Umoja Production Support

Jump-Start: iNeed Basics for Support Agents and Data Maintainers

Revision History

Ver	Author	Date	Description
01 - 05	H.Hendler	April 2014	First versions, revisions not tracked
06	H.Hendler	19-May-2014	Added revision history; using updated Umoja design template; updated support model graphic; added iSeek URL for additional iNeed guides; added work order Cancellation
07	H. Hendler	29-May-2014	Modified Triage guidelines, added Umoja iNeed Support email (UmojaiNeedSupport@un.org)
08	H. Hendler	4-Jun-2014	Updated Umoja Support Model graphic
09	H. Hendler	11-Jul-2014	• Added: • IE version requirements • iNeed entity hierarchy • Umoja Support Model – Definitions • Queries: Pre-Defined, User-Defined, Examples, Saving, etc. • Exporting data • User Preferences (startup, tab order, default view) • Updated: • *Triage/Assigning Work Orders* • iSeek link for iNeed materials
10	H. Hendler	11-Dec-2014	• Updated: • All slides to use new Umoja logo. Be The Change. • Minor clarifications on multiple slides
11	H. Hendler	13-Jan-2015	• Added sides explaining and listing Tier-based Assign-To Groups
12	H. Hendler	12-May-2015	• Updated iSeek links • Updated supported browsers • Added Work Order "Job Aid" • Miscellaneous enhancements and general cleanup
13	H. Hendler	2-Jun-2015	• Added WO Assignment notification (email) examples • Miscellanous minor mods
14	H. Hendler	15-Jul-2015	• Added instructions for viewing Attachments on Activities
15	H. Hendler	4-Sep-2015	• Rearranged slides • Removed "BP" qualification for Data Maintainers
16	H. Hendler	20-Oct-2015	• Minor cleanup, slides rearranged, screen shots updated
17	H. Hendler	06-Nov-2015	• Minor cleanup, slides rearranged, screen shots updated
18	H. Hendler	09-Nov-2015	• Changed Tier 2b to Tier 3 Escalation from reassignment to creation of a new work order.

umoja
be the change

Revision History (*cont.*)

Ver	Author	Date	Description
19	H.Hendler	19-Nov-2015	Misc updates and clarifications
20	H. Hendler	24-Nov-2015	Added Work Order Status slide
21	H. Hendler	03-Mar-2016	Changed UmojaiNeedSupport@un.org references to umojaiNeedConfig@un.org

Purpose/Audience

▸ This document provides introduction material for iNeed and sufficient detail to navigate, create, process and query work orders and related objects.

▸ Primarily intended for iNeed Agents at escalation points (Tier 2b/3), and Data Maintainers working primarily with work orders

▸ Should not be considered a full substitute for formal iNeed training or comprehensive review of iNeed training materials.

Additional Resources

➤ Umoja-Specific iNeed Materials on iSeek->Umoja->iNeed Materials

https://iseek.un.org/departmental_page/ineed-materials

▸ Note Data Maintainers guide on the above page

➤ Generic iNeed Training Materials on iSeek

https://iseek.un.org/departmental_page/unite-ineed-training-resources

➤ Unite Service Desk (esc@un.org)

