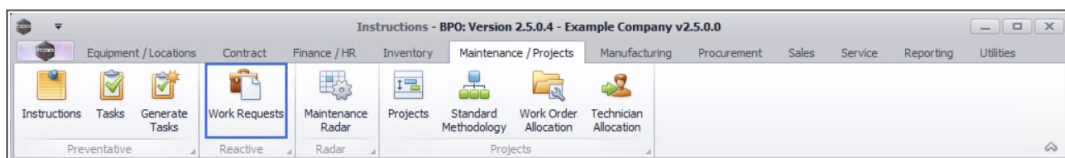


# MAINTENANCE

## WORK REQUESTS – ADD A WORK REQUEST

Work requests are instructions for work to be done, which can then be checked by a technical / service manager and approved or rejected as required.

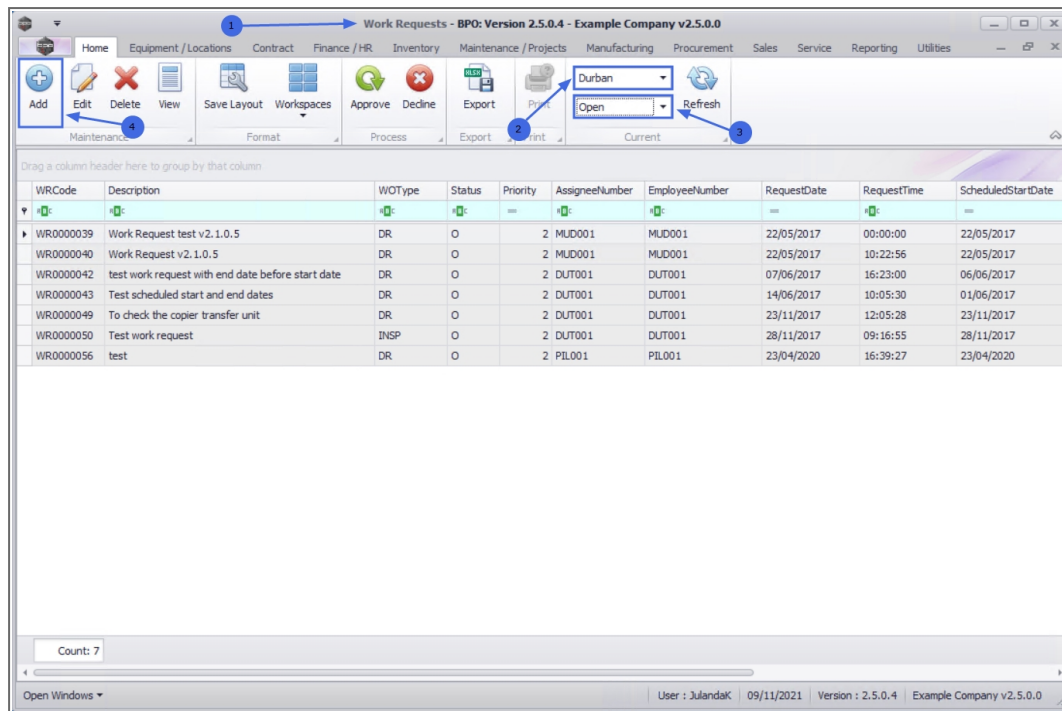
**Ribbon Access:** *Maintenance / Projects > Work Requests*



1. The **Work Requests** listing screen will be displayed.
2. Select the **Site** where you would like to create the work request.
  - The example has **Durban** selected.
3. You can add a work request in any **Status**.
  - The example has **Open** selected.
4. Click on **Add**.



Short cut key: **Right click** to display the **All groups** menu list. Click on **Add**.



5. The **Add new Work Request** screen will be displayed.

## WORK REQUEST DETAILS

- **Site:** This will be auto populated with the site selected in the Work Request screen but you can click on the drop-down arrow and select an **alternative site** if required.
- **Description:** Click in the text box to type in the description for the work that needs to be done.
- **Priority:** Set the **priority level**<sup>1</sup> for the task.
- **Requestor Type:** This option will have the **Employee** radio button selected by default. Click on the **Customer** radio button if the customer has requested this work.
  - To change the requestor, click on the **search** button to display the **Select an Employee** or **Select a Customer** screen.

