Requestor Manual

CUNY

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Requestor Manual

Using the navigation on the right of the screen select Corrective Maintenance>Report Problem.
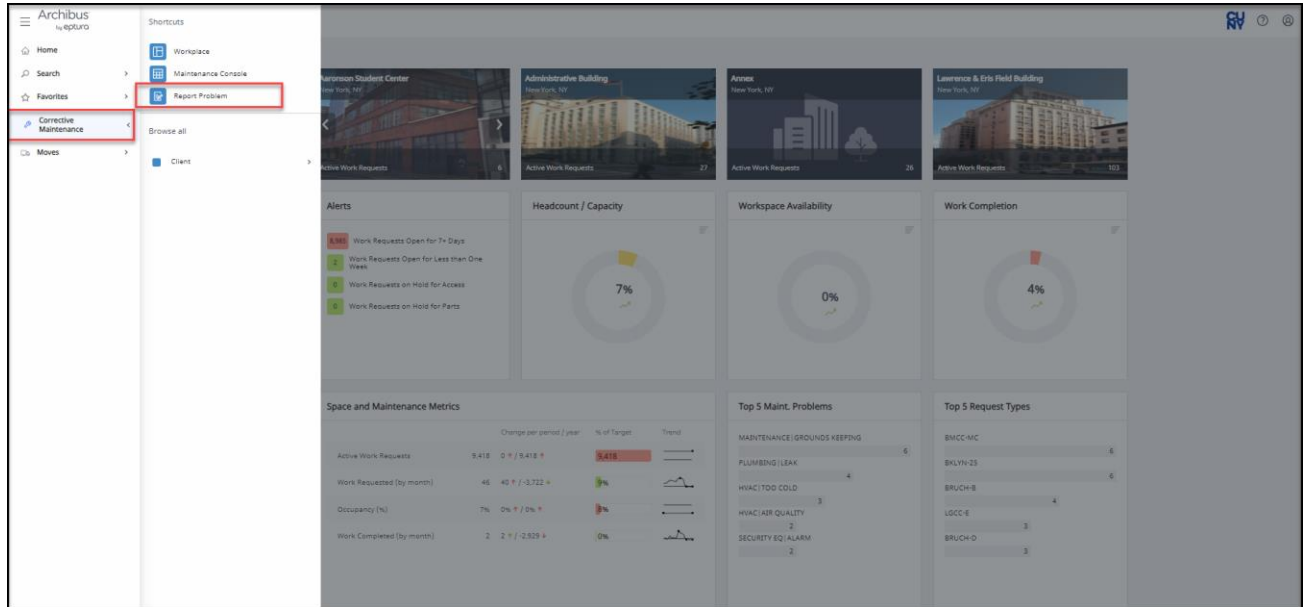

Maintenance Console Tips and Tricks

1. Navigator:
   a. Home: Presents the default home page for your role.
   b. Search: Presents a form for searching for the views by view title.
   c. Favorites: Presents your favorites list – A list of views that you have marked as favorites for easy access
   d. Navigator: The list of entries beneath the favorites entry represent the navigator – a tool for accessing the modules or application for which you are licensed. Expand a module or application to access it's processes and roles, which in turn present a list of tasks
   e. Shortcuts: For each module or application, the Shortcuts panel lists the tasks that are most commonly requested. Selecting a task from the shortcuts menu saves you from expanding a process or role and accessing the task from there
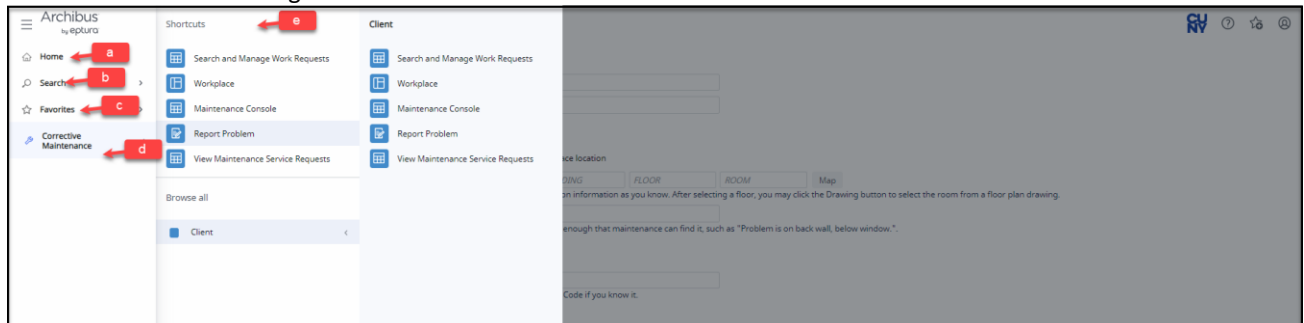
2. Hover over any box to look for "…" with your cursor. This lets you know that you **MUST** select this and choose from one of the select value options from the pop up.

Create Work Request

In the Report Problem page, there are 7 sections with information to create a Work Request.

1. Requestor
2. Location
3. Equipment
4. Problem
5. Description
6. Documents
7. Submit

1- Requestor

There are two name fields associated with every request:

Requestor – this is who you are creating the request for (this can be you or another person).

Creator – this is you. The person creating the request. You do not see this field on the web page – it is automatically filled in.

The field Requested By will default to your name. If you are creating the request for another person you will need to select the 3 dots on the right hand side of that white box and find the person you are requesting for. You will then select the "x" to clear out the selections.


