WORK ORDER MANAGEMENT

CREATING A WORK ORDER

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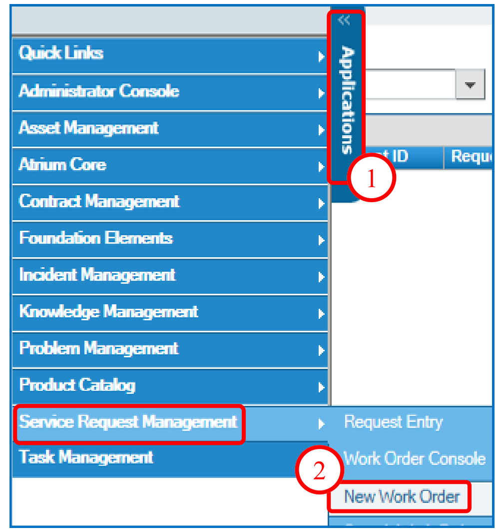
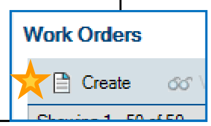
Remedy ITSM comes with a new type of ticket: Work Orders (WOs). They provide an easy way to request work without submitting a Service Request. While Incidents are used for "break-fix" scenarios, Work Orders are used for other types of work.

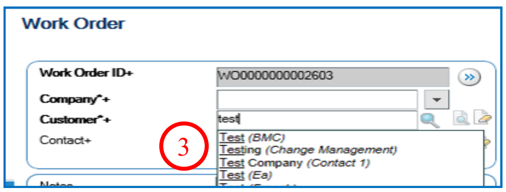
Creating a WO in Remedy ITSM is very similar to creating an Incident:



1. Select **Applications**
2. Choose **Service Request Management**, and then Select **New Work Order**. The work order form will open in *New* mode.

> ***Tip:** You can also create a WO from the WO console. Just hit the **Create** button at the top of the console..*



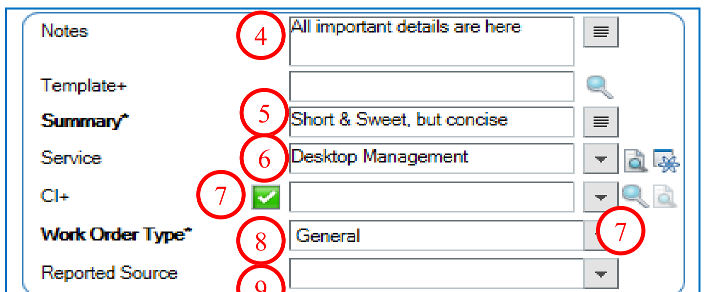


Populate the WO with the pertinent information:

3. In the **Customer*+** field type the requester's last name, and select the appropriate one from the list.

> ***Tip:** You can also search for the customer using the **Advanced Search** option*

4. Add the **Notes.** Include all relevant details.
5. Type in a **summary**. Be brief but concise: <u>this is what will appear in the WO console</u>.
6. If you know it, pick the **Service** from the list (Based on Customer selected)
7. To view a list of the requester's *CIs* click the drop down arrow, or for a more detailed list, click. Select the appropriate CI from the list presented to relate to the work order. To see ALL details on the CI highlighted click

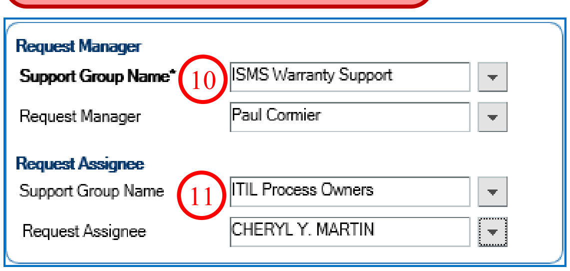


> ***Note:** Picking a service will populate the product categories on the classification tab.*

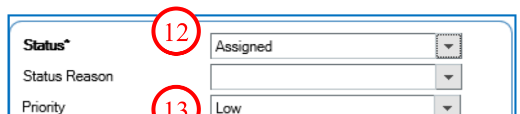
8. For **Work Order Type***, pick "General".
9. Select the **Reported Source** from the drop down.

