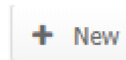
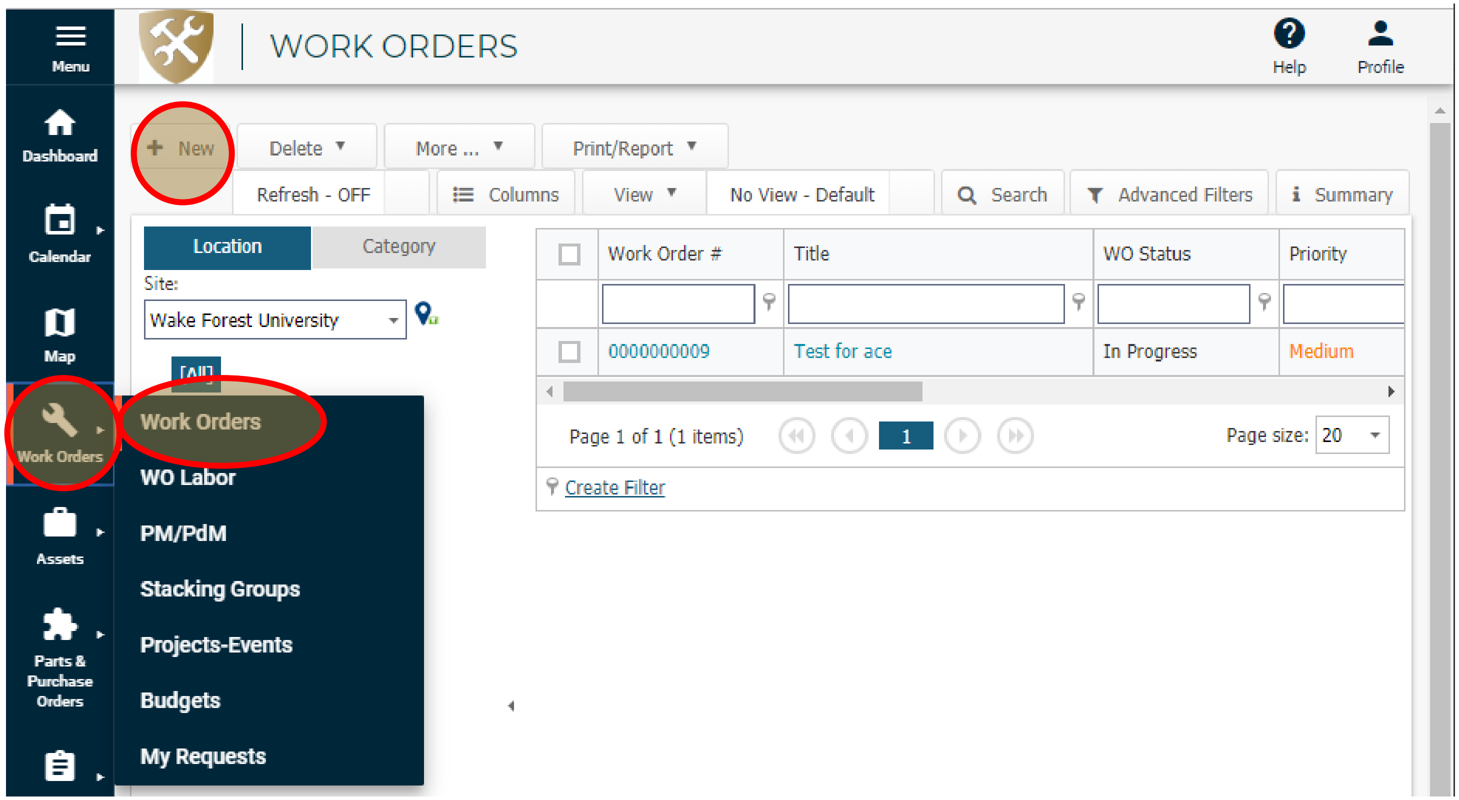
How to Create a Work Order

- 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.

