

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

\$ =				Inst	tructions -	BPO: Version	2.5.0.4 - Exa	mple Company	v2.5.0.0					
	Equipmen	it / Locations	Contract	Finance / HR	Inventory	Maintenan	ce / Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities	
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Instructions	Tasks	Generate Tasks	Work Requests	Maintenance Radar	Projects	Standard Methodology	Work Order Allocation	Technician Allocation						
Pre	eventative		Reactive	Radar 4		Proj	ects	4						\diamond

- 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*.



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	WRCode	Description		WOType	Status	Priority	AssigneeNumber	EmployeeNumber	RequestDate	RequestTime	ScheduledStartDate
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•	WR0000039	Work Request tes	t v2.1.0.5	DR	0	2	MUD001	MUD001	22/05/2017	00:00:00	22/05/2017
	WR0000040	Work Request v2.	1.0.5	DR	0	2	MUD001	MUD001	22/05/2017	10:22:56	22/05/2017
	WR0000042	test work request	with end date before start date	DR	0	2	DUT001	DUT001	07/06/2017	16:23:00	06/06/2017
	WR0000043	Test scheduled sta	art and end dates	DR.	0	2	DUT001	DUT001	14/06/2017	10:05:30	01/06/2017
	WR0000049	To check the copie	er transfer unit	DR.	0	2	DUT001	DUT001	23/11/2017	12:05:28	23/11/2017
	WR0000050	Test work request		INSP	0	2	DUT001	DUT001	28/11/2017	09:16:55	28/11/2017
	WR0000056	test		DR	0	2	PIL001	PIL001	23/04/2020	16:39:27	23/04/2020
	Count: 7										
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5. The *Add new Work Request* screen will be displayed.

WORK REQUEST DETAILS

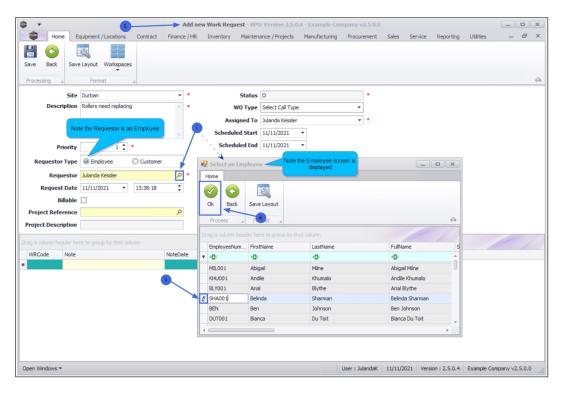
- **Site:** This will be auto populated with the site selected in the Work Request screen but you can click on the drop-down arrow and select an *alternative site* if required.
- **Description:** Click in the text box to type in the description for the work that needs to be done.
- **Priority:** Set the priority level¹ 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.
 - i. To change the requestor, click on the *search* button to display the *Select an Employee* or *Select a Customer* screen.

11 = 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.



• **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**.

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Site	Durban	•	Status	0	•					
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			Assigned To	Julanda Kessler	•					
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Priority	1 🗘 *		Scheduled End	11/11/2021 -						
Requestor Type			Work Request Item	·						
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-	Belinda Sharman	ب + <mark>م</mark>	Functional Locat							
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			ProjectRef 👻	Description	StatusDesc	StartDate	EndDate			
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				Site Inspection	Open	19/08/2021	26/02			
				New machine installation	Open	19/08/2021	26/02			
				Maintenance Project - SP400	Open	28/07/2021	26/02			
				DSU1001	Open	24/03/2021	31/03			
			PRJ0000406	860004	Open	24/03/2021	31/03 +			
Open Windows 🕶			4	(-			>	Example Com	pany v2.5.0	0.0

- **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.



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		Assigned To	Julanda Kessler		•						
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	Project Description	Maintenance Project - SP400								Ψ	
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NOTE ITEMS

^(a) 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*.



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		Type a note relevant to the work request here													
Open Windows	•							L	Jser : Juland	aK 11/11/	2021 Ver	sion: 2.5.0.4	Example C	ompany 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*.



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Requestor Type	Employee O Customer	r	Work Request Item					
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WRCode Note		NoteDate	NoteTime Employe		Status			
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			Work Request : W	(R0005000 saved				
				OK				
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Open Windows 🔻					User : Jular	daK 11/11/2	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.



Maintenance - Add Work Request

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Help v2.5.1.4 - Pg 9 - Printed: 27/06/2024