


Creating, Editing and Removing a Task-Based Work List

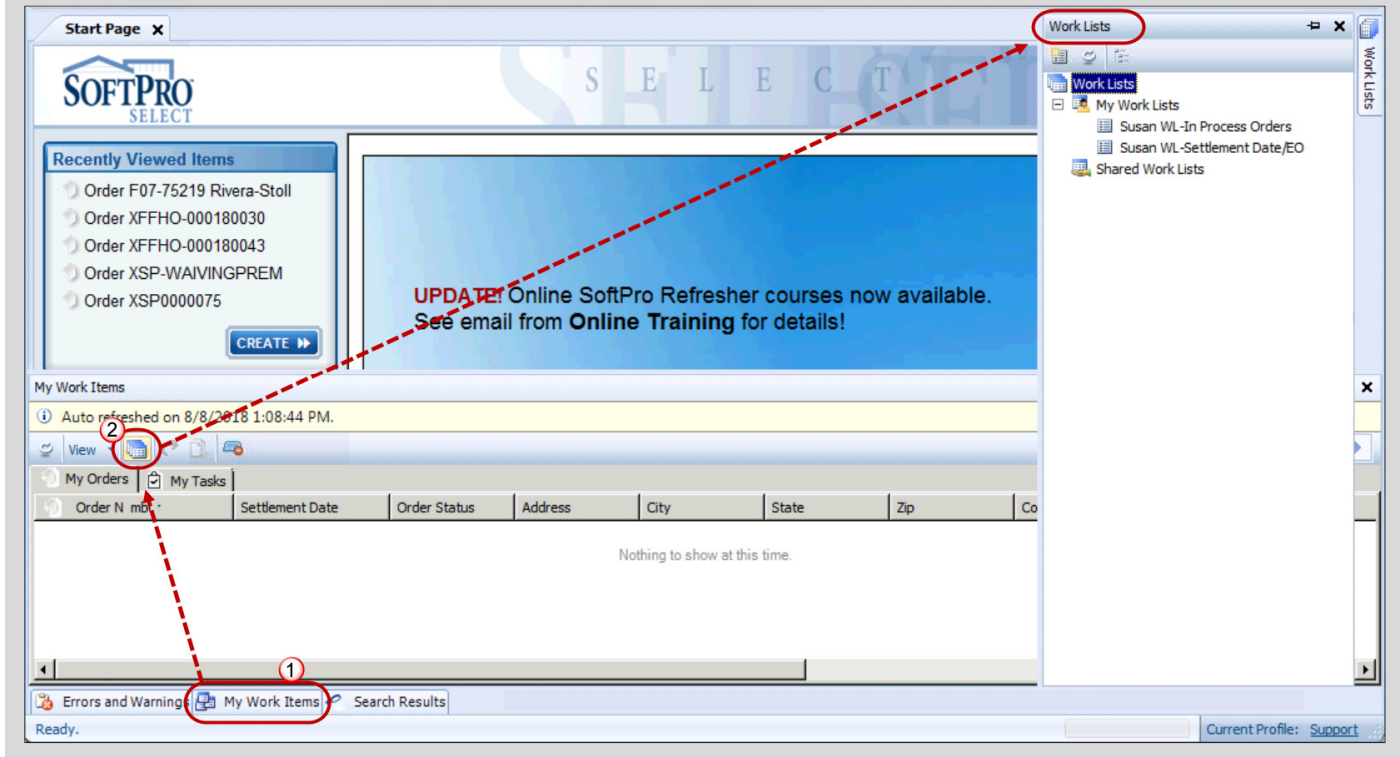
Utilizing the Work Lists feature allows you to create a query of specific order-criteria (i.e., orders where the Escrow Status is "in process") to assist in tracking orders. Follow these steps to create a new work list, edit an existing work list, remove a work list or create a view in My Work Items.

