Optimizing Work Order Types: Pre-Work and Completion Criteria

We're excited to announce significant updates to the Work Order Type settings, designed to refine and optimize the management of pre-work and completion criteria. These enhancements integrate a comprehensive improvement feedback system directly into the work order process, making it more intuitive and efficient than ever.

What's New:

Key features:

- **Work Request Criteria screen**: We added a new section under Work Order Type for better usability and access, featuring:
  - The "Available on Work Requests" setting, which we relocated here for easier configuration.
  - Added surveys to give you the option to request feedback from requestors after completing work.
  - Added checklists to allow requestors to input essential information upfront.
- **Pre-Work Criteria enhancements**:
  - New option to require a lead assignment before work begins, accessible directly from the Pre Work Criteria screen.
- **Continuous improvement**:
  - Features in the Work Order Completion dialogue now allow on-the-spot updates and suggestions for linked parts and procedures, based on user permissions.

Why these updates?

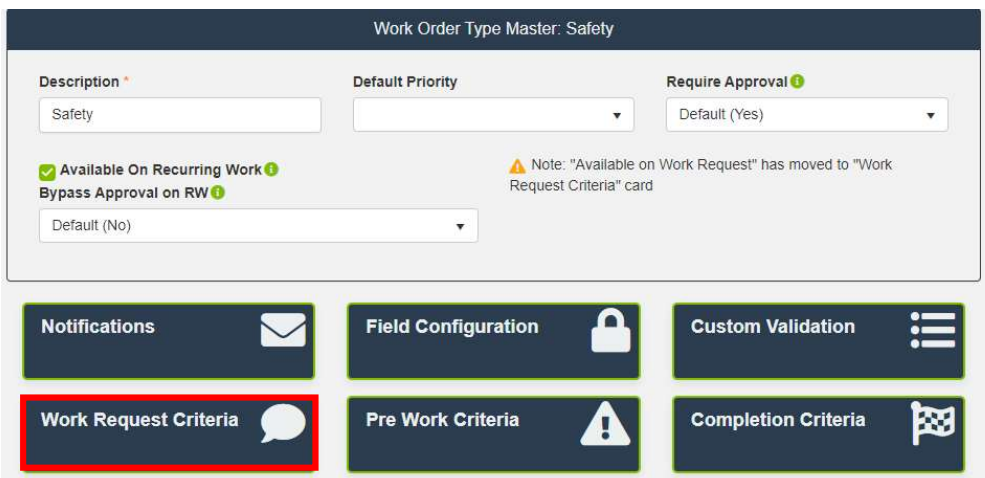
The latest enhancements to our Work Order Type settings are designed to streamline your management processes and enable more effective feedback loops. These changes are crucial for businesses looking to enhance operational accuracy and adapt quickly to new challenges.

- **Direct Benefits:**
  - **Increased Efficiency:** Simplifying setup and customization of work orders reduces time spent on routine tasks, allowing your team to focus on higher-priority activities.
  - **Enhanced responsiveness:** The new feedback system allows for immediate insights into operational successes and areas for improvement, facilitating faster decision making and process enhancement.

How it works:

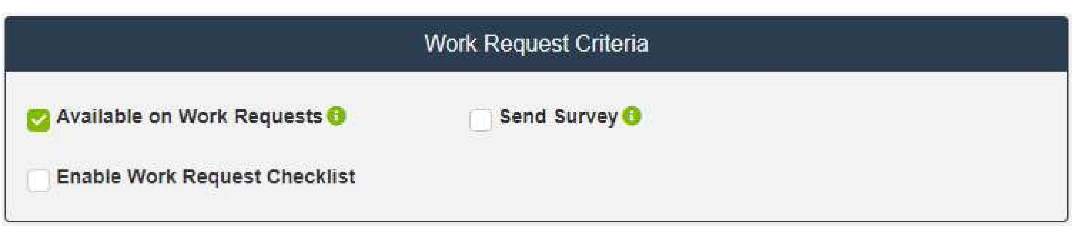
Setting up and using the new features:

- Navigate to **Configuration Mode** > **Assets and Work Management** > **Work Order Types** and select the desired work order type.



