SERVICE

WORK MANAGEMENT - RAISE WORK REQUEST

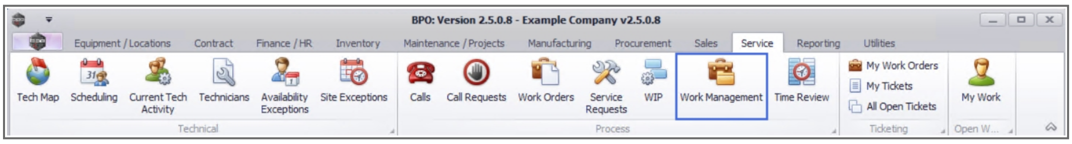
Work Requests can be raised for reactive maintenance, when **additional work** is required, for instance issues or problems found whilst a current service or maintenance job is being performed. This requires the **approval** from management.

A Service or Technical Manager can check the work request and then approve or reject as applicable. If approved, a Work Order is generated, which can then be assigned to an employee and actioned.

Work request **details** can be found in the **View Work Request** and the **Edit Work Request** screen.

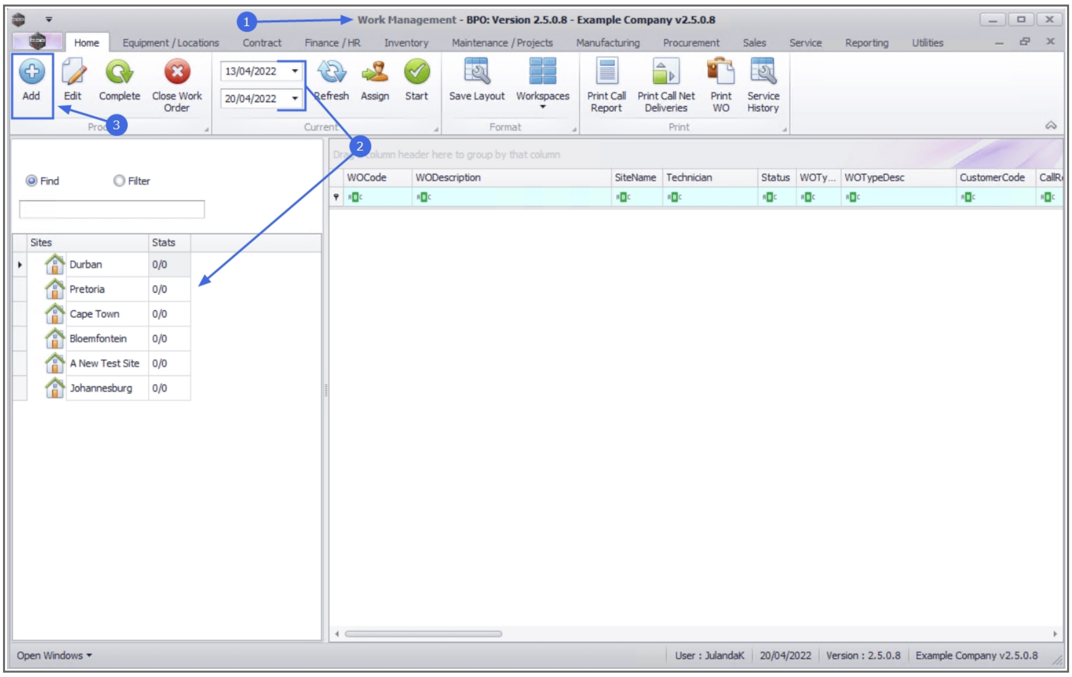
A Work Request can be raised directly from the Work Management screen.

Ribbon Access: *Service > Work Management*



1. The ***Work Management*** screen will be displayed.
2. You do <u>not</u> need to specify a ***date range*** or ***site*** on this screen, as these selections will be made in the next step.
3. Click on ***Add***.

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



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

WORK REQUEST DETAILS

- **Site:** This field will auto populate with the site that was open in the Work Management screen. Click on the down arrow to select the relevant site you wish to link the work request to.
- **Description:** Type in the work that is required for the work request.
- **Priority**[1]**:** Use the arrow indicators to change the priority level as required.
- **Requestor Type:** Click on the radio button to indicate who initiated this work request. Was it an employee or a customer.
- **Requestor:** Click on the search button to select the name of the employee or customer who is responsible for the work request,

[1] 1 = Most Important 5 = Least Important

from the ***Select an Employee*** or the ***Select a Customer Contact Name*** screen.

> Note that the *Select a ...* screen that displays will be linked to the *Requestor Type* chosen.

- **Request Date and Time:** The current date and time will be displayed.
    - **Request Date:** Click to type in or click on the down ***arrow*** to select the date using the calendar function.
    - **Request Time:** Click to type in or use the ***arrow indicators*** to adjust the time.
- **Billable:** Click to select the check box if this work request should be billed.
- **Project Reference:** Click on the search button to select the project linked to the work request.