➤ Your local ICT help desk (PK missions)
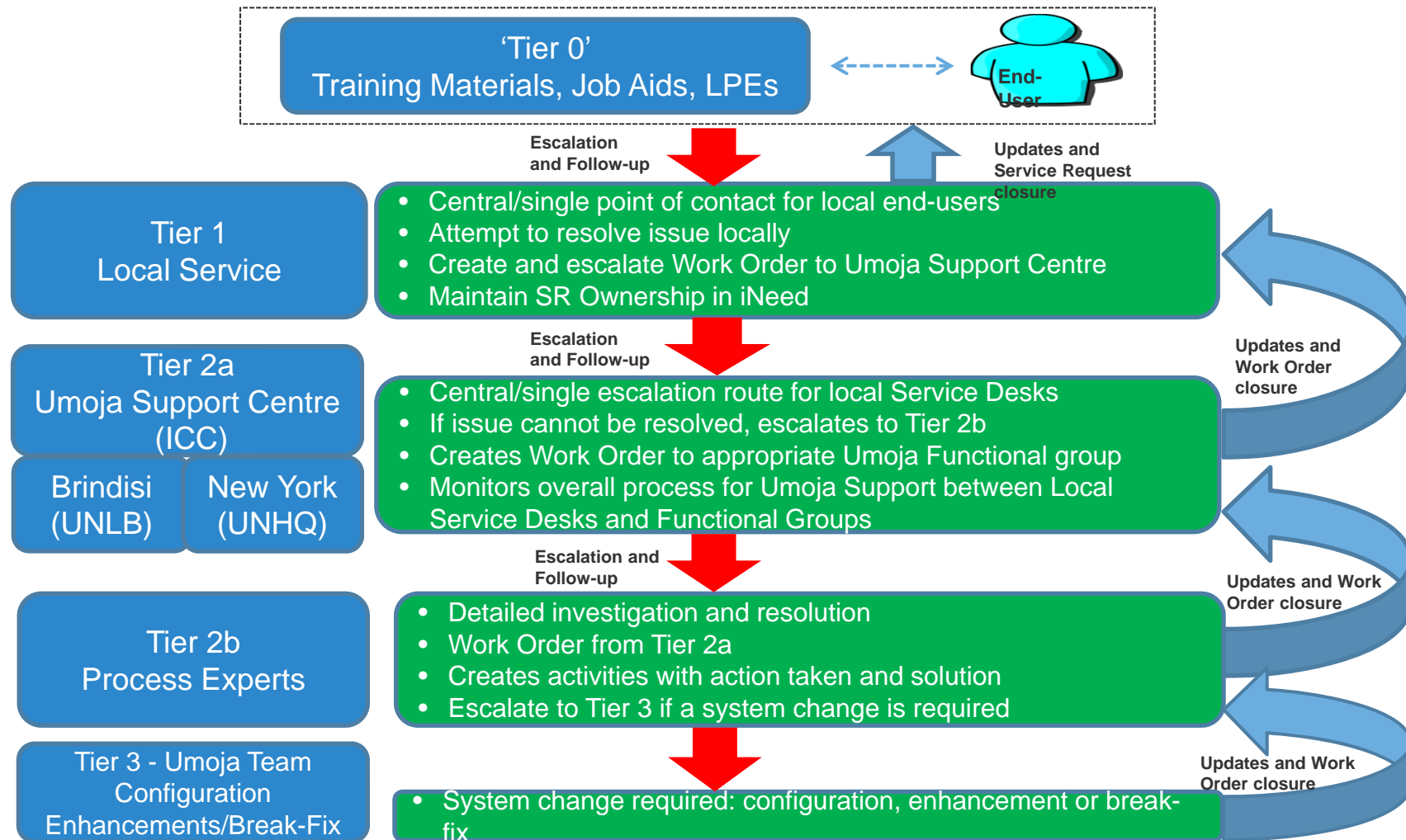
➤ Umoja-specific iNeed Config Requests: UmojaiNeedConfig@un.org

➤ Umoja Support Centre (Tier 2a): UmojaSupport@un.org

Umoja Support Model

Tier 0

USER

Training Materials

Job Aids

Communities of Practice

Local Process Experts (LPE)

Consultation, Advice
Guidance, Direction
No iNeed ticket

Tier 1

Local Service Desks/
Unite Service Desk

Tier 2

Global Service Desk –
Brindisi and New York
(UNICC) - Tier 2a

Hub/Entity HQ Process
Experts under overall
guidance of PO/Process
Experts - Tier 2b

Tier 3

Umoja Competency Centre
(Technical Analysis to
perform Break/Fix, FRICEW
& Configuration)

umoja
be the change

Umoja Support Model - Definitions

'Tier 0'
Training Materials, Job Aids, LPEs

End-User

Escalation and Follow-up

Updates and Service Request closure

Tier 1
Local Service

- Central/single point of contact for local end-users
- Attempt to resolve issue locally
- Create and escalate Work Order to Umoja Support Centre
- Maintain SR Ownership in iNeed

Escalation and Follow-up

Updates and Work Order closure

Tier 2a
Umoja Support Centre (ICC)

Brindisi (UNLB)	New York (UNHQ)

- Central/single escalation route for local Service Desks
- If issue cannot be resolved, escalates to Tier 2b
- Creates Work Order to appropriate Umoja Functional group
- Monitors overall process for Umoja Support between Local Service Desks and Functional Groups

Escalation and Follow-up

Updates and Work Order closure

Tier 2b
Process Experts

- Detailed investigation and resolution
- Work Order from Tier 2a
- Creates activities with action taken and solution
- Escalate to Tier 3 if a system change is required