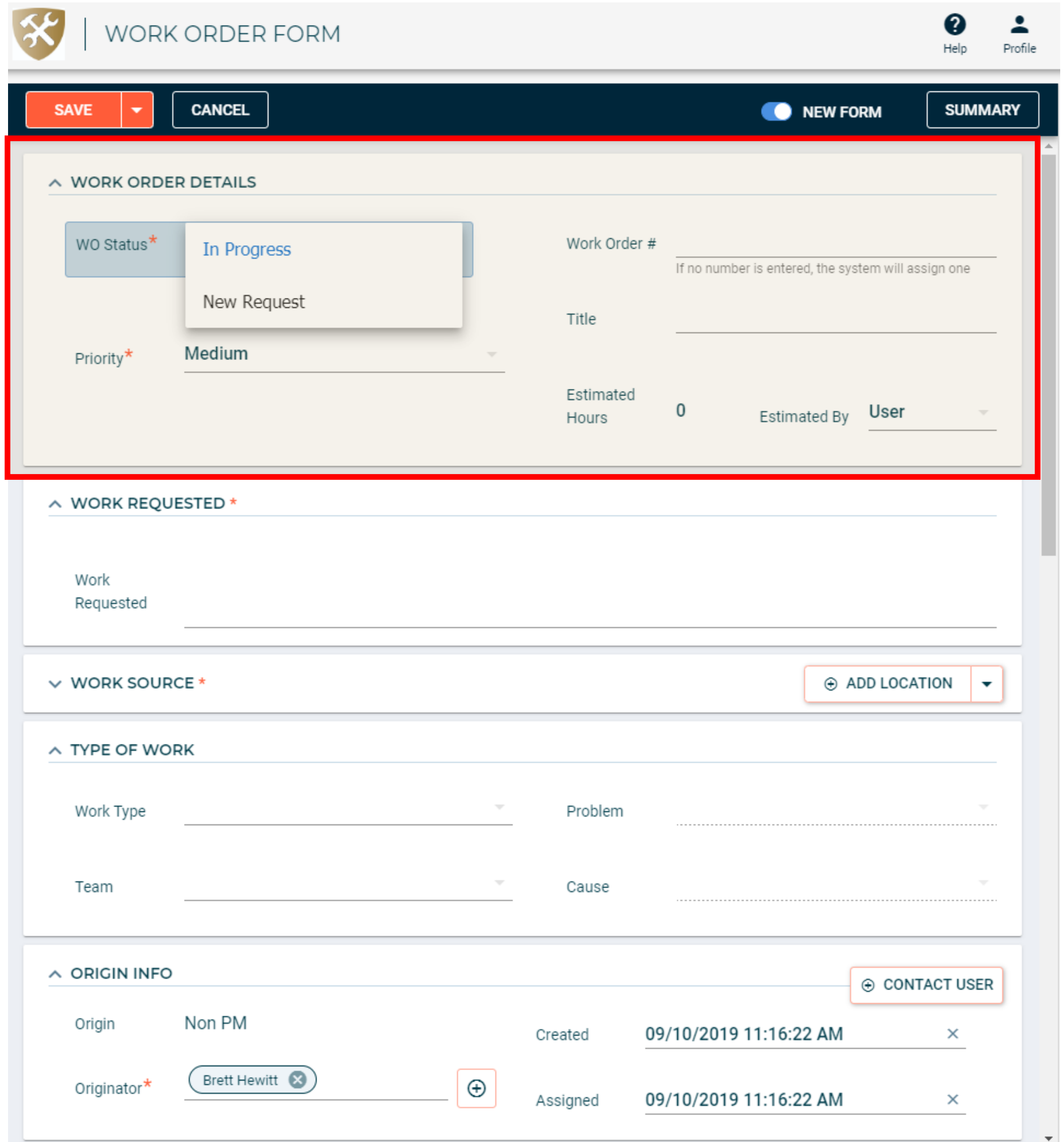
- Select the appropriate **WO Status***. A new Work Order will have a status of "New Request" Change the WO Status to "New Request"

- 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 #**.