> Note: Leave this field blank if you are not linking the work request to a project.

- **Project Description:** This will populate with the description of the project selected, else it will remain blank.
- **Status:** The status will display as **O** - Open for the new work request and cannot be adjusted.
- **Work Order Type:** Click on the down ***arrow*** to select the work order type from the drop-down list.
- **Assigned To:** The person currently logged on to the system will display in this field. Click on the down ***arrow*** to select an alternative employee to assign the work request to.

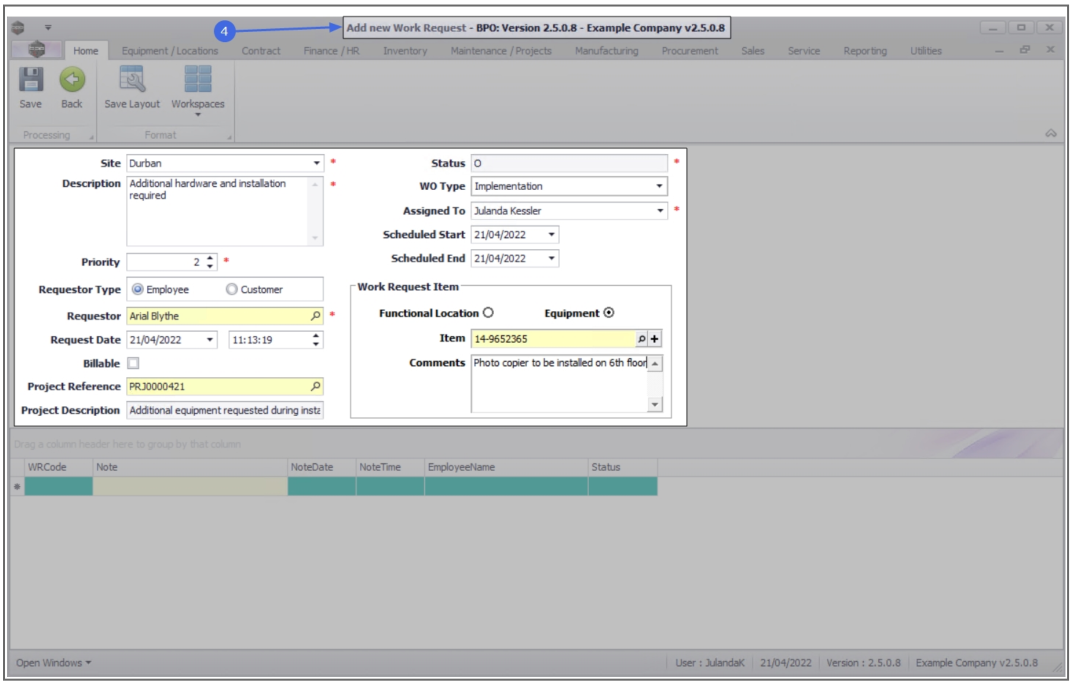
- **Scheduled Start:** The current date will display. Click to type in or click on the down ***arrow*** to select an alternative start date using the calendar function.
- **Scheduled End:** The current date will display. Click to type in or click on the down ***arrow*** to select an alternative end date using the calendar function.

WORK REQUEST ITEMS

- **Functional Location** or **Equipment:** Click on the radio button of the type of request item linked to this call.
- **Item:** Click on the search button to display either the ***Select the location item for this work request*** or ***Select the equipment item for this work request*** screen. Select the location or equipment item to be linked to the work request and click on ***OK***.