When the selections have cleared there will be a full list of employees with a filter on the top for name, phone and employee standard. You can begin typing or scroll to search for the employee that you are requesting for. Once you

selected the employees name their information will display in the Requestor section.
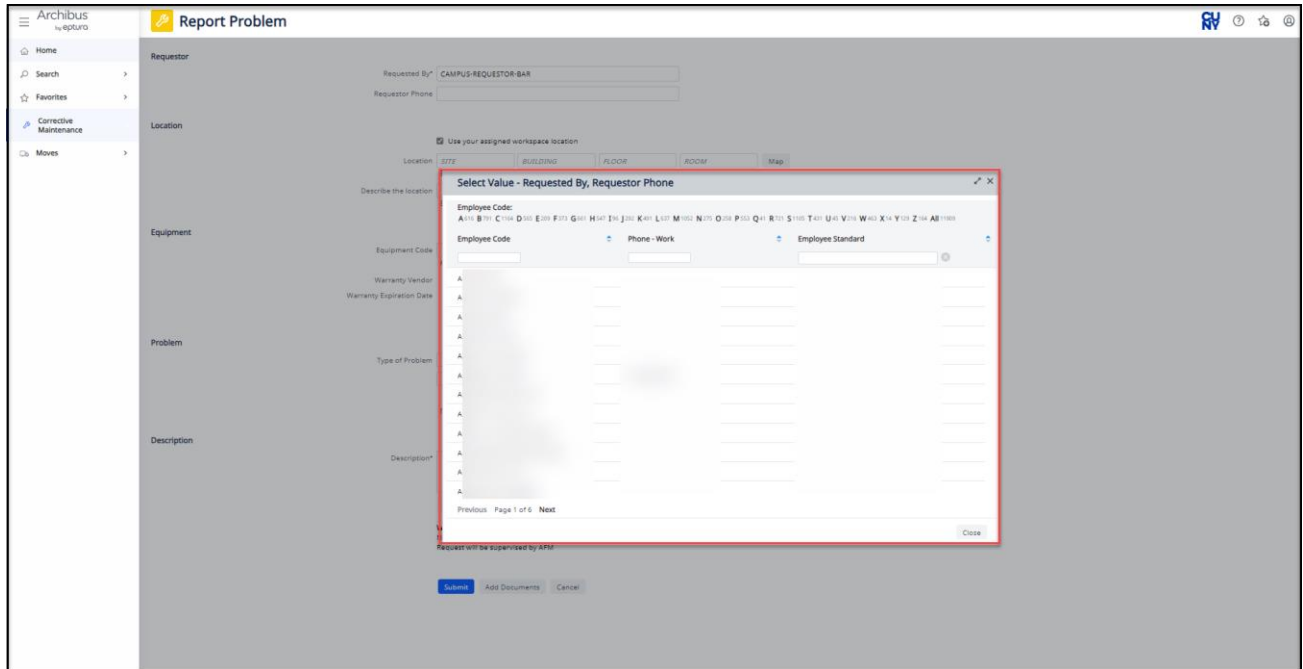
2- Location

If the box is checked for "Use your assigned workspace location" it will automatically fill in the signed in users location.
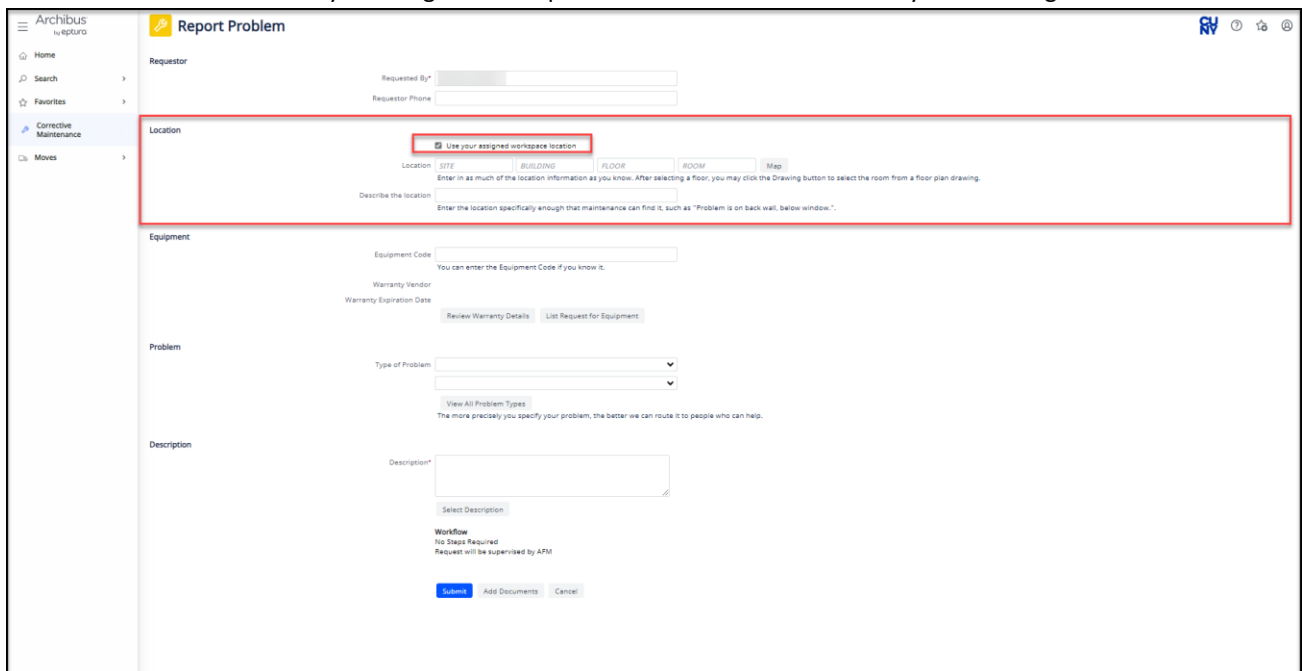
If the box is not checked, a location must be entered by hovering over the right side of each box to select a SITE, BUILDING, FLOOR, ROOM.

Check the three dots at the end of the boxes for Site to select the appropriate site. Repeat for Building, Floor and Room. If you have selected a building and a floor but do not know the room, there is a "Map" button that will open up the floor plan to be able to select a specific room/location. Please note that a Building is REQUIRED. Adding more detail with the floor and room will speed up the promptness of completion of the work request. The Describe a location box is a free form text box that is to provide additional location information and is optional.

3- Equipment

In the Equipment section there is a box with 3 dots to see a drop-down selection of all pieces of equipment. If you know the Equipment Code you can enter it without using the selection option. If the equipment has a Warranty Vendor

that will also display.

Two buttons that are available in the Equipment section are Review Warranty Details and List Request for Equipment. Selecting the Warranty Details will pop up a page that if there is warranty information in the system it will display all of that information there. Selecting List Request for Equipment button will open up an additional page where any current/previous work requests for that piece of equipment would display here.

4- Problem

THIS IS A REQUIRED FIELD. Click on the black down arrow and select the Problem Type that best describes your issue. The top drop down will be a list of top tier problem types. The bottom drop down will be second tier problem types, going into more detail of the issue.