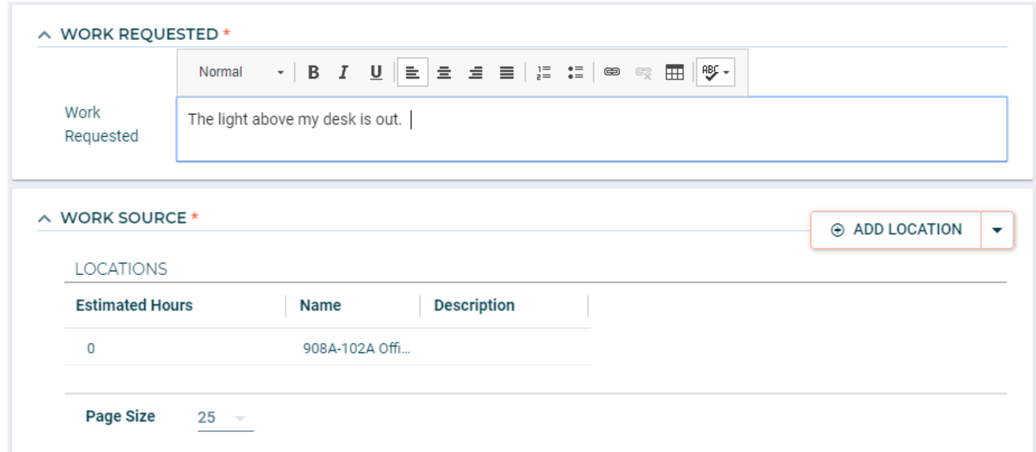
- Enter a **Title** for the work order, this should be a brief summary of the type of work to be completed.

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



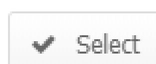
WORK REQUESTED*

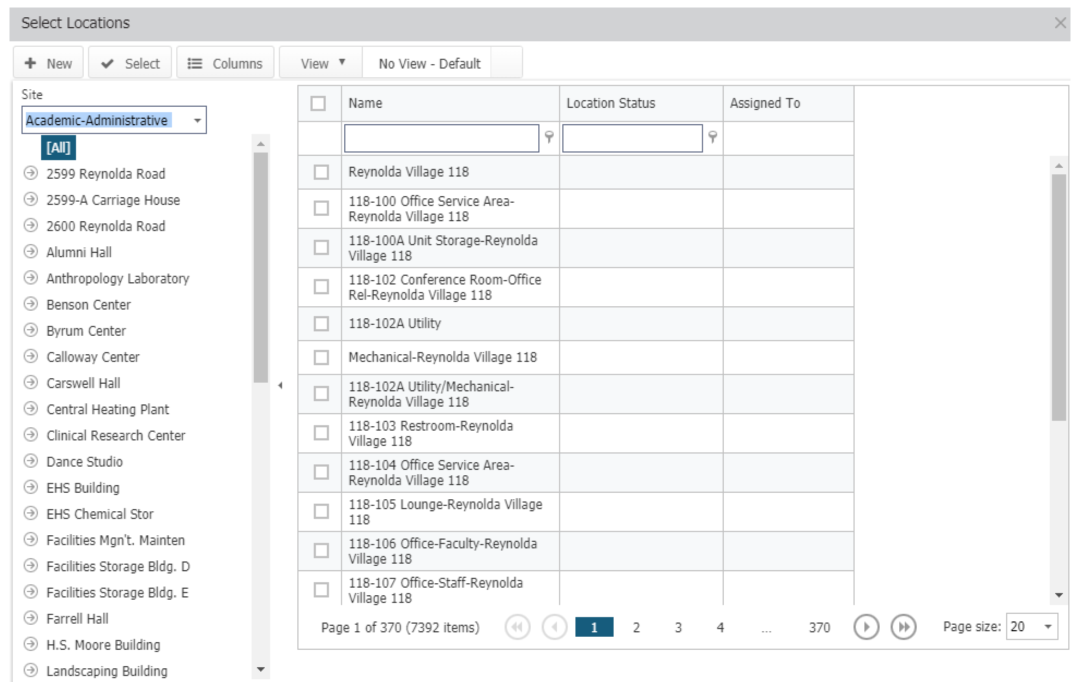
- Fill out a description of the **Work Requested.** This should be a detailed account of the work that needs to be performed in order to fulfill the request.