Tier 3 - Umoja Team
Configuration Enhancements/Break-Fix

- System change required: configuration, enhancement or break-fix

Updates and Work Order closure

umoja
be the change

Prerequisites/Logging In

- iNeed requires IE9+ or other common browser (Chrome, Firefox, etc.)
- iNeed Agent access established (request via UmojaiNeedConfig@un.org)
- URL: http://ineed.un.org (UN LAN). Login with Unite Identity credentials
    - If not on UN LAN, use Citrix - http://login.umoja.un.org - select iNeed icon
- Groups to which an agent belongs are shown in *User Preferences->Profile*

Module Hierarchy

- A **Service Request (SR)** is a request for a product/service, or for resolution of an issue or problem. SRs are typically created by Service/Help Desk Agents.

- A **Work Order (WO)** is a child record to the SR, used for escalation and/or division of work to different groups as needed to resolve/close the SR.

- An **Activity** is a child record within an SR or WO, reflecting action taken or notes relevant to the associated parent record.

- *Summary:*

  - **Service Requests (SRs)** are the highest level entity.

  - SRs may contain one or more **Work Orders (WOs)**

  - **SRs and WOs** contain **Activities**

  - **SRs, WOs and Activities** may contain **Attachments**

Common Service Desk Workflow

iNeed Workflow
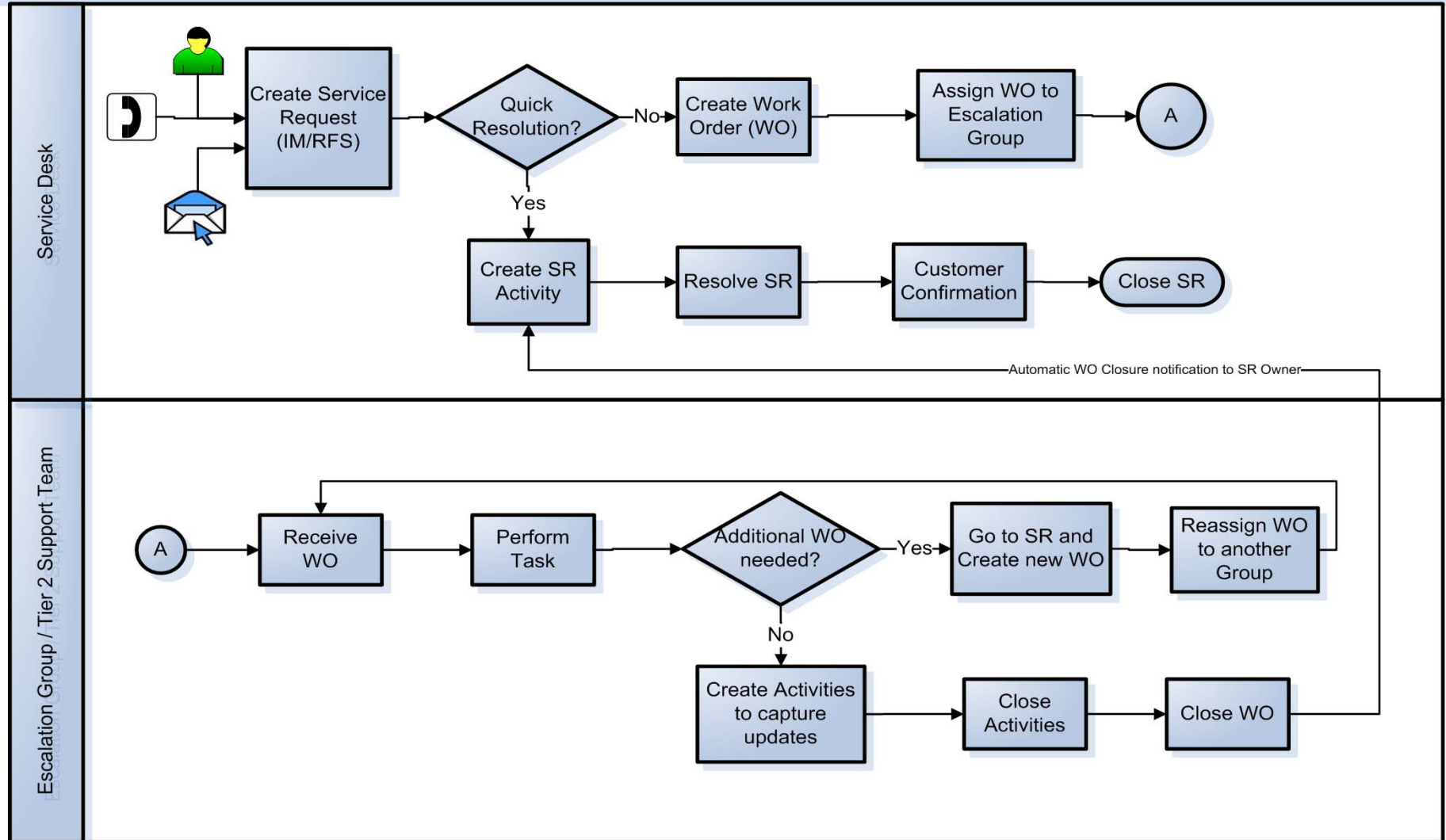
Service Requests (SRs)

