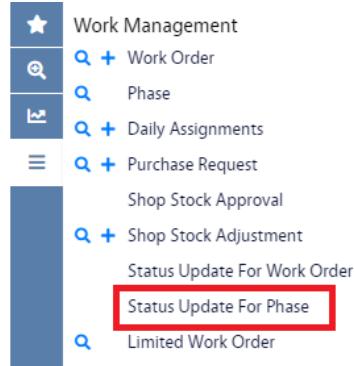# Mass Close of Phases (and Work Orders)

To make closing Phases (and Work Orders) more efficient, the Status Update for Phase screen can be used to update batches of Phases all at once. The option to also close Work Orders will be used to close Work Orders when all the Phases associated with the Work Order have been closed.
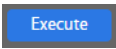
A. Close Phases

1. On the menu, under **Work Management**, select **Status Update for Phase**

2. The search screen will be used to find Phases that need to be closed. Most often this will be based on the Status of the Phase, but other criteria can be used.

Note: To get to the Phase Status, you will need to set the search to "Advanced Search" mode, then scroll down to get to the Phase Status, not the Work Order Status.
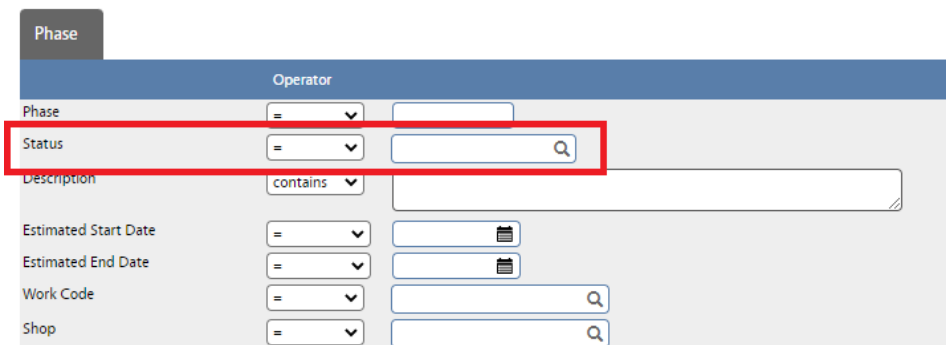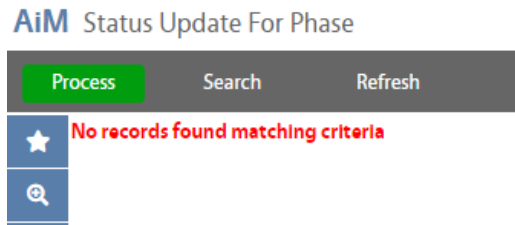

