SERVICE
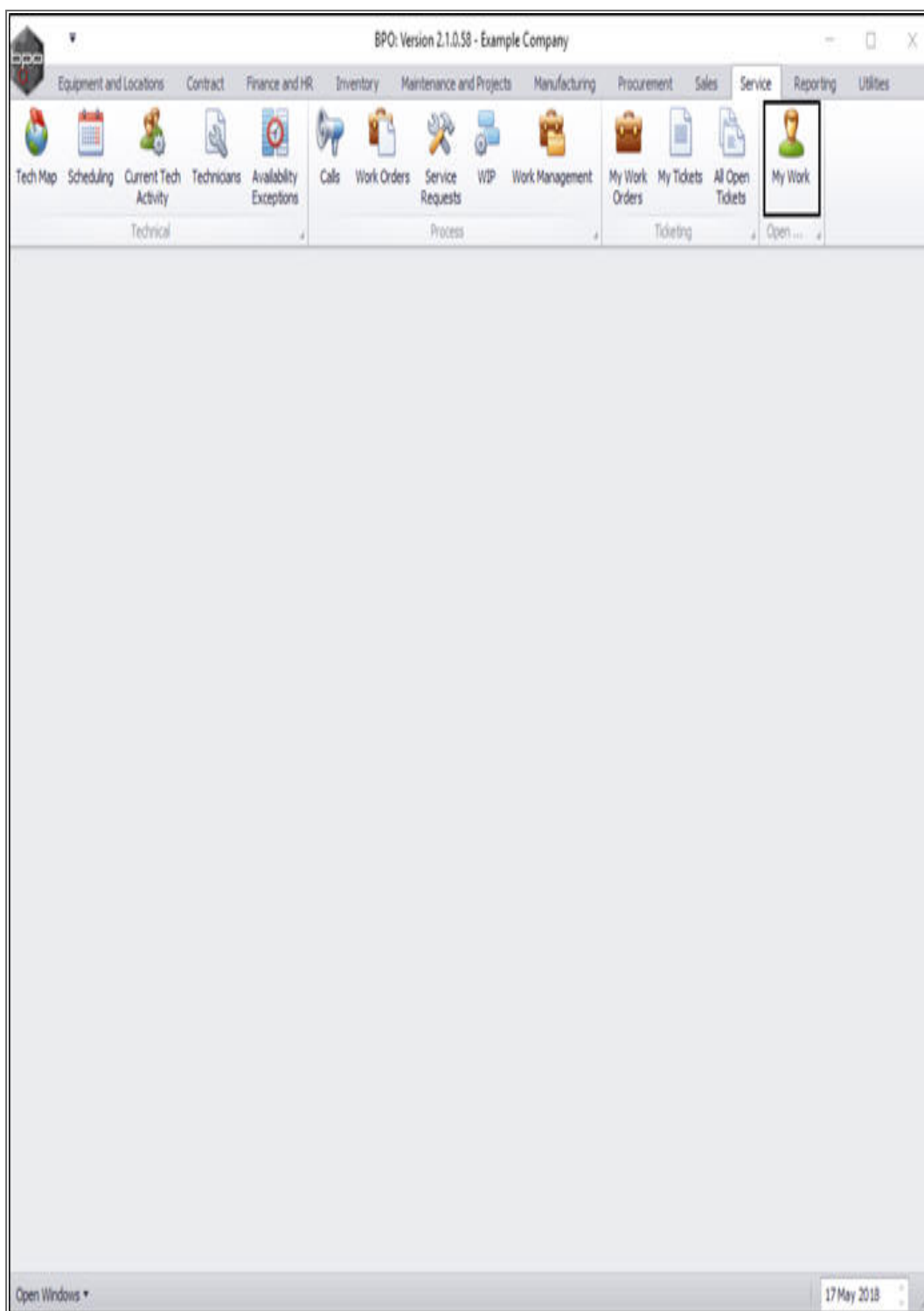
MY WORK – VIEW, ADD A WORK REQUEST

