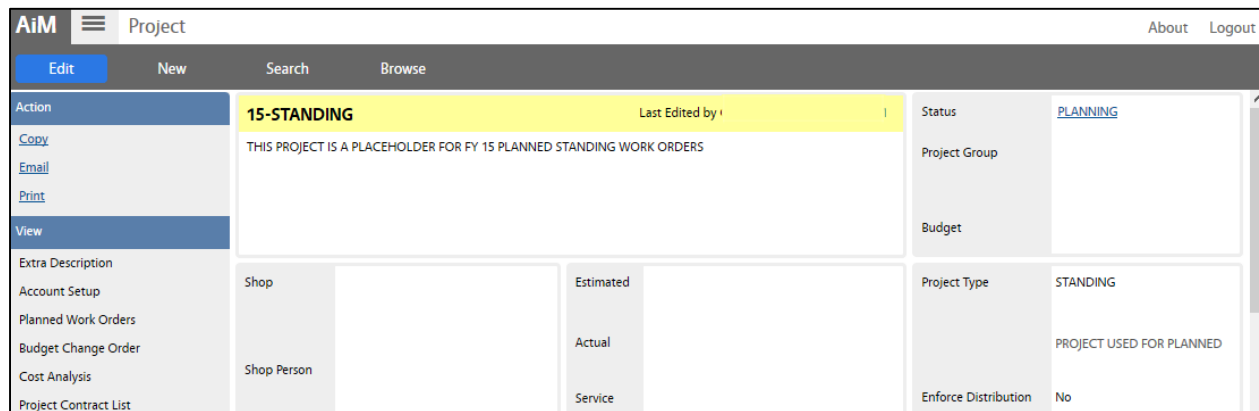# Work Control: Planned Work Orders

Standing work orders are typically created at the start of a fiscal year and remain open throughout the year. Prior to the start of a new fiscal year, new standing work orders are prepared in the form of AiM "planned" work orders. This allows your department time to create, review and revise standing work orders and batch promote them into real work orders on June 30th. This document describes the process of establishing and promoting standing work orders.

CREATING A PROJECT

1. Go to: **Project Management > Project**. Create an AiM project, with these settings. This project will facilitate a simple batch promote process of all your planned work orders into real work orders on July 1st.


