Work Requester Module – User Guide

The Work Requester module operates in conjunction with the FrontLine Maintenance module utilising the listings and look-up tables created within the maintenance module.

The licence allows an unlimited number of users (on a single local area network) to raise and log breakdown requests directly into the Maintenance module. These requests form the basis of a Work Order thus reducing the administration burden and improving the quality of the data returned.

This electronic method of recording work requests is designed to replace existing work request docket systems or those email and telephone calls that occur at the most inconvenient times. For the person making job requests it provides them with the comfort and knowledge that all of the work requests are being logged and not forgotten, along with a level of automated feedback on job status changes as work is started and completed. Gone is the need for Requesters to chase people to find out what is happening!

This guide has been put together to take you through the setting up followed by instructions on how to operate the Work Requester module. Having successfully installed the application on each of the "Work Requesters" PC's the Work Requester desktop icon will appear (below).

"Double click" on the icon to open the module.

We are using the demo dataset for the purposes of this guide and the series of screen shots show you the information presented along with your required inputs, from logging on, through to using this application.

Click on the Evaluation button highlighted in green on the first screen shot, Select Demo Data highlighted in Blue and then click the Next button highlighted in green on the second screen shot. This will take you to the log on screen, the evaluation mode ONLY requires you to type in the word **SUPERVISOR** in the User Name field highlighted in red and leave the Password field highlighted in green **BLANK,** as illustrated on the third screen shot.
(See Fig. 1)

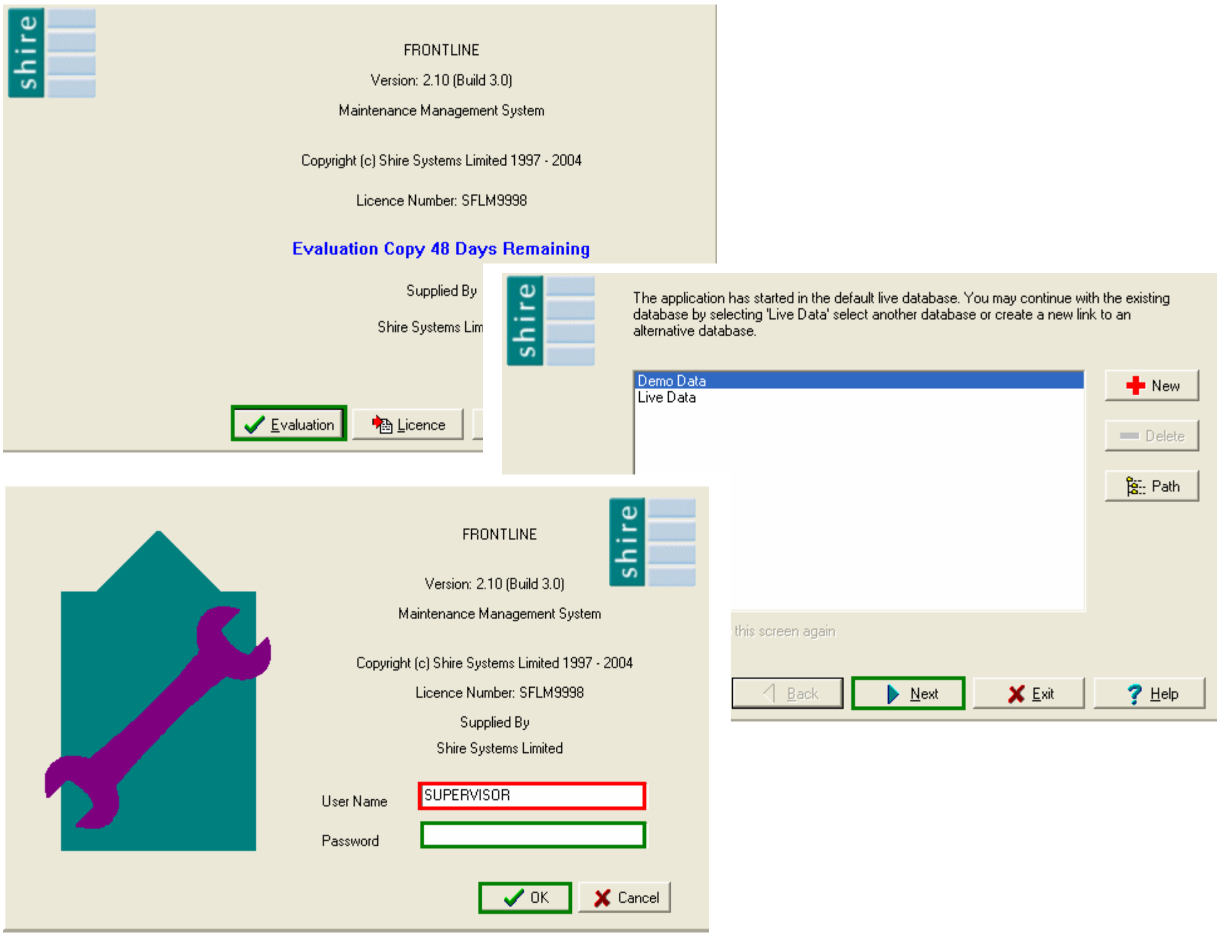
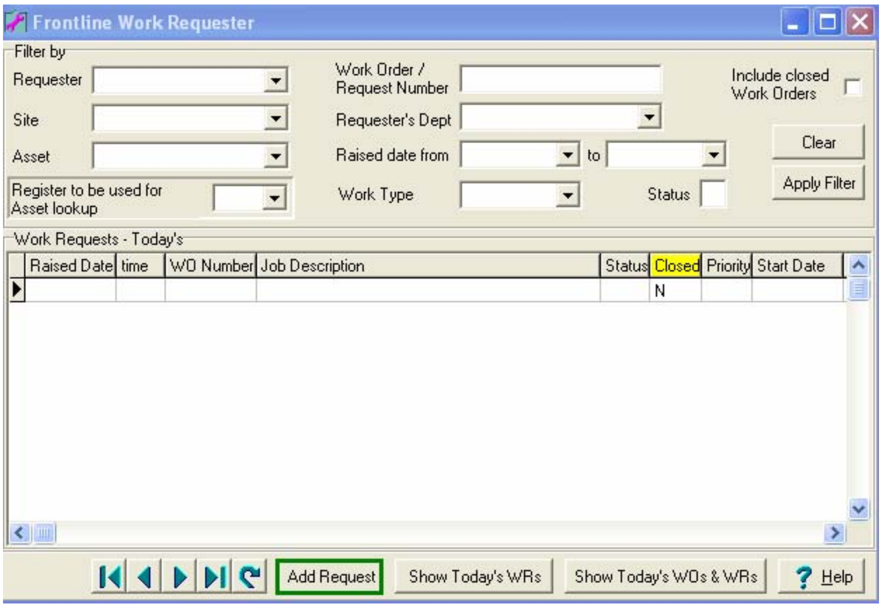


