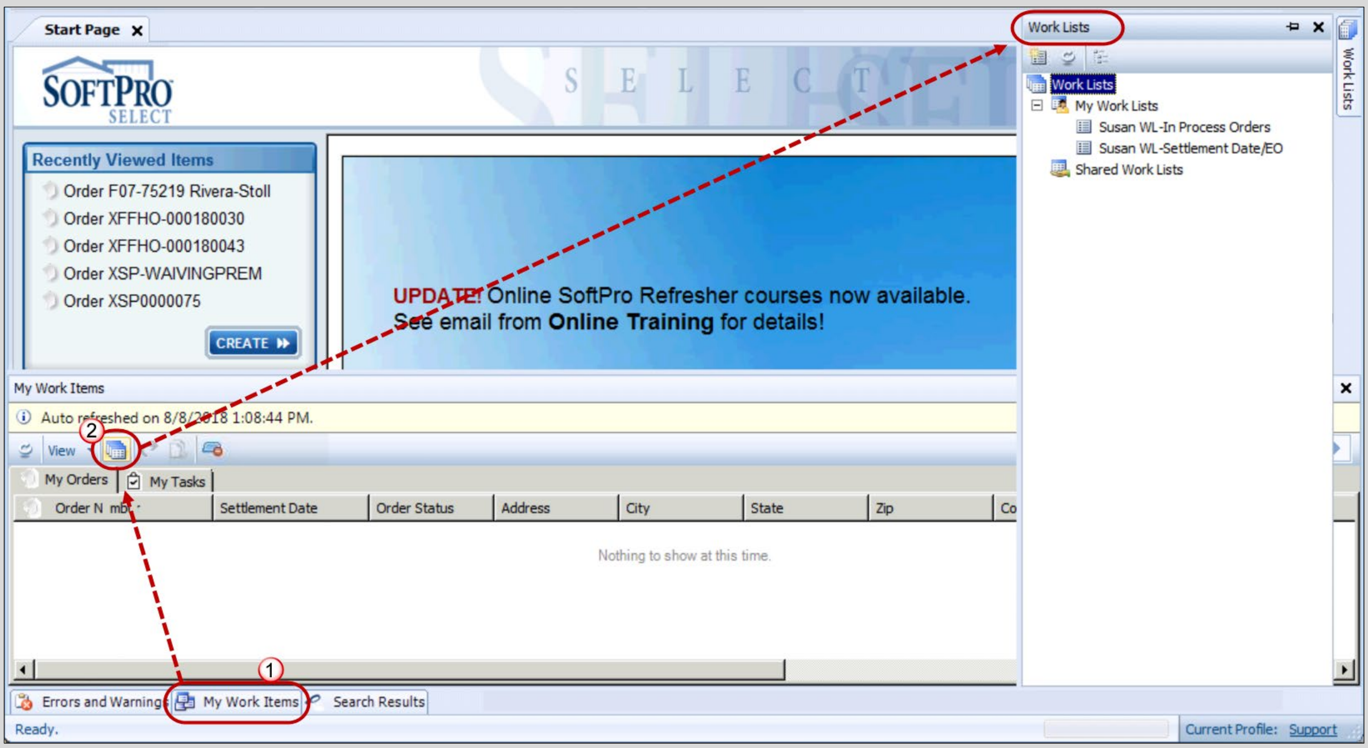
Creating, Editing and Removing Work Lists

Using the Work Lists feature allows you to create a query of specific order-criteria (e.g., orders where the Escrow Status is “In Process”) to assist in tracking orders. Follow these steps to create a new work list, edit an existing work list, remove a work list or create a view in **My Work Items**.