Creating a Task-Based Work List

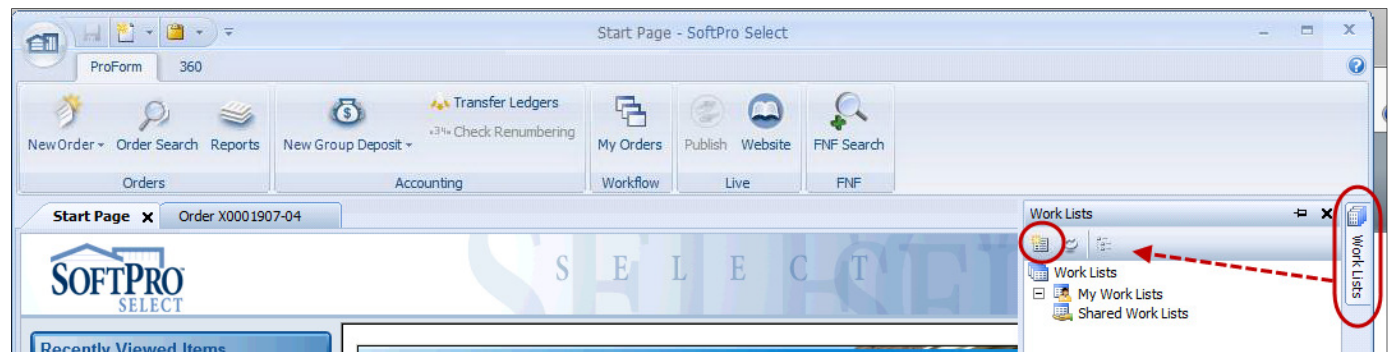
1. Hover over (or click) the **Work Lists** tab (far right of your SPS screen) to access the **Work Lists** tree

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

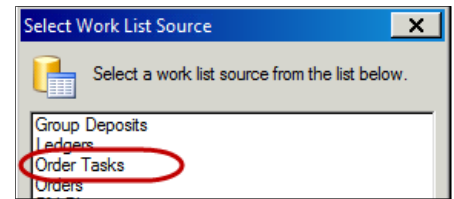


2. Click the **New Query**  icon



Creating, Editing and Removing a Task-Based Work List

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

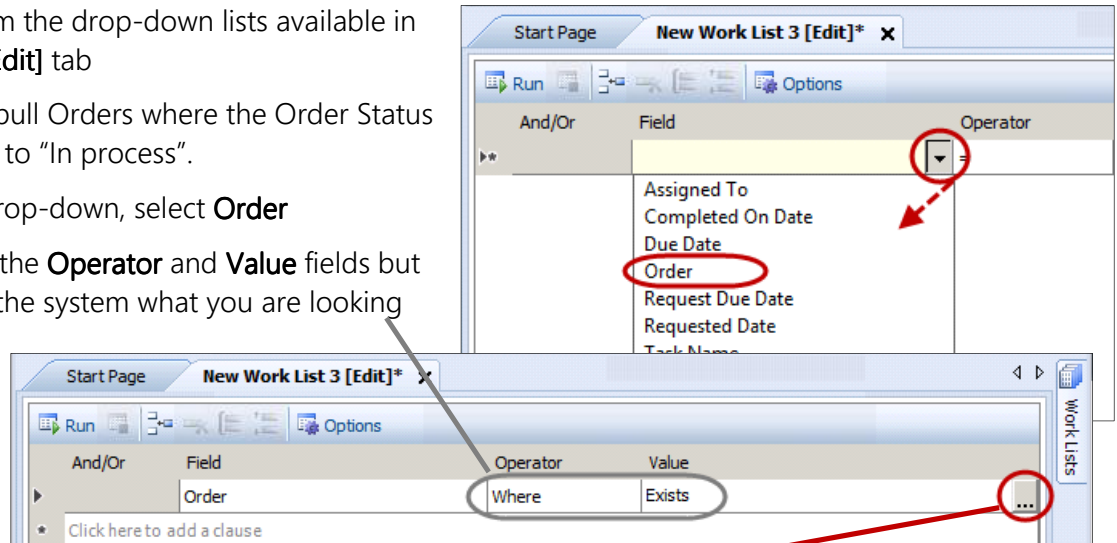


4. Build your query from the drop-down lists available in the **New Work List [Edit]** tab

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

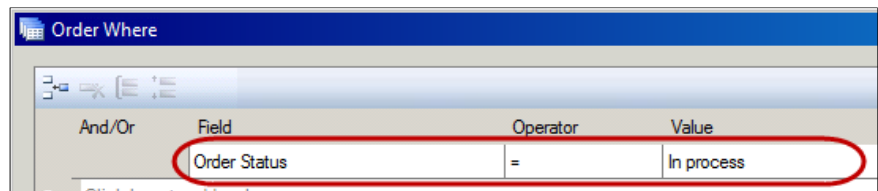
- a) From the **Field** drop-down, select **Order**

