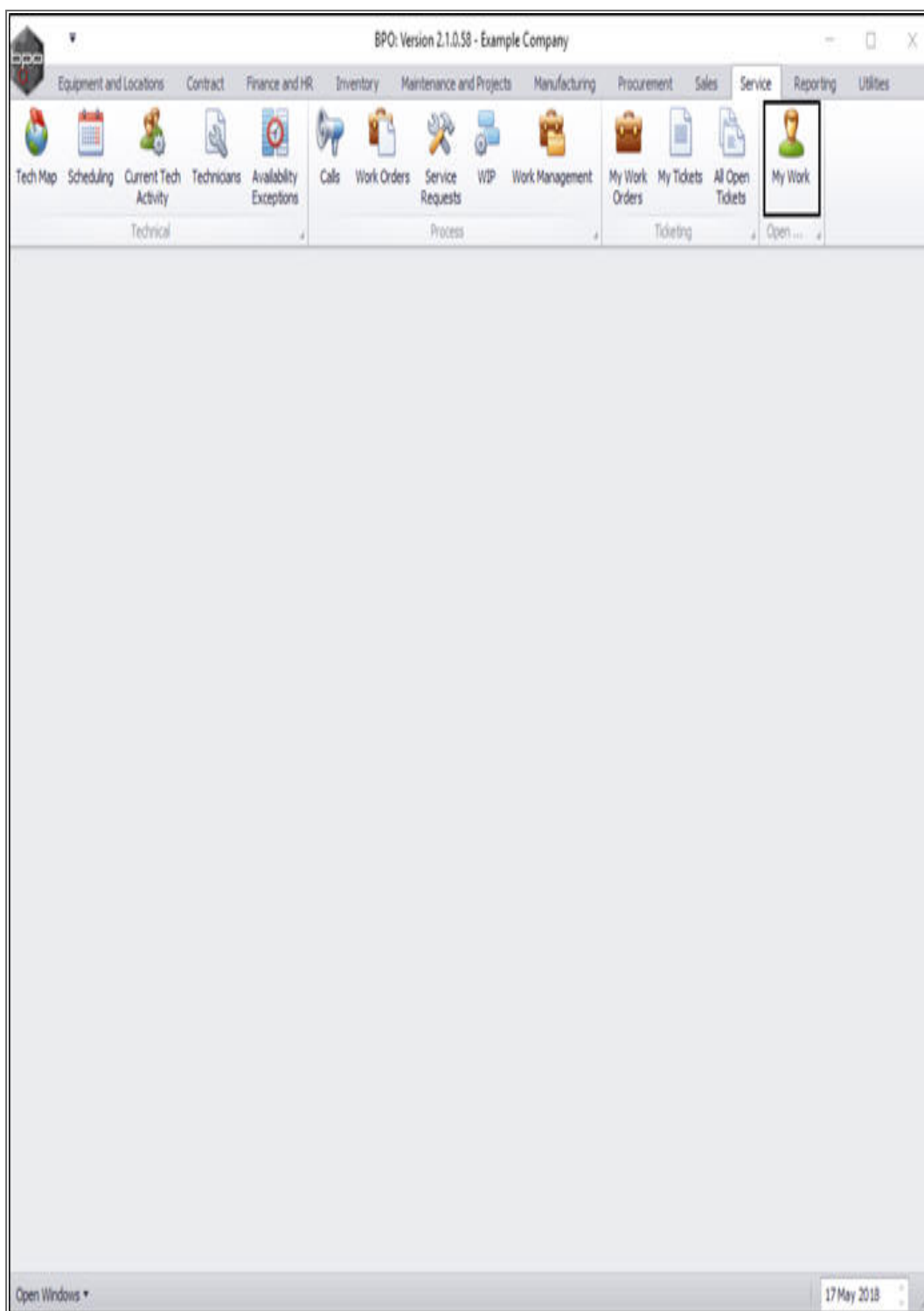


SERVICE

MY WORK – VIEW, ADD A WORK REQUEST

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

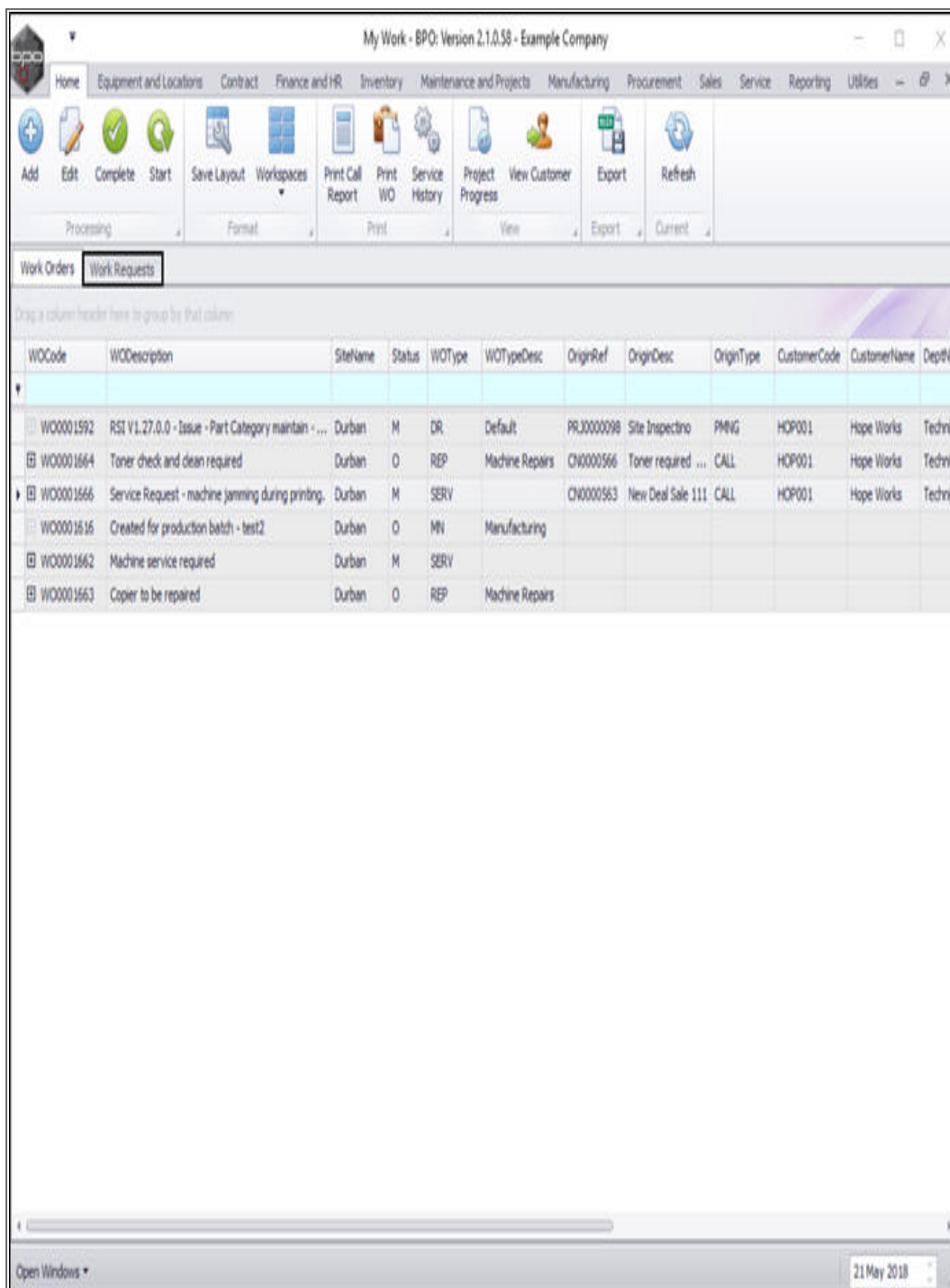
Ribbon Access: *Service > My Work*



The **My Work** listing screen will be displayed.

VIEW LINKED WORK REQUESTS

- Click on the **Work Requests** tab.



