How to Create a Work Order

- Click on the **Work Orders** menu icon, select **Work Orders**, and then click the **New** button. *Note: A work order can be generated from various sources within Asset Essentials (ex. Location, Asset) by right-clicking on the source, and selecting **Create WO**.

All fields with a “*” are required fields
**WORK ORDER DETAILS**

In the Work Order Details section of the Work Orders page, there are two required fields: WO Status, and Priority.

- Select the appropriate **WO Status**. A new Work Order will have a status of “New Request” Change the WO Status to “New Request”

- Choose a **Priority**, the default priority is Medium.  
  - **Critical** = Emergency, immediate  
  - **High** = < 48 hours  
  - **Medium** = 2-5 business days  
  - **Low** = 30 days  
  - **Scheduled** = Due on due date  
  - **Standing Work Order** = Open until scheduled close

- Leave **Work Order #** blank. The system will assign a WO #.

- Enter a **Title** for the work order, this should be a brief summary of the type of work to be completed.

- If this is for an Estimate type work order fill in the **Estimates Hours** and leave **Estimated By** field as “User”
WORK REQUESTED*

- Fill out a description of the Work Requested. This should be a detailed account of the work that needs to be performed in order to fulfill the request.

WORK SOURCE*

- Click Add Site, Add Asset, or Add Location. This will associate the work order with a source type of either Site, Asset, or Location. *Note: You can only associate one source type to the work order.
- A Selection Popup will appear

- Choose the Site from the dropdown menu on the left

- Left click on the appropriate field under site for the location you are searching. Some Sites/locations will have multiple drill down menus. This will filter the selection of locations on the right.

- You may further filter the Name column to search for room numbers, assets or location names

- Check the location or locations you would like to assign to the work order and then click the Select button
TYPE OF WORK

Select a **Team**, **Work Category**, **Problem**, and **Cause**, if known. *Note: Certain Work Categories may trigger Custom Fields to appear on the work order form.*

- **Work Type** - The Work Type is used to indicate the categorization of why the work is being performed, such as Reactive Maintenance, Events, or Project Work.
- **Team** - The Team is the Facilities & Campus Services group associated with the work being performed.
- **Problem** - The Problem field indicates the kind of issue that needs to be addressed. *Note: Problem types are associated with specific Work Categories.*
- **Cause** - The Cause is used to indicate why the problem occurred. *Note: Causes are associated with specific Problems*
ORIGIN INFO

- The **Originator** field is automatically populated with your name. If you need to select another user as the Originator, click on the plus sign (➕).

- To delete the **Created** or **Assigned** dates, click the 'x' next to the appropriate field.

- To modify the **Created** or **Assigned** dates, click on the appropriate date to pull up the calendar.

- Click the **Contact User** button to view the Originator’s contact information if this information has been filled out in their profile.

ADDRESS

- **Address** – It is not necessary to enter address information.

ACTION TAKEN

- If the work has been completed, click on **Completed** to enter the Date Completed

- If the work has been completed, enter **Action Taken** notes to describe what was done to complete the work order after the work is finished or click **Select Solution** to select a pre-populated action.
ASSIGNEE

- **Assignee** – This is a required field for any work order status except for “New Request”

- If you want to assign the work order to yourself, click on the **Add Me** button.

- If you want to assign the work order to other users, click on the **Add User** button and then choose the user(s) from the Select User list.

- To remove an assigned user, click the user in the list and then click **Remove**.

- To see an assigned user’s labor transactions for the work order, click the user in the list and select the **View Labor Entries** button.

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COMMENTS

- Enter any additional comments in the **Comments** section.
CUSTOM FIELDS

- **Target Date** – If the work order has an applicable target date complete the Target Date field.
- **ACM** - The Problem field indicates the kind of issue that needs to be addressed. Problem types can be associated with specific Work Categories.
- **Budget Code** – The budget code field is for our Requestors to populate if their work order requires a Budget Code. If this field is populated please double check that the Cost Center field in the next section is correct. *Note: Cost Centers default from the location/asset chosen and need to be updated if the work order is Billable.*
- **Vandalism** – If this work order is due to suspected vandalism change the Vandalism indicator to yes. *Note: This allows facilities to report suspected vandalism to Residence Life and Housing.*
- **Mold** - If this is a mold related work request change the Mold indicator to yes. *Note: This allows facilities to report suspected mold and to monitor mold issues that might arise on campus.*

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<tr>
<th>CUSTOM FIELDS</th>
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<tbody>
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<td><strong>Target Date</strong></td>
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PLANNING

Project-Events are a way to connect related work orders together. If there are a group of work orders that need to be tracked together for reporting purposes Project-Event is the field to use. Please see your system admin to set up new Project-Events. An example of Project-Event tracking would be tracking all commencement related work order together or tracking work orders that might be related to a capital project.

- Enter a **Project-Event** if applicable, and any estimated costs.
- Enter the appropriate **Cost Center** which map directly to the workday FDM fields for integration purposes. *Note: Cost Centers default from the location/asset chosen and need to be updated if the work order is Billable.*
ATTACHMENTS

Use this section to attach documents, images, or URLs related to your Work Order.

- Click on the Add button.
- In the pop-up window you can do the following:
  - **Add Attachment from the Library**: Check the box next to an image, document, or URL from the list of library items and then click Done.
  - **Add Web Link**: Click Add Web Link and enter a valid URL and Name. Click Add and then click Done.
  - **Upload Files**: Click Upload Files to select an image or document from your computer and then click Done.
**TASKS**

Asset Essentials allows you to create a list of tasks for the worker to follow. You have the option to either create a new task by clicking the **Add Task** button or you can select an existing task from the Tasks Library. *Note: The Tasks section will not show on the work order form until the work order is saved.*

**Adding a Single Task**

- Click on **Add Task** to create a new task on the work order.

- In the Task window, select the **User** responsible for the task from the drop down menu or click the user icon (👤) to select a user from the list.

- Enter the **Name** of the task as well as the **Description**.

- Select the **Task Type**. You can select "Instruction" for generic step-by-step tasks, or "Collect Reading" if the worker should record any meter readings from an asset. *Note: If you select Collect Reading, you must also select an Asset and a Meter Title.*

- If you need to attach a document to the task, click the image icon (🖼) and select a document from either your Document Library or upload a file from your computer.

- Repeat these steps to add as many tasks as needed.

- If necessary, you can reorder the steps by clicking the rearrange icon (≠) and dragging the task to its new location in the list.