Creating a Task-Based Work List

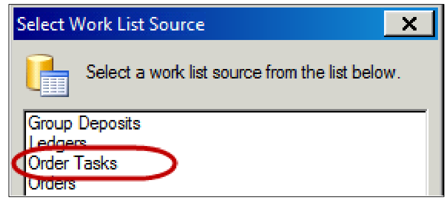
1. Hover over (or click) the **Work Lists** tab (far right of your SPS screen) to access the **Work Lists** tree

> **NOTE**: If the **Work Lists** tab is not displayed to the right of your SPS screen,
>
> 1. Click the **My Work Items** tab at the bottom of the page
> 2. Click the **Work Lists** icon; this opens the **Work Lists** tab to the right

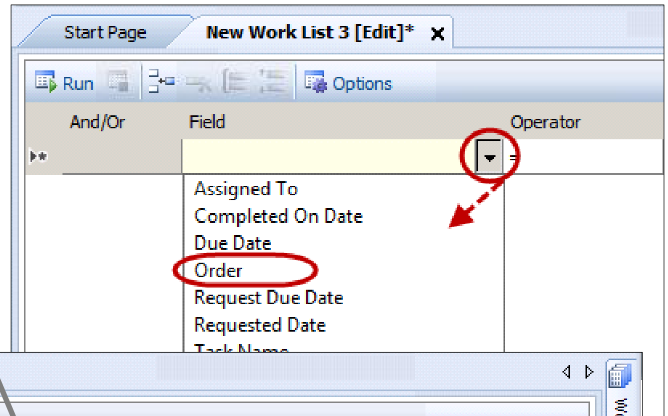


2. Click the **New Query** icon

3. From the **Select Work List Source** window, select **Order Tasks**; click the **OK** button



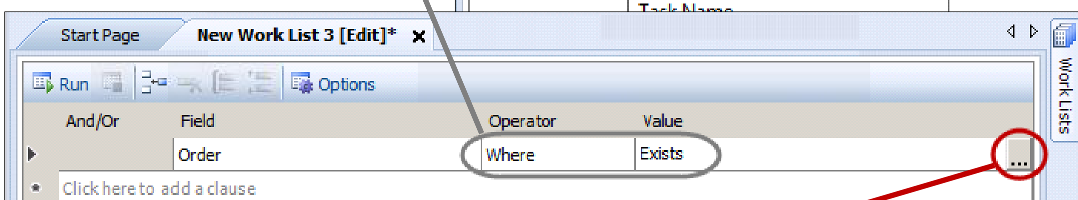
4. Build your query from the drop-down lists available in the **New Work List [Edit]** tab



In our example, we want to pull Orders where the **Order Status** and **Escrow Status** are equal to "**In process**".

a) From the **Field** drop-down, select **Order**

This auto-populates the **Operator** and **Value** fields but you still need to tell the system what you are looking for.



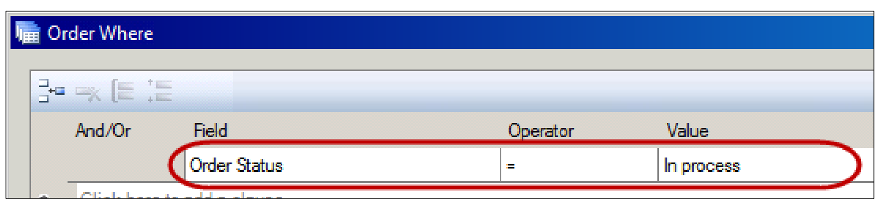
b) From the **Value** field, click on the **Ellipses** icon (far right)

c) From the **Order Where** window, select the values you want searched

i. **Field** = **Order Status**

ii. **Operator** = **Equal sign**

iii. **Value** = **In process**



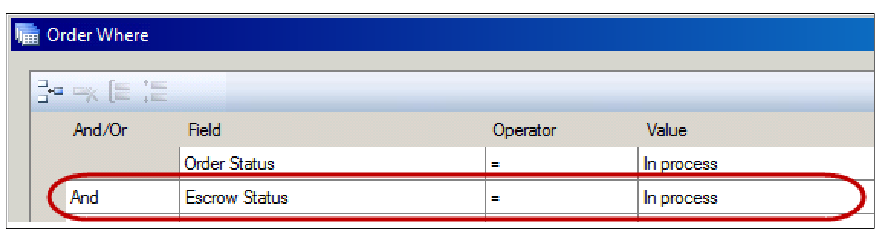
To add additional criteria, on the next line select

iv. **And/Or** = **And**

v. **Field** = **Escrow Status**

vi. **Operator** = **Equal sign**

vii. **Value** = **In process**

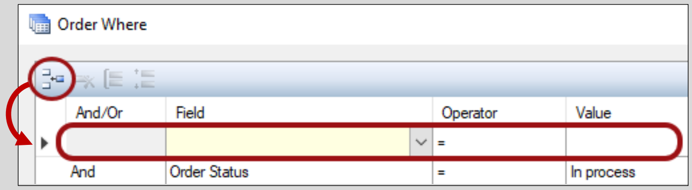


NOTE: You can include orders where the **Escrow Status** is blank by selecting **(None)** from the **Value** drop-down.