My Work - BPO; Version 2.1.0.58 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Complete Start Save Layout Workspaces Print Call Report Print WO Service History Project Progress View Customer Export Refresh

Processing Format Print View Export Current

Work Orders **Work Requests**

Drag a column header here to group by that column:


WOCODE	WODescription	SiteName	Status	WOType	WOTypeDesc	OriginRef	OriginDesc	OriginType	CustomerCode	CustomerName	DeptName
WO0001592	RST V1.27.0.0 - Issue - Part Category maintain - ...	Durban	M	DR	Default	PRJ0000098	Site Inspectio	PMNG	HOP001	Hope Works	Technic
WO0001664	Toner check and clean required	Durban	O	REP	Machine Repairs	CH0000566	Toner required ...	CALL	HOP001	Hope Works	Technic
WO0001666	Service Request - machine jamming during printing.	Durban	M	SERV		CH0000563	New Deal Sale 111	CALL	HOP001	Hope Works	Technic
WO0001616	Created for production batch - test2	Durban	O	MN	Manufacturing						
WO0001662	Machine service required	Durban	M	SERV							
WO0001663	Copier to be repaired	Durban	O	REP	Machine Repairs						

Open Windows • 21 May 2018

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

ADD WORK REQUEST

- Click on **Add**.



My Work - BPO: Version 2.1.0.58 - Example Company

Home

Equipment and Locations

Contract

Finance and HR

Inventory

Maintenance and Projects

Manufacturing

Procurement

Sales

Service

Reporting

Utilities

+

Add

✎

Edit

✓

Complete

🔄

Start

📄

Save Layout

📄

Workspaces

📄

Print Call Report

📄

Print WO

⚙️

Service History

📄

Project Progress

👤

View Customer

📄

Export

🔄

Refresh

Processing

Format

Print

View

Export

Current

Work Orders

Work Requests

Drag a column header here to group by that column

WRCODE	Description	WOTYPE	WOTYPEDESC	Status	Priority	AssigneeNumber	EmployeeNumber	RequestorType	RequestDate	RequestTime	ScheduledStartDate	ScheduledFinishDate	Task
WR0000052	Drum Requested	DR	Default	0	2	SHA001	MLL001	2	22 May 2018	15:50:04	22 May 2018	22 May 2018	

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21 May 2018

- 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**.

My Work - BPO: Version 2.1.0.58 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Complete Start Save Layout Workspaces Print Call Report Print WO Service History Project Progress View Customer Export Refresh

Processing Format Print View Export Current

Work Orders Work Requests

Drag a column header here to group by that column

WRCODE	Description	WOTYPE	WOTYPEDESC	Status	Priority	AssigneeNumber	EmployeeNumber	RequestorType	RequestDate	RequestTime	ScheduledStartDate	ScheduledFinishDate	Task
WR0000052	Drum Requested	DR	Default	0	2	SHA001	MIL001	2	22 May 2018	15:50:04	22 May 2018	22 May 2018	

Select the site for this work order

Home

Ok Back Save Layout

Process Format


Drag a column header here to group by that column

SiteDescription
Durban
Pretoria
Cape Town
Johannesburg

Open Windows 21 May 2018

- 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.



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Manufacturing

Procurement

Sales

Service

Reporting

Utilities

Save

Back

Save Layout

Workspaces

Processing

Format

Site

Durban

Description

Priority

2

Requestor Type

Employee

Customer

Requestor

Belinda Sharman

Request Date

22 May 2018

4:10:25 PM

Billable

☐

Status

0

WO Type

Select Call Type

Assigned To

Abigail Mlne

Scheduled Start

22 May 2018

Scheduled End

22 May 2018

Work Request Item

Functional Location

Equipment

Item

Comments

Project Reference

Project Description

Drag a column header here to group by that column

WRCODE	Note	NoteDate	NoteTime	EmployeeName	Status
1					

Open Windows

21 May 2018

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

Add new Work Request - BPO: Version 2.1.0.58 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Save Layout Workspaces

Processing Format

Site: Durban Status: 0

Description: New drum requested to complete repair requirements. WO Type: Select Call Type

Assigned To: Abigail Mire Scheduled Start: 22 May 2018 Scheduled End: 22 May 2018

Priority: 2

Requestor Type: Employee Customer

Requestor: Belinda Sharman Request Date: 22 May 2018 4:10:25 PM

Billable: ☐

Project Reference: Project Description:

Work Request Item

Functional Location: Equipment:

Item: Comments:

Drag a column header here to group by that column

VRCode	Note	NoteDate	NoteTime	EmployeeName	Status
*					

Open Windows 21 May 2018

- 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**.