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



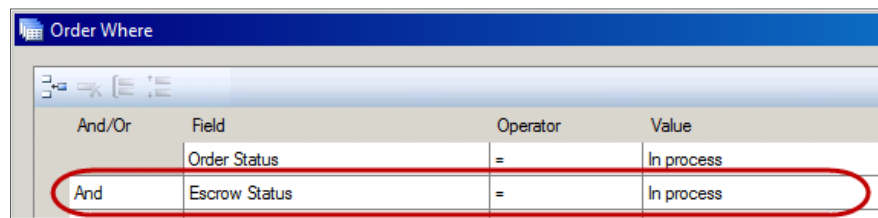
- b) From the **Value** field, click on the **Ellipses** ... icon (far right)
- c) From the **Order Where** window, select the values you want searched

- i. **Field** = Order Status
- ii. **Operator** = Equal sign
- iii. **Value** = In process

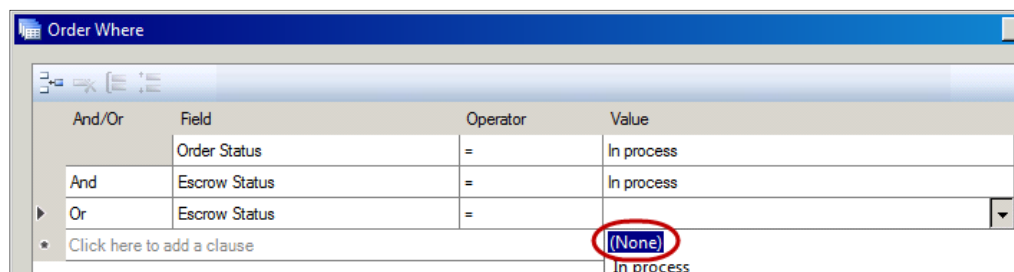


To add additional criteria, on the next line select

- iv. **And/Or** = And
- v. **Field** = Escrow Status
- vi. **Operator** = Equal sign
- vii. **Value** = In process



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

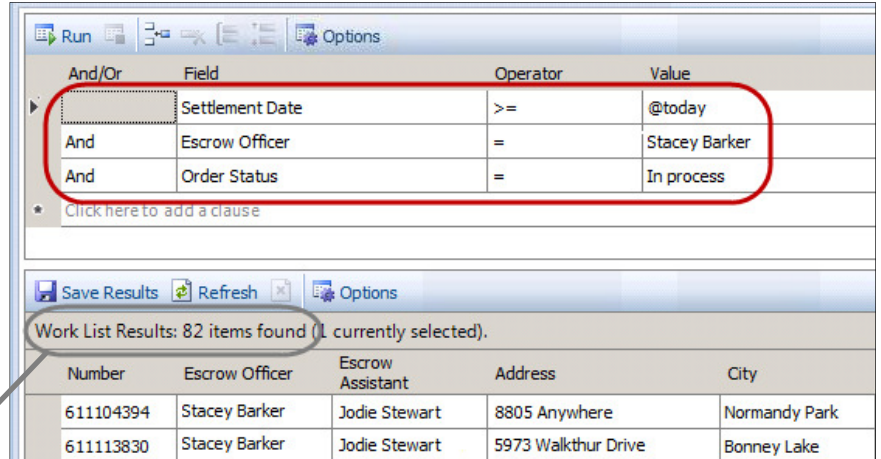


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You can also setup a Work List to quickly review settlements identified with the current date for a specific Escrow Officer.

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



And/Or	Field	Operator	Value
	Settlement Date	>=	@today
And	Escrow Officer	=	Stacey Barker
And	Order Status	=	In process

Click here to add a clause





Save Results Refresh Options

Work List Results: 82 items found (1 currently selected).


Number	Escrow Officer	Escrow Assistant	Address	City
611104394	Stacey Barker	Jodie Stewart	8805 Anywhere	Normandy Park
611113830	Stacey Barker	Jodie Stewart	5973 Walkthur Drive	Bonney Lake

This query results in a Work List of 82 records.