➢ **Service Request (SR) a customer request for a new product/service or assistance with an issue or problem.**

  ▸ Two primary SR types

    ▸ Request for Service (RFS) – request for a new product or service

    ▸ Incident – requesting help with a question, issue, or interruption of service

  ▸ Created and followed through to completion by Service/Help Desk Agents

  ▸ NOT typically created or actioned by escalation groups (see **Work Orders**)

  ▸ Can be generated automatically (via Self Service or Umoja MDM Forms)

  ▸ Assigned to a group and individual within that group, most commonly reflecting where the SR was created and by whom

  ▸ May contain work order(s), Activities, Attachments, Audit Trail, etc.

Work Orders (WOs)

➢ **Work Order (WO) child entity to an SR, reflecting a specific task assigned to a group ("Assigned to Group") and/or an individual within a group**

▸ One or more WOs are created as needed to fulfill the request or solve the problem being reported/requested in the SR

▸ Typically represent escalation of an issue or request to a higher-tier group

▸ …or for Data Maintenance, Work Orders represent forms to be processed

▸ Assigned to a group when created ("Assigned to Group"), and an individual agent within the group based on established triage procedures

▸ Work Order "Category" field can be used to identify the substantive area/type of the WO

Tasks of Tier 2b+ Agents & Data Maintainers

➢ Receive notification that work orders have been assigned to their group(s)

➢ Receive notification that work orders are assigned to them individually

➢ Triage work orders to determine Assigned To agent

➢ Log in to iNeed, review Work Order and SR details, attachments, Activities, etc.

➢ Take action to resolve issues

➢ Create Activities to document work done, resolutions, workarounds, etc.

➢ Send e-mail via iNeed and review replies

➢ Create new and/or Reassign Work Orders to other groups as necessary

➢ Follow Work Orders through to completion

➢ Close Work Orders

Navigation - Basics

Navigation – Menus

➢ A menu button appears in each form and list in the application window, providing options available based on context and Agent permissions.

Navigation – Saving a Record

➤ **Records can be saved in different ways:**

– Step off the record (move to another record by clicking on it or using the Application level menu ('Next Record'/'Previous Record')

– Menu - > Save Record.