5. Click the **OK** button to return to the **New Work Lists [Edit]** tab

When creating or editing a query, you can use the toolbar to,

- **Insert** icon - insert a new clause above a selected entry

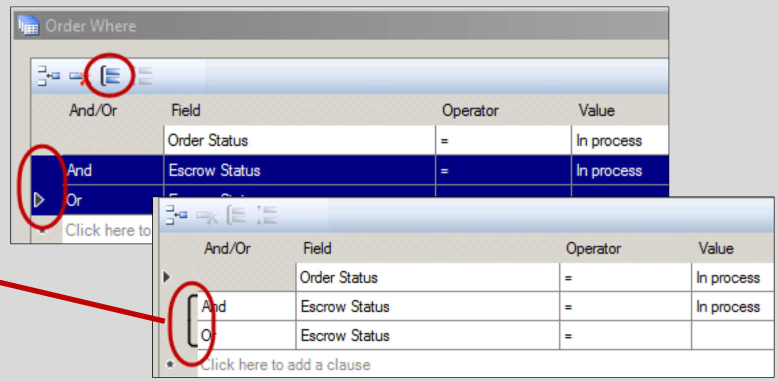


- **Delete** icon – remove an existing clause
- **Group** icon – group two or more clauses together; groupings function as a single unit separate from the rest of the query and are helpful when constructing complex queries
- **Ungroup** icon – ungroup clauses

If you want to group data, while still on the **Order Where** screen,

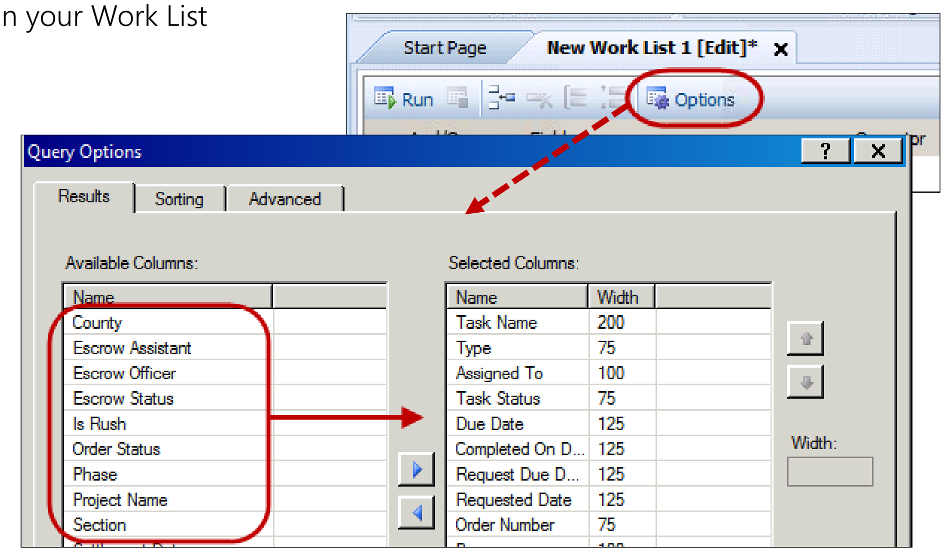
1. Holding the **Shift** key, click in the left most column to select the lines to be grouped
2. Click the **Group** icon

This adds a bracket in the left-most column identifying the data to be grouped together.