An example is below. The top tier is HVAC and the second tier is TOO HOT.

Clicking on the View All Problem Types button will display a list of Problem Types including the Problem Type Description.
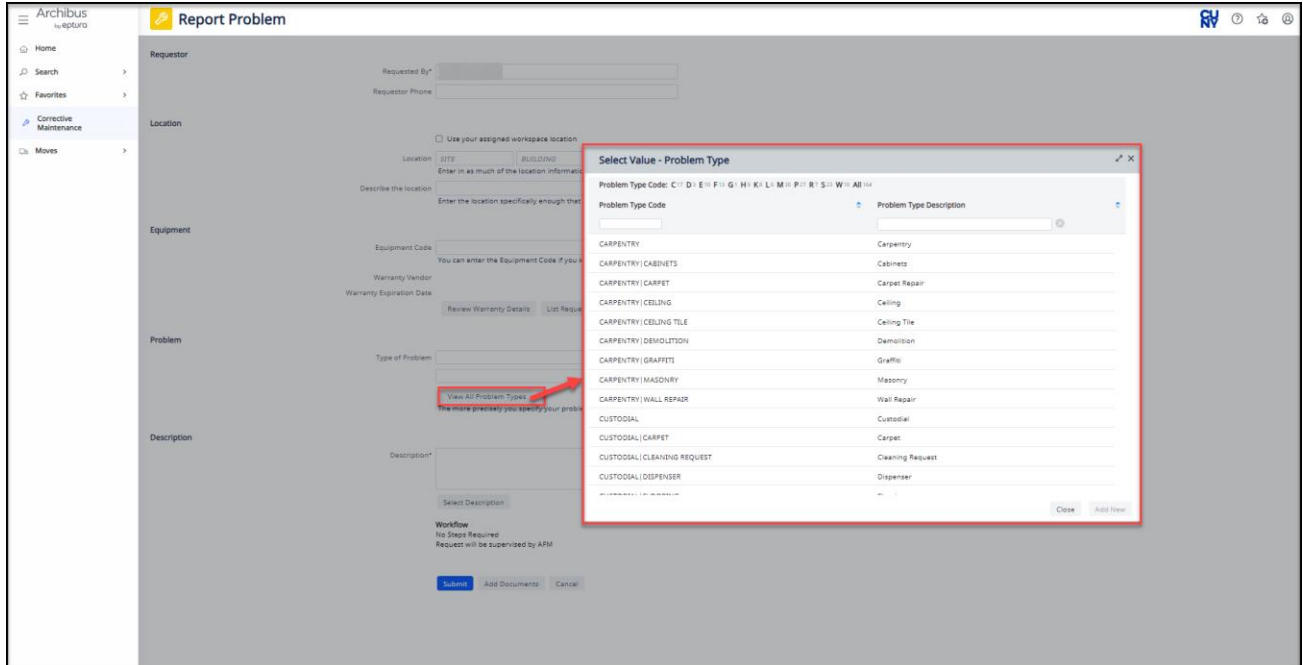
5- Description

THIS IS A REQUIRED FIELD. This field is a text field to enter an explanation of the issue being reported.
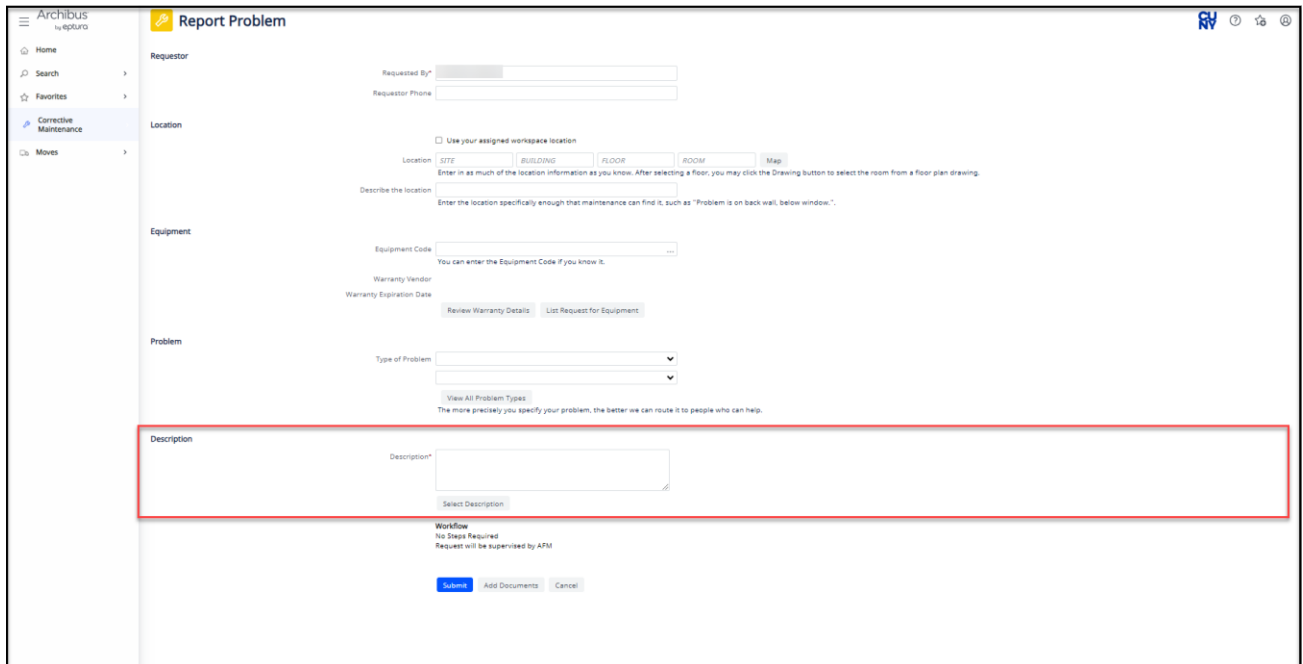
6- Documents

