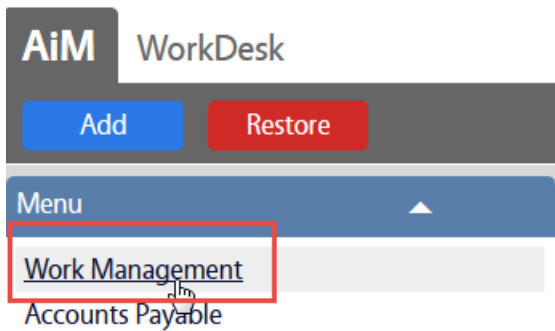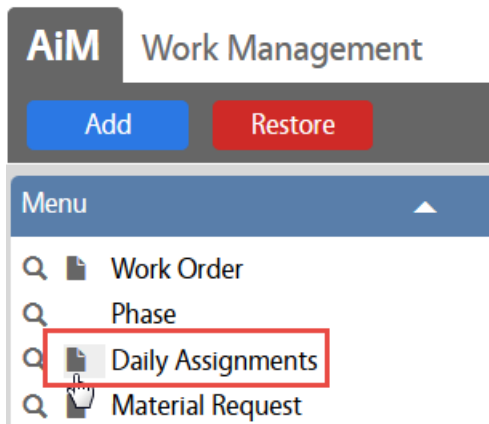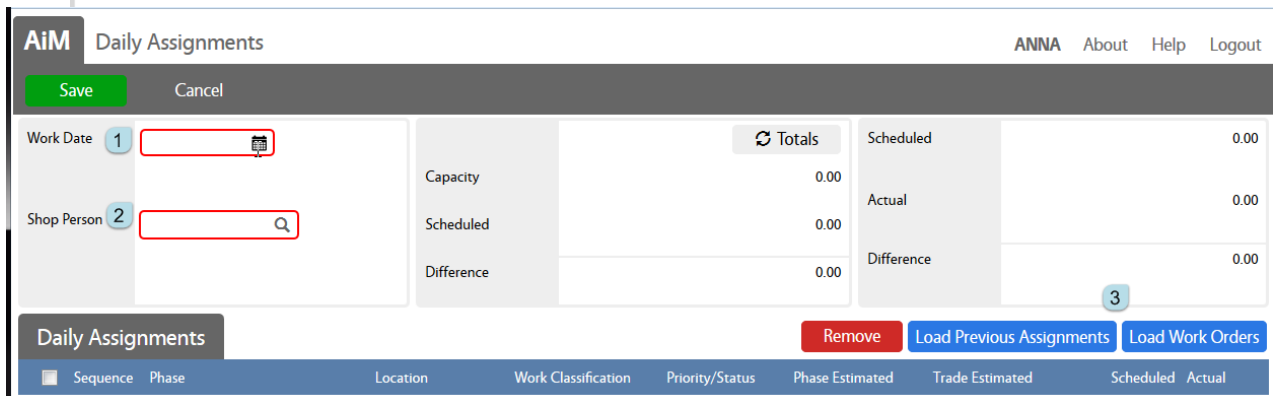# Daily Assignment

# AiM

2019

# Daily Assignment

The Daily Assignment screen is used to set a schedule for a technician. It is a list of Work Orders assigned to the shop person for a particular day. The Daily Assignment shows on the Daily Assignment screen in GO WorkMgmt.



- On the WorkDesk Menu, click Work Management



- On the Work Management menu, click 📄 next to Daily Assignment.



- Work Date – the date the technician is to complete these Work Orders
- Shop Person – technician number
- Click Load Work Orders or Load Previous Assignments
    a. Load Work Orders – will open the search screen. The system will only search Work Orders assigned to the shop(s) that the technician is assigned to. Work Order must be in Assigned or In Progress status for it to appear.
    b. Load Previous Assignments -will pull the Work Orders from the previous date that are not in a Complete status.