– Press [Ctrl-S]
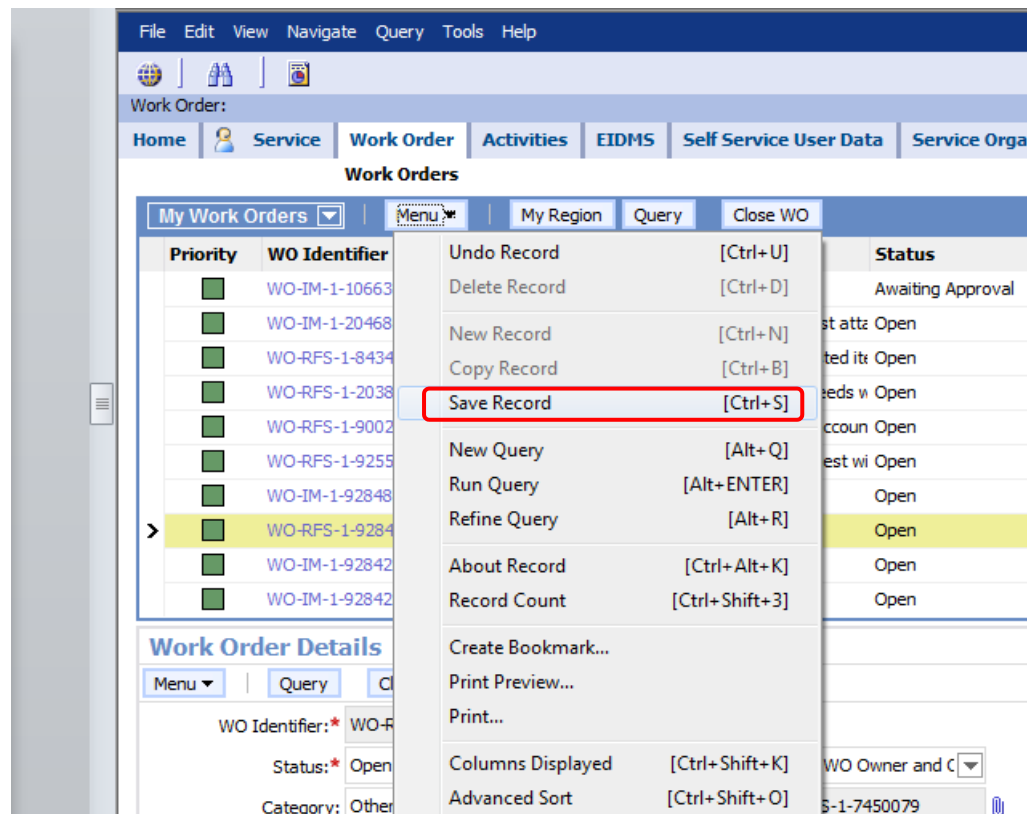
Navigation - Undo

➢ Canceling edits and reverting a record to it's saved state is possible *only* before saving changes

➢ Press [ESC], [Ctrl-U] or select Menu -> Undo Record
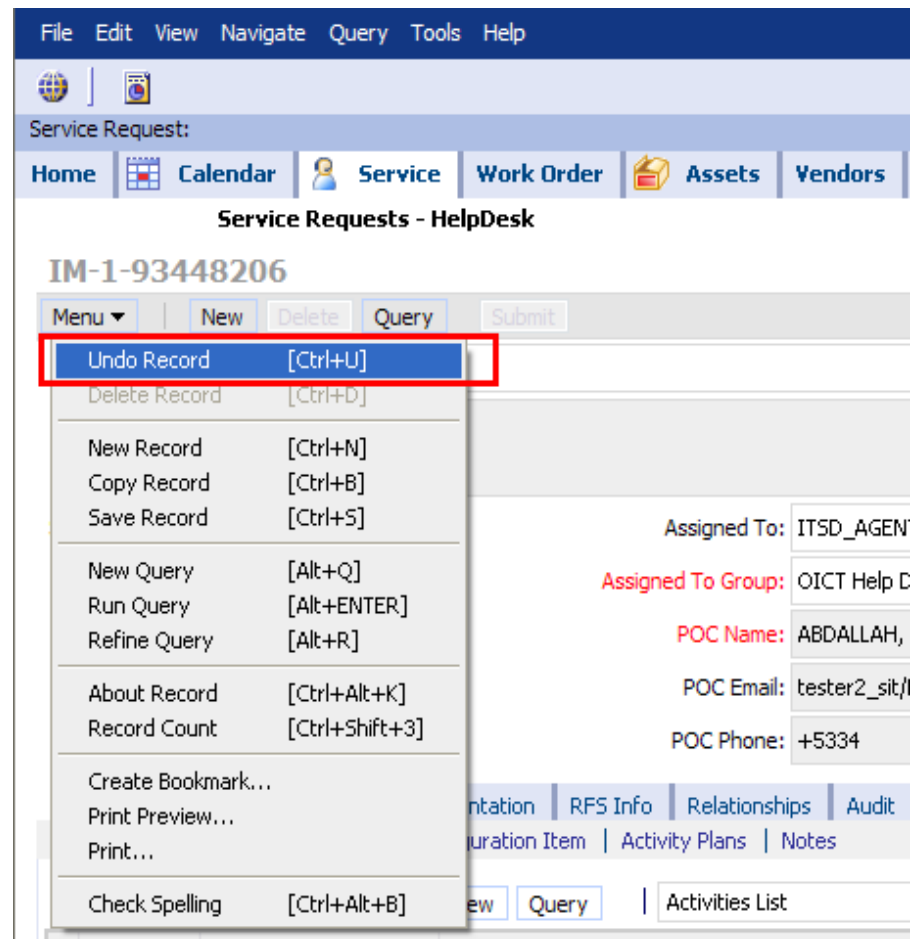
Navigation – Customizing List Views