Up to 4 documents can be attached to each Work Request. Click the Add Documents button.
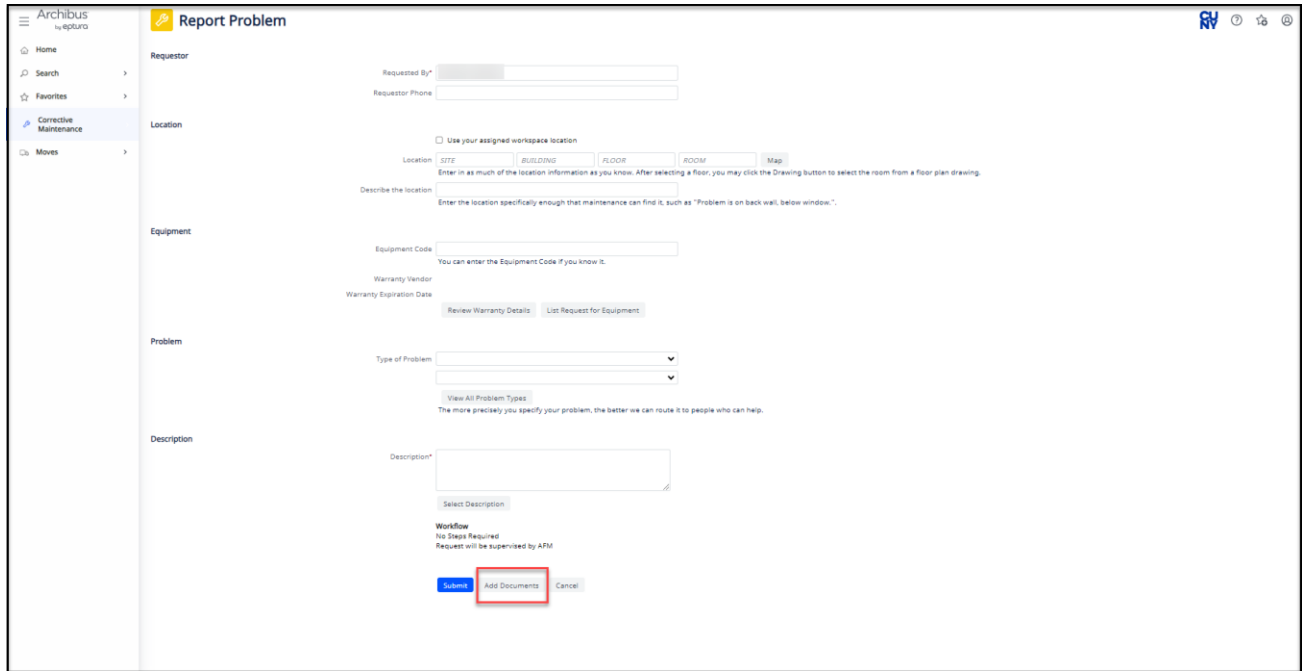
To add a document click on the grey up arrow at the end of the box or drag and drop the file.
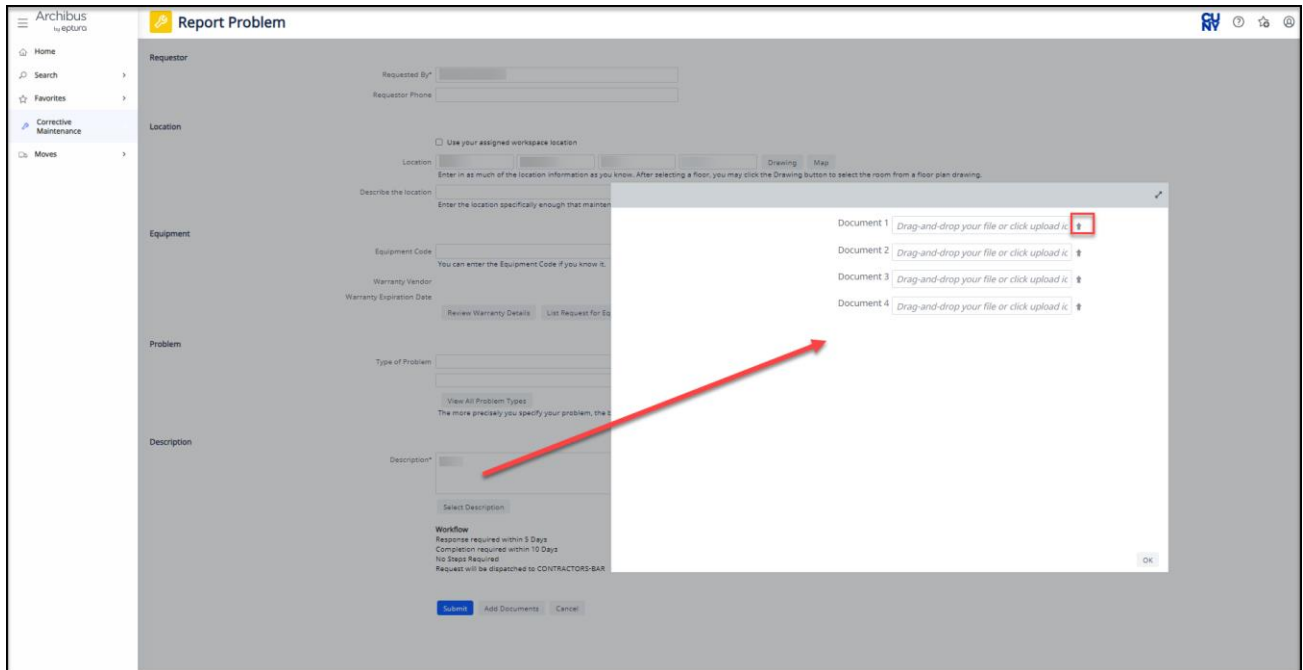
When adding each document there is also a place to add a description of the document provided. Select "OK" and the document will show as uploaded.
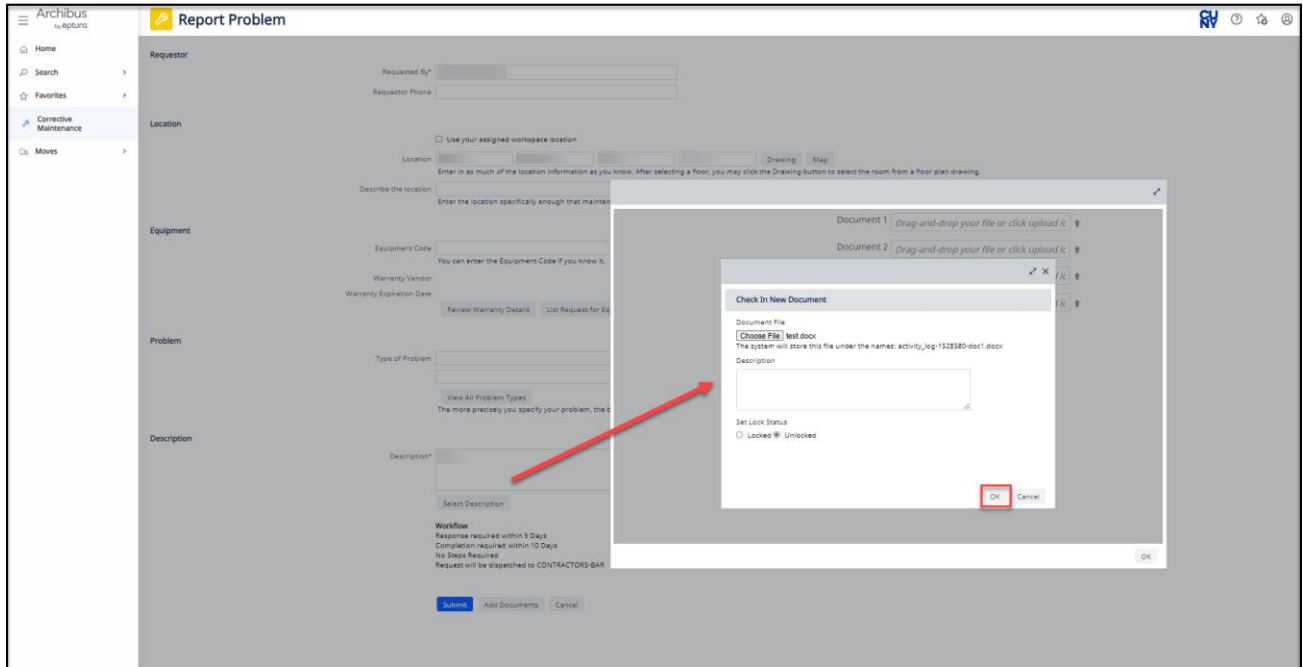
