
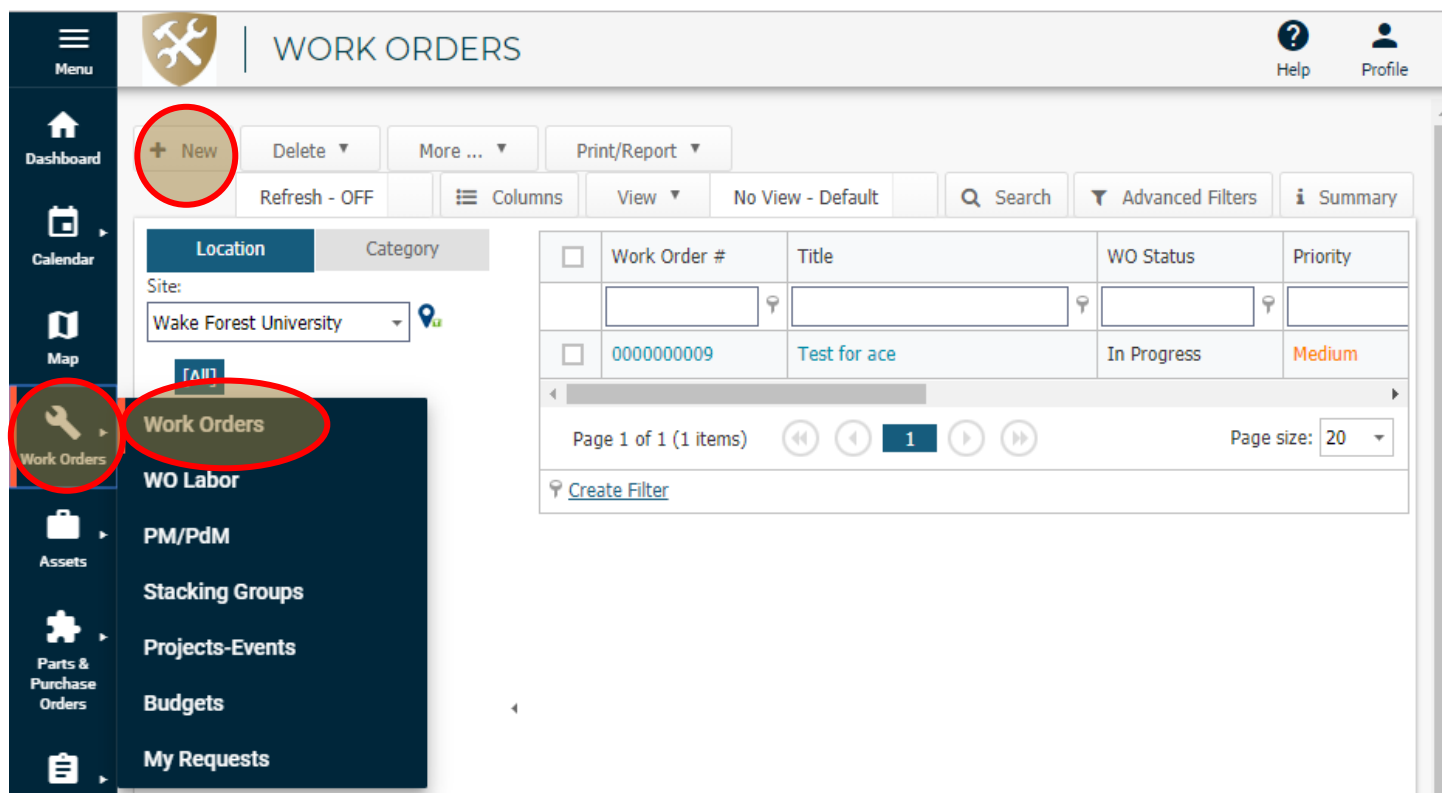




How to Create a Work Order

- Click on the **Work Orders** menu icon, select **Work Orders**, and then click the New( 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**.*



The screenshot displays the 'WORK ORDERS' interface. The left sidebar contains a menu with 'Work Orders' highlighted. The main area features a 'New' button (circled in red) and a table with the following data:

Work Order #	Title	WO Status	Priority
0000000009	Test for ace	In Progress	Medium

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



WORK REQUESTED *

Normal | B | I | U | [Text Formatting Icons]

Work Requested: The light above my desk is out. |

WORK SOURCE * [ADD LOCATION]

LOCATIONS

Estimated Hours	Name	Description
0	908A-102A Offi...	