- Columns can be moved to a different position by dragging the column heading.
- Clicking on a column heading will sort the view by that column (ascending, click again to sort descending, etc.)
- Double-clicking a column heading will freeze that column and those to the left of it (double-click again to un-freeze)
- In some List Views (SR and work orders especially), not all fields are visible. Using the scroll bar will reveal more fields but not necessarily all fields available.
- Use Menu->Columns Displayed to add, remove, and rearrange columns as desired

Navigation – Customising List Views (*cont.*)

➢ The 'Columns Displayed' screen allows selection of columns to display (or not) in the List View and the order in which they appear
➢ Use the left/right control buttons to move columns from 'Available' to 'Selected' and back
➢ Use the up/down buttons to change a columns position in the list
➢ Click 'Save' when done
➢ Note the 'Reset Defaults' button
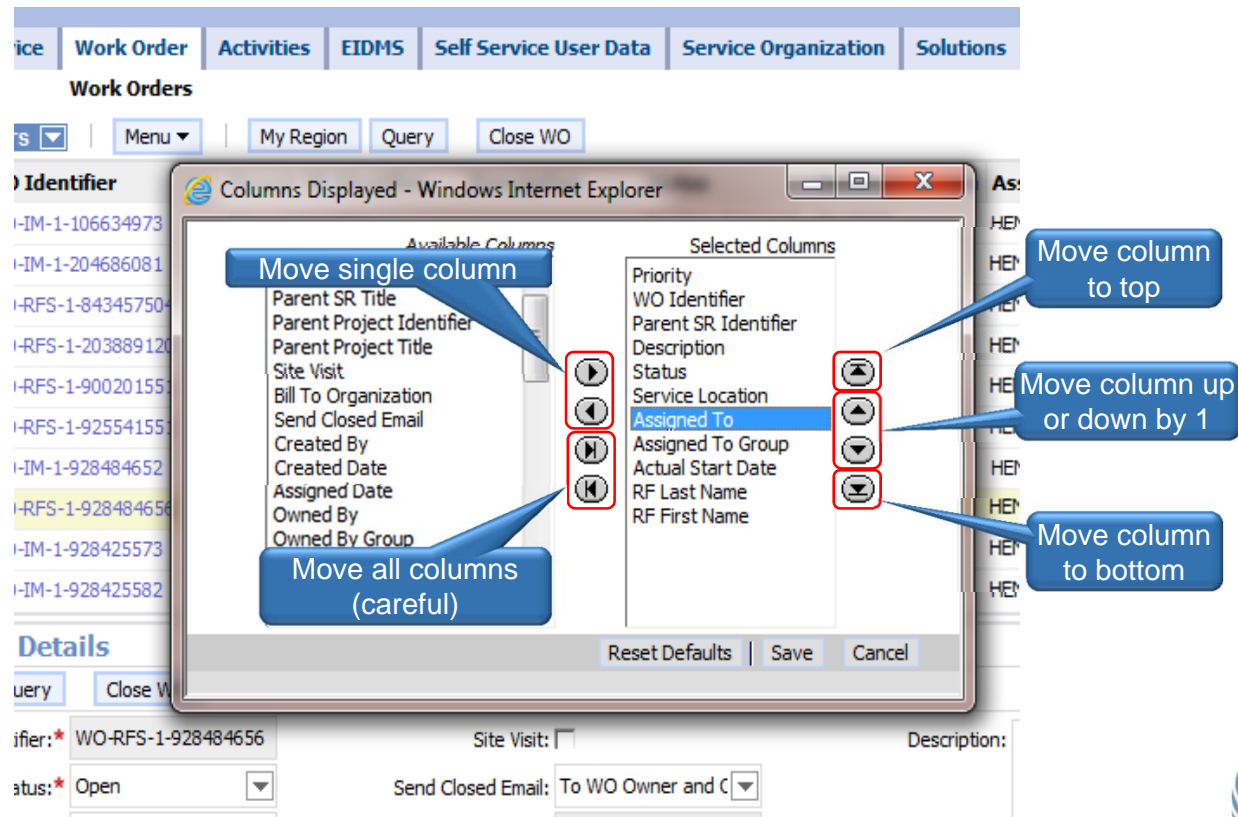
Filters – Views

