Split Orders Overview

To Do List

Planned Maintenance Item
- Planned Maintenance
- Orders
- Create New Split
- CREATE NEW ORDER

Split Item List

Item moved to the Split Item List
- Planned Maintenance
- Items
- Current Split Items
- Select Item
- Create further work orders

Completed Item List

No further work orders are required
- Planned Maintenance
- Items
- Current Split Orders
- Update Item to Completed

Figure 1 – Overview of Split Orders

How to use this guide

This guide has been designed to aid in the use of the Planned Maintenance module of PRMS21.
The standard format used throughout is as follows:

Function
How to get there
How to use

Each page is laid out as shown here

FUNCTION NAME
INTRODUCTION / BACKGROUND (WHERE NECESSARY)

SCREEN SHOT

1. HOW TO USE
2. STEP BY STEP

NOTES RELATING TO FUNCTIONALITY
CREATING SPLIT ORDERS

How to get to the ‘Create new Split Order’

To get to the Create New Split Order select the following menu options:

1. Planned Maintenance
2. Orders
3. Split

Figure 1 – Creating New Split Order
## How to create a split order

### Figure 2 – Create New Split Order Screen

<table>
<thead>
<tr>
<th>Ref</th>
<th>Field/Button</th>
<th>Instruction</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Date</td>
<td>SELECT Date of Order by clicking onto the calendar icon</td>
<td>The date will default to today’s date.</td>
</tr>
<tr>
<td>2</td>
<td>Service Category</td>
<td>SELECT the service category from the drop down list</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Service Provider</td>
<td>SELECT the service provider from the drop down list</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Send Via</td>
<td>TICK the method to send the order via</td>
<td>At least one method is required. Options not available for that service provider are greyed out.</td>
</tr>
<tr>
<td>5</td>
<td>Comment</td>
<td>ENTER order comments where required.</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Clear Contents</td>
<td>CLICK the ‘clear contents’ button to clear all information entered onto order form.</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Check</td>
<td>TICK the item to split</td>
<td>Only one item can be split in an order.</td>
</tr>
<tr>
<td>8</td>
<td>Sort</td>
<td>SELECT from the drop down menu the column heading to sort the items.</td>
<td>If item number is known Ctrl-F will allow you to ‘find’ by the number.</td>
</tr>
<tr>
<td>9</td>
<td>Save/Send Order</td>
<td>CLICK to save the information and create the first order against the item.</td>
<td></td>
</tr>
</tbody>
</table>

### Note

When the 1st order of a split item is saved the item becomes a ‘current split order’ and can be found under the menu option Planned Maintenance – Items – Current Split Items. From this menu option further orders can be created against the item.
MANAGING A SPLIT ITEM

How to get to the current split items

To get to the Current Split Items to create further orders select the following menu options:

1. Planned Maintenance
2. Items
3. Current Split Items

Figure xx – Managing current split items – menu option
## Current Split Items – Managing the item

<table>
<thead>
<tr>
<th>Ref</th>
<th>Field/Button</th>
<th>Instruction</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Check</td>
<td>TICK item to create further orders, complete or remove</td>
<td>Only one item can be selected</td>
</tr>
<tr>
<td>2</td>
<td>Orders</td>
<td>SELECT from drop down list to sort by column heading to find item</td>
<td>Indicates all orders item has been assigned to</td>
</tr>
<tr>
<td>3</td>
<td>Sort</td>
<td>CLICK create order button to create additional work orders for the item selected.</td>
<td>If item number is known CRT-F find function can be used.</td>
</tr>
<tr>
<td>4</td>
<td>Complete Item</td>
<td>CLICK Complete Item button to complete the item.</td>
<td>Once completed no further orders can be created against the item.</td>
</tr>
<tr>
<td>5</td>
<td>Remove from Split</td>
<td>CLICK Remove from Split button to put the item back to the To Do List</td>
<td>An item can only be removed where there are no current orders (i.e. order(s) have been cancelled)</td>
</tr>
</tbody>
</table>

Figure xx – Current split item lists