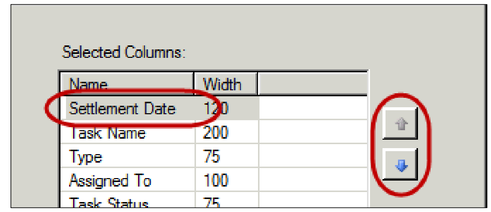


Completing and Running the Query

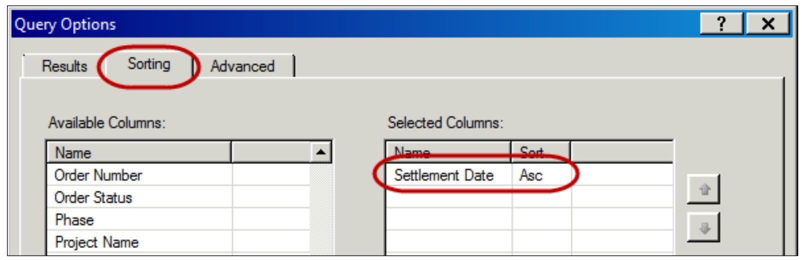
1. Add the fields you want displayed in your Work List
   a) Click the **Options** button
   b) From the **Available Columns** list (on the left), double-click the item(s) you wish to add



c) You can then order columns in the **Selected Columns** list (on the right), using the **Up/Down** icons, based on the order in which you wish to see the information

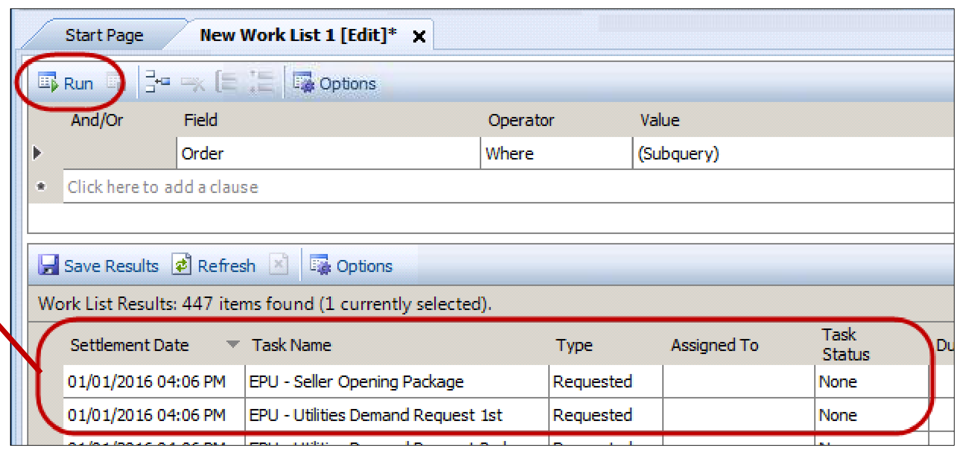


2. Click the **Sorting** tab to select **one** field on which to sort the data (i.e., **Settlement Date**)
3. Click the **Apply** button; click **OK**

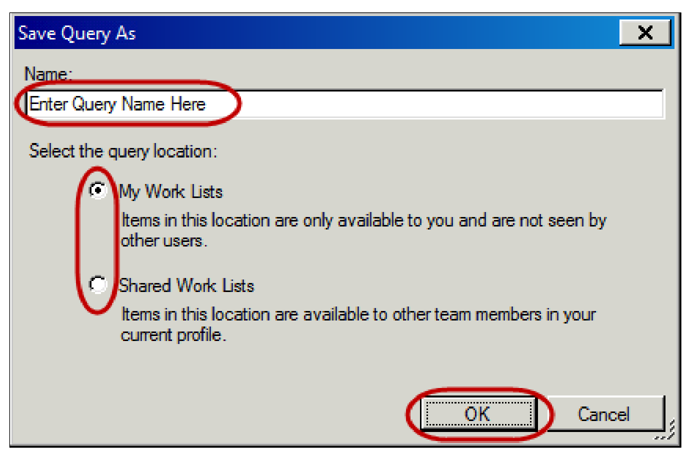


4. Test your query by clicking the **Run** button

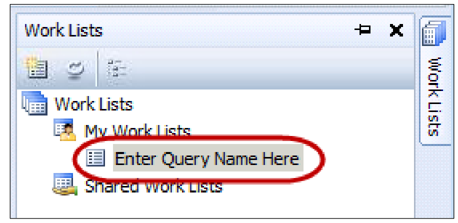
The results appear in the Results pane at the bottom of the screen.