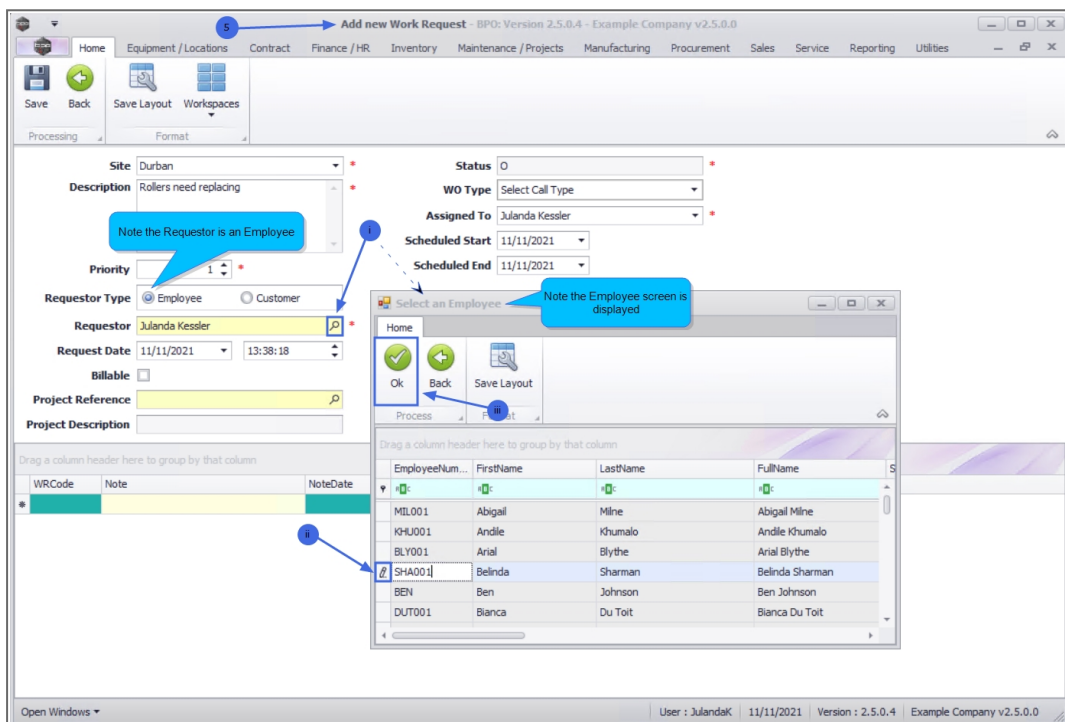
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<sup>1</sup>1 = Most Important 5 = Least Important



Note that the screen displayed will depend on the option you have selected as the **Requester Type**.

- ii. Click on the row of the **employee name** or **customer name**, that is requesting the task.
  - iii. Click on **OK**.
- **Requestor:** This field will populate with the name of the employee currently logged on to the system.



Annotations in the screenshot:

