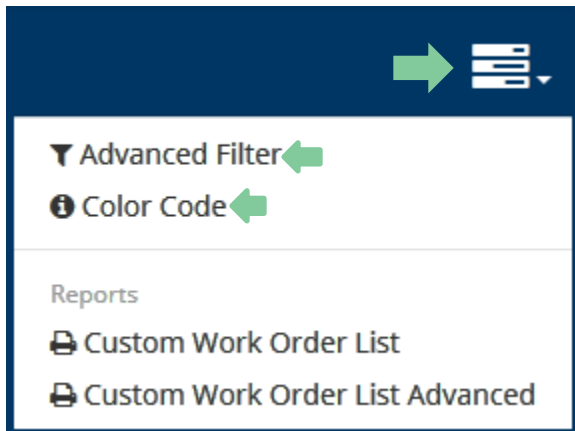
# OPEN WORK ORDERS

The **Open Work Orders** page is also color coded to make it easy to differentiate types of work orders and statuses just by looking at them.

To locate the definition of the color codes, you can locate and click on the menu icon ⬛ in the top right-hand corner of the screen and then click ⓘ Color Code

**Color Code**

| | |
|---|---|
| Service Description: | Tenant Service Request |
| Service Description: | Inspection Work Order |
| Service Description: | Preventive Maintenance |
| DUE | On Due |
| DUE | Nearly Due |
| DUE | Complete |
| DUE | Late |

**▼ Advanced Filter** ⬅
**ⓘ Color Code** ⬅

Reports
🖶 Custom Work Order List
🖶 Custom Work Order List Advanced

The menu icon (⬛) also allows you to apply an **Advanced Filter** where you can filter the **Open Work Order** view based off of the following criteria:

- Origin Date: From - To
- Work Order Type
- Work Order Status
- Billable
- Service Location
- Job Type
- Technician
- Tenant
- Contractor
- Property Manager