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

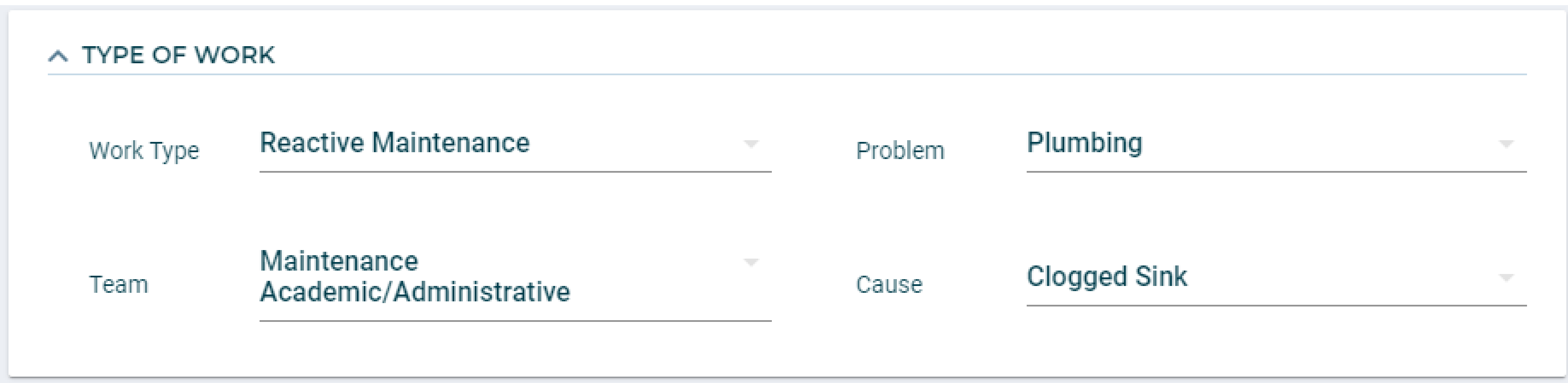




TYPE OF WORK

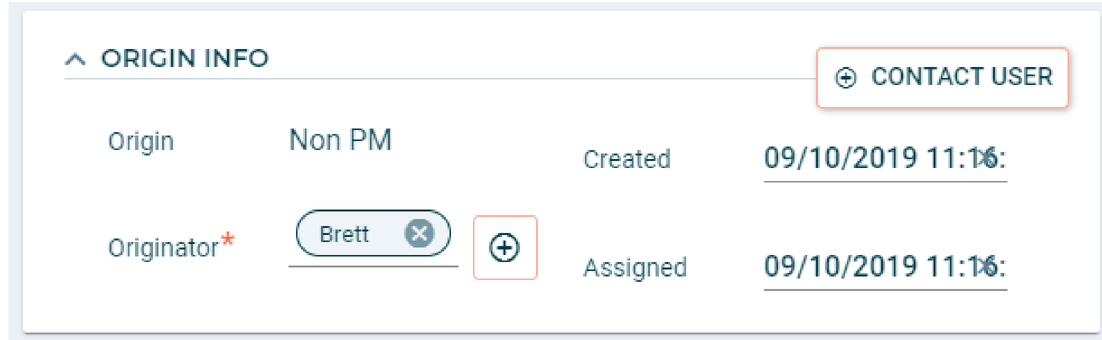
Select a **Team**, **Work Category**, **Problem**, and **Cause**, if known. **Note: Certain Work Categories may trigger Custom Fields to appear on the work order form.*

- **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

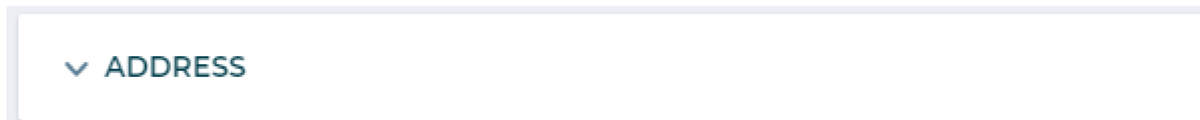
- The **Originator*** field is automatically populated with your name. If you need to select another user as the Originator, click on the plus sign (⊕).
- To delete the **Created** or **Assigned** dates, click the 'x' next to the appropriate field.
- To modify the **Created** or **Assigned** dates, click 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.