Fig. 1

This screen will now appear – to add a request click on the Add Request Button highlighted green (See Fig. 2)



The "Enter Work Request" form opens – The Work Request is identified by its own unique Request number, this is automatically generated for each new request (R0114 in our example). We have also set up for the logged-in user information to be carried through from the Personnel section in the Maintenance module (System Option setting). You will notice that several of the fields are shaded blue; this indicates that an input of information is required for each of these fields (mandatory information). Again this is a System Option setting where **you** can set the highlighted fields **you** require to be completed. (See Fig. 3)

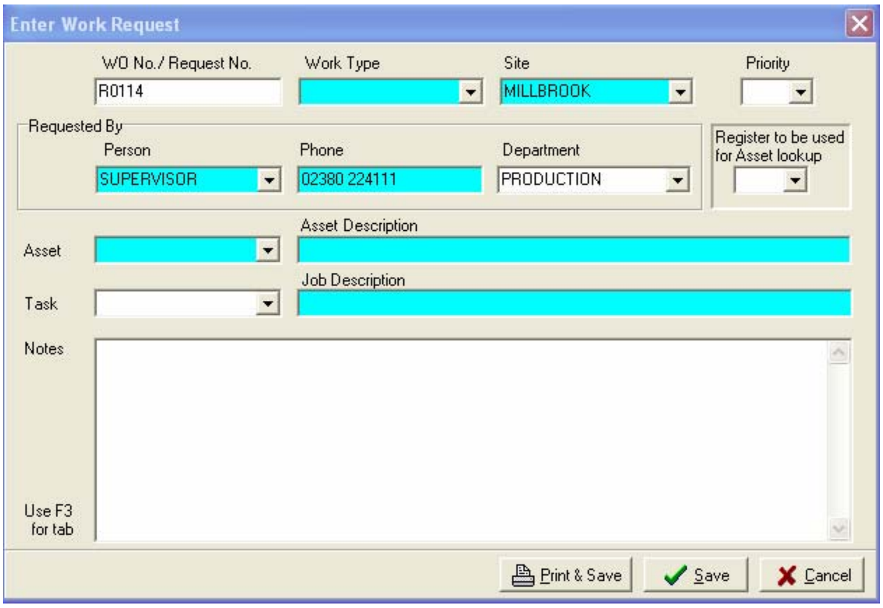


Fig. 3

Information is filled out using the drop down boxes/look-up tables; these tables draw their information from the data entered in the Maintenance module.
One of the key fields required is Asset Number – This can be entered by clicking on the dropdown arrow to reveal a table of all the Assets on the selected site (first screen shot, showing an unrestricted view of assets). To improve the accuracy and speed of identifying the Asset, within the Maintenance module you are able to "**tag**" Assets to a "Register" (second screen shot – highlighted in green). By using the Register field it will restrict the Asset lookup table in the "Enter Work Request" form (third screen shot – highlighted in green). Within the Maintenance module the register field can be determined as a process line, area, equipment type, department etc. In our example, we have grouped together all the Forklift Trucks into a Register called "Fork". (See Fig. 4)