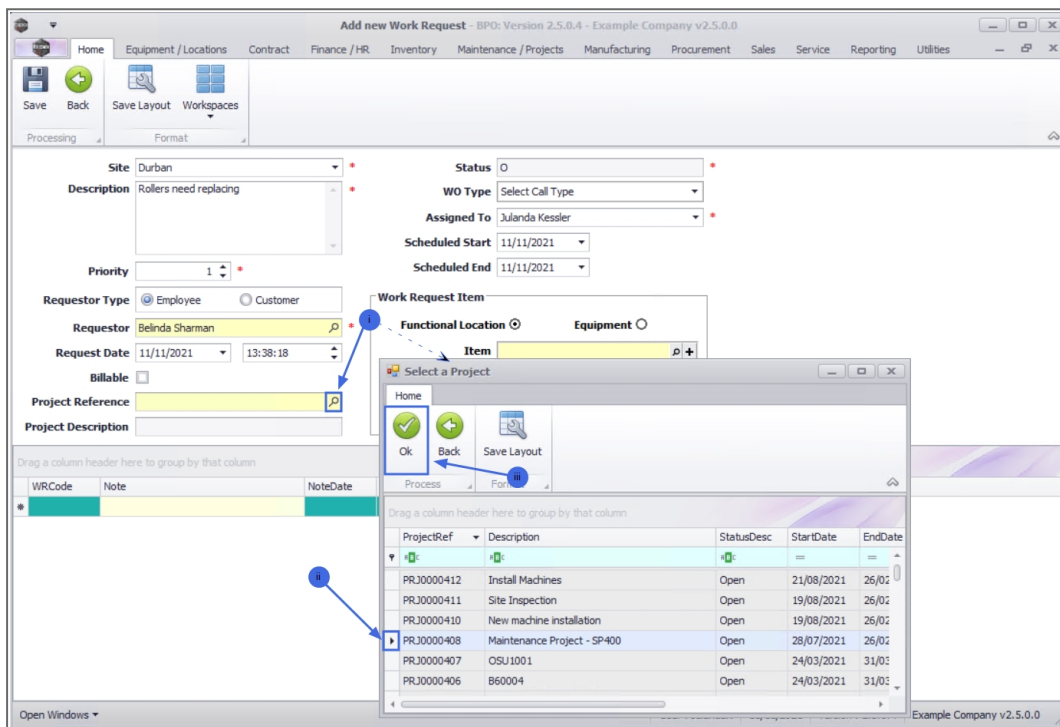
- Note the Requestor is an Employee (points to Requestor field)
- Note the Employee screen is displayed (points to the 'Select an Employee' modal)
- (points to the selected employee row in the list)

- **Request Date and Time:** These fields will auto populate with the current date and time.

**Date:** Type in or click on the down **arrow** to use the calendar function to select an alternative date, if required.

**Time:** Type in or use the directional **arrows** to adjust the time, if required.

- **Billable:** If this work request will be billable when the work request is converted to a work order, ensure to click in the check box to select.
- **Project Reference:** If the work request is part of a project;
  - i. Click on the **search** button to display the Select a Project screen.
  - ii. Click on the row of the relevant **project reference number**.
  - iii. Click on **OK**.



ProjectRef	Description	StatusDesc	StartDate	EndDate
PRJ0000412	Install Machines	Open	21/08/2021	26/02
PRJ0000411	Site Inspection	Open	19/08/2021	26/02
PRJ0000410	New machine installation	Open	19/08/2021	26/02
PRJ0000408	Maintenance Project - SP400	Open	28/07/2021	26/02
PRJ0000407	OSU1001	Open	24/03/2021	31/03
PRJ0000406	B60004	Open	24/03/2021	31/03

- **Project Description:** This field will populate with the description of the project selected.
- **Status:** The status for the work request will be **O - Open** by default when it is created and cannot be changed on this screen.
- **Work Order Type:** Click on the down **arrow** to select the work order type applicable from the drop-down list.
- **Assigned To:** Click on the down **arrow** to select the person responsible for this work request, from the drop-down list.

- **Scheduled Start:** This field will display the current date. Type in or click on the down **arrow** to use the calendar function to select an alternative start date, if required.
- **Scheduled End:** This field will display the current date. Type in or click on the down **arrow** to use the calendar function to select an alternative end date, if required.