Work Requests can be raised when additional work is required, but needs **approval** from management.
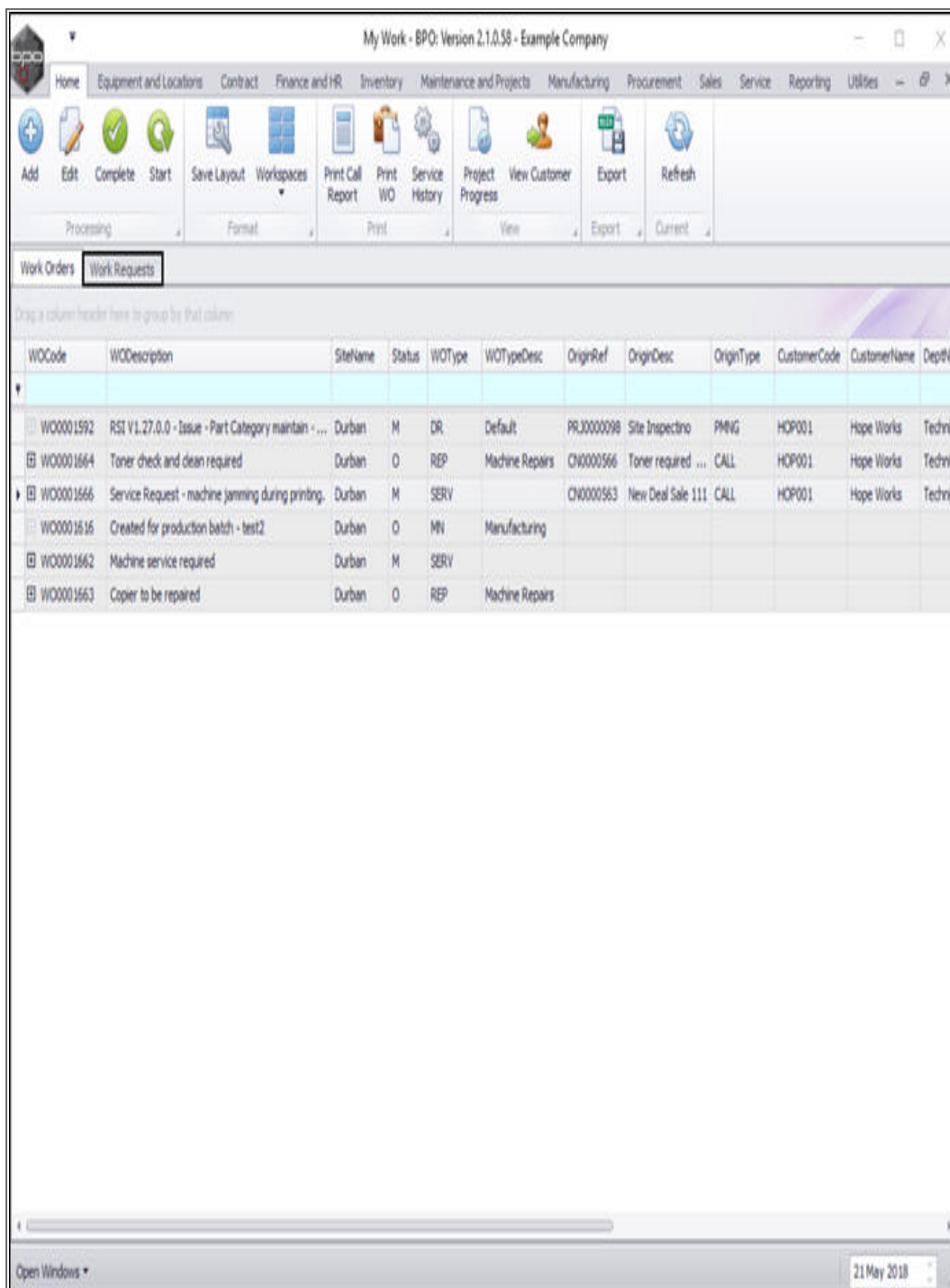

Ribbon Access: *Service > My Work*

The *My Work* listing screen will be displayed.

VIEW LINKED WORK REQUESTS

- Click on the *Work Requests* tab.

Now you can view a list of all the work requests raised.

ADD WORK REQUEST

- Click on *Add*.