5. **Save** your query using the **Ctrl + S** keyboard shortcut
6. Enter a name for your query when prompted
7. Select the query location
   - **My Work Lists** – you are creating the query for only you
   - **Shared Work Lists** – you are creating the query for your office
8. Click the **OK** button
9. Close the **New Work Lists [Edit]** tab



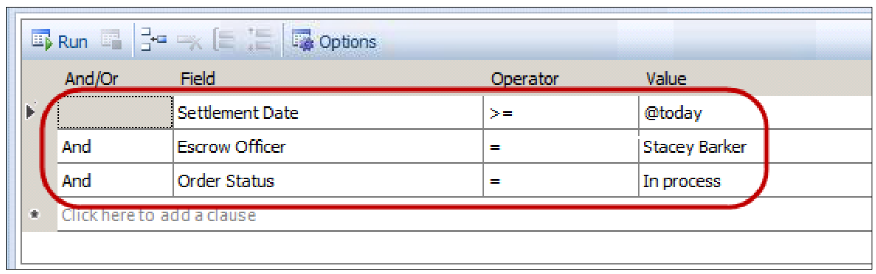
Your query now appears in the **Work Lists** tree.



Creating an Order-Based Work List

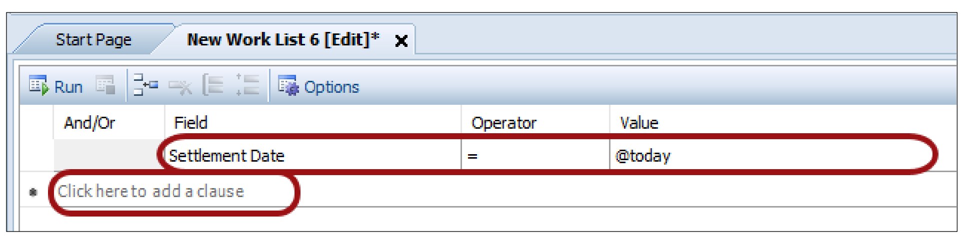
You can also set up a **Work List** to quickly review settlements identified with the current date for a specific Escrow Officer.

In this example, the



- First line sets the criteria to pull all orders with a settlement date greater than today
- Second line sets the criteria to pull only those orders where the selected **Escrow Officer** is identified in the order
- Third line sets the criteria to pull only those orders with an **Escrow status** of **In process**

1. Click the **New Query** icon
2. From the **Field** drop-down, select **Order**
3. Select the values you want searched
   a) Add a date clause



      i. **Field** = **Settlement Date**
      ii. **Operator** = **Greater than/Equal sign**
      iii. **Value** = select a date from the drop-down or enter a variable (i.e., **@today**)

> **NOTE**: A list of **Date Field Variables** can be viewed on F1 Help on the Work Lists Query Elements > Values page along with other available options for Work Lists.

   d) Add a new clause using the **Click here to add a clause** link

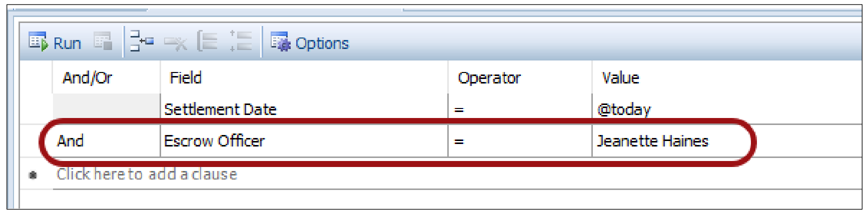
e) Add the Escrow Officer clause

   i. **And/Or = And**

   ii. **Field** = **Escrow Officer**

   iii. **Operator** = **Equal sign**

   iv. **Value** = select the corresponding Escrow Officer



f) Add a new clause using the **Click here to add a clause** link

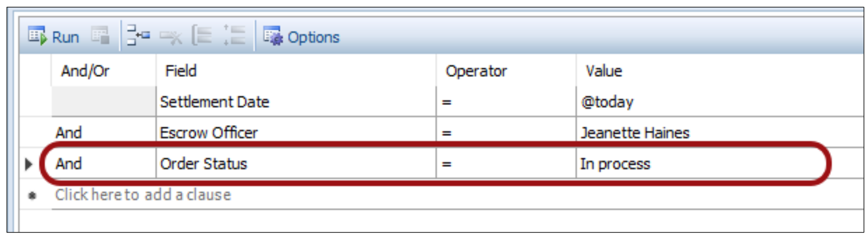
g) Add the Order Status clause

   v. **And/Or = And**

   vi. **Field** = **Order Status**

   vii. **Operator** = **Equal sign**

   viii. **Value** = **In Process**



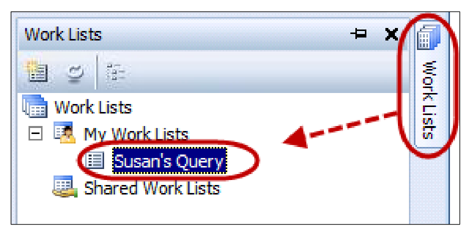
4. Complete the steps in [Completing and Running the Query](#) section