To delete the document attached select the "X" button.
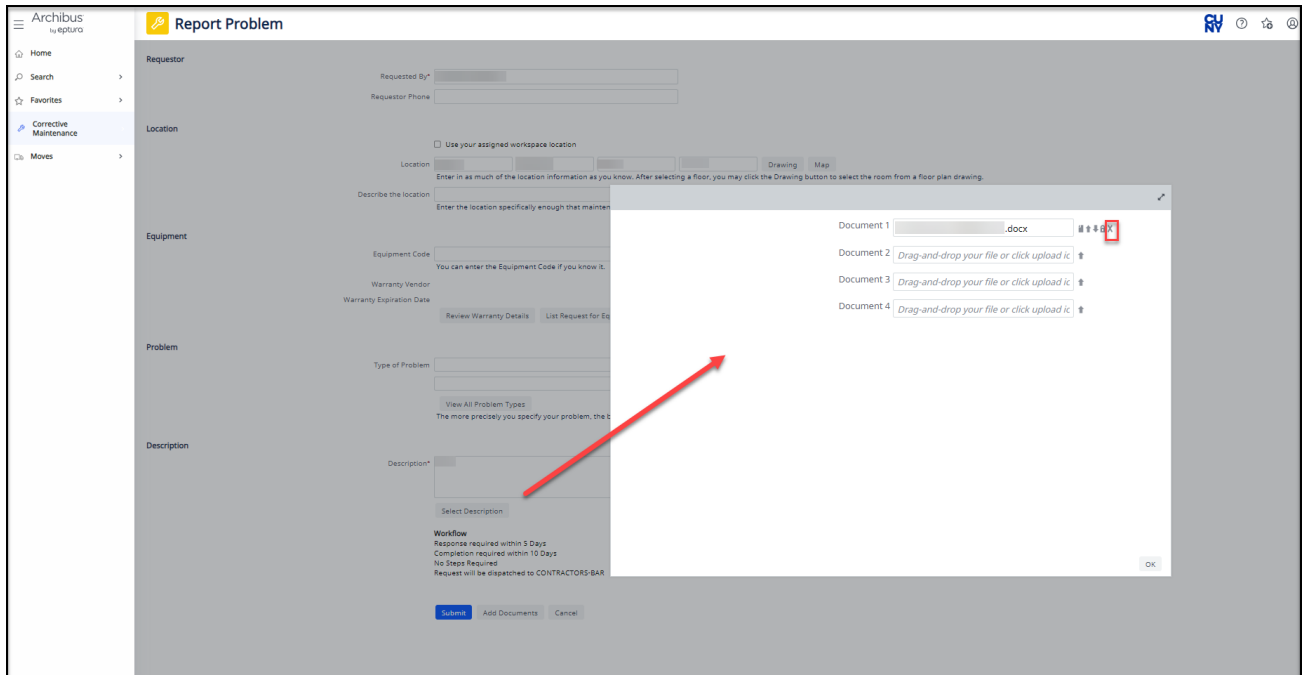
NOTE: If the desired image to upload was taken with a device (cell phone or tablet) that image will have to be downloaded to a computer and attached from there. If more than four images are needed, it is possible to download all desired images to a computer, add them all to a word doc and then attach the word doc as shown in the manual.

