

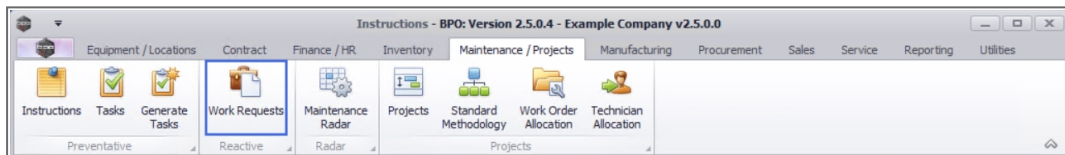
We are currently updating our site; thank you for your patience.

## 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.

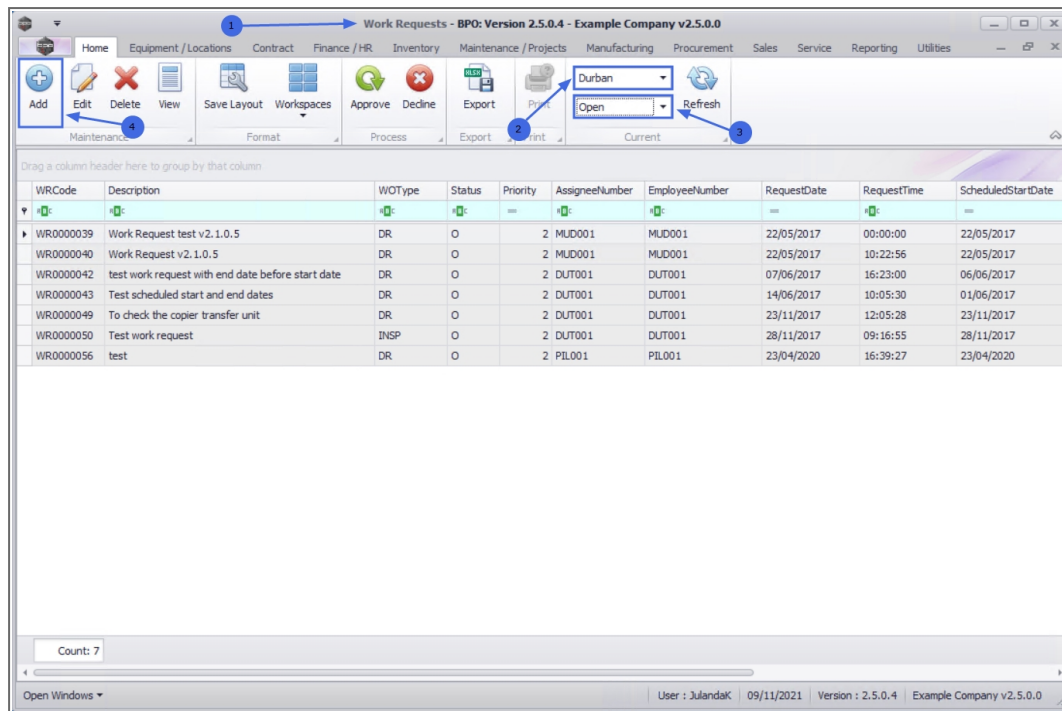
**Ribbon Access:** Maintenance / Projects > Work Requests



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

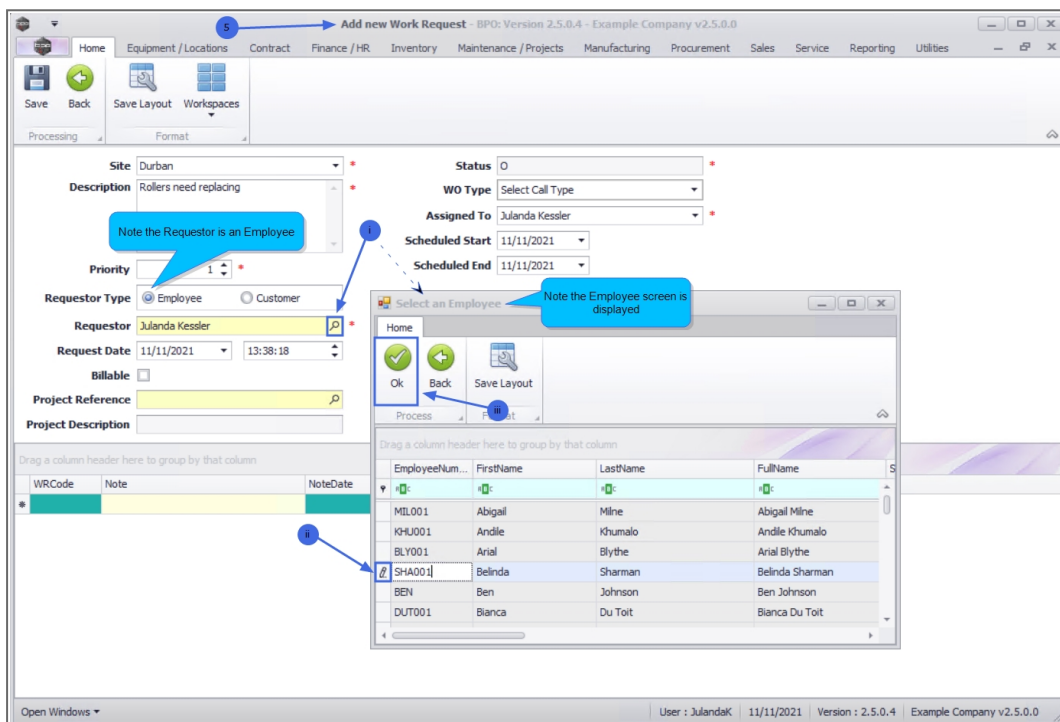
- **Site:** This will be auto populated with the site selected in the Work Request screen but you can click on the drop-down arrow and select an **alternative site** if required.
- **Description:** Click in the text box to type in the description for the work that needs to be done.
- **Priority:** Set 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.