2. Create new planned orders or copy planned work orders from the prior fiscal Year.

   CREATING NEW PLANNED WORK ORDERS
   Go to: **Project Management > Planned Work Order**. Create new planned work orders if you have a need for a new standing work order that will be used every year. This is preferable to keeping external lists or files of standing work orders needed for the next fiscal. Just create a new planned work order, promote it, and it will be there along with other planned work orders for the next fiscal year.
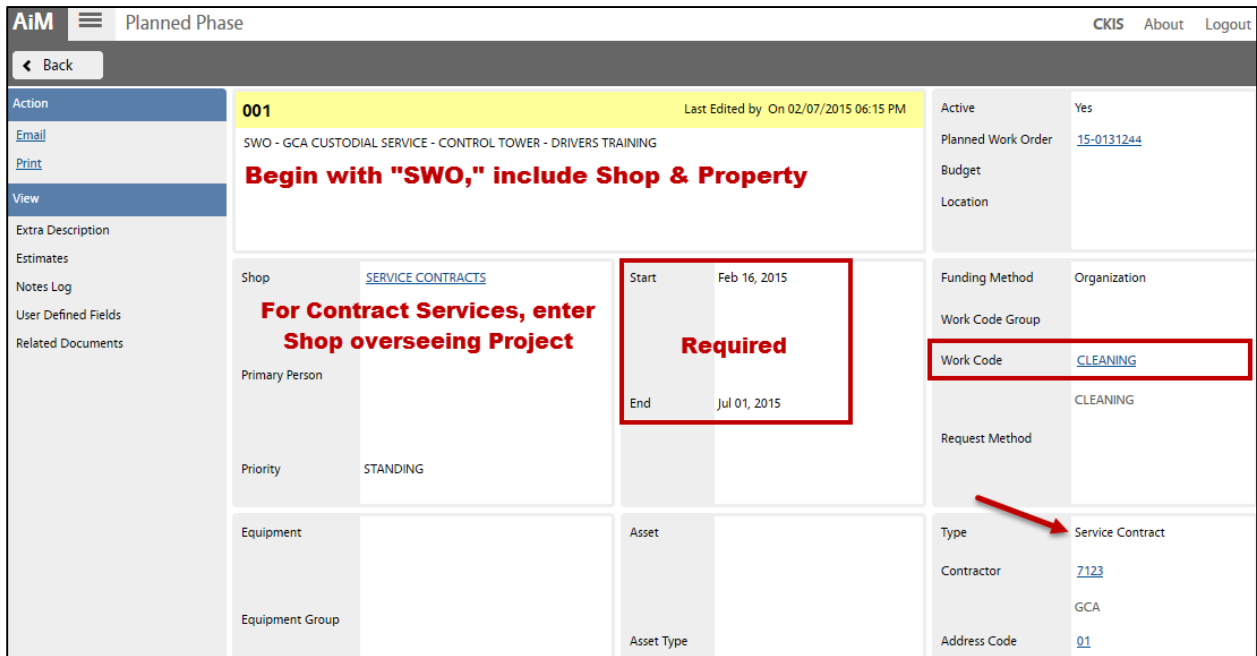
   a. In the Planned Work Order screen, create a new work order.
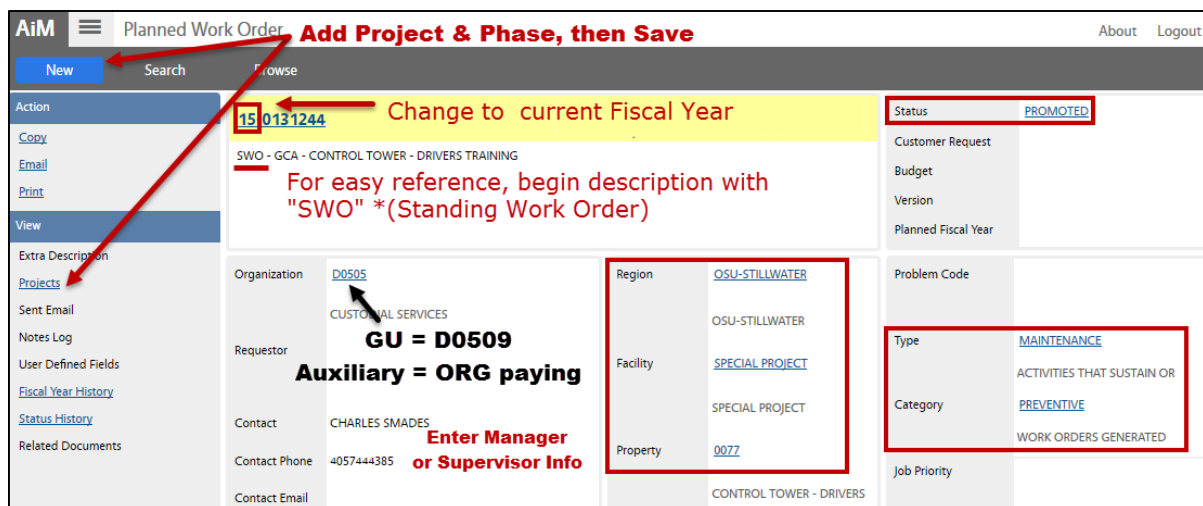
b. Click: **Projects** (*left side bar*), select the Planned Work Order **Project**.
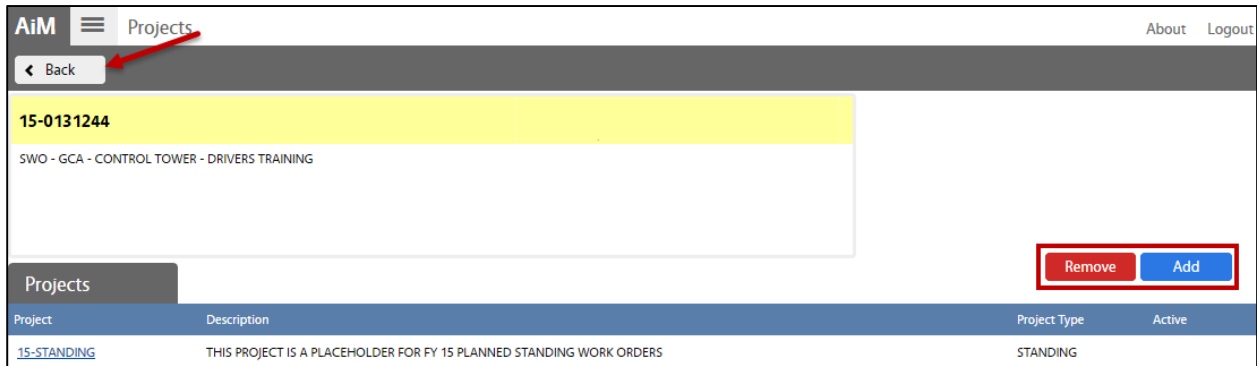

c. Create **Planned Phases** as needed by selecting **Copy** or **Add**. *NOTE: For Contract Services, enter the Shop overseeing the Project. The contractor field is left blank until a PO is awarded.*

