

# Work Order Requests Module

The Work Requests module is a simplified version of a Work Order module. Non-maintenance personnel can use the Work Requests module to report a problem to the maintenance department. This Chapter describes how to use the Web Work, Work Requests Module.

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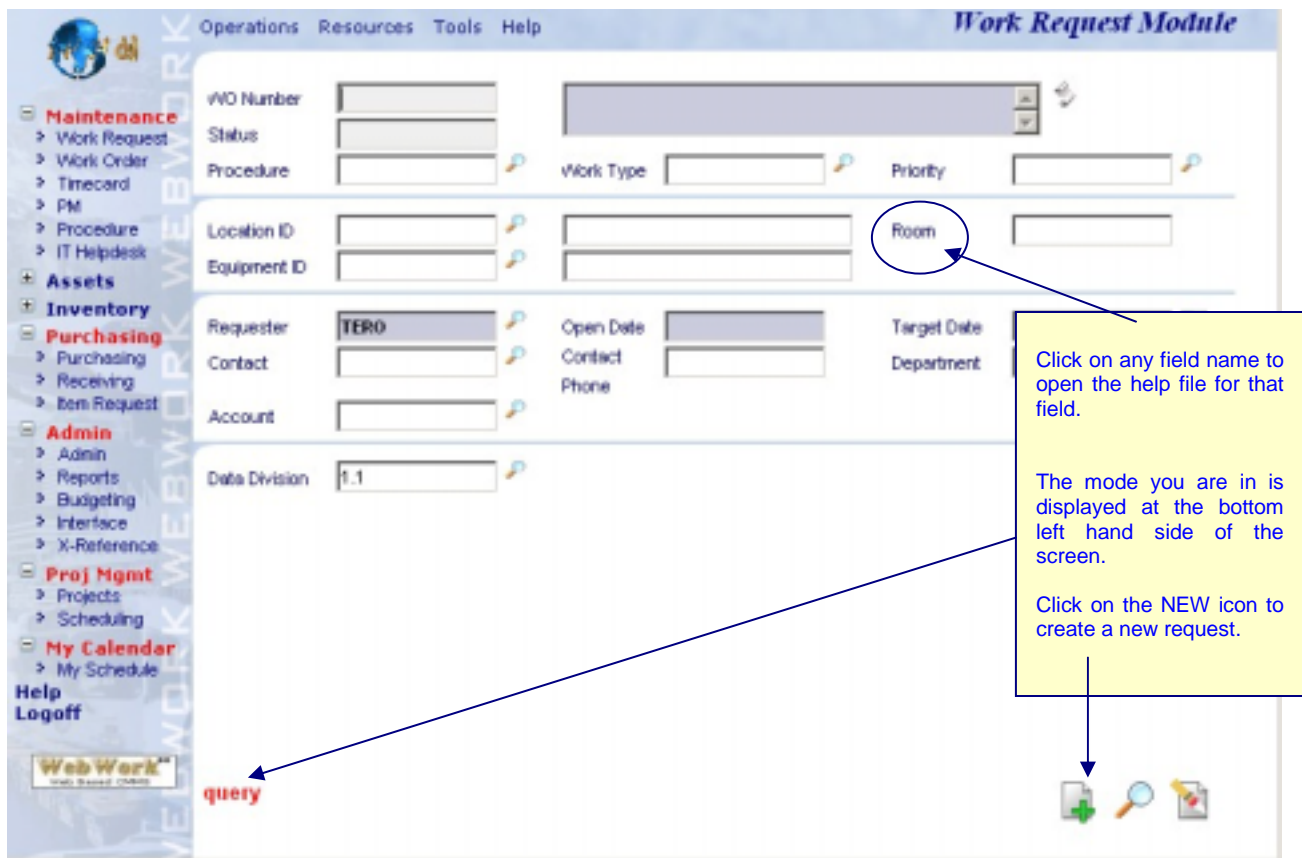
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## 2.1 Overview of the Work Requests Module

The Work Requests Module is used to enter new Work Requests into the Web Work system. Those who have Requester privileges will have access to this module. The maintenance department will then take the work requests and turn them into work orders.

The Work Requests module is found in the Maintenance Group on the Side Bar Menu. If the group is not already 'expanded', click on the word Maintenance to expand the group, and click on Work Requests to open the Work Request module (NOTE: If Work Requests does not appear on this list, you either do not have permissions for the module or the module is not installed. Contact your Web Work administrator for assistance.)

When you enter the Work Requests module you will be in Query mode as shown in the screen below:



The Module Option Menu (Operations, Resources, Tools, Help) drop down menus contain the various features available in the Work Requests module.