<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.



The screenshot shows the 'Add new Work Request' form in the CO3 system. The form includes fields for Site (Durban), Description (Rollers need replacing), Priority (1), Requestor Type (Employee), Requestor (Julanda Kessler), Request Date (11/11/2021), and Request Time (13:38:18). A 'Select an Employee' dialog box is open, showing a list of employees with 'SHAD001' (Belinda Sharman) selected. Annotations with blue arrows point to the 'Requestor' field, the 'Select an Employee' dialog, and the 'SHAD001' row in the employee list.

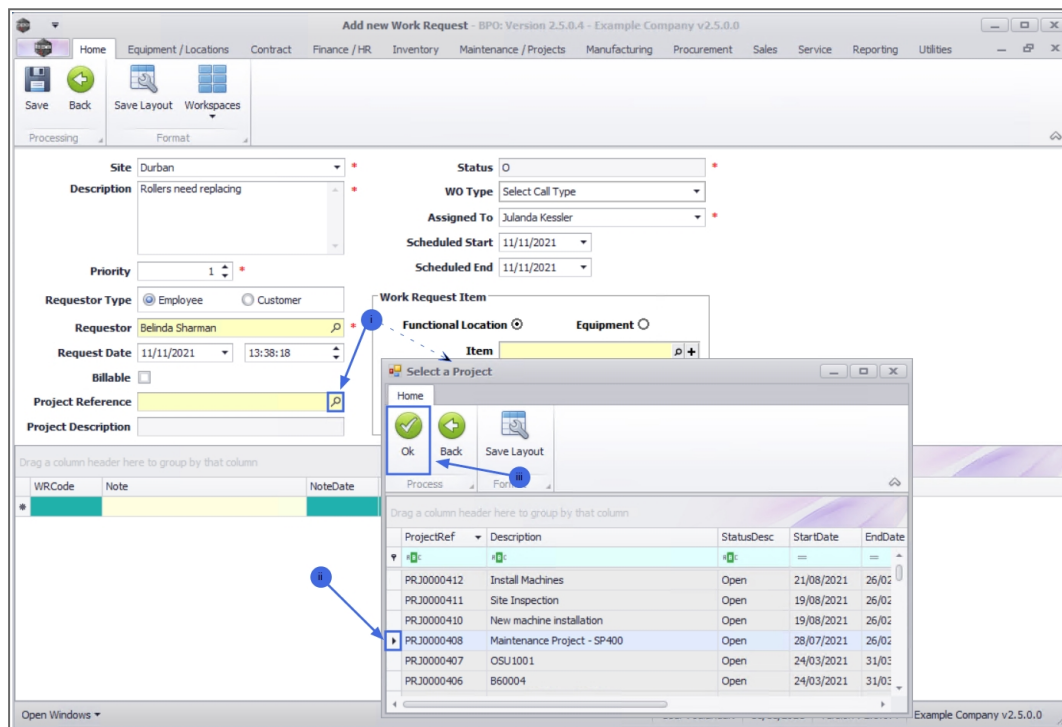
EmployeeNum...	FirstName	LastName	FullName
ML001	Abigail	Milne	Abigail Milne
KHJ001	Andie	Khumalo	Andie Khumalo
BLY001	Arial	Blythe	Arial Blythe
SHAD001	Belinda	Sharman	Belinda Sharman
BEN	Ben	Johnson	Ben Johnson
DUT001	Bianca	Du Toit	Bianca Du Toit