- Check the boxes of the Work Orders to add
- Click [Done]



- Sequence – What order should the Work Orders be completed in
- Scheduled – Can enter how long it is expected to take to complete the job
- Click [Save]

**The Daily Assignment must contain at least 1 Work Order in order to be saved.*
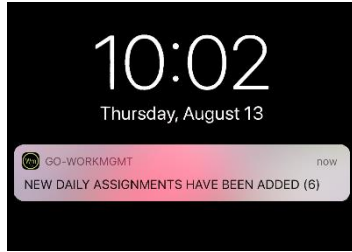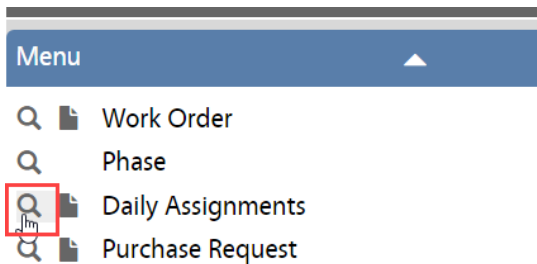


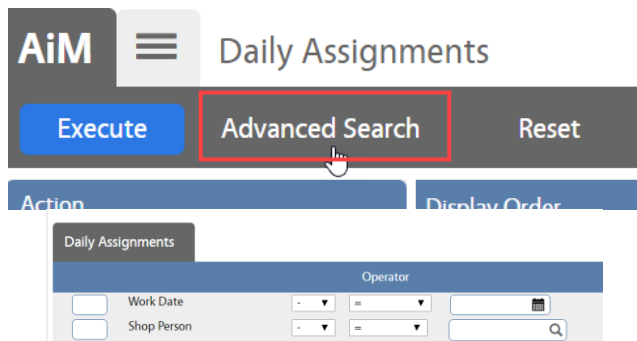- Daily Assignments can be duplicated by clicking Copy

- Notification is sent to technician through GO WorkMgmt iPhone app.
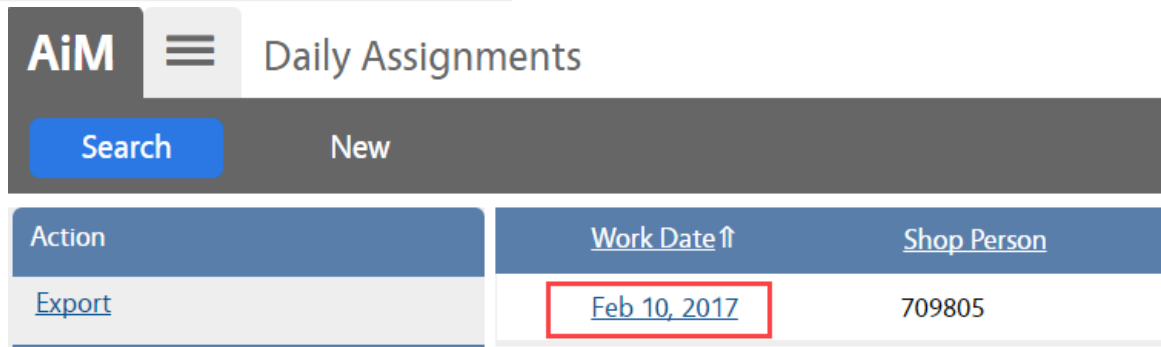
# Update Existing Daily Assignment