6-Submit

Click the Submit button if you have completed all fields and added all documents. Click the Cancel button if you do not want to submit the work request.

View My Work Requests

Using the navigation on the right of the screen select Corrective Maintenance>Client>View My Work Requests.

The display of work requests will be those requests that you have requested. It will display the data for Work Request Code, Request Type, Problem Type, Work Request Status and Date Work Requested.

The filter functionality at the top allows you to search for requests by the status, the date requested from and the date requested to.

Select the down arrow to view the list of statuses to filter by. Reminder, you must select the "Show" button for page to filter.

Search by date: using calendar functionality. Hover over any box to look for calendar icon with your cursor. This lets you know that you **MUST** select this and choose a date from the pop up calendar. Reminder, you must select the
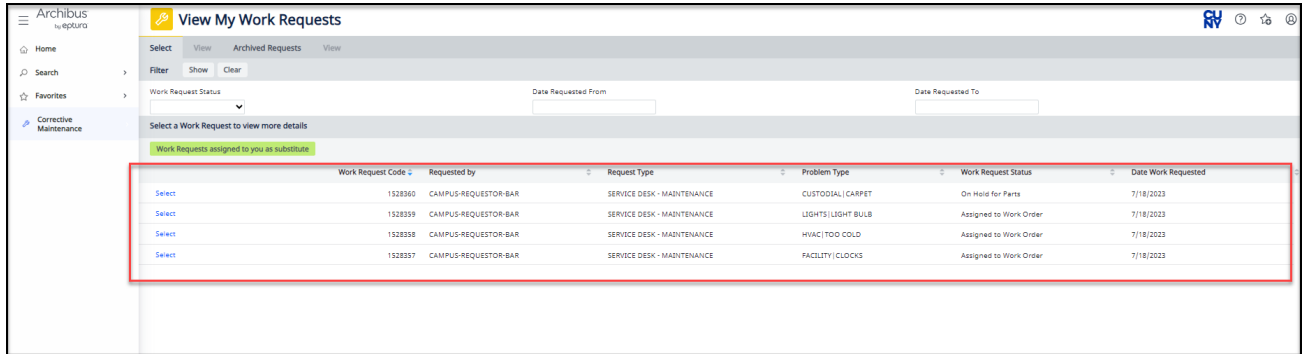
"Show" button for page to filter.

View Work Requests by Department

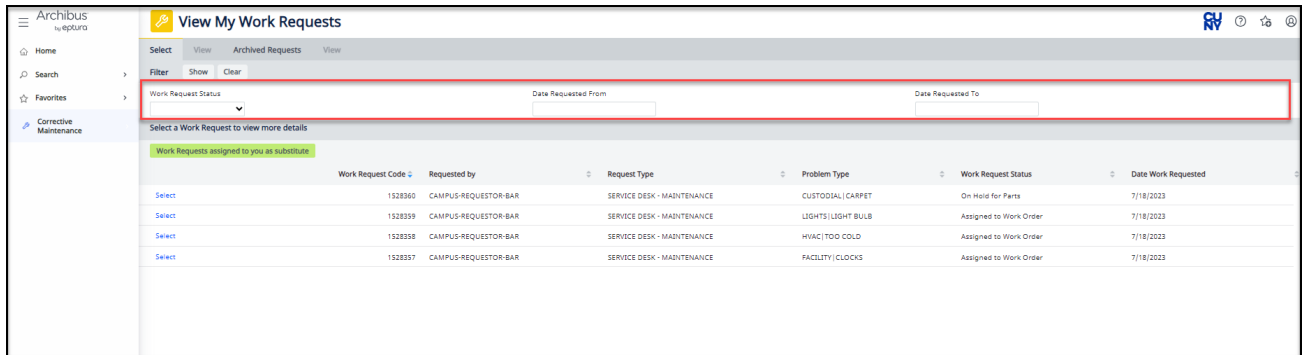Using the navigation on the right of the screen select Corrective Maintenance>Client>View My Work Requests.
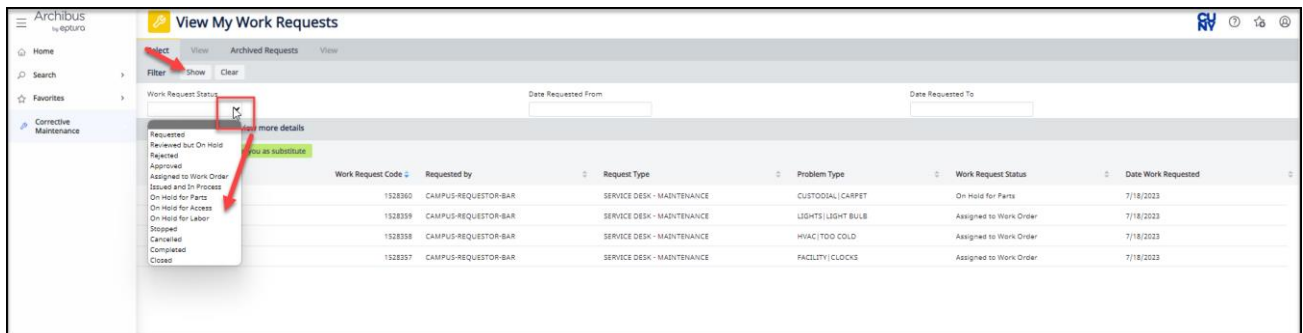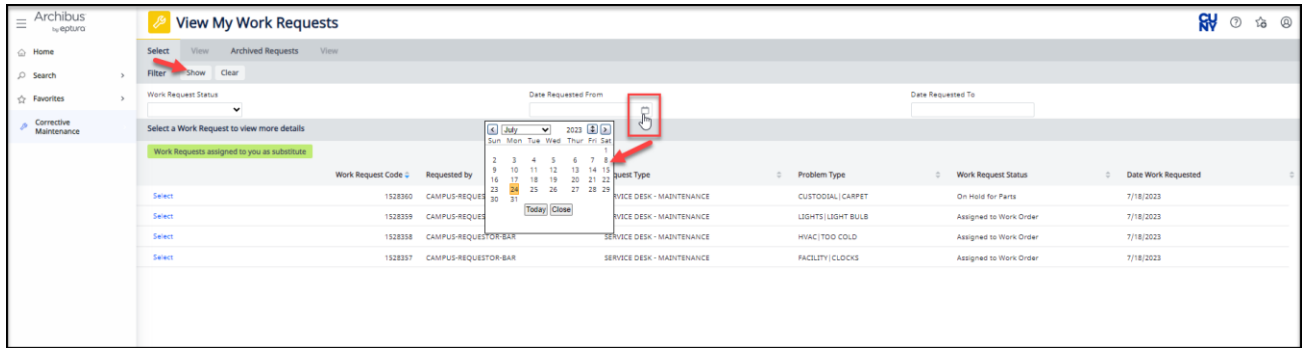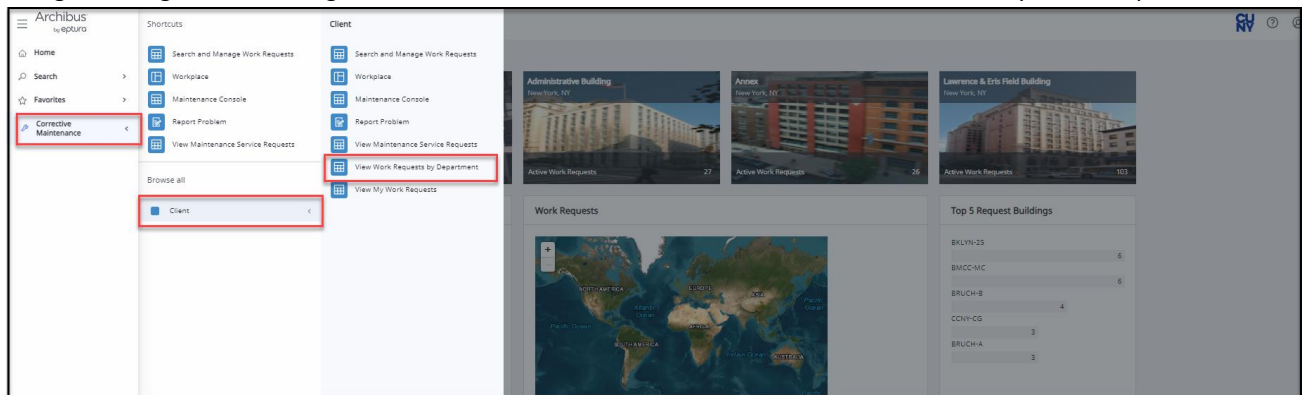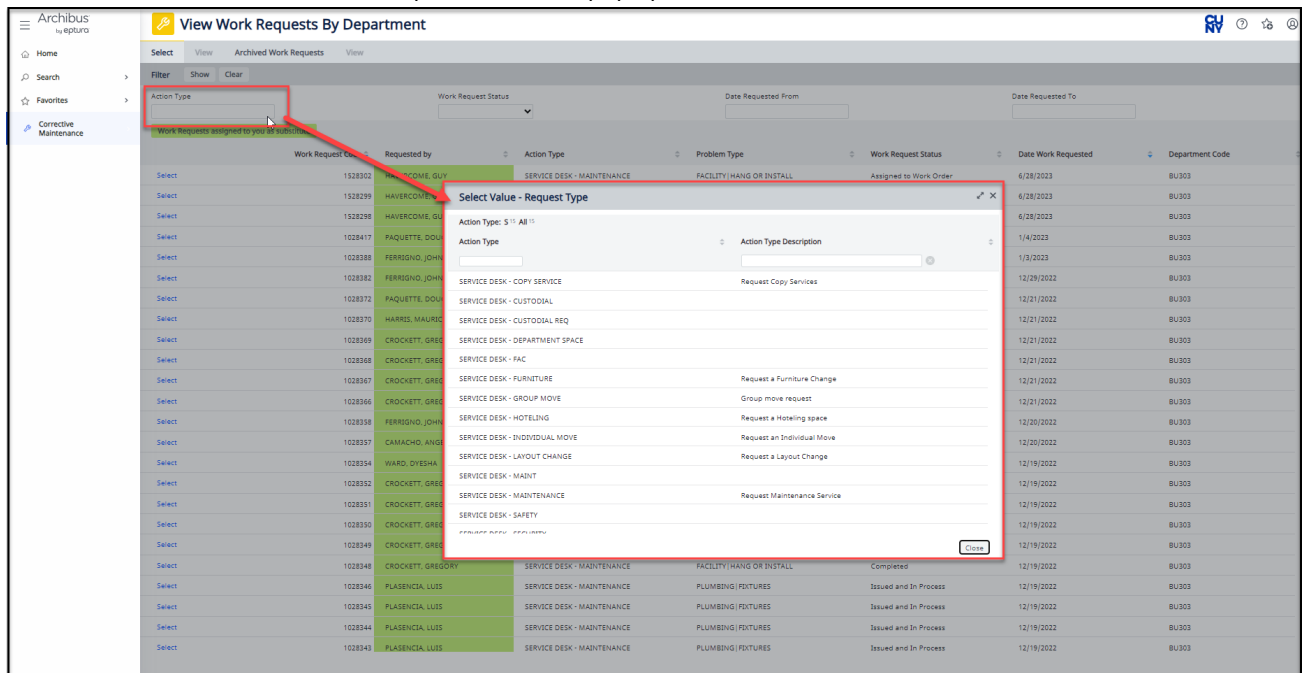