- **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

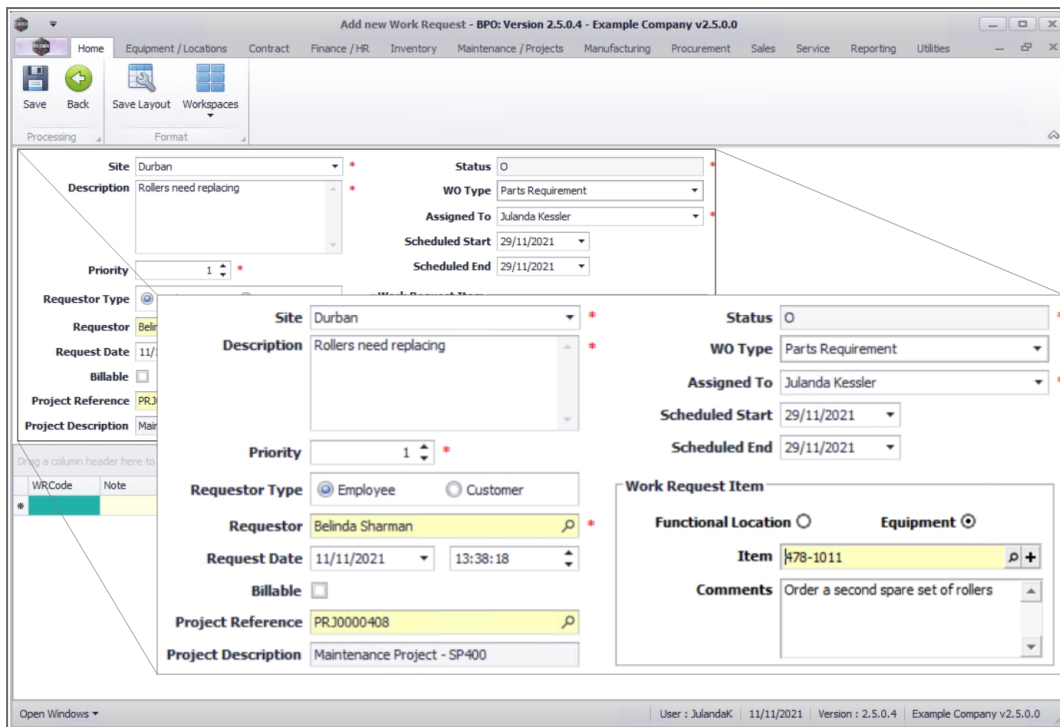
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- **Functional Location / Equipment:** Click on the **radio button** of the item that is affected by this work request and requires the work.
  - In this example, the rollers need replacing, therefore this is an **Equipment** item.
- **Item:** Click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

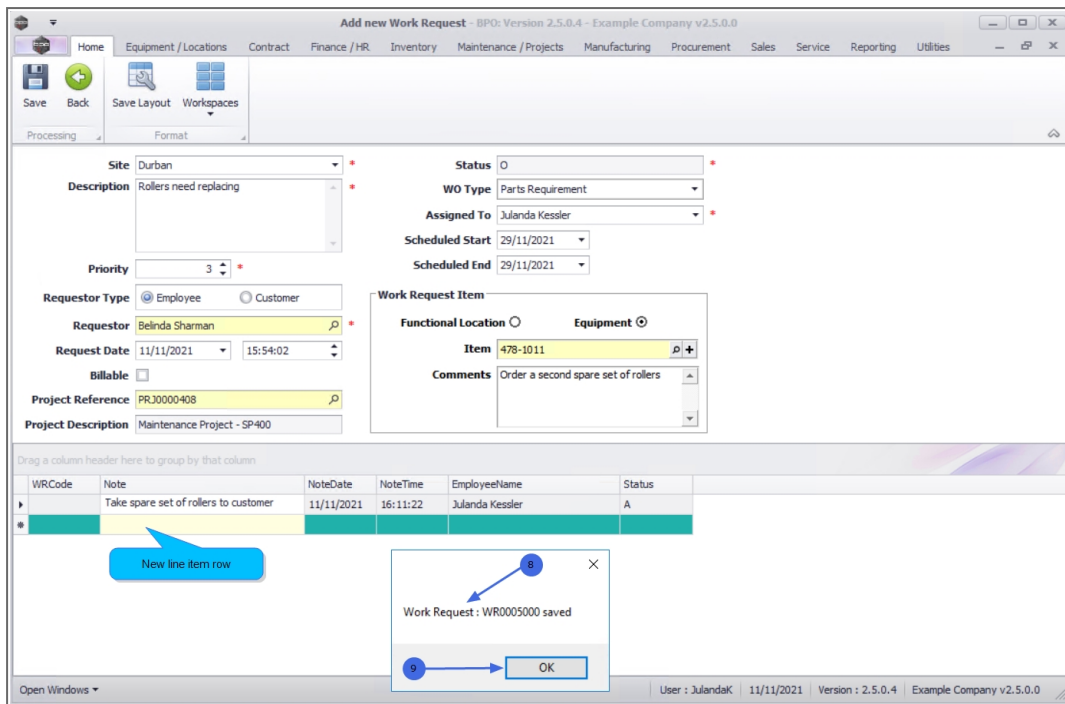
Drag a column header here to group by that column

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