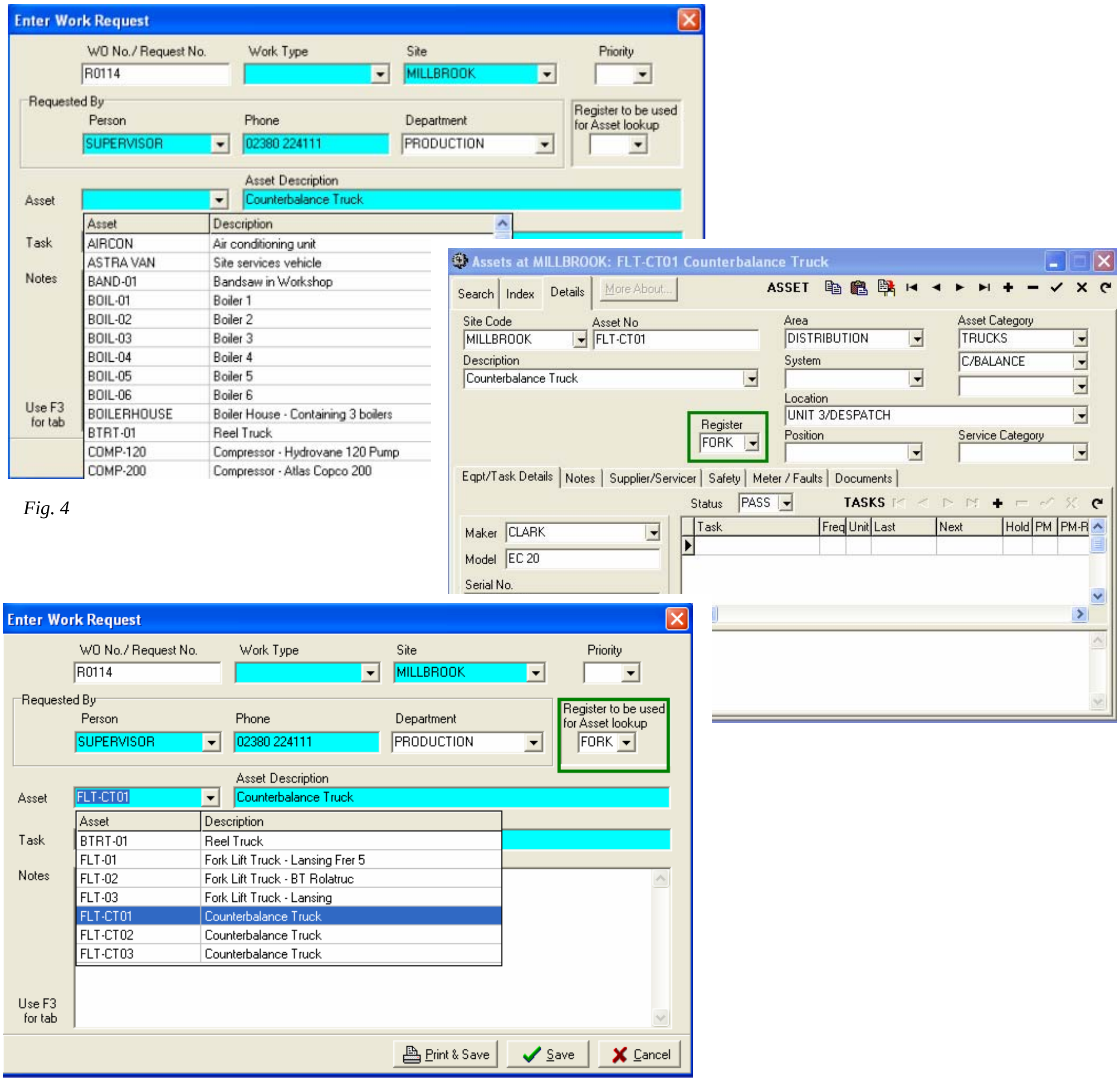


Fig. 4

The Maintenance module allows you to create within the "Task" section not only planned tasks but also a user defined breakdown library of the most common occurring faults on your site. These tasks can be identified and marked as "Available for Work Request" within the main system. The task information can also include job priority, work type, notes and trade, required to carry out the task. (Highlighted in green, in the first screen shot).
The second screen shot illustrates the data in the previously identified fields. Further notes can be added if necessary and with all "Mandatory" fields completed the request is now ready to be sent to the FrontLine Maintenance module. By clicking on the Save button (highlighted in green, on the last screen shot) the job is sent to the Maintenance module. Alternatively, it is possible to click on the Print and Save button (highlighted in red) this will send the job to the maintenance module as well as producing a paper record for you to keep/file. (See Fig. 5)