Add new Work Request - BPO: Version 2.1.0.58 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Save Layout Workspaces

Processing Format

Site: Durban Status: 0

Description: New drum requested to complete repair requirements. WO Type: Select Call Type

Assigned To: Abigail Milne Scheduled Start: 22 May 2018 Scheduled End: 22 May 2018

Priority: 2

Requestor Type: ☒ Employee ☐ Customer

Requestor: Belinda Sharman Request Date: 22 May 2018 4:10:25 PM

Billable: ☐

Project Reference: Project Description:

Drag a column header here to group by that column

WRCode Note NoteDate

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Select a Project

Home

Ok Back Save Layout

Process Format

Drag a column header here to group by that column

ProjectRef	Description	StatusDesc	StartDate	EndDate	ManagerName	Notify
PRJ0000281	test	Open	07 Nov 2017	14 Nov 2017	Belinda Sharman	No
PRJ0000282	test	Open	08 Nov 2017	08 Dec 2017	Abigail Milne	No
PRJ0000283	test	Open	06 Dec 2017	13 Dec 2017	Bianca Du Toit	No
PRJ0000284	New deal Rental Test	Open	06 Dec 2017	13 Dec 2017	Bianca Du Toit	No
PRJ0000285	Project not linked to a client for a meth...	Open	12 Dec 2017	11 Jan 2018	Belinda Sharman	No
PRJ0000286	Test BPO2	Open	30 Jan 2018	09 Feb 2018	Belinda Sharman	Yes
PRJ0000287	Specification BPO2	Open	31 Jan 2018	01 Feb 2018	Belinda Sharman	Yes
PRJ0000288	Design BPO2	Open	01 Feb 2018	02 Feb 2018	Belinda Sharman	Yes
PRJ0000289	Developemnt BPO2	Open	02 Feb 2018	03 Feb 2018	Belinda Sharman	Yes
PRJ0000290	Testing BPO2	Open	04 Feb 2018	05 Feb 2018	Belinda Sharman	No
PRJ0000291	Implementation BPO2	Open	05 Feb 2018	06 Feb 2018	Belinda Sharman	Yes

- **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.

Add new Work Request - BPO: Version 2.1.0.58 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Save Layout Workspaces

Processing Format

Site: Durban

Description: New drum requested to complete repair requirements.

Priority: 2

Requestor Type: ☒ Employee ☐ Customer

Requestor: Belinda Sharman

Request Date: 22 May 2018 4:10:25 PM

Billable: ☐

Project Reference: PRJ0000290

Project Description: Testing BPO2

Status: 0

WO Type: Select Call Type

Assigned To: Abigail Mine

Scheduled Start: 22 May 2018

Scheduled End: 22 May 2018

Work Request Item

Functional Location: ☒ Equipment: ☐

Item:

Comments:

Drag a column header here to group by that column

WRCODE	Note	NoteDate	NoteTime	EmployeeName	Status
*					

Open Windows 21 May 2018

- **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.

Add new Work Request - BPO: Version 2.1.0.58 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Save Layout Workspaces

Processing Format

Site: Durban

Description: New drum requested to complete repair requirements.

Priority: 2

Requestor Type: ☒ Employee ☐ Customer

Requestor: Belinda Sharman

Request Date: 22 May 2018 4:10:25 PM

Billable: ☐

Project Reference: PRJ0000290

Project Description: Testing BPO2

Status: 0

WO Type: Select Call Type

Assigned To: Abigail Mlne

Scheduled Start: 22 May 2018

Scheduled End: 22 May 2018

Work Request Item

Functional Location: ☒ Equipment: ☐

Item:

Comments:

Drag a column header here to group by that column

WRCODE	Note	NoteDate	NoteTime	EmployeeName	Status
*					

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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.