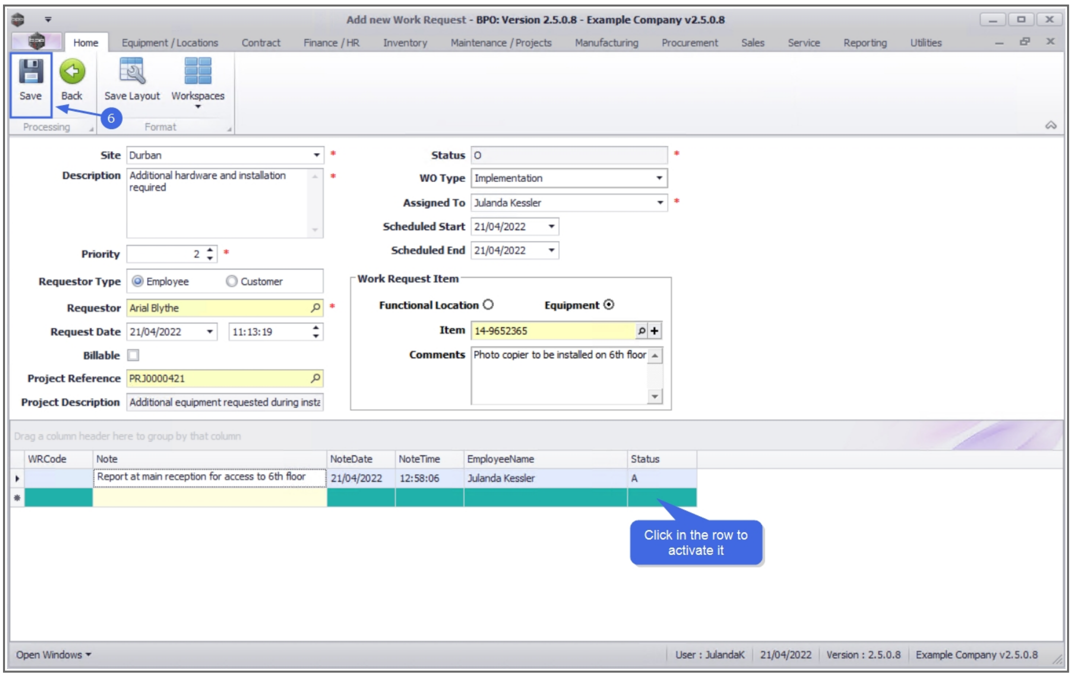
> The *Select a ...* screen that displays will be linked to the functional location selected.

- **Comments:** Type in comments, relevant to the work request item.



WORK REQUEST NOTES

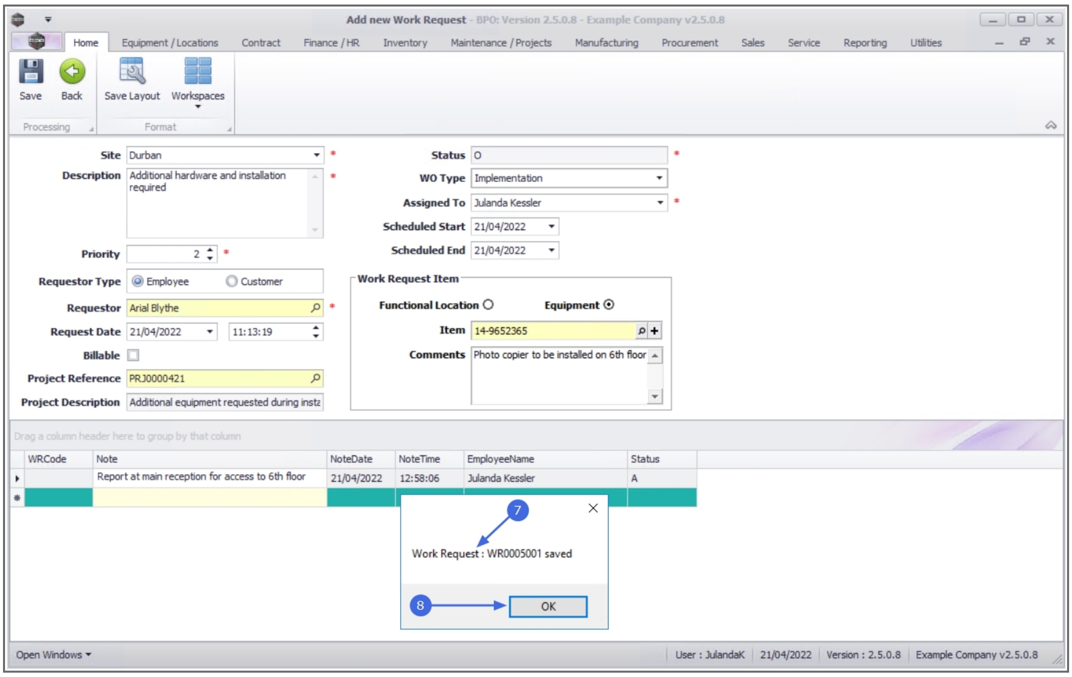
5. Click in a row of the **Notes** frame to activate the row.
    - **WR Code:** The work request number will be generated by the system when saved.
    - **Note:** Click in the text box to type in any additional notes for the work request, if required.
    - **Note Date:** The current date will display in this field.
    - **Note Time:** The current time will display in this field.
    - **Employee Name:** The person currently logged on to the system will display in this field.
    - **Status:** This will auto populate with **A** - Active.
6. When you have finished adding the details to this work request, click on ***Save***.



7. When you receive the message to confirm that;
   - ***Work Request: [****work request number****] saved.***

The system has auto generated the ***work request number***. Make a note of this number if you wish to view the new work request.

8. Click on ***OK***.



You will return to the ***Work Management*** screen.

Related Topics

- Maintenance - View Work Request

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