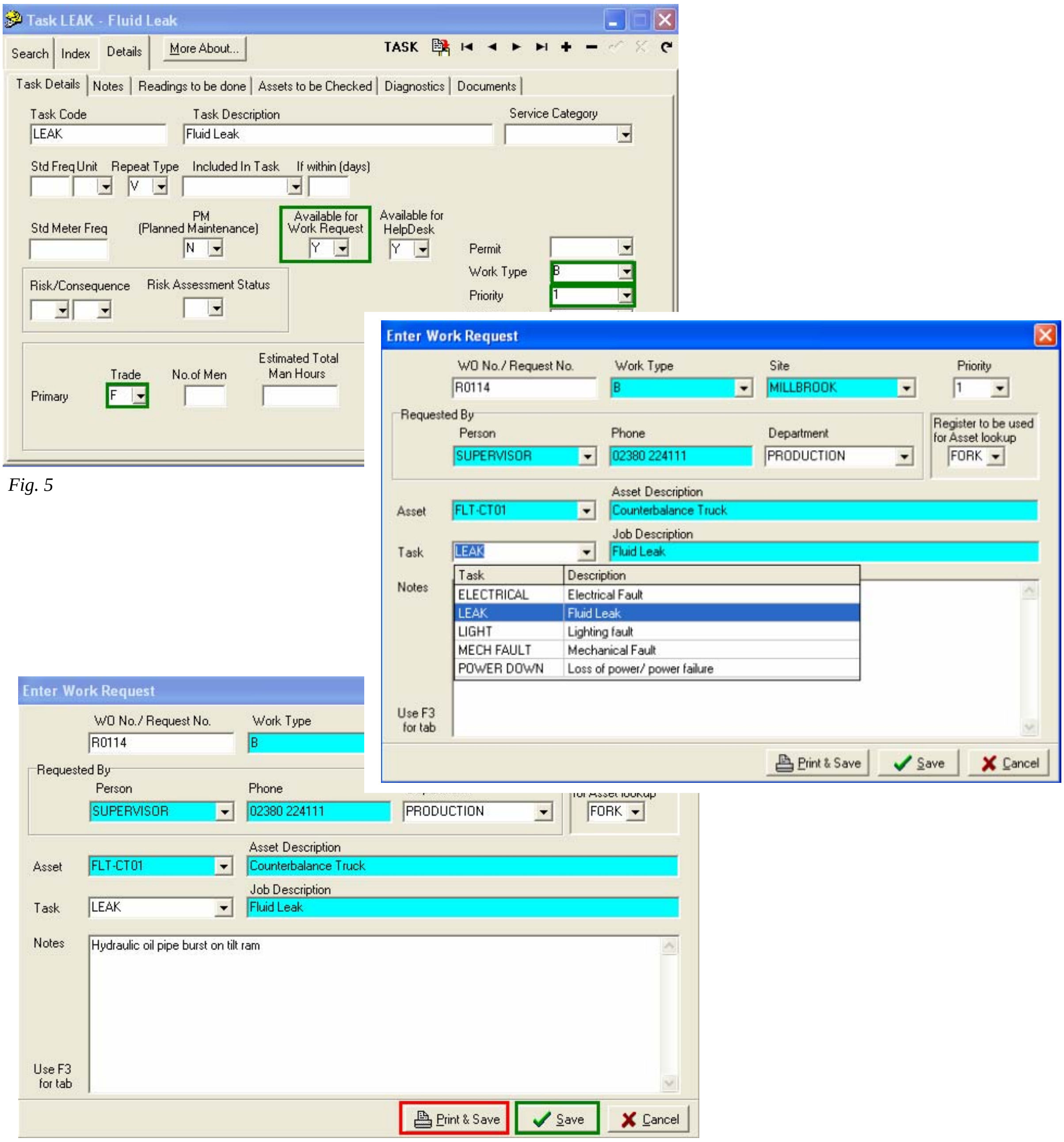


Fig. 5

From the “File” menu in the FrontLine Maintenance module it is possible to launch the “Work Request Alert”. When launched, it can be set to pop-up every time a new Work Request is entered onto the system. Once alerted, the screen can be minimised. As jobs are completed, they are automatically removed from the “pop-up” Work Request Alert.
(See Fig. 6)

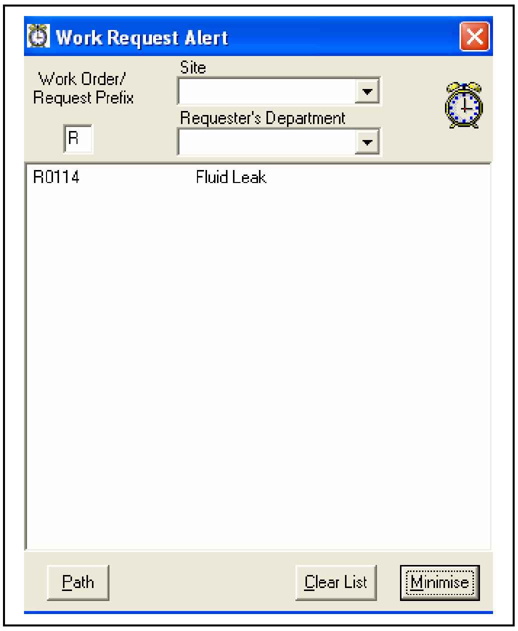
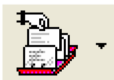


Fig. 6

To check for the jobs that are arriving from the Work Request module go to the “Work Control” section in the Maintenance Module.