- A *Select the site for this work order* screen will pop up.
- Click on the *row selector* in front of the *site* that you wish to *link* to this work request.
- Click on *Ok*.

- The *Add new Work Request* screen will be displayed.
  - **Site:** This will populate with the site selected in the previous step.
  - **Description:** Type in a *description* of the work that needs to be done.
  - **Priority:** Change the priority as required (**1** = Most Important **5** = Least Important)
  - **Requestor Type:** Click on the *radio* button in front of the type that initiated this work request, either *Employee* or *Customer*.
  - **Requestor:** This will auto populate with the person currently logged on to the system and making the request. Click on the *search* button and select an alternative requestor from the relevant pop up screen if required.
    - **Note 1:** The type of pop up screen will be linked to the *Requestor Type* selected in the previous step. If, for example, you clicked on *Customer* in the previous step then the *Select a Customer Contact Name* screen will pop up. If you clicked on *Employee* in the previous step, then the *Select an Employee* screen will pop up.
  - **Request Date and Time:** These fields will be populated with the current date and time.
    - **Request Date:** You can either type in or click on the drop-down arrow and use the calendar function to select an alternative date if required.

- **Time:** You can either type in or use the arrow indicators to select an alternative time if required.
- **Billable:** Click in this text box if this work request is to be billable.

- **Project Ref:** Click on the *search* button in this field.
  - **Note:** If you are not linking this to a <u>project</u>, then leave this field blank.

- The *Select a Project* screen will pop up.
- Click on the *row selector* in front of the *project* that you wish to *link* to this work request.
- Click on *Ok*.

- **Project Ref:** This will now be populated with the selected project reference number.

- **Project Description:** This will now be populated with the description relating to the selected project reference number.

- **Status:** This will auto populate with **O** - Open.
- **Work Order Type:** Click on the drop-down arrow and select from the menu the work order type.
- **Assigned To:** This will auto populate with the person who is currently logged on to the system. You can click on the drop-down arrow and select from the menu an alternative employee assigned to this work request if required.
  - **Important Note:** Whoever is assigned to this work request will have the work request details linked to their own*My Work* screen.
- **Scheduled Start:** This will auto populate with the current date. You can either type in or click on the drop-down arrow and use the calendar function to select an alternative start date if required.
- **Scheduled End:** This will auto populate with the current date. You can either type in or click on the drop-down arrow and use the calendar function to select an alternative end date if required.

WORK REQUEST ITEM

Use this data grid to select the *location* (e.g. company non stock purchases) or *machine* (e.g. ABC123).

- **Functional Location:** Click on the *radio* button next to *Functional Location* if this work request relates to a *location*.
- **Equipment:** Click on the *radio* button next to *Equipment* if this work request relates to an *equipment item*.
    - In this example, a work request for a drum is being created therefore the *Equipment* radio button has been selected.

- **Item:** Click on the *search* button in this field.

- The *Select the equipment item for this work request* screen will pop up.

- Click on the *row selector* in front of the *item* you wish to *link* to this work request.
- Click on *Ok*.
  - Note: The *'Select a ... screen'* that pops up will be relevant to the *initially* selected radio button. If for example the *Location* radio button was selected in the previous step, then the **Select the location item for this work request** screen will pop up.

- **Item:** This will now populate with the item selected in the previous step.

- **Comment:** Type in a comment relating to this request item if required.

NOTES

- *Click anywhere* in the *new row* of this data grid to *'activate'* it.

- **Note Date:** This will now auto populate with the current date.
- **Note Time:** This will now auto populate with the current time.
- **Employee Name:** This will now auto populate with the person currently logged on to the system.
- **Status:** This will now auto populate with **A** - Active.

- **WR Code:** This field is static.
- **Note:** You can type additional notes in this text box if required.

SAVE WORK REQUEST

- When you have finished adding the work request details, click on *Save*.

- A message box will pop up informing you that;
  - *Work Request: [ ] saved.*

- Click on *Ok*.

- You will return to the *My Work - Work Requests* listing screen.
- Here you can view the newly raised work request.
    - **Note:** Remember: <u>The work request must then be approved</u>.

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