How to Locate Work Order History

Step	Action	Note
1. Identify the type of work orders to be included in the report	Select from Filter Selection Control dropdown menu options: **All Work Orders** **Open Work Orders** **Closed Work Orders**	Required field Selecting **All Work Orders** may increase processing time substantially
2. Identify the items for which you want data to be returned	Click **Select All** to include every data item in the list; click WO Only to select WO related data items (bolded in list below) *Or* Click the checkbox next to the individual items to select a subset of data elements: • **Work Order** • **Work Order Status Code** • **Order Type** • **Category** • **Bldg** • **Bldg Name** • **WO Total Cost** • **WO Create Date** • **WO Age** • **WO Funding Source** • **WO Description** • **WO Obligations** • **Request Date** • **WO First Labor** • **WO Last Labor** • **Work Manager** • **User Reference Number** • Phase • Phase Status Code • Phase Description • Shop • Shop Name • Asset Type • Asset Group • Asset • Phase Cost • Phase Begin Date • Phase End Date • Phase Age • Room	Selecting all will create a column for each of the 30 possible items and possibly increase processing time Selecting any of the following data elements requires supplying a building or building name filter entry: • Shop • Shop Description • Room • Asset Group • WO Create Date 　　*(See Step 3)*

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Step	Action	Note
3. Identify Filter Criteria	Click **Add Filter Criteria** from available options: • **Building** • **Building Description** • Room • AiM Account • Asset Group • Asset ID • Shop • Shop Description • WO Create Date • User Reference Number	At least one filter entry is required Bolded filter criteria required if any of the following data items are selected: • Shop • Shop Description • Room • Asset Group • WO Create Date
4. Run Query	Click <u>Run Query</u> link	

List of Portal Tabs and Fields, including selection options

Filter Selection Controls (allows user to narrow the number of work orders searched)
Options: All Work Order
            Open Work Orders
            Closed Work Orders

Column Selection Controls (allows user to include all data categories, a limited number of categories, or categories specific to work orders)

Options: Select All
            Deselect All
            WO Only* (bolded categories only)

Column Selection Grid Categories | Filter Criteria Value Options

Column Selection Grid Categories		Filter Criteria Value Options
Work Order*	Phase	Building
Work Order Status Code*	Phase Status Code	Building Description
Order Type*	Phase Description	Room
Category*	Shop	AiM Account
Bldg*	Shop Name	Asset Group
Bldg Name*	Asset Type	Asset ID
WO Total Cost*	Asset Group	Shop
WO Create Date*	Asset	Shop Description
WO Age*	Phase Cost	WO Create Date
WO Funding Source*	Phase Begin Date	User Reference Number
WO Description*	Phase End Date	
WO Obligations*	Phase Age	
Request Date*		
WO First Labor*		
WO Last Labor*		
Work Manager*	Room	
User Reference Number*		