Using the “Status” field in the “Search” criteria screen click on the drop down arrow and select “R” Work Requests from the table. Click the OK button (highlighted red) to confirm the entry and then click the OK button (highlighted green) to initiate the search. (See Fig. 7)

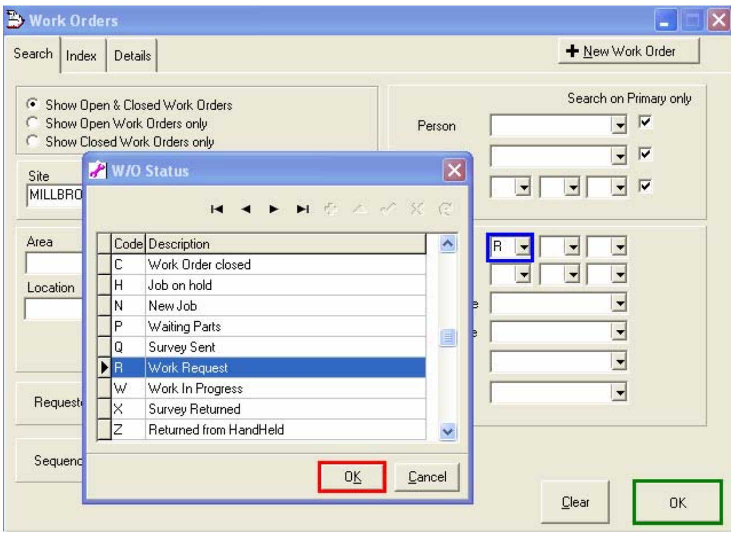


Fig. 7

In the “Index” (Spreadsheet) view you will see all the outstanding Work Requests (Jobs Requests are further identified by Blue text). By selecting or double clicking on a specific Request you will open the “Detail” view. Information from the Work Request is automatically populated on the new Work Order detail. (See Fig. 8)