Page Size: 25

Select Locations

+ New | Select | Columns | View | No View - Default

Site: Academic-Administrative [All]

	Name	Location Status	Assigned To
<input type="checkbox"/>	Reynolda Village 118		
<input type="checkbox"/>	118-100 Office Service Area-Reynolda Village 118		
<input type="checkbox"/>	118-100A Unit Storage-Reynolda Village 118		
<input type="checkbox"/>	118-102 Conference Room-Office Rel-Reynolda Village 118		
<input type="checkbox"/>	118-102A Utility		
<input type="checkbox"/>	Mechanical-Reynolda Village 118		
<input type="checkbox"/>	118-102A Utility/Mechanical-Reynolda Village 118		
<input type="checkbox"/>	118-103 Restroom-Reynolda Village 118		
<input type="checkbox"/>	118-104 Office Service Area-Reynolda Village 118		
<input type="checkbox"/>	118-105 Lounge-Reynolda Village 118		
<input type="checkbox"/>	118-106 Office-Faculty-Reynolda Village 118		
<input type="checkbox"/>	118-107 Office-Staff-Reynolda Village 118		

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Site List (Left): 2599 Reynolda Road, 2599-A Carriage House, 2600 Reynolda Road, Alumni Hall, Anthropology Laboratory, Benson Center, Byrum Center, Calloway Center, Carswell Hall, Central Heating Plant, Clinical Research Center, Dance Studio, EHS Building, EHS Chemical Stor, Facilities Mgn't. Mainten, Facilities Storage Bldg. D, Facilities Storage Bldg. E, Farrell Hall, H.S. Moore Building, Landscaping Building



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*

^ TYPE OF WORK

Work Type

Reactive Maintenance

▼

Problem

Plumbing

▼

Team

Maintenance
Academic/Administrative

▼

Cause

Clogged Sink

▼



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.

The screenshot shows the 'ORIGIN INFO' section with a 'CONTACT USER' button in the top right. The form contains the following fields:

Field	Value	Action
Origin	Non PM	
Created	09/10/2019 11:16	
Originator*	Brett	⊕
Assigned	09/10/2019 11:16	

ADDRESS

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

The screenshot shows the 'ADDRESS' section with a dropdown arrow and the text 'ADDRESS'.

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.

The screenshot shows the 'ACTION TAKEN' section with a 'SELECT SOLUTION' button in the top right. The form contains the following fields:

Field	Value	Action
Completed		
Action Taken		



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.

The screenshot shows the 'ASSIGNEE' section of a software interface. At the top, there is a header 'ASSIGNEE *' with a dropdown arrow. To the right of the header are two buttons: 'ADD ME' and 'ADD USER', both with dropdown arrows. Below the header, there is a table with columns: 'Estimated Hours', 'Start at: Days/Hours/Mins from the Assigned date/time', 'First Nam', and 'Last Nam'. Below the table, there are two buttons: 'REMOVE' and 'VIEW LABOR ENTRIES'. Below the buttons, there is a row of data: '0', '0 Days : 0 Hours : 0 Minutes', 'Brett', and 'Hewitt'.

Estimated Hours	Start at: Days/Hours/Mins from the Assigned date/time	First Nam	Last Nam
0	0 Days : 0 Hours : 0 Minutes	Brett	Hewitt

COMMENTS

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

The screenshot shows the 'COMMENTS' section of a software interface. It has a header 'COMMENTS' with a dropdown arrow. Below the header, there is a text input field labeled 'Comments'.



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.*

^ CUSTOM FIELDS


Target Date	09/03/2019 02:50:16 PM	×	Vandalism	No	▼
ACM	No	▼	Mold	No	▼
Budget Code					



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.

^ PLANNING

Project-Event 

Cost Center*

Estimated Cost

- 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**.

EXPAND ALL

> System

- Uploads
 - ☐ CitizenPortal
 - ☐ Icons
 - ☐ Mobile
 - ☐ Requests

ADD WEB LINK

UPLOAD FILES or drag and drop files below

<input type="checkbox"/>	Name	Type	Size (KB)	Path	Created On
<input type="checkbox"/>	school dude icon (2).jpg	Image	740	Uploads\school dude icon (2).jpg	08/12/2019
<input type="checkbox"/>	Grounds.png	Image	29	Uploads\Grounds.png	11/05/2018
<input type="checkbox"/>	Contractor.png	Image	22	Uploads\Contractor.png	11/05/2018
<input type="checkbox"/>	Surplus.png	Image	5	Uploads\Surplus.png	11/05/2018
<input type="checkbox"/>	Wall Repair.png	Image	15	Uploads\Wall Repair.png	11/05/2018
<input type="checkbox"/>	Vehicle Maintenance.png	Image	17	Uploads\Vehicle Maintenance.png	11/05/2018
<input type="checkbox"/>	Roofing.png	Image	23	Uploads\Roofing.png	11/05/2018
<input type="checkbox"/>	Plumbing.png	Image	18	Uploads\Plumbing.png	11/05/2018
<input type="checkbox"/>	Pest Control.png	Image	32	Uploads\Pest Control.png	11/05/2018
<input type="checkbox"/>	Painting.png	Image	14	Uploads\Painting.png	11/05/2018
<input type="checkbox"/>	MovingDelivery.png	Image	18	Uploads\MovingDelivery.png	11/05/2018
<input type="checkbox"/>	Lighting.png	Image	16	Uploads\Lighting.png	11/05/2018
<input type="checkbox"/>	Electrical.png	Image	11	Uploads\Electrical.png	11/05/2018

Page Size 25

DONE

CANCEL






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.*

TASKS						
Step	User	Task Type	Done?	Asset	Name	Description
= 1	Brett Hewitt	Instruction				change light
= 2	Brett Hewitt	Instruction	Done		cleanup	cleanup

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.


Task

Step: *

3

☐ Done

User:



Name:

Task Type:

Instruction


Description:


B


/


U

REC










Document:



Save

Cancel