Running, Editing or Removing a Work List

1. To run your query,

   a) click the **Work Lists** tab

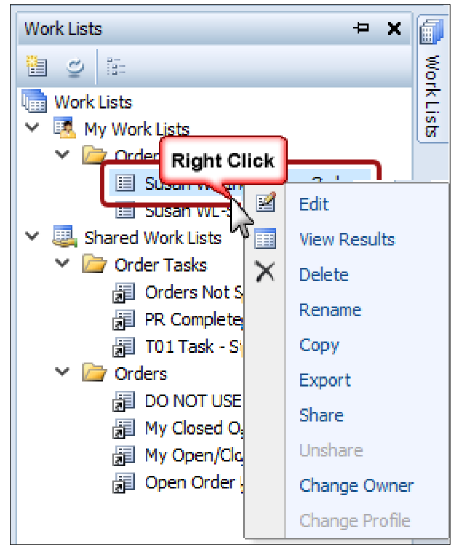
   b) double-click the work list you wish to run



-OR-

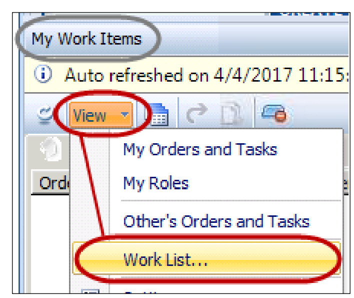
1. From the **Work Lists** tab, highlight the query you wish to edit or remove
2. Right click to open the menu
3. Click on a selection in the menu

NOTE: Not all menu options may be enabled as permissions are required for access.

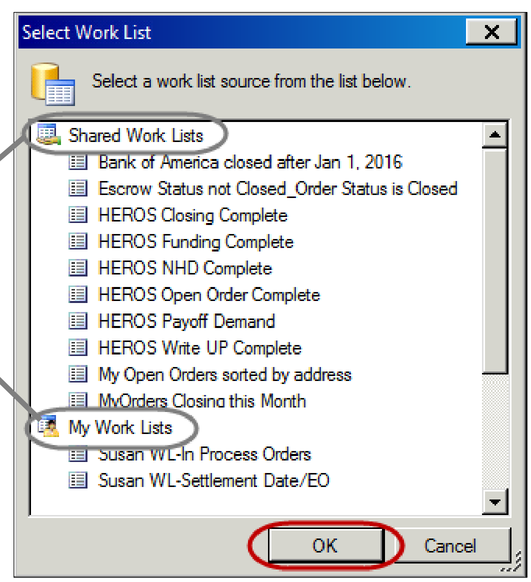


- **Edit** – to modify the search criteria
- **View Results** – to run the query
- **Delete** – to remove the query from the list
- **Rename** – change the name of the query
- **Copy** – to copy a work list in the Work Lists tree
- **Export** – export the query results
- **Share** – move the query from **My Work List** to **Shared Work Lists**
- **Unshare** – move the query from **Shared Work Lists** to **My Work List**
- **Change Owner** – change the owner of a Work List in the **My Work Lists**
- **Change Profile** – change the owning profile of a Work List in the **Shared Work Lists**

Creating a Work List View in My Work Items



1. If it is not already open, open the **My Work Items** tab
2. Click the **View** button
3. Click **Work List**



4. From the **Select Work List** window, click the Work List you wish to view

> **NOTE**: You can add multiple Work Lists by selecting from those others have created and shared (**Shared Work Lists**) or from those you created (**My Work Lists**).

5. Click the **OK** button

You now have **Work List** tab(s) enabled in **My Work Items**.

You may also access the **Work Lists** tab by clicking the **Work Lists** icon regardless of whether a **View** was added.