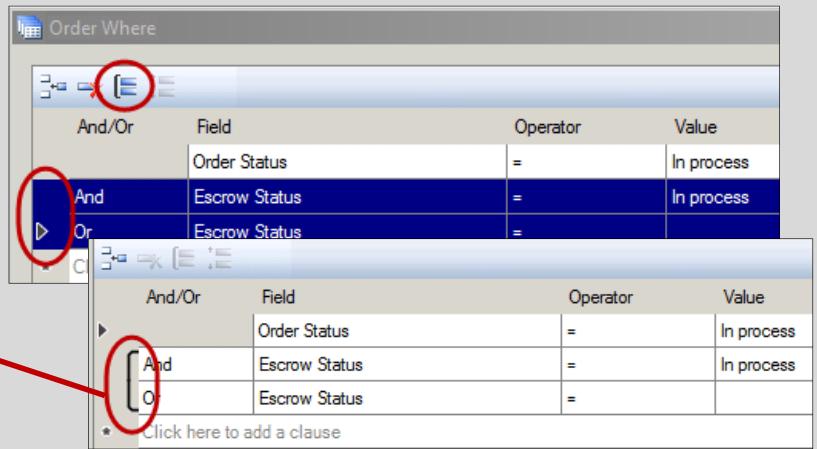
You may use the toolbar icons to,

- › **Insert**  icon - insert a new clause
- › **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.



Order Where

And/Or	Field	Operator	Value
	Order Status	=	In process
And	Escrow Status	=	In process
Or	Escrow Status	=	

Click here to add a clause

Below the main table, a smaller table shows the result of grouping:

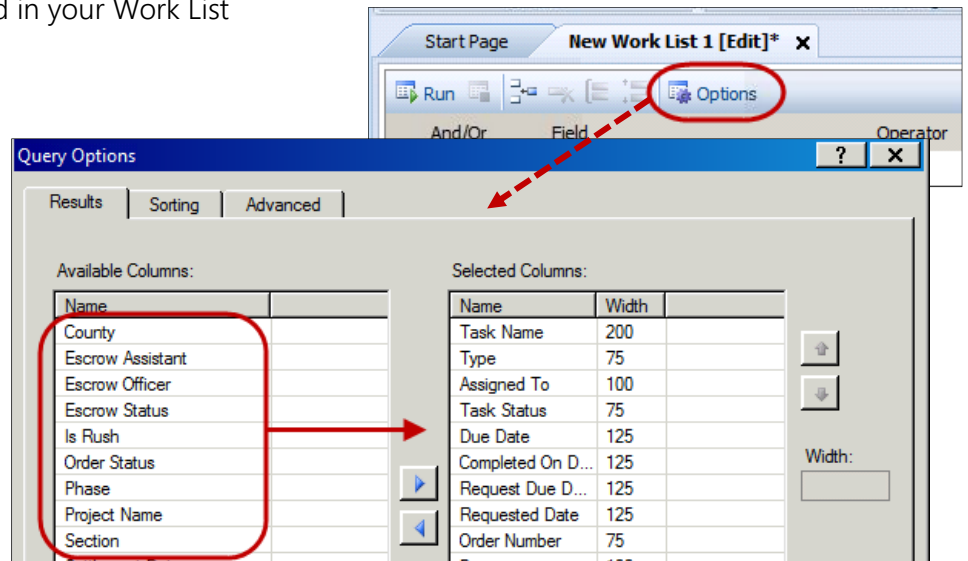
And/Or	Field	Operator	Value
	Order Status	=	In process
And	Escrow Status	=	In process
Or	Escrow Status	=	



Click here to add a clause

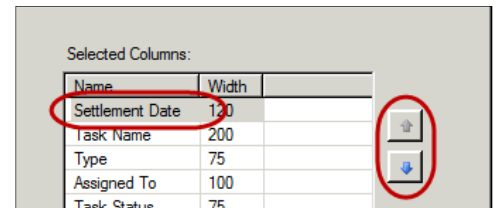
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5. Click the **OK** button to return to the **New Work Lists [Edit]** tab
6. Add the fields you want displayed in your Work List