Add new Work Request - BPO: Version 2.1.0.58 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Save Layout Workspaces

Processing Format

Site: Durban Status: 0

Description: New drum requested to complete repair requirements. WO Type: Select Call Type

Assigned To: Abigail Mlne Scheduled Start: 22 May 2018 Scheduled End: 22 May 2018

Priority: 2

Requestor Type: Employee Customer

Requestor: Belinda Sharman Request Date: 22 May 2018 4:10:28 AM

Billable: ☐

Project Reference: PRJ0000290 Project Description: Testing BPO2

Work Request Item

Functional Location ☐ Equipment ☒

Item:

Comments:

Drag a column header here to group by that column

WRCODE	Note	NoteDate	NoteTime	EmployeeName	Status
*					

Open Windows 21 May 2018

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

Add new Work Request - BPO: Version 2.1.0.58 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Save Layout Workspaces

Processing Format

Site: Durban Status: 0

Description: New drum requested to complete repair requirements. WO Type: Select Call Type

Assigned To: Abigail Mlne Scheduled Start: 22 May 2018 Scheduled End: 22 May 2018

Priority: 2

Requestor Type: ☒ Employee ☐ Customer

Requestor: Belinda Sharman Request Date: 22 May 2018 4:10:28 AM

Billable: ☐

Project Reference: PRJ0000290 Project Description: Testing BPO2

Work Request Item

Functional Location: ☐ Equipment: ☒

Item: Comments:

Drag a column header here to group by that column

WRCODE	Note	NoteDate	NoteTime	EmployeeName	Status
*					

Open Windows 21 May 2018

- 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.

Add new Work Request - BPO: Version 2.1.0.58 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Save Layout Workspaces

Processing Format

Site: Durban Status: 0

Description: New drum requested to complete repair requirements. WO Type: Select Call Type

Assigned To: Abigal Mine Scheduled Start: 22 May 2018 Scheduled End: 22 May 2018

Priority: 2

Requestor Type: ☒ Employee ☐ Customer

Requestor: Belinda Sharman

Request Date: 22 May 2018 4:10:25 AM

Work Request Item

Functional Location: ☐ Equipment ☒

Item:

Billable: ☐

Project Reference: PRJ0000290

Project Description: Testing BPO2

Drag a column header here to group by that column

WRCODE	Note

Select the equipment item for this work request

Home

Ok Back Save Layout

Process Format

Drag a column header here to group by that column

SerialNo	PartCode	Description	CategoryDesc	ModelNo	Asset	IsFixedAsset	CU
2020-4327	2020-856	Drum	Accessories		No	Yes	
2020-4328	2020-856	Drum	Accessories		No	No	
2020-4329	2020-856	Drum	Accessories		No	Yes	
2020-6537	2020-856	Drum	Accessories		No	No	
2020-6589	2020-856	Drum	Accessories		No	No	
2020856-1234	2020-856	Drum	Accessories		Yes	Yes	
2020-8749	2020-856	Drum	Accessories		No	No	
77458	2020-856	Drum	Accessories		No	No	

Open Windows

21 May 2018

- **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.

Add new Work Request - BPO: Version 2.1.0.58 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Save | Back | Save Layout | Workspaces

Processing | Format

Site: Durban | Status: 0

Description: New drum requested to complete repair requirements. | WO Type: Select Call Type

Assigned To: Abigail Mline | Scheduled Start: 22 May 2018 | Scheduled End: 22 May 2018

Priority: 2

Requestor Type: ☒ Employee ☐ Customer

Requestor: Belinda Sharman | Request Date: 22 May 2018 4:10:25 AM

Billable: ☐

Project Reference: PRJ0000290 | Project Description: Testing BPO2

Work Request Item

Functional Location ☐ Equipment ☒

Item: 2020-6589 | Comments:

Drag a column header here to group by that column

VRCode	Note	NoteDate	NoteTime	EmployeeName	Status
*					

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NOTES

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

Add new Work Request - BPO: Version 2.1.0.58 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Save Layout Workspaces

Processing Format

Site: Durban Status: 0

Description: New drum requested to complete repair requirements. WO Type: Select Call Type

Assigned To: Abigal Mlne Scheduled Start: 22 May 2018 Scheduled End: 22 May 2018

Priority: 2

Requestor Type: ☒ Employee ☐ Customer

Requestor: Belinda Sharman Request Date: 22 May 2018 4:10:25 AM

Billable: ☐ Project Reference: PRJ0000290 Project Description: Testing BPO2

Work Request Item

Functional Location: ☐ Equipment: ☒

Item: 2020-6589

Comments:

Drag a column header here to group by that column

VRCode	Note	NoteDate	NoteTime	EmployeeName	Status
*					

Open Windows 21 May 2018

- **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.

