

PROCESSING A WORK REQUEST

(Building Operations Console under Service Requests on Employee Home Page)

Note 1



Note 1: You may review any job request you have by clicking on the work request number. The Estimate, Schedule, Issue and Cancel buttons shown above only appear on the Supervisor Role.

A screenshot of the 'Work Request' interface. The top section is 'Work Request Summary' with fields for Work Request # (201504592), Work Team Code (ZONE MAINT-SECTOR A (ZONE 9) (POE)), Shop Priority (N), Problem Location, Work Order # (301503909), Problem Type (ASPHALT/REPAIR POTHOLE'S (PROVIDE LOCATION BELOW)), and Description (Giant hole in parking spot A1). Below is the 'General Details' section with fields for Requested by (POE, ERIC JUSTIN - 237383), Priority (Default), Location (50111300--), Building Name (Ayres Hall), GL Account (436100), Status (Issued and In Process), Is Chargeable? (No), and Document upload fields. On the right, there are fields for Requested For, Date Requested (04/22/2015), Time Requested (4:56 PM), College ID (70172), Fund ID (E017219001), Equipment Code, and Ready for Bill? (No). At the bottom, there are sections for 'Total Costs' (Estimated, Actual, Apply Upcharge, Upcharge Costs) and a row of buttons: 'Forward', 'Update Request', 'Shop Assist', and 'Close'. A 'Total Cost 0.00' label is above the buttons.

Note 2

Note 3

Note 2: (Supervisor Role) Clicking the “Forward” button will send the work request to a completely new shop. This is to be used only if the original shop has not done any work on the work request.

Note 3: (Supervisor Role) Clicking the “Shop Assist” button adds a shop (for help) to the work request. This is used when the original shop has time on the work request.

PROCESSING A WORK REQUEST CONTINUED



1. **(Supervisor Role)** Under Assigned to Work Order list on Building Operations Console, locate specific work request, click “Estimate”.

Estimate Work Request 201500779

Estimate requests to more accurately budget, to schedule labor, and to reserve parts. You can change your estimates until you issue the request.

▼ Estimate Trades Add Trade

No records to display.

▼ Estimate and Reserve Parts Add Part

No records to display.

▼ Summary of Estimated Costs

Estimated Cost of Labor	0.00
Estimated Cost of Parts	0.00
Estimated Other Costs	0.00
Estimated Total Cost	0.00

Other Resource Description

Quantity Used

Units each

Estimated Cost

Parts Upcharge Cost 0.00

Project Management Upcharge Cost 0.00

Total Upcharge Cost 0.00

Save Close

2. **(Supervisor Role)** In new window, click “Add Trade” to assign a trade.

Note 1: (Supervisor Role) If needed, add any parts required for the work request. Clicking “Add Parts” will open the below window. Use ellipses button to add part by stock number. Enter quantity requested and unit of issue. Click “Save”. This same parts request window is available to the Craftsperson after the job has issued.

Add Part

Part Code*

Quantity Requested 0.000

Units of Issue

Location

Part Description

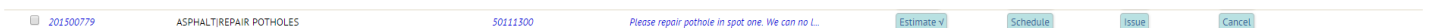
Part Status SHOPPING

Requested by BAKER, TERRY DALE

Issued To

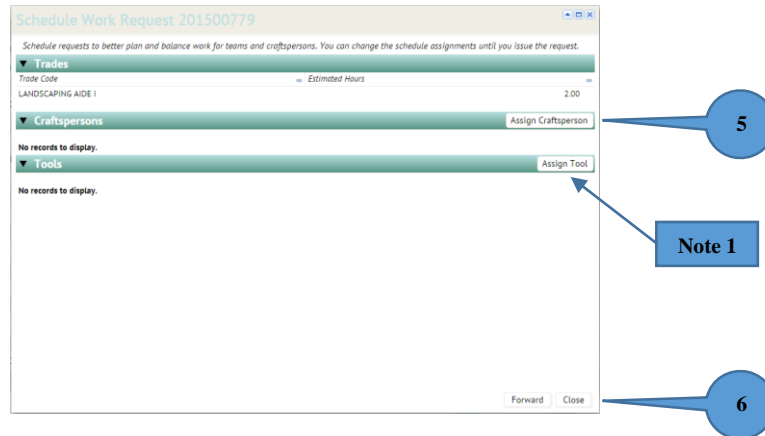
Save Cancel

3. Click “Save”.



4. **(Supervisor Role)** Click “Schedule”.

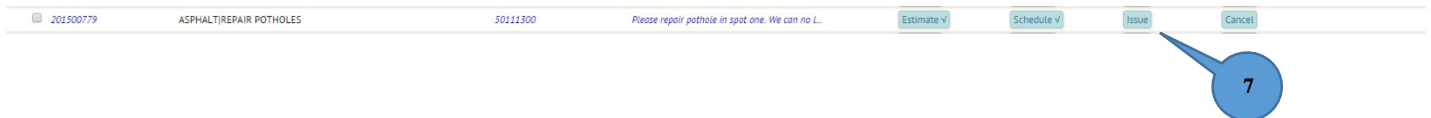
PROCESSING A WORK REQUEST CONTINUED



5. **(Supervisor Role)** In new window, click “Assign Craftsperson” to assign an employee by name.