## WORK REQUEST ITEM

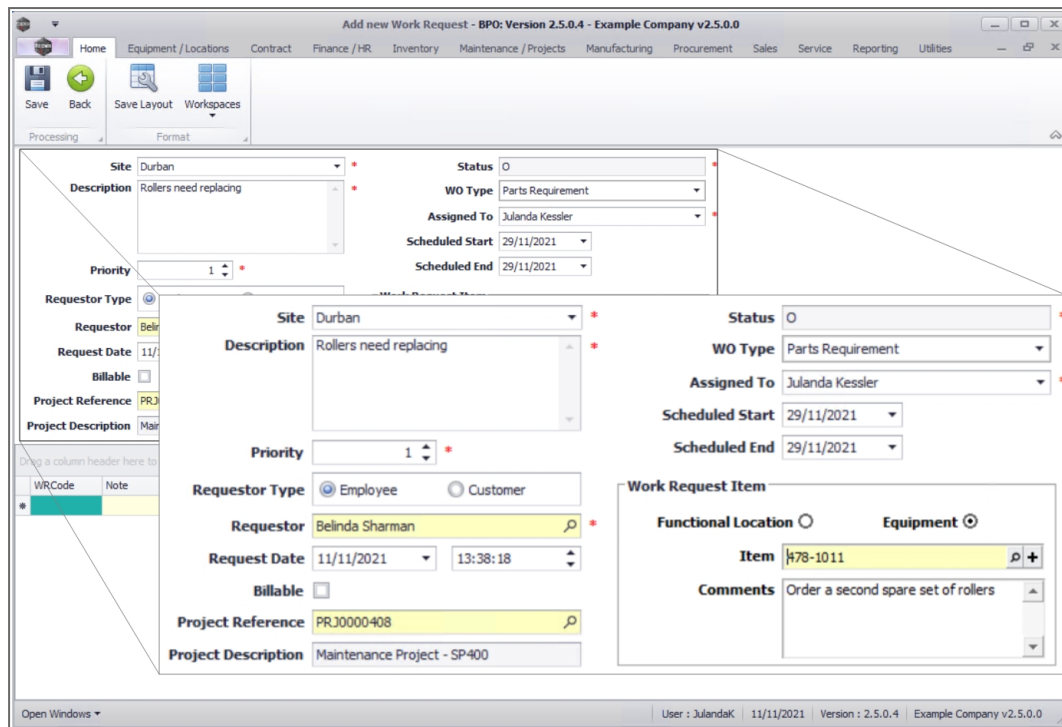
---

- **Functional Location / Equipment:** Click on the **radio button** of the item that is affected by this work request and requires the work.
  - In this example, the rollers need replacing, therefore this is an **Equipment** item.
- **Item:** Click on the **search** button to select the item linked to the this work request.



Note that the screen displayed will depend on the option you have selected as **Functional Location** or **Equipment**.

- **Comments:** Type in a comment regarding this work request item, if required.



## NOTE ITEMS



Click in any of the edible fields to activate the first note item row.

- **Note Date:** This field will display the current date.
- **Note Time:** This will auto populate with the current time.
- **Employee Name:** This will auto populate with the person currently logged on to the system.
- **Status:** This will auto populate with **A** - Active.
- **Note:** In this text box, type in a note relevant to this work request, if required.

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

Add new Work Request - BPO: Version 2.5.0.4 - Example Company v2.5.0.0

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

Save Back Save Layout Workspaces

Processing Format

Site: Durban \*  
 Description: Rollers need replacing \*  
 Priority: 3 \*  
 Requestor Type: ☒ Employee ☐ Customer  
 Requestor: Belinda Sharman \*  
 Request Date: 11/11/2021 15:54:02  
 Billable: ☐  
 Project Reference: PR30000408 \*  
 Project Description: Maintenance Project - SP400

Status: O \*  
 WO Type: Parts Requirement \*  
 Assigned To: Julanda Kessler \*  
 Scheduled Start: 29/11/2021  
 Scheduled End: 29/11/2021

Work Request Item

Functional Location ☐ Equipment ☒  
 Item: 478-1011  
 Comments: Order a second spare set of rollers