The search criteria may differ based on what needs to be closed, but basically, look for work phases that are ready to close and assigned to your shop.
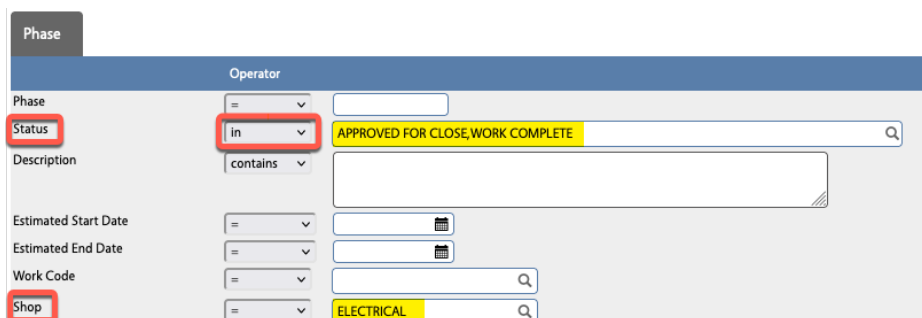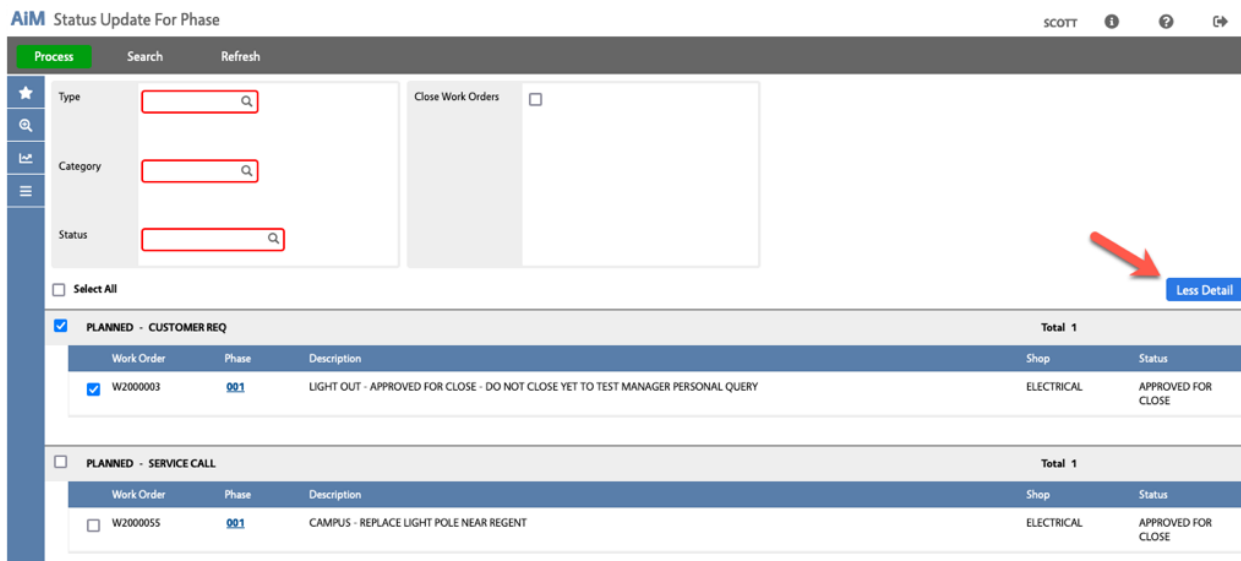

3. Click: 🔍 to select the status from a list.

4. Click: [Execute]

5. If no Phases were found you will get a message saying, "No records found matching criteria".

6. If Phases were found, the results will be grouped by Type and Category with a total for each combination found.

   Click: **More Detail** for a list of the Work Order and Phase for each combination.

7. Select Phases by clicking the check box for the category and type you are updating.

    a. Do not check the **Select ALL Checkbox.**

8. Enter **Type** and **Category** for Work Orders selected.

> *IMPORTANT- Process each Type and Category separately. Because this is a "mass update" application, you would be changing other phase types to the ones entered here in the upper right.*

To select only one type and category, you can go back to search and add in the search criteria for type and category as shown.
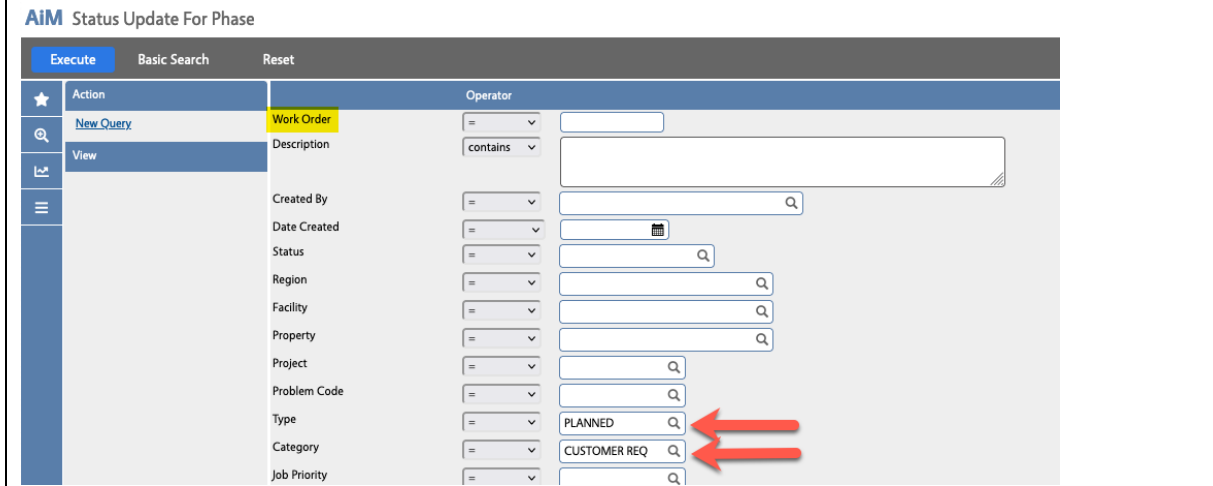
9. Under Status, select **CLOSED.**

