Entering a Work Order: Managers and Requesters

Managers and Requesters share the same new request form. As you view the form from each role, you will see a few slight differences in the order of the fields. There are some fields on the form that can be hidden depending on how the administrators have set up the account. Some of the fields shown here may or may not appear in your account. There may also be additional fields that are not shown here.

**Fields that are marked with a red check mark are required fields.*

- Managers will click on the **New Request** tab to begin entering a work request. Requesters will click on the **Work Order** tab.

- Identify where the work needs to be done by choosing the **Location**. You will only be able enter new work orders for your assigned locations.
- If your organization utilizes the **Bldg./Unit** field, select one from the drop down box.
- If applicable, choose the general **Area** type that best fits the location of the work request.
- Enter the specific area in the **Area Number** field if applicable. (The Area Number field is alphanumeric and is where you can enter specific room names or numbers.)
- Select the **Priority** of the work order.
- Select the appropriate **Problem Type** to identify *what* type of work is being requested.
- **Please describe your problem or request** in the open text box.

- Depending on how your account was set up, the remaining steps on your form may vary. You may see some, all, or none of the following steps. Be sure to complete any required steps indicated with a red check box .

- **Time Available for Maintenance**: Type in the best time for a technician to come by.
- **Purpose**: Click on the drop down box and select a Purpose Code that best describes why this work is needed.
- **Requested Completion Date**: Use the calendar to select a date that you wish for the work to be completed by.
- **Budget**: Select the budget code that will be used for costs allocated to complete the request.
- **Attachment**: Click the Attach New File link to attach a photo or document detailing the issue.

- **Contact Information** will automatically populate based on your participant information.
- Managers will see an **Action Taken** field at the bottom of the form. In most cases, they can leave this field blank. Enter information here if any work has already been completed for this request.
- Click **Submit** to save the work order.