3. **COPYING PLANNED WORK ORDERS**
    When it is time to begin planning for the next year's standing work orders, assuming that all your standing work orders from the previous year were setup as planned work orders, simply create a new project (*see above - 1.Creating a Project*).

    a. Copy the planned work orders into new ones and make the following changes:
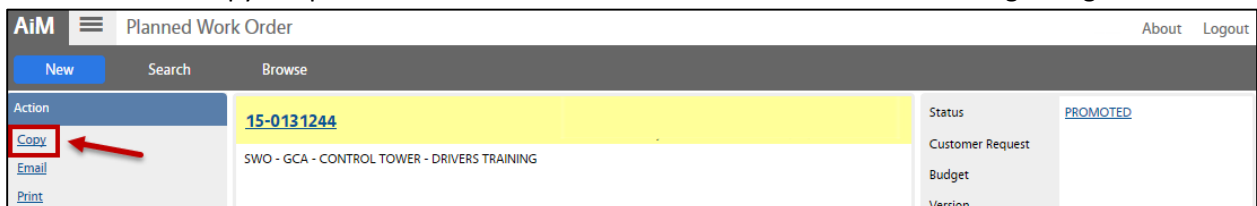
b. Change the copied Work Order to start with new Fiscal Year, in this case **16**-0169562.

c. Click: **Projects** (*see above – 2a.*)
   i. Remove the old standing project and add current Fiscal Year.

d. Add or edit phases as needed.

e. Remove a Phase by setting Active to "No"

4. **PROMOTING PLANNED WORK ORDERS TO STANDING WORK ORDERS**

   On June 30th, you will batch promote planned work orders to create standing work orders. **First, update the Fiscal Year default**, go to: **System Administration >** Setup Menu: **System Setup > Edit**.

   a. From **Project Management > Project >** Search for current Fiscal Year Project.
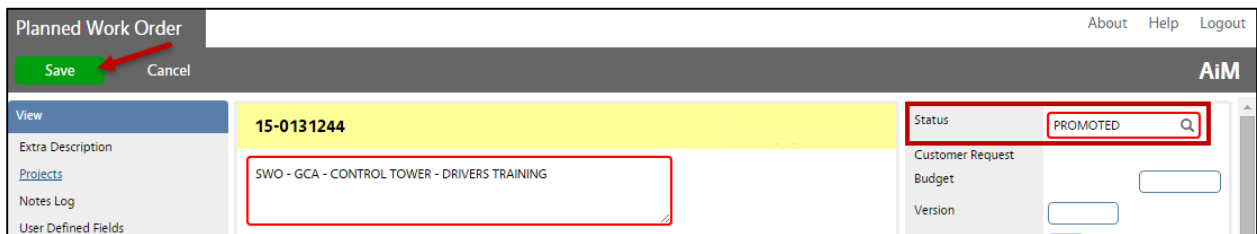
   b. Promote planned work orders. Click: **Edit** > **Planned Work Orders**

c. Select a **Work Order** under Planned Work Orders
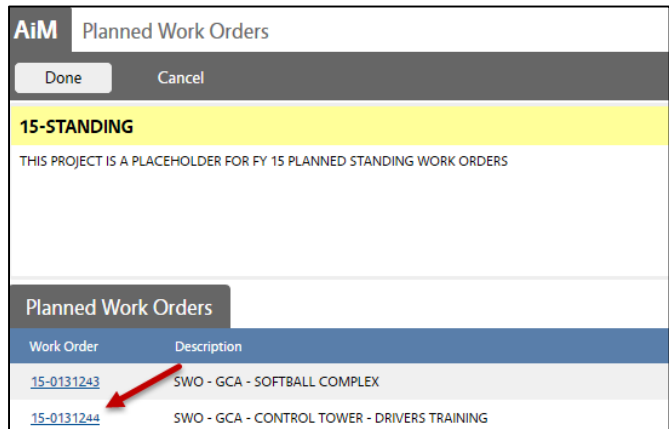
d. Click: Edit, change status to **PROMOTED**

e. Click: **Save**