

# WORK ORDER MANAGEMENT

## UPDATING & COMPLETING A WORK ORDER (WO)

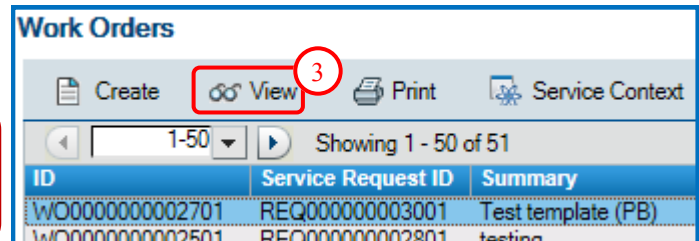
### FINDING A WORK ORDER

You can update work orders assigned to you or your group during its lifecycle. First, you need to find your WO in Remedy ITSM:

1. Select **Applications**
2. Choose **Service Request Management**, and then Select **Search Work Order**. The work order form will open in "Search" mode. You can then search your work order and view it.
3. Alternately, you can select it from the WO **Console** and then click the **View** button.




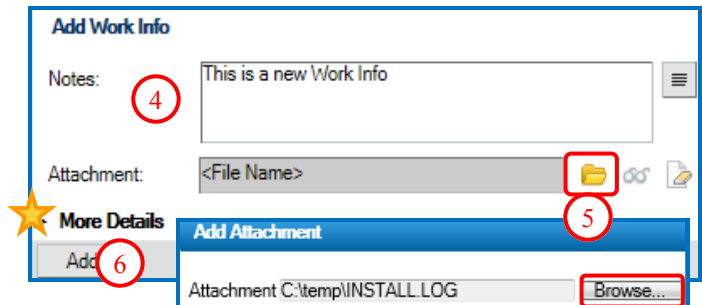
**Note:** To update or complete a WO, You must be a member of the WO Manager or WO Assignee group, and have WO User permissions.



### ADDING A WORK INFO (WORK LOG)

At any point in the work order lifecycle, you can add a work info to a work order.

4. On the Work details tab, add your update in the **Notes** field.
5. If you want to attach a file, you can do so in the attachment field. Select the  button and then **Browse...** to navigate to your file.
6. Then select the **Add** button.
7. The new Work Info is then displayed in the list on the Work Details Tab.



**Tip:** You can add additional attachments and select a Work Info Type by selecting the "More Details" option

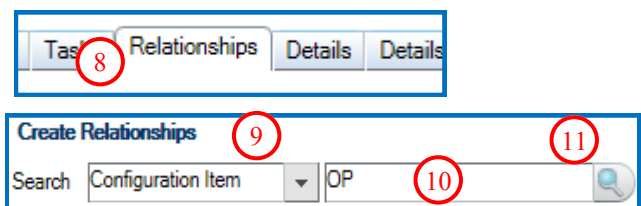


### RELATING A CONFIGURATION ITEM TO A WORK ORDER

To associate a CI to a WO, follow these steps:

To search for a CI to associate:


8. Go to the **Relationships** tab of the WO.
9. At the bottom, select **Configuration Item** from the list.
10. Enter part or all of the CI name of the CI you wish to relate to the WO.
11. Then click the **magnifying glass** button.

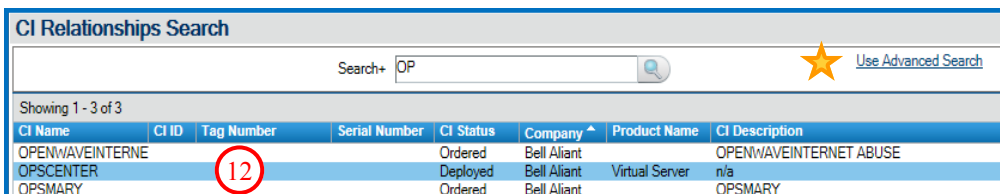


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## RELATING A CONFIGURATION ITEM TO A WORK ORDER

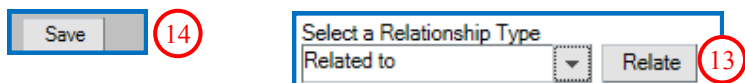
12. The system will open the CI Relationships Search screen, and show you a list of matching CIs. Select the one you want to associate.