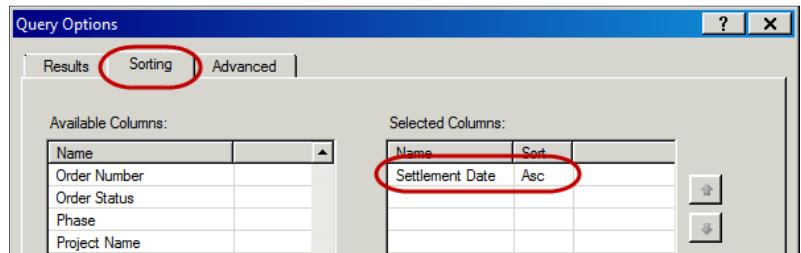
- a) Click the **Options** button
- b) From the **Available Columns** list (on the left), double-click the item(s) you wish to add



- 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

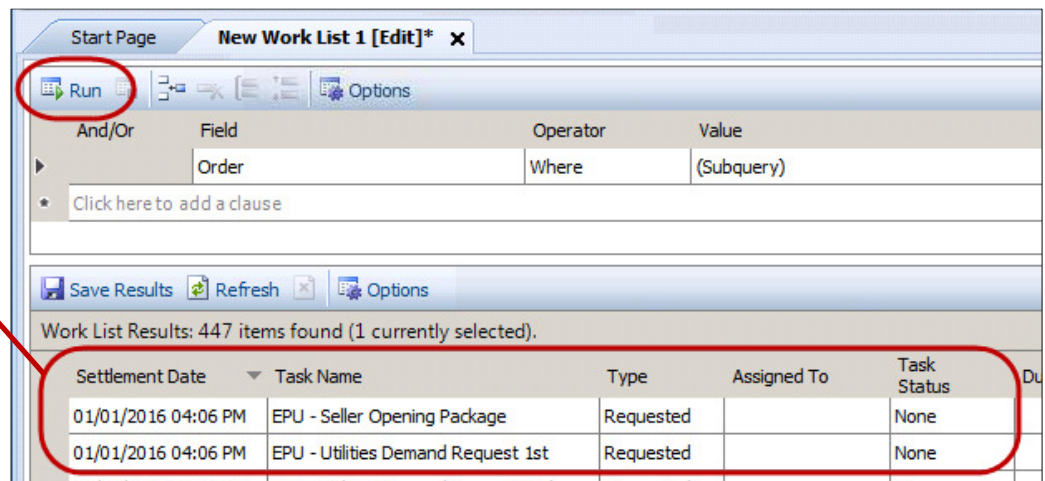


7. Click the **Sorting** tab to select **one** field on which to sort the data (i.e., Settlement Date)
8. Click the **Apply** button; click **OK**



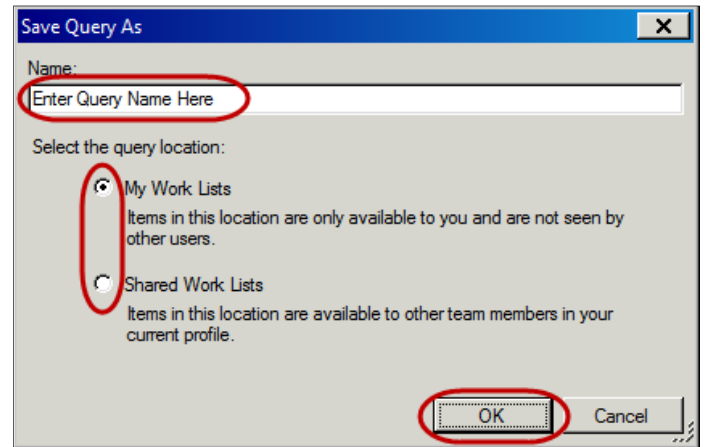
9. Test your query by clicking the **Run** button

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

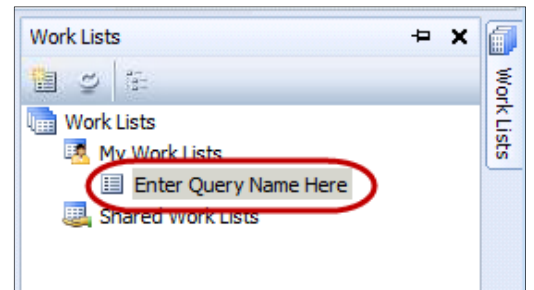


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10. Save your query using the **Ctrl + S** keyboard shortcut
11. Enter a name for your query when prompted
12. Select the query location
 - › **My Work Lists** – you are creating the query for only you
 - › **Shared Work Lists** – you are creating the query for your office
13. Click the **OK** button; close the **New Work Lists [Edit]** tab

