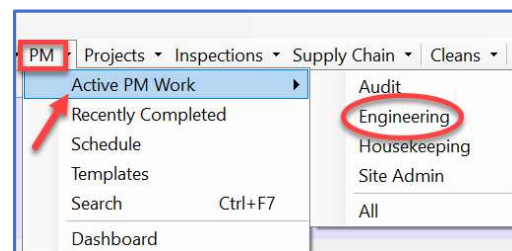


Completing PM Work Orders (With Incomplete Tasks)

Completing PM Work Orders with Incomplete Task may happen if you have limited availability to complete the PM. You may wish to complete the PM anyway and come back when the unit is available to complete the remaining tasks.

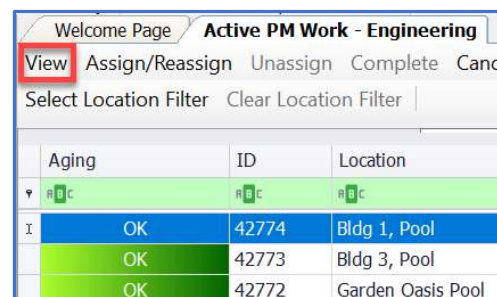
Step 1: Open the *Active PM Work* drop down from the PM menu tab. Select a *Department*.



Step 2: Highlight the PM work order you would like to complete from the *Active PM* list. Click the drop-down arrow in the *Assigned To* column and select an assignee from the list.

Aging	Location	Work Requested	Assigned To	Last Completed
OK	Bldg 2, Pool	Pool PM-WKL	[None]	7/9/2021
OK	Bldg 1, Pool	Pool PM-WKL	User Full Name	
OK	Bldg 3, Pool	Pool PM-WKL	[None]	
OK	Garden Oasis Pool	Pool PM-WKL	Abrix, Leanne	
OVERDUE	Bldg 2, Pool	Pool PM-WKL	Chamblain, William	
OVERDUE	Garden Oasis Pool	Pool PM-WKL	Chavez, Jose	
OVERDUE	Bldg 3, Pool	Pool PM-WKL	Farro, Royston	
OVERDUE	Bldg 1, Pool	Pool PM-WKL	George, Bob	
OK	Unit #3304 (2 Bdrm)	A/C Filter Change PM-MTH	Green, Miles	
OK	Unit #1201 (1 Bdrm)	A/C Filter Change PM-MTH	[None]	2/26/2020

Step 3: Click the *View* button on top of the menu bar.



Step 4: The Task list is found on the bottom half of the work order details screen. To update all the tasks at once click the **Select All** button, next go two buttons to the right and click **Change Selected Tasks to** and Select **Complete**.

Tasks (0/11)					Costs	Comments (0)	Journal Entries	Log	Notifications
Edit	Delete	Move Up	Move Down	Select All	Deselect All	Change Selected Tasks to: ▾			
#	Completed	Name	Category	Summary	Notes				
1	<input type="checkbox"/>	Walk pool deck a...							
2	<input type="checkbox"/>	Check that all po...							
3	<input type="checkbox"/>	Inspect all filter b...							
4	<input type="checkbox"/>	Inspect all weir fl...							
5	<input type="checkbox"/>	Inspect pool fenc...							
6	<input type="checkbox"/>	Inspect pool gate...							
11 Tasks									

Step 5: Uncheck any Incomplete tasks in the *Completed* column. You can also enter any needed or required task information by simply clicking on the associated Notes field.



To change the status of multiple tasks, press and hold the Shift key to select sequential tasks or the Control key to select random tasks.

Edit	Delete	Move Up	Move Down	Select All	Des
#	Completed	Name	Category		
	<input type="checkbox"/>				
1	<input checked="" type="checkbox"/>	Walk pool deck and in...			
2	<input checked="" type="checkbox"/>	Check that all pool lig...			
3	<input checked="" type="checkbox"/>	Inspect all filter basket...			
4	<input type="checkbox"/>	Inspect all weir floats			
5	<input checked="" type="checkbox"/>	Inspect pool fences to...			
6	<input checked="" type="checkbox"/>	Inspect pool gates for...			
11 Tasks					

Step 6: If applicable, add Notes to the associated Task(s). Simply click on the note field to add or edit a Note(s).

Tasks (10/11) Costs Comments (0) Journal Entries Log Notifications						
Edit	Delete	Move Up	Move Down	Select All	Deselect All	Change Selected Tasks to: Add/Edit Notes on Selected New Standard Work C
#	Completed	Name	Category	Summary	Notes	Extra Reques
	<input type="checkbox"/>					<input type="checkbox"/>
1	<input checked="" type="checkbox"/>	Walk pool deck and inspect for damage and o...				<input type="checkbox"/>
2	<input checked="" type="checkbox"/>	Check that all pool lights are functioning corre...				<input type="checkbox"/>
3	<input checked="" type="checkbox"/>	Inspect all filter baskets for damage				<input type="checkbox"/>
4	<input type="checkbox"/>	Inspect all weir floats			Needs to be replaced, not work...	<input type="checkbox"/>
5	<input checked="" type="checkbox"/>	Inspect pool fences to meet code				<input type="checkbox"/>
6	<input checked="" type="checkbox"/>	Inspect pool gates for proper closure to meet c...				<input type="checkbox"/>
11 Tasks						

Step 7: Select *Complete* button on top of the menu bar.

Welcome Page Active PM Work - Engineering [42774] Pool PM-WKL*

Suspend **Complete** Cancel Create Template Reports **OK**

Request: Pool PM-WKL

Location: Bldg 1, Pool

Reported By: Staff Reported By Guest: Staff Name

Type: Equipment PM (Engineering) Priority: Medium

Step 8: The Complete Work Order dialogue box will open. Enter the work time. Next select a **Task Completion reason** and click **OK**. If you need to track and complete the incomplete work later Select "Create new rework work order for the incomplete tasks".



Completed PMs can be viewed from the *Recently Completed PM Work Screen up to the last 7 days*.

Complete Work Order

Actual Start and Completion:

Started: ☐ Calculate 7/27/2021 at 1:35 PM

Duration: ☐ Calculate Days: 0 Hours: 0 Minutes: 0

Completed: ☒ Calculate 7/27/2021 at 1:35 PM

☐ This work order is being backdated (set Expected Start to Actual Start)

Comment:

Task Completion: Mark remaining tasks complete If chosen actions taken must be applied if required
 Mark remaining tasks complete If chosen actions taken must be applied if required
 Leave some tasks incomplete
 Create new rework work order for the incomplete tasks
Create new incomplete work order for the incomplete tasks
 Create new suspend work order for the incomplete tasks

Step 9: Click **Save and Close** on the upper right-hand corner.