 **Tip:** If you don't know your CI Name, use the **Advanced Search** feature to find your CI.



CI Name	CI ID	Tag Number	Serial Number	CI Status	Company	Product Name	CI Description
OPENWAVEINTERNE				Ordered	Bell Aliant		OPENWAVEINTERNET ABUSE
OPSCENTER				Deployed	Bell Aliant	Virtual Server	n/a
OPSMARY				Ordered	Bell Aliant		OPSMARY

13. At the bottom of the screen, select **Relate**. Click Ok on the confirmation message. You will be returned to the WO screen.

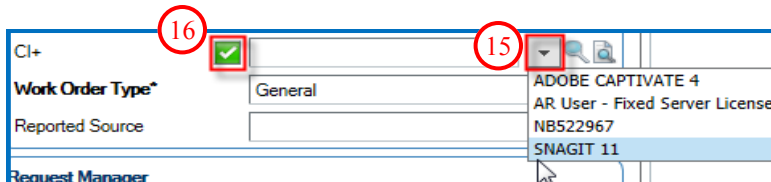


14. Click **Save**

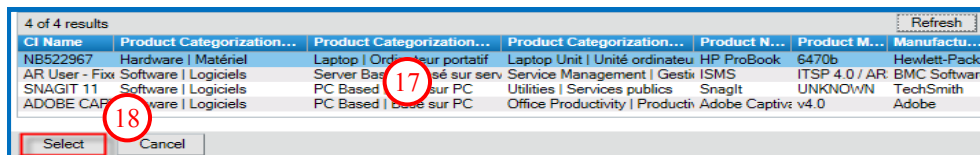
*To select from a list of the requester's CIs*

15. Click the drop down arrow next to the **CI+** field and choose from the list presented, or

16. Click  for a more detailed list.



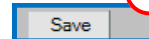
17. Highlight the appropriate CI from the list presented to relate to the work order.



CI Name	Product Categorization...	Product Categorization...	Product N...	Product M...	Manufactu...
NB522967	Hardware   Matériel	Laptop   Ordinateur portatif	Laptop Unit   Unité ordinateu	HP ProBook 6470b	Hewlett-Packard
AR User - Fixed Server License	Software   Logiciels	Server Base   Base sur serv	Service Management   Gestio	ISMS	BMC Software
SNAGIT 11	Software   Logiciels	PC Based   Base sur PC	Utilities   Services publics	SnagIt UNKNOWN	TechSmith
ADOBE CAPTIVATE 4	Software   Logiciels	PC Based   Base sur PC	Office Productivity   Product	Adobe Captiv v4.0	Adobe

18. Click **Select**

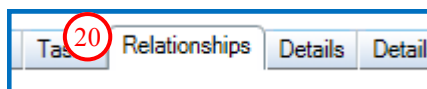
19. Click **Save**



## RELATING OTHER TICKETS TO A WORK ORDER

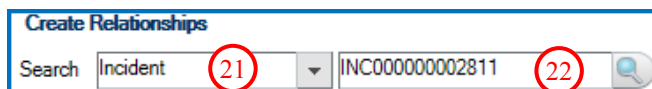
You can also relate incidents, infrastructure changes, or other work orders to a work order:

20. Go to the **Relationships** tab of the WO.



21. At the bottom, select the type of ticket from the list.

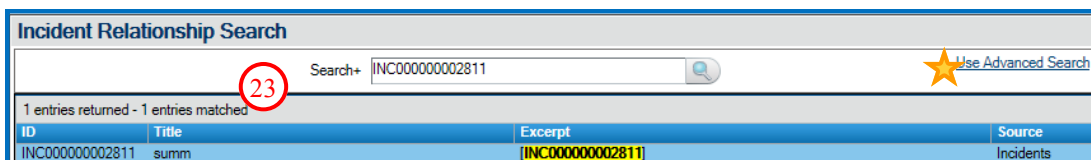
22. Enter the ID of the ticket you wish to relate to the WO. Then click the **magnifying glass** button.



