

- Click on the **New Work Order** tab.



- In the **Status** drop down box, choose **New Request**. **Note: If entering a work order that is already in progress or has been completed, you can choose the appropriate status.*
- From the **Priority** drop down box, select the appropriate priority.
- Identify where the work needs to be done by choosing the **Location**.
- If your organization utilizes the **Building** 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.)
- The **Request Date** will automatically populate with today's date. **Note: If entering a work order that has already been completed, this date can be changed to the date of the actual request.*
- Checking the **Emergency?** check box along with setting the Priority to Emergency, will make this work order appear in the Work Center section of the homepage as an emergency work order.
- Enter the complete **Request Description** in the open text box.

Add/Update Work Order

Work Order: NEW

Save Reset Route To IT Incident

Status New Request

Priority Medium

Status Date

Created By
Dude Learn

Date Created

Request Info

Location
ABC High School

Building
<-- Select Building -->

Area
Bathroom

Area Number
2nd floor Women's Bathro

Request Date 3/13/2017

Emergency?

Request Description
Please check the sink, there is a small leak.

- Identify the name of the requester in the **Contact Info** section. If the requester's name does not appear in the drop down list, choose OTHER and enter the requester's first name, last name, and email address. **Note: This will add the contact as a requester.*

Contact Info

Name
(Select "OTHER" if requester not in list and type their name in field below.)

Beal, Betty

First Name
Betty

Last Name
Beal

Email
betty.beal@schooldistrict.edu

Phone

Pager

Cellular Phone

- As an Administrator or Supervisor, you can either directly assign a work order to yourself or to another user in the **Assigned To** drop down box or you can leave the drop down box empty for the work order to follow automatic routing rules.
- Fill in the **Target Start Date, Requested Completion Date, Target Completion, Estimated Costs, and Estimated Hours.** **Note: These are all optional fields.*

Assignment Info	
Assigned To -- Select Assignee -- ▼	
<input checked="" type="checkbox"/> Route for approval or review?	
Target Start Date 3/13/2017	Requested Completion <input type="text"/>
Target Completion <input type="text"/>	Actual Completion <input type="text"/>
Estimated Costs 0.00	Estimated Hours 0.00
Actual Costs: 0.00 (Note: Actual costs exclude tax amounts.)	Actual Hours: 0.00
Total Costs: 0.00	

- Choose the **Purpose Code** that best describes why the work order is being requested.
- Select the appropriate **Craft** to identify what type of work is being requested.
- If your organization is utilizing **Budget Codes**, the **Custom Category, Projects, Equipment, or Classifications** and **Types**, identify any of the codes by clicking on the drop down boxes.
- Click **Save**. The work order will now be assigned a work order ID number.

Budget Info	
Purpose General Maintenance ▼	Craft Plumbing ▼
Budget -- Select Budget Account -- ▼	Custom Category -- Select Custom Category -- ▼
Project -- Select Project -- ▼	Equipment <-- Select Equipments --> ▼
Classification <-- Select Classification --> ▼	
Type <-- Select Type --> ▼	
▶ Back to Shortcuts	
◀ Prev Next ▶	
<input type="button" value="Save"/> <input type="button" value="Reset"/> <input type="button" value="Route To IT Incident"/> <input type="button" value="Print Form"/>	