There is only 1 Daily Assignment per person per day. If the record already exists, additional Work Orders can be added by editing the Daily Assignment. You can only edit Daily Assignments for the current date or a future date.
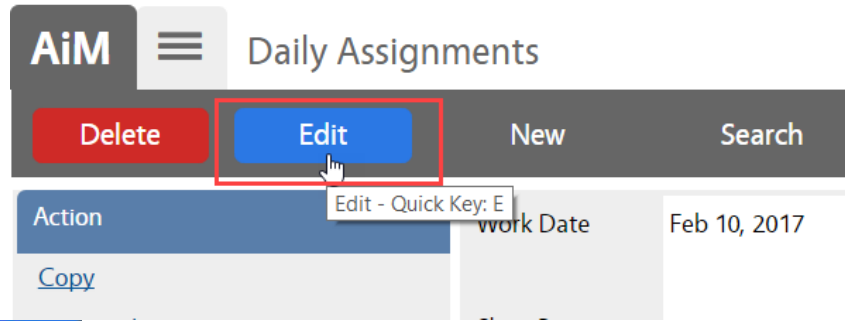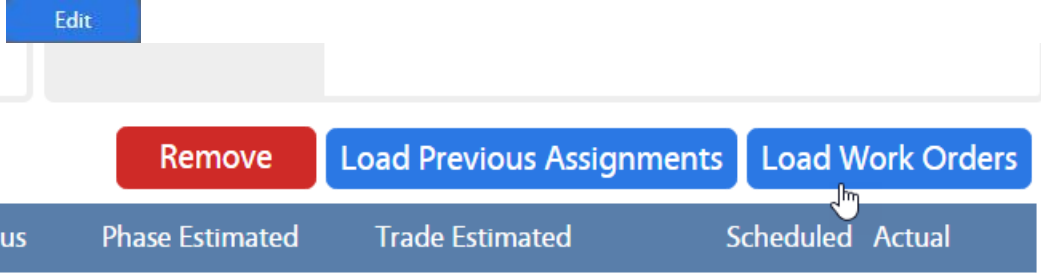


- Click the 🔍 next to Daily Assignments



- Click Advanced Search



- Search for the Daily Assignment by Work Date and Shop Person number
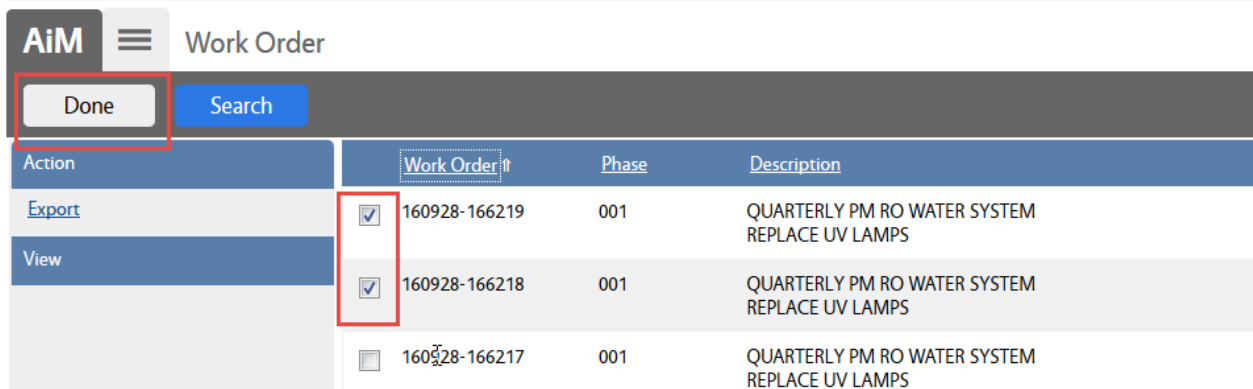- Click **Execute**



| Action | Work Date ⇑ | Shop Person |
|--------|-------------|-------------|
| Export | Feb 10, 2017 | 709805 |

- Click on the Work Date to open the Daily Assignment

- Click  Edit



- Click Load Work Orders or Load Previous Assignments
  a. Load Work Orders – will open the search screen. The system will only search Work Orders assigned to the shop(s) that the technician is assigned to. Work Order must be in Assigned or In Progress status for it to appear.
  b. Load Previous Assignments -will pull the Work Orders from the previous date that are not in a Complete status.



- Click  Save