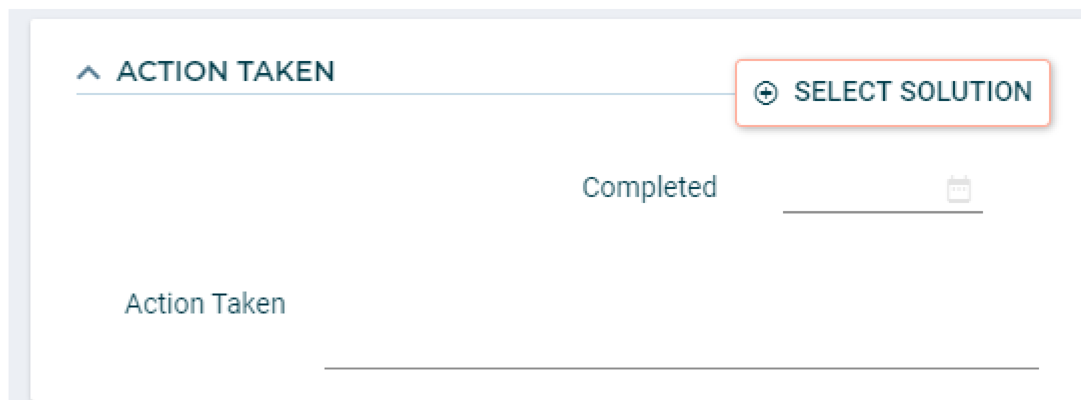
ADDRESS

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



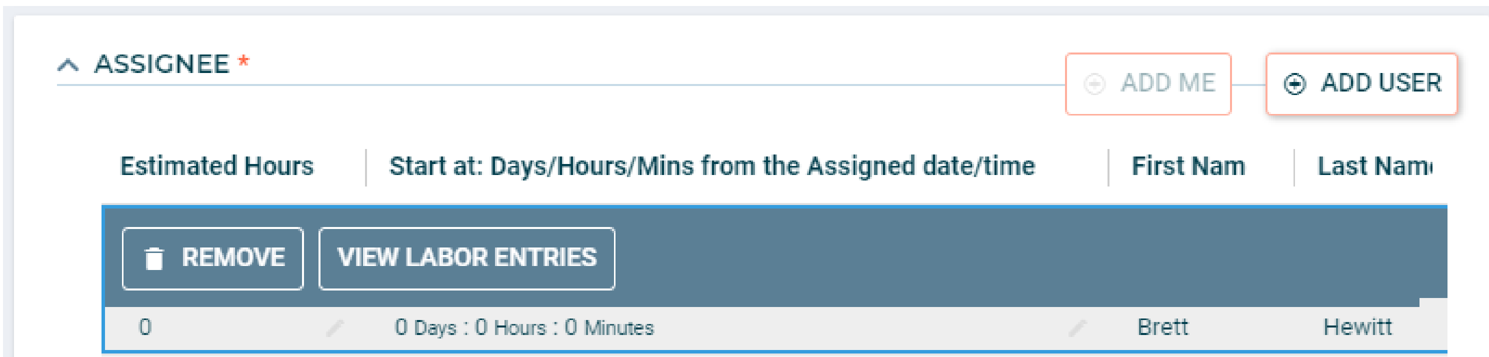
ACTION TAKEN

- 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.



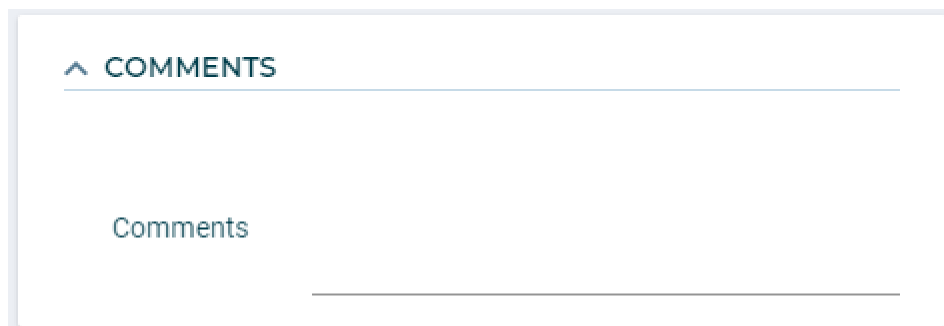
ASSIGNEE

- **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.