10. Click: checkbox next to **Close Work Orders.**
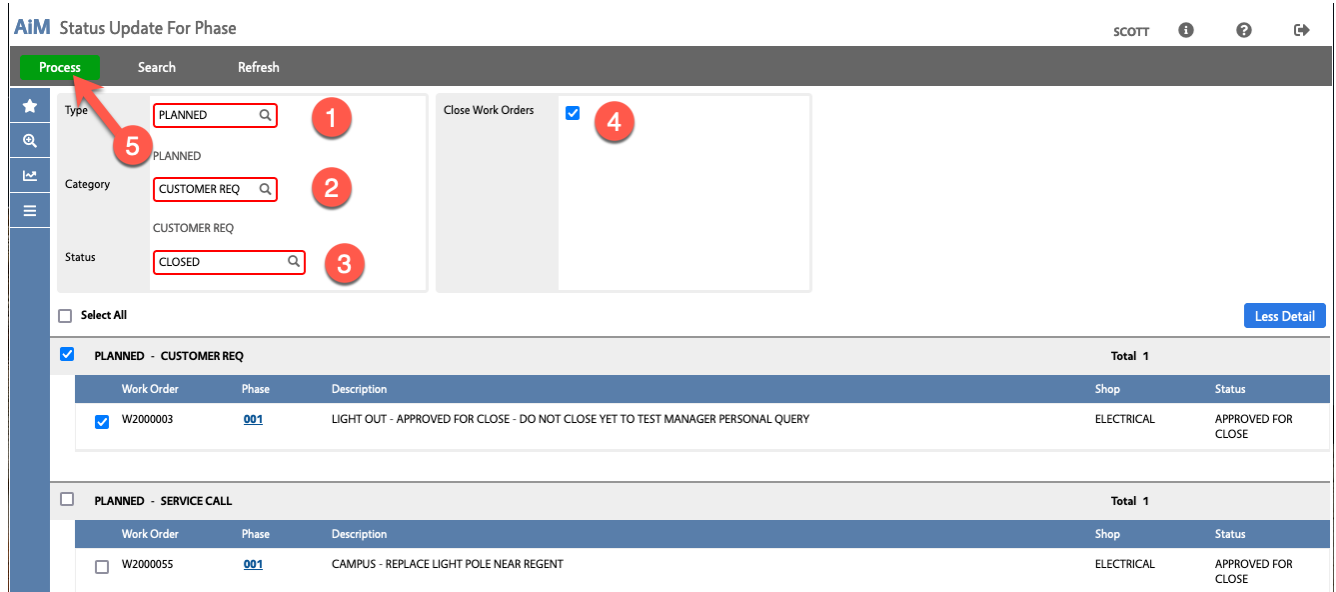
11. Click: **Process**

   a. Pop-up Message - **Records updated: #,** click: **OK**

12. Repeat steps 8-12. for all Types and Categories.

B. ERRORS

1. After processing, if applicable, an error message will show in **red** on the Status Update for Phase screen:

2. OPTION 1: Hover over the **red flag** next to Work Order to view Error Code. A red box will appear with the error message in it.

3. OPTION 2: Click: **Error Log**

   a.   Note **reason** for errors.

   b.   Click: Done

4. Once the error has been corrected, you can proceed to step A 12 above.