The display of work requests will be those requests that are tied to your department. It will display the data for Work Request Code, Request Type, Problem Type, Work Request Status and Date Work Requested.

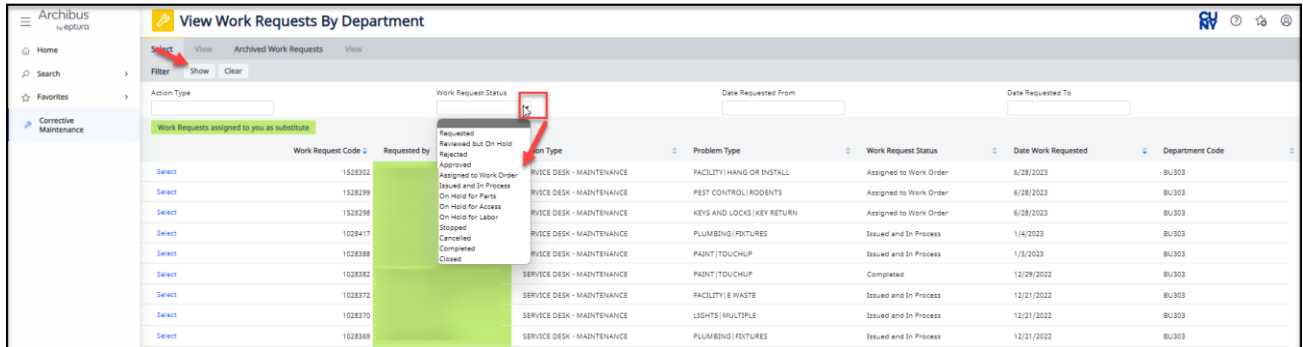|	Work Request Code	Requested by	Action Type	Problem Type	Work Request Status	Date Work Requested	Department Code
Select	1528302		SERVICE DESK - MAINTENANCE	FACILITY	HANG OR INSTALL	Assigned to Work Order	6/28/2023	BU303
Select	1528299		SERVICE DESK - MAINTENANCE	PEST CONTROL	RODENTS	Assigned to Work Order	6/28/2023	BU303
Select	1528298		SERVICE DESK - MAINTENANCE	KEYS AND LOCKS	KEY RETURN	Assigned to Work Order	6/28/2023	BU303
Select	1028417		SERVICE DESK - MAINTENANCE	PLUMBING	FIXTURES	Issued and In Process	1/4/2023	BU303
Select	1028388		SERVICE DESK - MAINTENANCE	PAINT	TOUCHUP	Issued and In Process	1/3/2023	BU303
Select	1028382		SERVICE DESK - MAINTENANCE	PAINT	TOUCHUP	Completed	12/29/2022	BU303
Select	1028372		SERVICE DESK - MAINTENANCE	FACILITY	E WASTE	Issued and In Process	12/21/2022	BU303
Select	1028370		SERVICE DESK - MAINTENANCE	LIGHTS	MULTIPLE	Issued and In Process	12/21/2022	BU303
Select	1028369		SERVICE DESK - MAINTENANCE	PLUMBING	FIXTURES	Issued and In Process	12/21/2022	BU303
Select	1028368		SERVICE DESK - MAINTENANCE	PLUMBING	FIXTURES	Issued and In Process	12/21/2022	BU303
Select	1028367		SERVICE DESK - MAINTENANCE	PLUMBING	FIXTURES	Issued and In Process	12/21/2022	BU303
Select	1028366		SERVICE DESK - MAINTENANCE	PLUMBING	FIXTURES	Issued and In Process	12/21/2022	BU303
Select	1028358		SERVICE DESK - MAINTENANCE	PAINT	TOUCHUP	Completed	12/20/2022	BU303
Select	1028357		SERVICE DESK - MAINTENANCE	KEYS AND LOCKS	KEY REQUEST	Issued and In Process	12/20/2022	BU303
Select	1028354		SERVICE DESK - MAINTENANCE	PLUMBING	FIXTURES	Issued and In Process	12/19/2022	BU303
Select	1028352		SERVICE DESK - MAINTENANCE	DOOR	HARDWARE	Completed	12/19/2022	BU303
Select	1028351		SERVICE DESK - MAINTENANCE	PLUMBING	FIXTURES	Issued and In Process	12/19/2022	BU303
Select	1028350		SERVICE DESK - MAINTENANCE	PLUMBING	FIXTURES	Issued and In Process	12/19/2022	BU303
Select	1028349		SERVICE DESK - MAINTENANCE	PLUMBING	FIXTURES	Issued and In Process	12/19/2022	BU303
Select	1028348		SERVICE DESK - MAINTENANCE	FACILITY	HANG OR INSTALL	Completed	12/19/2022	BU303
Select	1028346		SERVICE DESK - MAINTENANCE	PLUMBING	FIXTURES	Issued and In Process	12/19/2022	BU303
Select	1028345		SERVICE DESK - MAINTENANCE	PLUMBING	FIXTURES	Issued and In Process	12/19/2022	BU303
Select	1028344		SERVICE DESK - MAINTENANCE	PLUMBING	FIXTURES	Issued and In Process	12/19/2022	BU303
Select	1028343		SERVICE DESK - MAINTENANCE	PLUMBING	FIXTURES	Issued and In Process	12/19/2022	BU303

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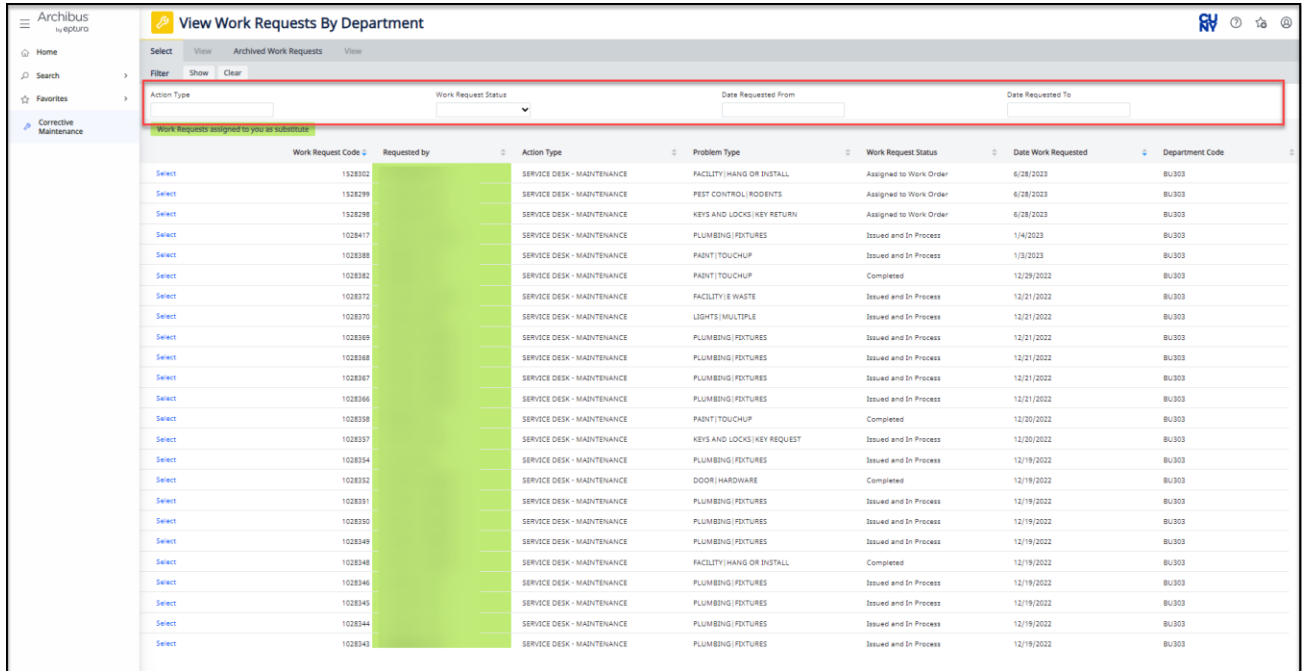
Action Type: Hover over any box to look for "…" with your cursor. This lets you know that you **MUST** select this and choose from one of the select value options from the pop up.

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