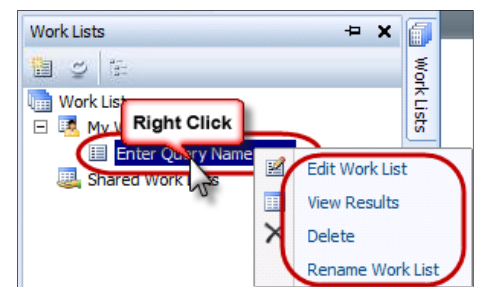
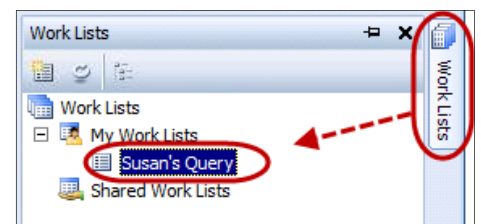


Your query now appears in the **Work Lists** tree



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-
2. From the **Work Lists** tab, highlight the query you wish to work with
3. Right click to open the menu
4. Click on a selection in the menu
 - › **Edit Work Lists** – to modify the search criteria
 - › **View Results** – to run the query
 - › **Delete** – to remove the query from the list
 - › **Rename Work List** – change the name of the query



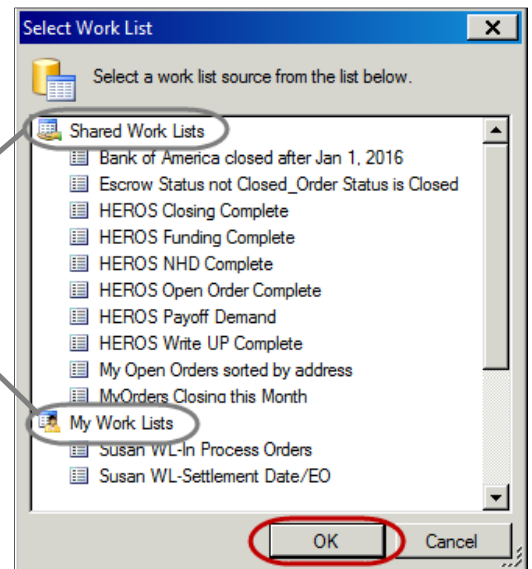
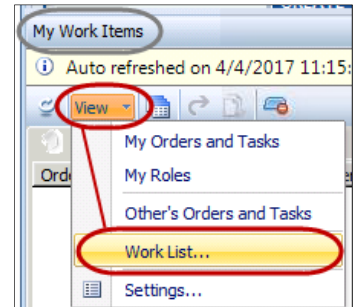
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Creating a Work List View in My Work Items

1. If 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

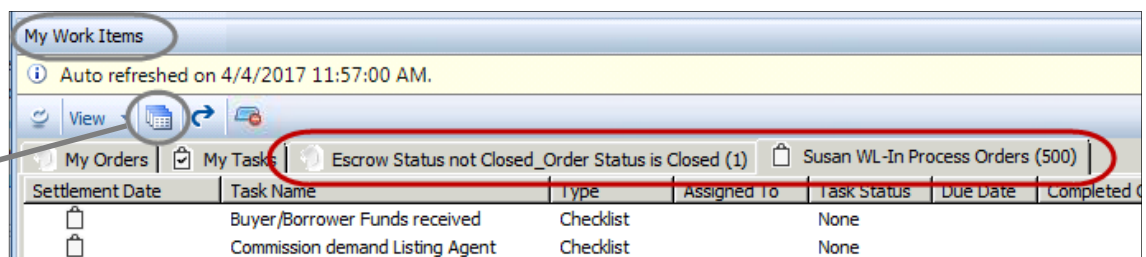
NOTE: You can add multiple Work Lists by selecting from those others have created and shared (**Shared Work Lists**) or from those you created (**My Work Lists**).

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.



Settlement Date	Task Name	Type	Assigned To	Task Status	Due Date	Completed
	Buyer/Borrower Funds received	Checklist		None		
	Commission demand Listing Agent	Checklist		None		