> ***Tip:** Select a **Template+** to pre-populate several fields & save time. See next page.*

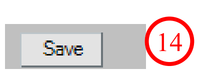
Next, you will need to assign and prioritize the WO.



10. Select a **WO Manager group** and individual if applicable.
11. Select a **WO Assignee group** and individual if applicable .
12. Pick a **Status*** from the list ("Assigned" by default)



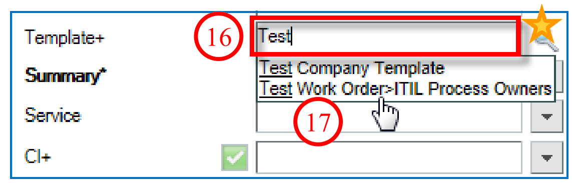
13. Select a **Priority**
14. Hit **Save**



CREATING A WORK ORDER FROM A TEMPLATE

You can use a template to create a work order. Templates automatically populate fields and make sure WOs are created consistently. They are very useful when certain WOs are used frequently.

15. Start creating your WO (see steps 1 and 2, previous page)
16. In the **Template+** field, type in a keyword that is part of your template name.
17. Select the template from the list.
18. The template fields are auto-populated on the WO.
19. Populate the other fields and save the WO as outlined on the previous page.



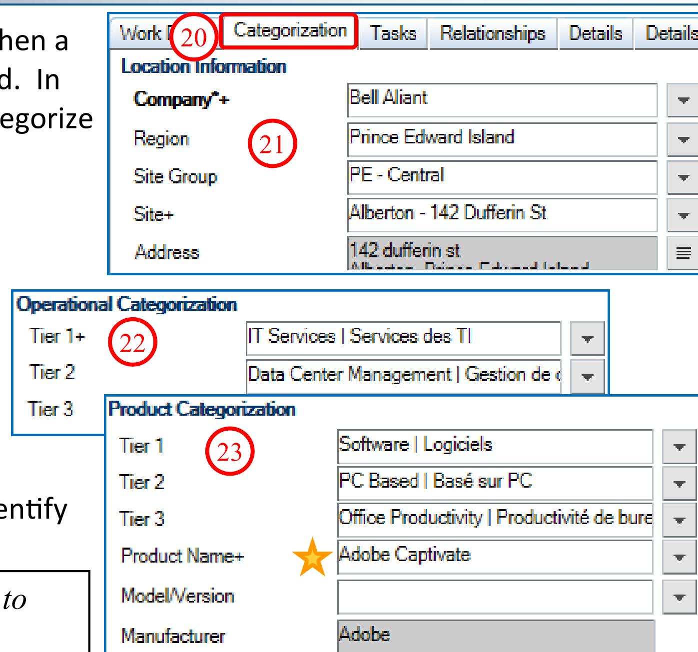
***Tip:** If you don't know the template name, use the **advanced search** option.*

***Note:** Templates will populate the most important info on the WO such as the summary, notes, tasks, assignment & categorization info. You may need to manually add some more info before saving your WO.*

WORK ORDER CATEGORIZATION

Work Order Categorization may be auto-completed when a WO template is selected and/or the Service is specified. In the event they are not populated, you will need to categorize the WO.

20. Select **Categorization** tab
21. **Company, region, site group, site and address** is pre-populated based on Customer selected.
22. **Operational Categorization** is a 3 tier model where you can specify the Portfolio (Tier1) & Service (Teri 2) impacted. Tier 3 is utilized to identify the activity being performed.
23. **Product Categorization** is a multi tier option to identify the impacted product.



***Tip:** Type in a **Product Name**+ and hit enter to populate the rest of the product categories.*

OTHER FEATURES

You can do other things when creating a WO, such as:

22. Add work info records (aka work logs) - this is covered in the "*Update & Complete WO*" Quick Reference Guide
23. Add **Tasks** to your WO—this is helpful if the WO requires several steps to be completed and you want to track them individually—this is covered in the "*Create Task*" Quick Reference Guide
24. **Relate** your WO to a CI, to an incident, change request or to another WO.
25. Add dates—this is covered in the "*Update & Complete WO*" quick reference Guide.
26. Note: The **Reported Date** is captured automatically and populated here when the WO is saved.

***Note:** The "Details, "Details 2" and "Additional details" tabs are **not used**.*