Web Work includes “help files” for all field names. To access these help files, click on the field name. A popup window will open displaying help for the field selected.

## 2.2 Creating Work Order Requests

When a maintenance problem is identified, create a work request to advise the Maintenance Department of the problem. The Maintenance Department will change the request to a work order and assign the required tradesperson to the work order.

### 2.2.1 To Create a Work Request

- Open the Work Requests module by selecting it from the Side Bar Menu as described above.

- Click on the  (Add new record) icon in the lower right of the screen, or select Operations, New Work Request from the upper Module Option menu.






- The screen should then ‘reset’ with the beginnings of a new work request:

The screenshot shows the 'Work Request Module' interface. At the top, there are navigation tabs: 'Operations', 'Resources', 'Tools', and 'Help'. The main form contains the following fields:

- WO Number: 00003303
- Status: NEWREQ
- Procedure: (empty)
- Work Type: (empty)
- Priority: 2
- Location ID: (empty)
- Equipment ID: (empty)
- Room: (empty)
- Requester: TERO
- Open Date: 7/4/2005
- Target Date: (empty)
- Contact: (empty)
- Department: (empty)
- Account: (empty)
- Data Division: 1.1

At the bottom left, there is a red 'NEW' label. At the bottom right, there are icons for a printer and a document with a pencil.


- The Work Order #, Status, Requester, Data Division (If being used) and Open Date will be populated by the Web Work system.
- The MODE will now be showing as NEW
- The icons in the lower right corner will change to SAVE  and CLEAR FORM .
- The location field may also automatically be populated with the Requesters work location. The Show Location on Request feature can be setup in the Web Work System Defaults. See the Admin section of the manual for more information on System Defaults.
- Enter information into the fields displayed on the screen. For information on field contents click on any field name – this will open a popup help window for that field name.
- NOTE: The Work Order #, Description, Requester and Open Date fields are the only required fields, all other fields are optional. Data division is automatically assigned when the user logs in to Web Work. The setting is done through the Labour module; refer to the chapter on Labour for additional information. If the data division is left blank, other users will be able to see the request.
- Click on the  Save icon at the bottom right hand side of the screen to save the Work Request Record.
- You will then be in edit mode: you can edit and re-save the Work Request, print the Work Request or continue working in the module of your choice by clicking on the module on the right hand side of the screen.

### 2.2.2 Editing Work Requests

- Click on the Work Request Module (in the Maintenance Group) on the left hand Side Bar Menu of the screen to access the Work Requests module.
- Click on OPERATIONS from the Module Option Menu at the top of the screen to display the drop down menu.
- Perform a Work Requests query to locate and open applicable work requests. See Work Requests queries for more information on performing work requests queries.
- When you retrieve the work requests you will be in edit mode.



Only Work Requests with the status of WTAPPR can be edited. Work Requests that have been approved, closed, cancelled, etc. cannot be edited.

- Make the necessary changes to the Work Requests.
- Click on the  (Save) icon at the bottom right hand side of the screen to save the Work Requests Record.

## 2.3 Work Requests – Estimates

The Work Requests – Estimates menu item is a read only function. This function enables the user to view the estimated tasks, labour and materials associated with their work request(s).

To View Estimates – while viewing a work request in EDIT mode:

- Click on the ESTIMATES tab to view the estimates screen:

Operations Resources Tools Help *Work Request Module*

Main **Estimates** Status History

WO Number

Tasks Labour Materials Tools

Task Number	Description	Additional Notes
10	Plug out power socket	
20	Open back cover	
30	clear out dust in inside compartment	
40	add oil to motor	use 10w-30
50	replace back cover	
60	connect power	

estimate task (1 of 18)

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- Click on the Task, Labour, Materials, or Tools tab to view the Estimated Tasks, Labour, Material, or Tool used in this work requests.
- Click back on the MAIN tab to return to the main Work Request screen.