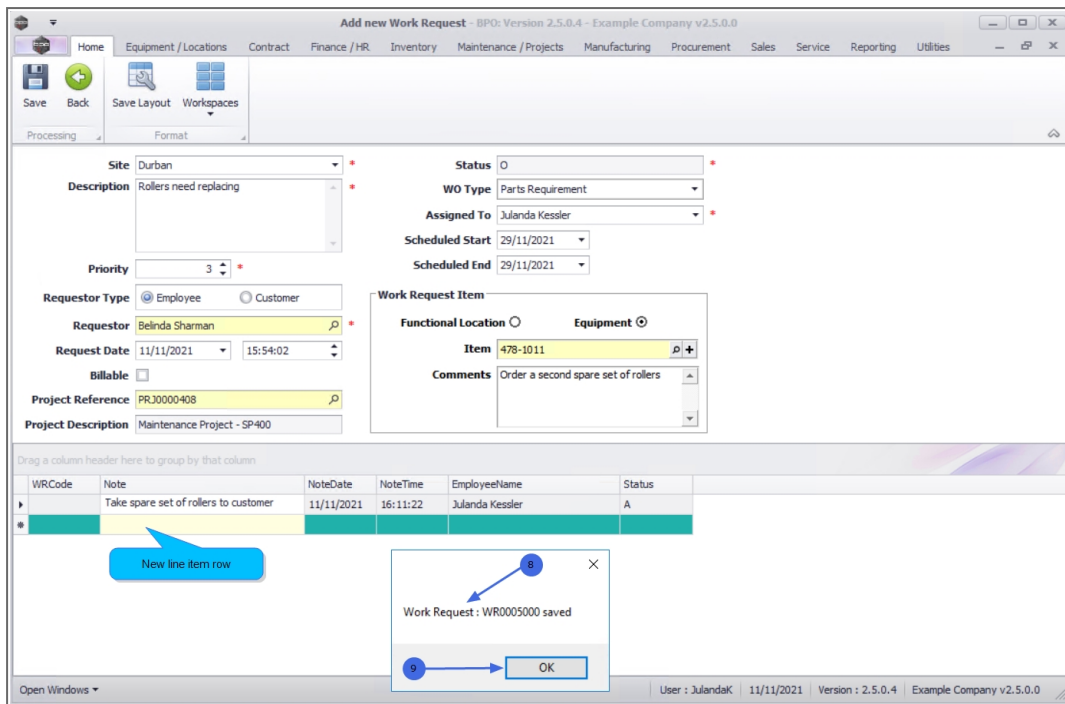
Drag a column header here to group by that column

WRCode	Note	NoteDate	NoteTime	EmployeeName	Status
I	Take spare set of rollers to customer	11/11/2021	16:11:22	Julanda Kessler	A

Type a note relevant to the work request here

Open Windows User: JulandaK 11/11/2021 Version: 2.5.0.4 Example Company v2.5.0.0

7. A **line item row** will be added to the Notes area.
8. When you receive the message to confirm that;
  - **Work Request: WR[work request number] saved.**
9. Click on **OK**.



Drag a column header here to group by that column

WRCODE	Note	NoteDate	NoteTime	EmployeeName	Status
	Take spare set of rollers to customer	11/11/2021	16:11:22	Julanda Kessler	A

Work Request : WR0005000 saved

OK

User : JulandaK | 11/11/2021 | Version : 2.5.0.4 | Example Company v2.5.0.0

10. You will return to the **Work Requests** listing screen where you can now view the newly raised work request.



**Note** that the work request code was issued by the system.



Work Requests - BPO: Version 2.5.0.4 - Example Company v2.5.0.0

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

Add Edit Delete View Save Layout Workspaces Approve Decline Export Print

Durban Open Refresh

Drag a column header here to group by that column

WRCode	Description	WOType	Status	Priority	AssignedNumber	EmployeeNumber	RequestDate	RequestTime	ScheduleDate
WR0000039	Work Request test v2.1.0.5	DR	O	2	MJD001	MJD001	22/05/2017	00:00:00	22/05/2017
WR0000040	Work Request v2.1.0.5	DR	O	2	MJD001	MJD001	22/05/2017	10:22:56	22/05/2017
WR0000042	test work request with end date before start date	DR	O	2	DU7001	DU7001	07/06/2017	16:23:00	06/06/2017
WR0000043	Test scheduled start and end dates	DR	O	2	DU7001	DU7001	14/06/2017	10:05:30	01/06/2017
WR0000049	To check the copper transfer unit	DR	O	2	DU7001	DU7001	23/11/2017	12:05:28	23/11/2017
WR0000050	Test work request	DR	O	2	DU7001	DU7001	28/11/2017	09:16:55	28/11/2017
WR0000056	test	DR	O	2	PSL001	PSL001	23/04/2020	16:39:27	23/04/2020
WR0005000	Rollers need replacing	PR	O	3	KE5001	SHA001	11/11/2021	15:54:01	29/11/2021

Count: 8

Open Windows

User: JulianBak 11/11/2021 Version: 2.5.0.4 Example Company v2.5.0.0

MNU.002.001