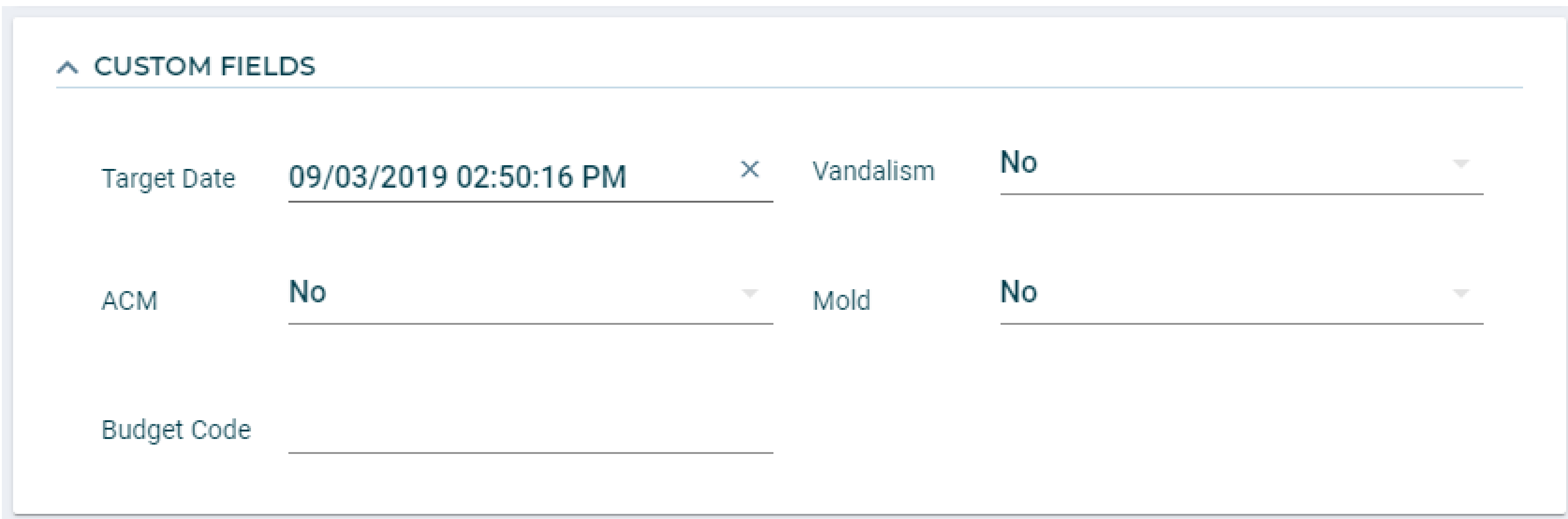
COMMENTS

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



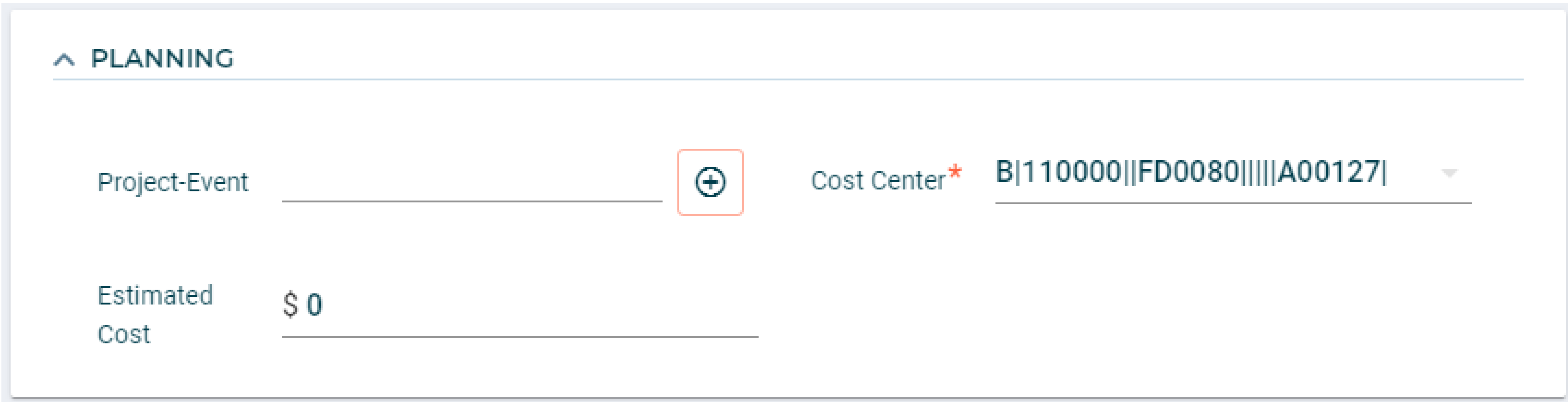
CUSTOM FIELDS

- **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.*



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.