## 2.4 Performing Work Order Request Queries

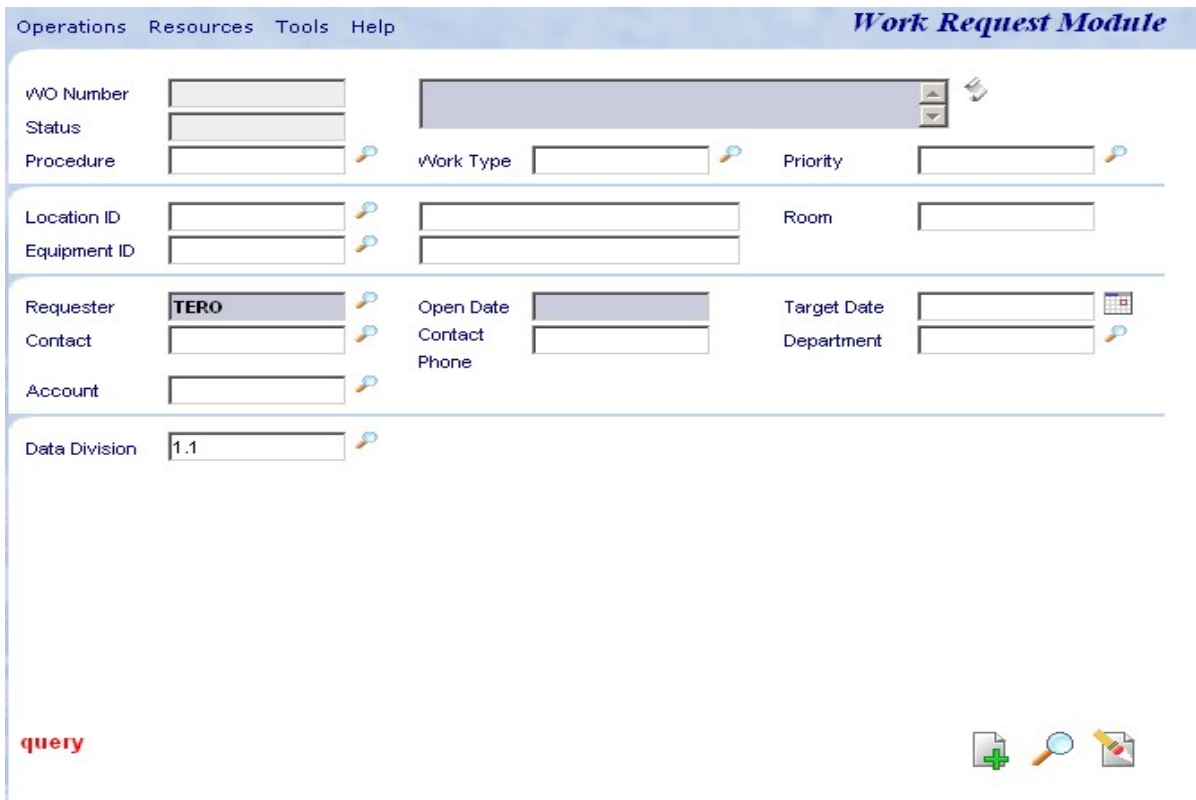
You can find the Work Requests you have entered, quickly and easily, using Web Work's Query by Example feature. For more information on Query by Example see the QUERIES chapter of this manual.

### 2.4.1 To perform a Work Order Request Query


- Click on the Work Request Module, in the Maintenance Group, from the Side Bar Menu on the left hand side of the screen to access the Work Requests module.
- When you enter the Work Requests module you will be in query mode. If you have been working in the Work Requests module, and you are not in query mode, you can click on OPERATIONS in the Module

Option Menu and select Work Requests query from the drop down, or click on the New Query icon  to change to query mode.

- A screen similar to the one shown below will open:



**NOTE:** Because Web Work is highly customizable , your screens may vary from what is shown here – contact your system administrator if any screens differ from those shown in these manuals.



- Enter selection criteria into any of the fields (again, refer to QUERIES chapter for more details).
- Click on the  (lookup) icon to display a list of the records (Query Result List) matching the specified criteria.


Operations Resources Tools Help **Work Request Module**

Select all Unselect all Retrieve Records Order by: WoNum

	WO Number	Request	Location ID	Equipment ID	Status	Open Date
<input type="checkbox"/>	0000067	Routine inspection and lubrication	MALL	WTR-HTR-GAS-01	APPR	2/29/2000
<input type="checkbox"/>	0000398	Repair the stove	CT		NEWREQ	4/10/2000
<input type="checkbox"/>	0000406	Fix the window	GYM		NEWREQ	4/10/2000
<input type="checkbox"/>	0000416	this is a new test	MALL	WTR-COOLER-02	NEWREQ	4/14/2000
<input type="checkbox"/>	0000417	this is a newer test	MALL	WC-FLOOR-01	NEWREQ	4/14/2000
<input type="checkbox"/>	0000558	repair toilet	CAFE		NEWREQ	5/23/2000
<input type="checkbox"/>	0000559	Repair toilet	CAFE		NEWREQ	5/23/2000
<input type="checkbox"/>	0000560	Repair toilet	CAFE		NEWREQ	5/23/2000
<input type="checkbox"/>	0000573	This is mark			NEWREQ	5/26/2000
<input type="checkbox"/>	0000706	IVER			NEWREQ	6/13/2000
<input type="checkbox"/>	00001047	Fix leaking windows	BW	ROOM225	NEWREQ	10/25/2000
<input type="checkbox"/>	00001052	qwqw			NEWREQ	10/26/2000
<input type="checkbox"/>	00001053	qwqwdeea q			NEWREQ	10/26/2000
<input type="checkbox"/>	00001085	fix leaking windows on 2nd floor			NEWREQ	11/6/2000
<input type="checkbox"/>	00001103	fix door	1000		NEWREQ	11/9/2000

