
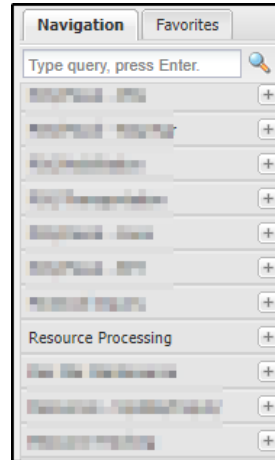



Resource Work Orders

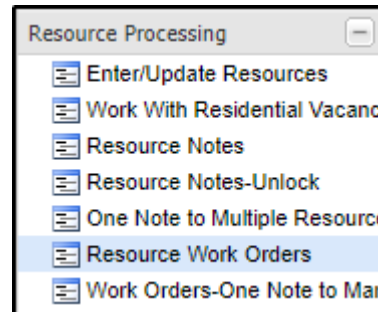
Resource Work Orders are used to document action taken on a resource’s record, such as updates on a SANDIS record, any collateral requests, and if a letter was sent to the resource.

To access **Resource Work Orders**, use the Navigation menu in the Atrium to find the **Resource Processing** section. Select the  next to Resource Processing to display the options available to the user profile.

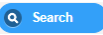


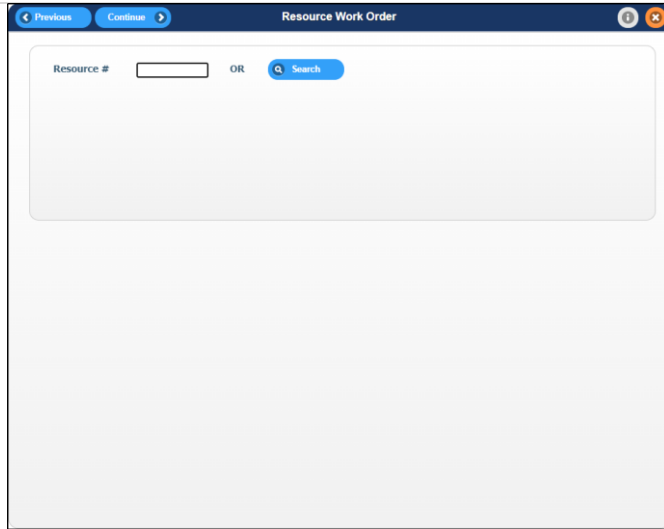
In this sub-menu select,

 **Resource Work Orders**

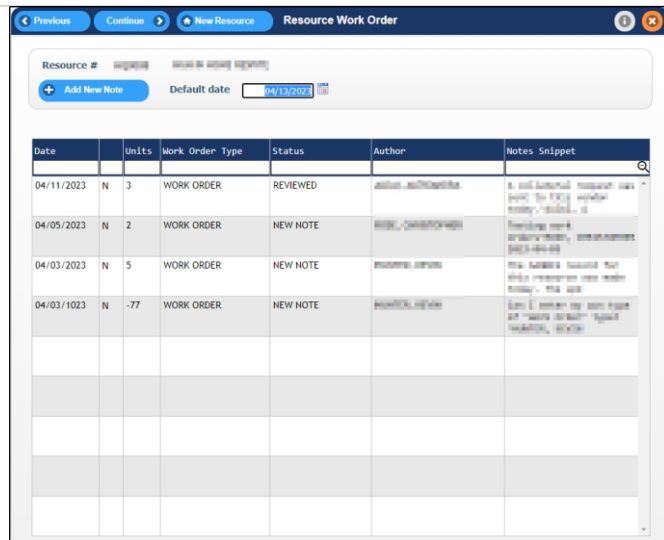


When prompted, enter the **Resource #**.

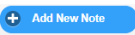
A  button is available to search for a resource by name.

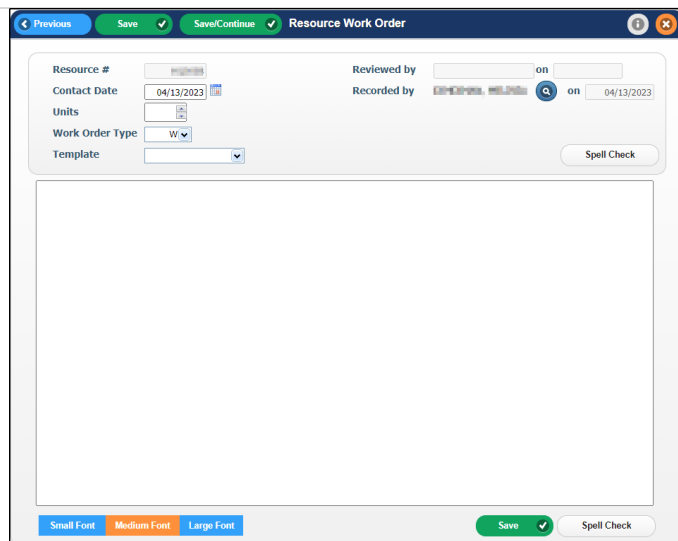


The **Resource Work Order** screen will display any prior notes documented in SANDIS.

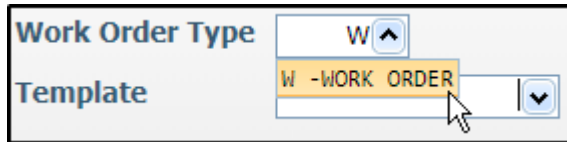


Creating A Work Order

To start a new Work Order, click . A new entry will be created and an empty Resource Work order text box will display. Fill in the **contact date**.

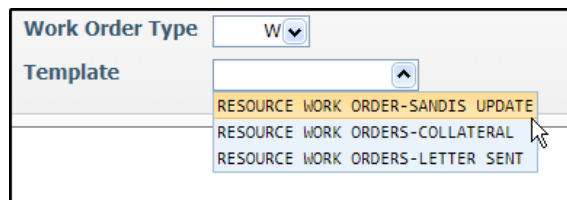


Under **Work Order Type**, click on the drop-down menu and choose the **W – Work Order** option.



Templates

Next, go to **Template**, click on the drop-down menu, and select the appropriate template to work with.




When choosing a template, it will auto-populate the unit amount.

The unit amount can be adjusted by either manually typing in the amount or using the arrow buttons beside the unit text box.



When switching between templates, the number of units will be updated to reflect the default amount.

A message will appear next to the unit text box indicating the change and will fade out. To view the message after it is no longer displayed, click on the  icon.




Once the template is chosen, it will be loaded into the Resource Work Order text box.

Edit the text box with the appropriate information.

The font size can also be modified:



Select  to check for misspelled words.

Select  when finished.