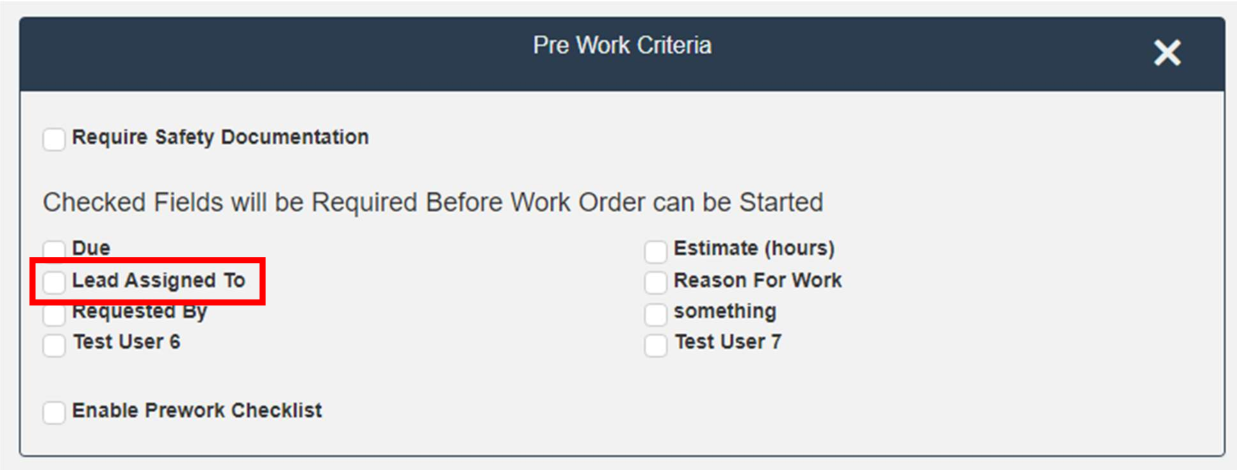
Explore the new settings:

- After selecting **Work Request Criteria**, you can do the following:
  - Select **Available on Work Requests** to enable the use of Work Order Types for work requests.
  - Select **Send Survey** to enable post-completion survey.
  - Select **Enable Work Request Checklist** to set up checklists for requestors, enhancing the data capture for work requests.



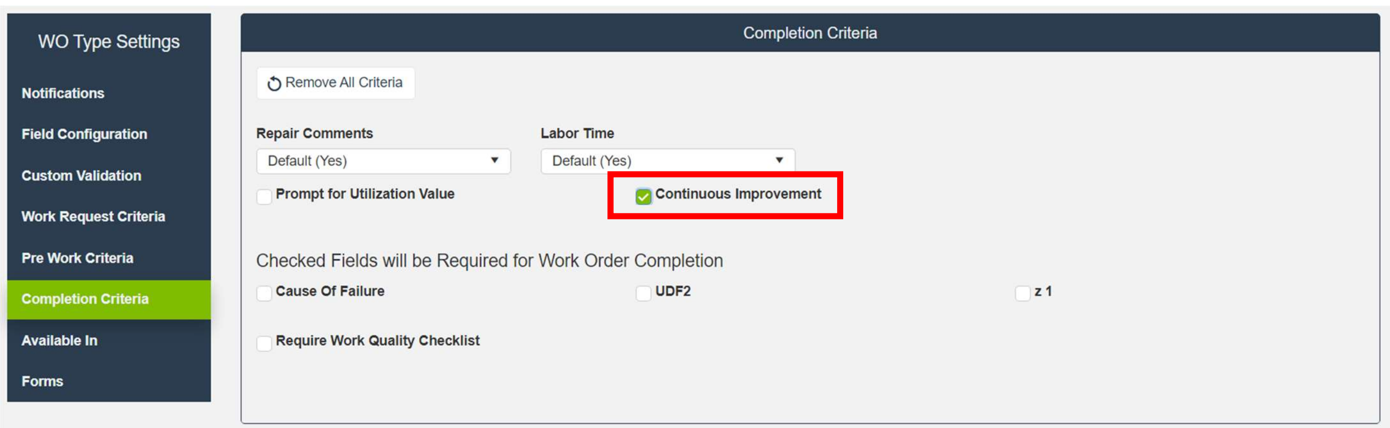
Assigning a lead:

- Under the **Pre Work Criteria**, we've added a feature allowing you to require a Lead to be Assigned to a work order before startup.
- Simply select the option to start using this feature.



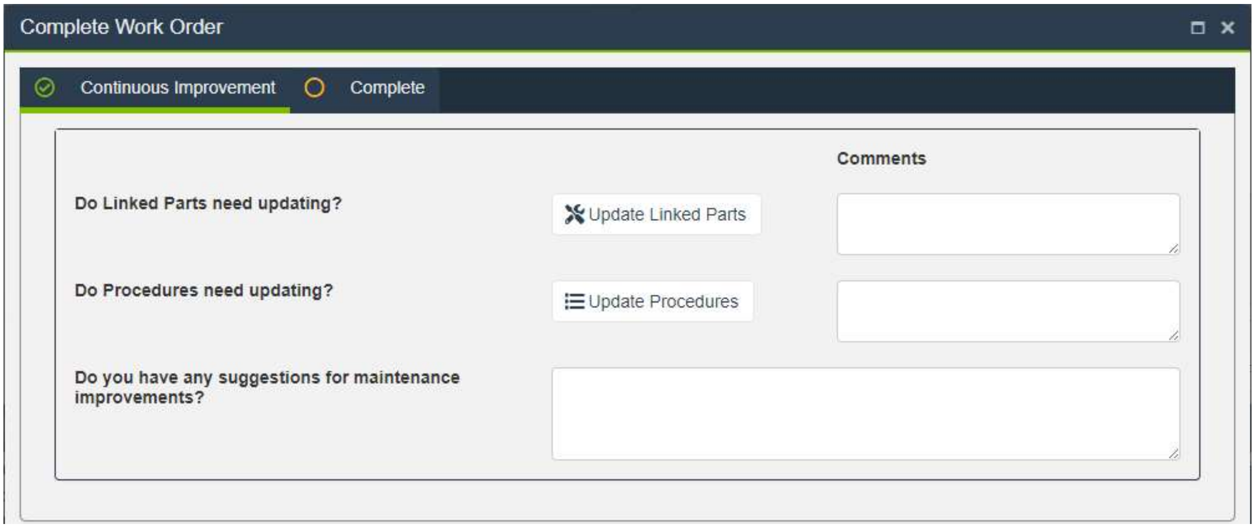
Enabling the new Continuous Improvement function:

- Navigate back to the Work Order Type settings and select **Completion Criteria**.
- Click the **Continuous Improvement** checkbox to enable the feature. This action adds a feedback prompt to the Work Order Completion window, allowing users to suggest updates during the process.



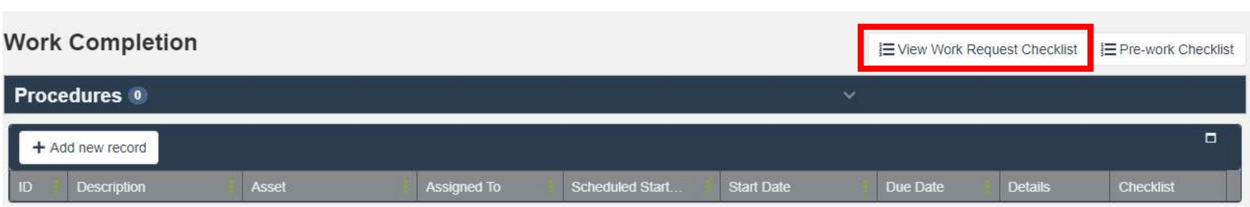
Continuous Improvement in action:

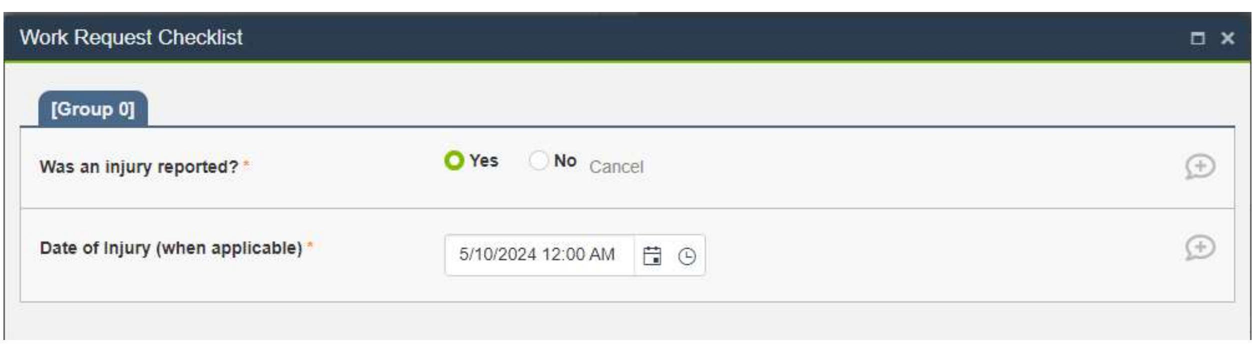
- As users complete a work order, a prompt will appear asking if any linked parts or procedures need updates.
- Users can also provide feedback via a free-form text box, but only those with appropriate editing permissions for procedures can make direct changes to procedures.



New checklists:

- A **View Work Request Checklist** button was added to work orders stemming from approved requests with completed checklists.
- Clicking the button retrieves a completed checklist. Depending on user permissions and system configuration, you can view and edit the checklist to ensure all details are accurate.





Setup and configuration:

Ready to get started? Now that you've seen what's possible, here's a quick recap on setting up the new Work Order Type enhancements.

1. Navigate to **Configuration Mode** > **Assets and Work Management** > **Work Order Types.**
2. Enable features like Available on Work Requests, post-completion surveys, and requestor checklists.
3. Activate options such as lead assignment requirements and continuous improvement functions for real-time updates.

Take the next step: Fine-tune these features to enhance your work order management processes efficiently!

Frequently Asked Questions (FAQs)

1. **What if I need to change settings after the initial setup?**
   - You can modify the settings at any time by navigating back to the Work Order Type settings.
2. **What is a lead assignment, and why is it important?**
   - A lead assignment refers to designating a lead work or manager responsible for overseeing the completion of a work order. It's important for ensuring accountability and that there is clear responsibility for the execution and completion of the task.
3. **What should I do if the system doesn't allow me to enable a feature?**
   - If you're unable to enable a feature, it may be due to restricted permissions or prerequisites that are not met. Contact your system administrator or support for assistance to ensure your user account has the appropriate access.

For additional resources, updates, and support, please visit our website or contact our helpdesk at support@llumin.zendesk.com. We are committed to ensuring your success with LLumin CMMS+.