SELECT \* FROM Workorder WHERE (Requester = 'TERO')

**query result (18 / 18)**  

- To open any of these Work Requests click the WO Number or anywhere on the line when it is highlighted.
- To open MULTIPLE Work Requests, check the checkbox to the left of the WO Number by clicking with your mouse – once you have selected all of the work requests you wish to view, click Retrieve Records from the top of the list or the  (retrieve) icon.
- You will return to the work request screen, in edit mode, with the work requests you selected available.

## 2.5 Work Request Status History

To view the status history for a work requests:

- With a work request on screen, click on the Status History tab.

Date/Time	Status	Changed By	Remark
04/07/2005 12:46:03	APPR		
04/07/2005	COMP		Replaced the filter

- The first column shows the date and time of the status change. The second column shows the changed status. The third column shows the name of the user who performed the status change. The last column shows the status remarks for each status.
- Click on the MAIN tab to return to the work request main screen.



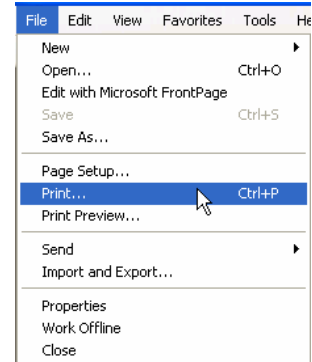
## 2.6 Printing Work Requests

To print a work request:

- Locate and retrieve the Work Request(s) you wish to print. See the Work Requests Queries section of this chapter for more information on locating and opening work requests matching the criteria you select.



- Click on the (print) icon at the bottom right hand side of the screen.
- The selected record will open in a new browser window.
- Click on File and select Print from the drop down menu to proceed with printing.

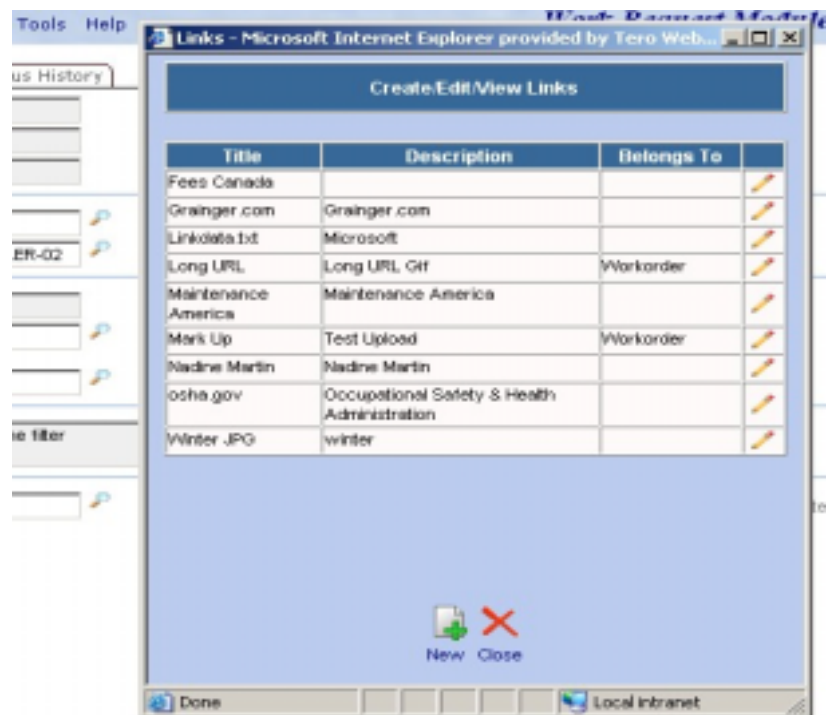


## 2.7 Links

When you are in the Work Requests module and select Links from TOOLS on the Module Option Menu at the top of the screen.

The Web Work Create/Edit Links window will open as shown .

You can view existing links or create new links using this feature.



You can only view links which have been setup to be accessible from this module or from all modules. Links set up in other modules with the accessibility set as only within that module will not be shown.

NOTE: For information on creating New links see the Links Chapter of this manual.