Note 1: Click “Assign Tool” to reserve unique tools like forklifts or aerial lifts.

6. Click “Close”.



7. **(Supervisor Role)** Click “Issue” to send this work request to the assigned craftsperson. Click “Yes” on the confirmation message which pops up after clicking to issue.



8. **(Supervisor Role/Craftsperson Role)** Under Issued and In Process list on Building Operations Console, click “Update” to update employee time taken on the job.

Note 2: Clicking the “Hold” button will allow the craftsperson to place the job on hold for labor, access or parts. This action will also notify the requestor the job is on hold.

Note 3: Clicking the “Stop” button stops progress on the work request completely, but allows the work previously done to be billed. This action will also notify the requestor the job has been stopped.

PROCESSING A WORK REQUEST CONTINUED

Work Request Summary

Work Request # 201504592 Work Order # 301503909
Work Team Code ZONE MAINT-SECTOR A (ZONE 9) (POE) Problem Type ASPHALT/REPAIR POTHOLES (PROVIDE LOCATION BELOW)
Shop Priority N Description Giant hole in parking spot A1.
Problem Location

General Details

Requested by POE, ERIC JUSTIN - 237383 Requested For
Priority Default Date Requested 04/22/2015
Location 50111300-- Time Requested 4:56 PM
Building Name Ayres Hall College ID 70172
GL Account 436100 Fund ID E017219001
Status Issued and In Process
Is Chargeable? No Equipment Code
Ready for Bill? No
Document 1 Upload a document
Document 2 Upload a document
Document 3 Upload a document
Document 4 Upload a document

Actual Labor

Craftsperson	Date	Time	Estimated Hours	Actual Hours	Holidaytime Hours	Overtime Hours	Date Started	Time Started	Date Finished	Time Finished
BAKER, TERRY DALE -	4/29/2015	2:08 PM		2.00	0.00	0.00				

Other Resources

Total Costs

Estimated Costs	Actual Costs	Apply Upcharge	Upcharge Costs
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Forward Update Request Shop Assist Close

9. (Supervisor Role/Craftsperson Role) In new window, click the blue numbers to update actual hours spent on the job.

Note 1: Enter overtime hours if needed. This would be hours on the job over 8 hours each day.

Note 2: Enter holiday time hours if needed. Entered only if work occurred on Holiday or Administrative Closing.

10. Click “Other Costs” to add shop stock used on the job. Once you click the “Other Costs” button, the “Add” button will become active. Click “Add”.

11. Add all items/shop stock used under “Other Resource Description”. You must itemize all additional items here and enter the total cost of all the items combined next to “Actual Cost”. Click “Save”.

Add Other Cost

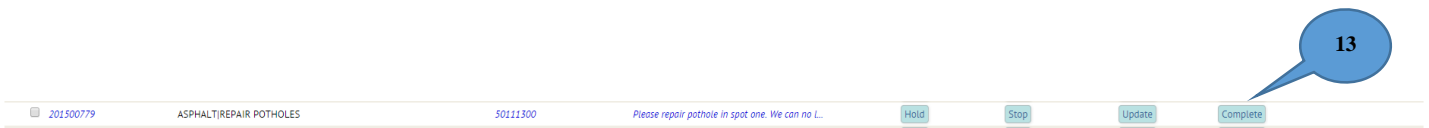
Purchase Doc / Shop Stock SHOP STOCK
Other Resource Description

Quantity Used 0.000
Units
Estimated Cost 0.00
Actual Cost 0.00

Save Cancel

12. Click “Close”.

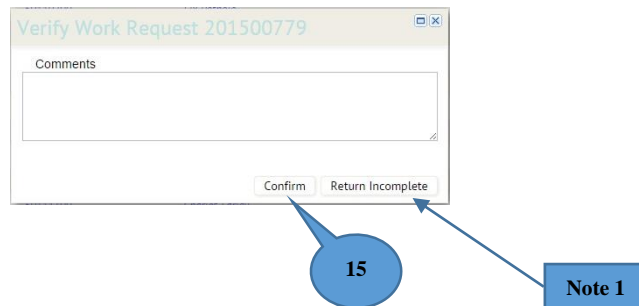
PROCESSING A WORK REQUEST CONTINUED



13. (Supervisor/Craftsperson Role) Click “Complete” when the job is reported as finished. Click “Yes” for the confirmation message which pops up.



14. (Supervisor Role) Under Completed list on Building Operations Console, locate work request, click “Verify”.



15. (Supervisor Role) Click “Confirm” to verify completion of the work request.

Note 1: Should a work request need to go back to the craftsperson for rework, click “Return Incomplete”. Enter the reason for the return in the comments (hours not recorded, stock not recorded etc.).