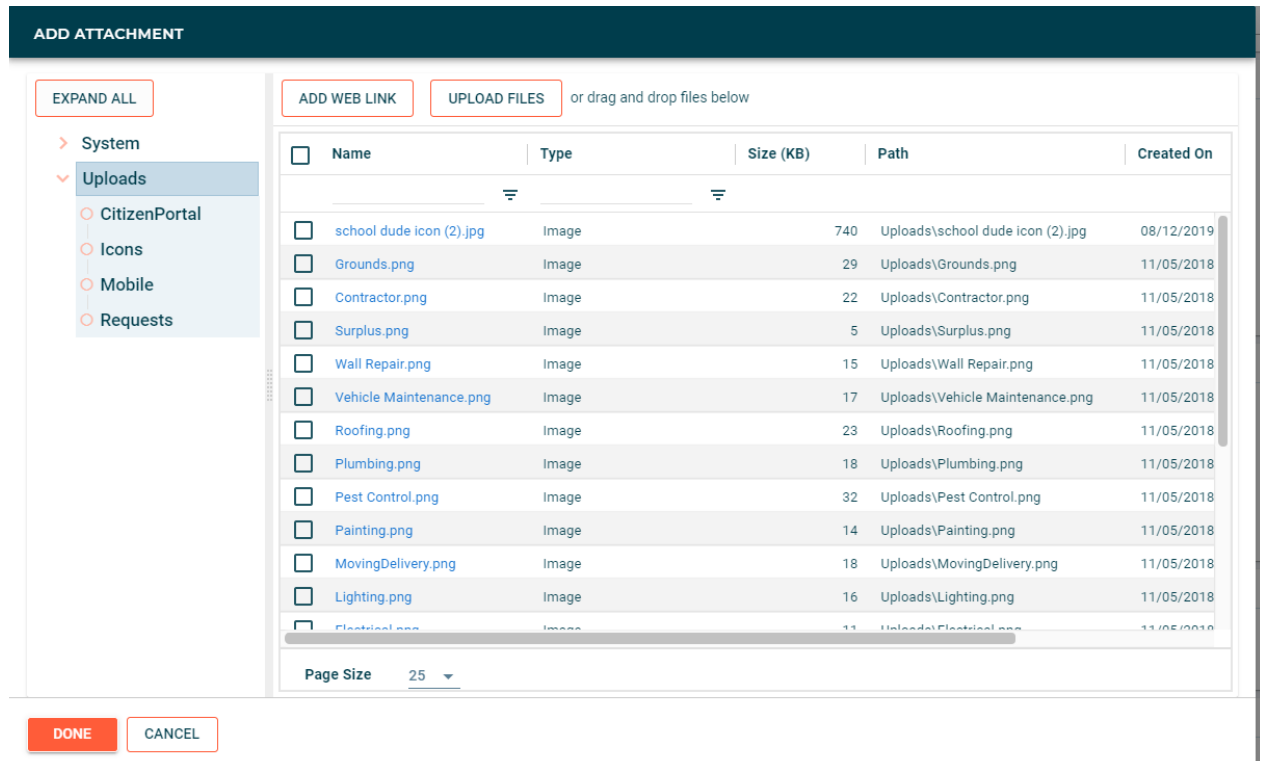


- Enter a **Project-Event** if applicable, and any estimated costs.
- Enter the appropriate Cost Center* which map directly to the workday FDM fields for integration purposes. ***Note: Cost Centers default from the location/asset chosen and need to be updated if the work order is Billable.***

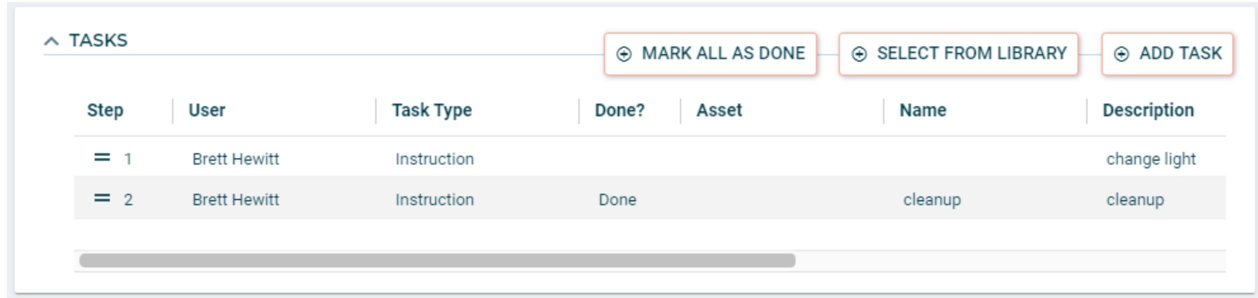
ATTACHMENTS

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.