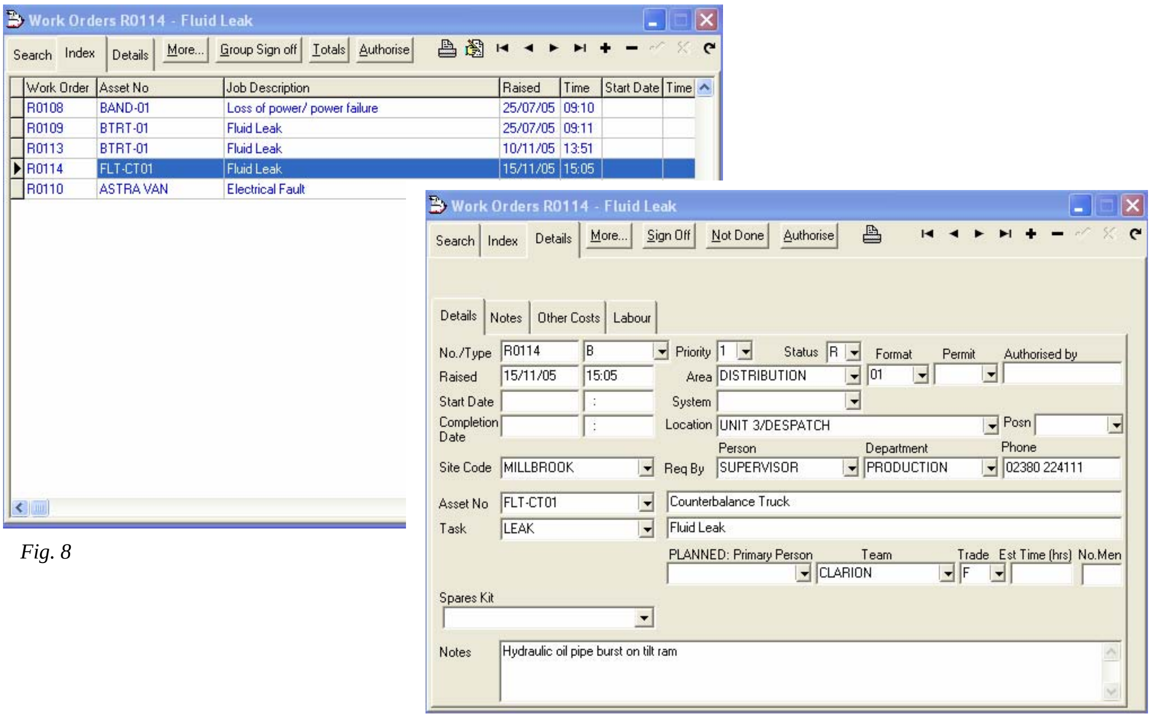


Fig. 8

If satisfied that this is a valid Request, the job can be allocated and authorised. Further details can be added/amended at this stage (start time, change of priority, planned person/team/trade, additional notes/work instructions etc.).To open the “Authorise” screen click on button highlighted in red and then OK to confirm, (highlighted in green). The new Work Order can now be printed, left on the screen ready for further information to be added or even output to a hand held PDA device. (See Fig. 9)

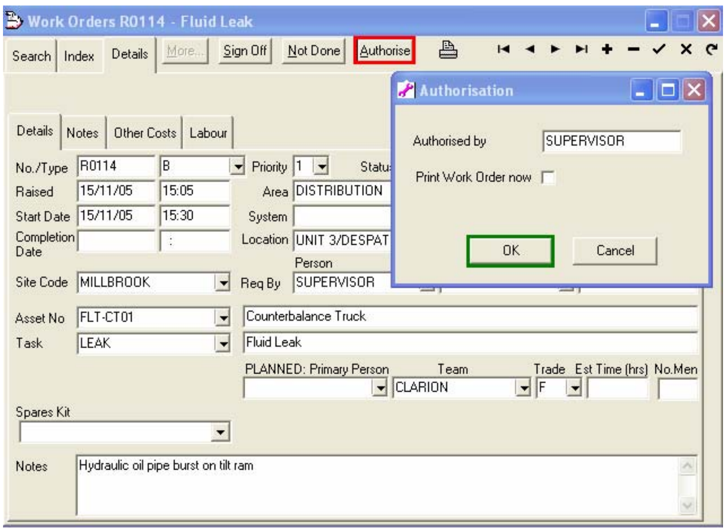
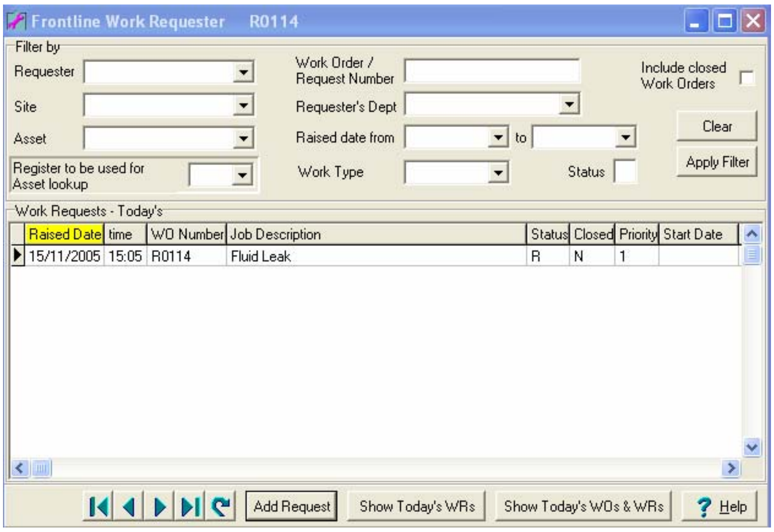