Add new Work Request - BPO: Version 2.1.0.58 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Save | Back | Save Layout | Workspaces

Processing | Format

Site: Durban | Status: 0

Description: New drum requested to complete repair requirements.

WO Type: Select Call Type

Assigned To: Abigail Mlne

Scheduled Start: 22 May 2018 | Scheduled End: 22 May 2018

Priority: 2

Requestor Type: ☒ Employee ☐ Customer

Requestor: Belinda Sharman

Request Date: 22 May 2018 | 4:10:25 AM

Billable: ☐

Project Reference: PRJ0000290

Project Description: Testing BPO2

Work Request Item

Functional Location: ☐ Equipment: ☒

Item: 2020-6589

Comments:

Drag a column header here to group by that column

WRCode	Note	NoteDate	NoteTime	EmployeeName	Status
1		23 May 2018	12:32:36	Abigail Mlne	A

Open Windows | 21 May 2018

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

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SAVE WORK REQUEST

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

Add new Work Request - BPO: Version 2.1.0.58 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Save Layout Workspaces

Processing Format

Site: Durban Status: 0

Description: New drum requested to complete repair requirements. WO Type: Select Call Type

Assigned To: Abigail Milne Scheduled Start: 22 May 2018 Scheduled End: 22 May 2018

Priority: 2

Requestor Type: ☒ Employee ☐ Customer

Requestor: Belinda Sharman Request Date: 22 May 2018 4:10:25 AM

Billable: ☐ Project Reference: PRJ0000290 Project Description: Testing BPO2

Work Request Item

Functional Location: ☐ Equipment: ☒

Item: 2020-6589

Comments:

Drag a column header here to group by that column

WRCode	Note	NoteDate	NoteTime	EmployeeName	Status
I	Drum to be inspected by technician.	23 May 2018	12:32:36	Abigail Milne	A

Open Windows 21 May 2018

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

- Click on **Ok**.

Add new Work Request - BPO: Version 2.1.0.58 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Save | Back | Save Layout | Workspaces

Processing | Format

Site: Durban | Status: 0

Description: New drum requested to complete repair requirements. | WO Type: Select Call Type

Assigned To: Abigail Mine | Scheduled Start: 22 May 2018 | Scheduled End: 22 May 2018

Priority: 2

Requestor Type: Employee | Requestor: Belinda Sharman | Request Date: 22 May 2018 4:10:25 AM

Billable: ☐ | Project Reference: PRJ0000290 | Project Description: Testing BPO2

Work Request Item

Functional Location: ☐ Equipment: ☒

Item: 2020-6589

Comments:

Drag a column header here to group by that column

WRCODE	Note	NoteDate	NoteTime	EmployeeName	Status
	Drum to be inspected by technician.	23 May 2018	12:32:36	Abigail Mine	A

Work Request: WR0000054 saved

OK

Open Windows | 21 May 2018

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

My Work - BPO: Version 2.1.0.58 - Example Company

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Print WO

Service History

Project Progress

View Customer

Export

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View

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Work Orders

Work Requests

Drag a column header here to group by that column

WRCODE	Description	WOType	WOTypeDesc	Status	Priority	AssigneeNumber	EmployeeNumber	RequestorType	RequestDate	RequestTime	ScheduledStar
WR0000052	Drum Requested	DR	Default	O	2	SHA001	ML001	2	22 May 2018	15:50:04	22 May 2018
WR0000054	New drum requested to complete repair requirements.	DR	Default	O	2	ML001	SHA001	2	22 May 2018	04:10:24	22 May 2018

Open Windows

21 May 2018

MNU.073.019