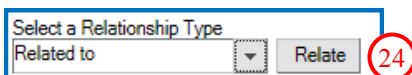
**Note:** You must enter the **entire ID** for the system to find your ticket. A partial ID will not return results.

23. The system will open the relationships Search screen with the matching record.

24. At the bottom of the screen, select **Relate**. Click **Ok** on the confirmation message. You will be returned to the WO screen.



ID	Title	Excerpt	Source
INC000000002811	summ	INC000000002811	Incidents




**Tip:** If you don't know your ticket ID, use the **Advanced Search** feature to find your ticket.

## MOVING A WORK ORDER THROUGH ITS LIFECYCLE (STATUS TRANSITIONS)

In the standard lifecycle of a work order, you will primarily use 4 statuses in the following order:

► **Assigned** → **In progress** → **Completed** → **Closed**.

Occasionally, you may also use the Pending and Cancelled statuses.

25. New WOs always start in **Assigned** status.

26. When starting to work on the work order, you will want to move it to **In Progress**.

27. When changing the status to **In Progress**, you should always enter a request assignee. This is normally the person doing the work.

28. When the WO is completed. You will change the status to **Completed**.

**Note:** If you change the status to **In Progress** or **Completed** without a WO assignee, a **Warning** message will be displayed.

29. When changing the status to **Completed**, you should select a **status reason**.

30. Once completed, the work order can be **closed**.

Status\* 30 Closed

Status Reason

**Note:** Closed is a final state. You cannot reopen a WO after it has been closed.

Request Assignee

Support Group Name ITIL Process Owners

Request Assignee 27 Test User Cindy

Status\* 26 In Progress

Status Reason

**Tip:** To provide a complete update, it is good practice to enter a **Work Info** when changing the status of a WO.

Status\* 28 Completed

Status Reason 29 Successful

**Note:** A WO cannot be completed if it has **open tasks**. All tasks must be completed 1st. Once all tasks are completed, the WO is automatically completed as well.

**Tip:** Remedy will **auto-close WOs after 7 days** of being completed. If you are not sure that a WO can be closed, you can leave it in completed status for up to 7 days in case you need to modify it.

## REASSIGNING A WORK ORDER

As the current WO assignee or WO manager, you can reassign it to another group and/or individual.

31. In the main section of the WO, select the Request Manager Support Group and the Request Manager's name if needed.

32. Select the Request Assignee group and name if required.

Request Manager

Support Group Name\* ISMS Warranty Support 31

Request Manager Paul Cormier

Request Assignee

Support Group Name 32 ISMS Warranty Support

Request Assignee Robert J Babineau

**Tip:** To provide a complete update, it is good practice to enter a **Work Info** when changing the status of a WO.

**Note:** Once you reassign a WO to someone else, you may no longer be able to modify it.



## NON-STANDARD PROCESS

Occasionally, you may need to suspend a WO (i.e. if waiting for info before you can complete the requested work).

33. To suspend a work order, simply put the WO in **Pending** status.

You may also need to cancel a Work order if it was created in error or is no longer a valid request.

34. To cancel a WO, change the status to **Cancelled**.

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35. Click **Save**

**Note:** If you change the status to **Pending** without a WO assignee, a **Warning** message will be displayed.

**Note:** Cancelled is a final state. You cannot “uncancel” a WO.

## UPDATING EFFORT & DATES ON A WORK ORDER

36. To specify scheduled or actual dates on your WO, go to the **Dates/System** tab, and enter your dates.

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37. The **Reported Date** will automatically be populated with the Submit Date and Time of the WO

38. To add effort on a WO, In the **Functions** menu, click on **Track Effort**.

39. Add or Update your effort and then close the window.

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**Note:** Refer to the “Track Effort” Quick reference Guide for more details on this feature.