Fig. 9

With the Work Order Status now changed to New Job "N" this information is automatically fed back to the Work Request module where you are able to view the status of this and any other outstanding jobs. From the review screen in the Work Request module, the "requester" has the ability to review their own raised jobs or all jobs raised across the site ("User Profile" option setting). The Requester is unable to change any of the details previously recorded. The screen shots below show the level of feed back that a job requester would receive. (See Fig. 10)



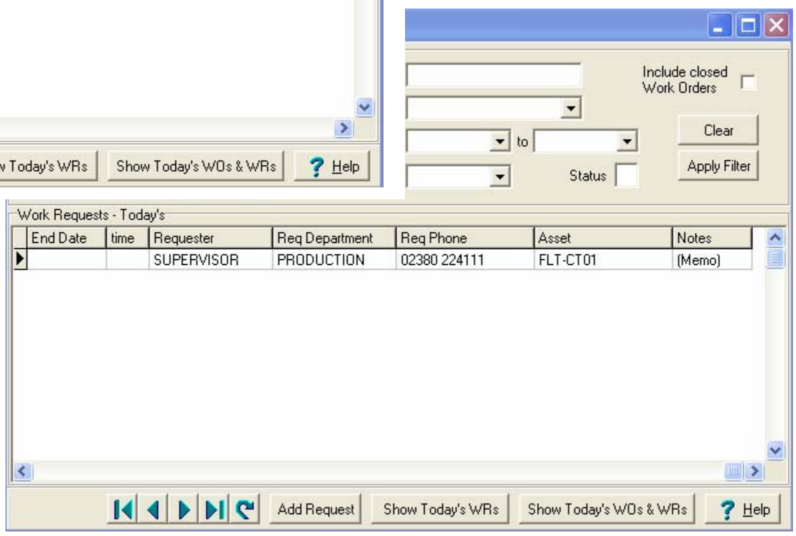


Fig. 10

When the job has been completed and the Work Order "Closed" (status "C"), the details are automatically updated within the Work Request module. In the second screen shot you can see this updated data (highlighted in blue). The last screen shot shows the expanded memo/notes field – double click on the word *memo* in the appropriate record this will allow the "requester" to "read only" the Work Order and Job Sign Off notes (See Fig. 11)

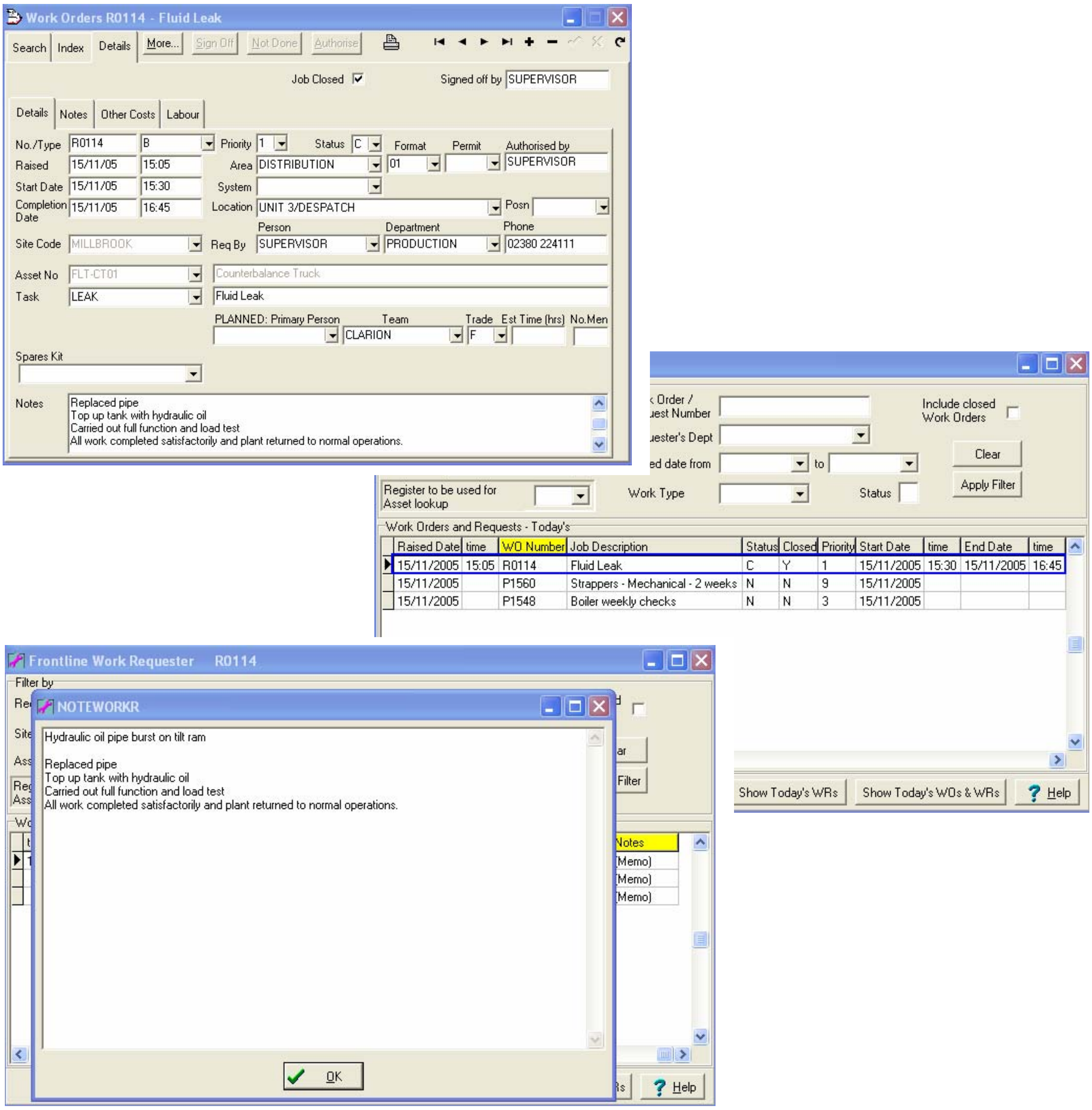


Fig. 11

Finally, from the Work Request module the "work requester" is able to filter Work Orders/Work Requests by any of the search fields identified in the section highlighted in red below (Filter by). The results are displayed for review. (See Fig. 12)

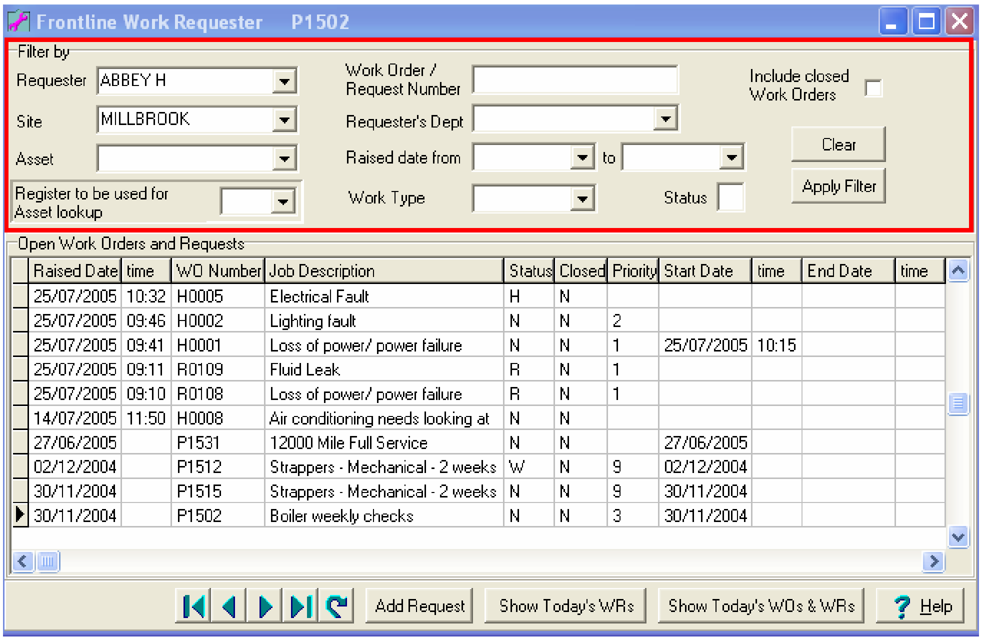


Fig. 12