➢ Within the Work Order (and Service) screen tabs, the available views are shown in the dropdown list:
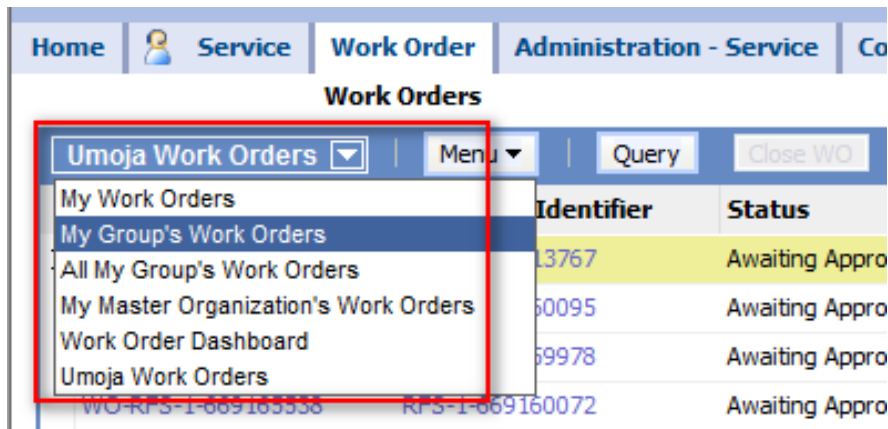
➢ My Work Orders displays the Work Orders (or SRs) assigned to the individual agent.

➢ My Group's Work Orders displays work orders assigned to the agent's *primary group**, whether assigned to the agent individually or not

  ▸ ** Agents may belong to multiple groups but only one is designated 'Primary'*

➢ All My Group's Work Orders lists WOs assigned to *all groups* the agent belongs to

  ▸ *NOTE: If an agent belongs to multiple groups but does NOT have the All My Group's Work Orders view, the agent should contact UmojaiNeedConfig@un.org to request this view.*

➢ Work Order Dashboard shows work order distribution by individual within each group. This view is given as provided as need to triage agents and group managers

➢ Umoja Work Orders shows all Umoja Work Orders. This view is provided on an as-needed basis.

Filters – Pre-Defined Queries (PDQs)

➢ The 'Saved Queries' list displays predefined filter criteria that can be applied to the existing view
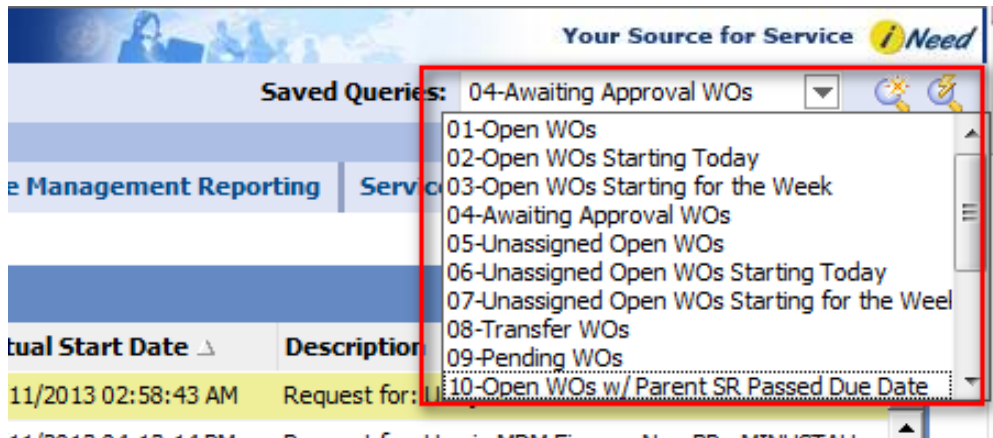
➢ NOTE: The records displayed in a list view (SR or WO) are a combination of the filters applied by both the selected view *and* the selected Predefined Query (for example, All My Group's Work Orders view and Unassigned Open WOs Saved Query)

➢ iNeed predefined queries are static but customised queries can be created and saved for repeated use. See 'Queries' below

Service Request Details

Work Order Details

Queries - Finding Records

➢ Click 'Query'
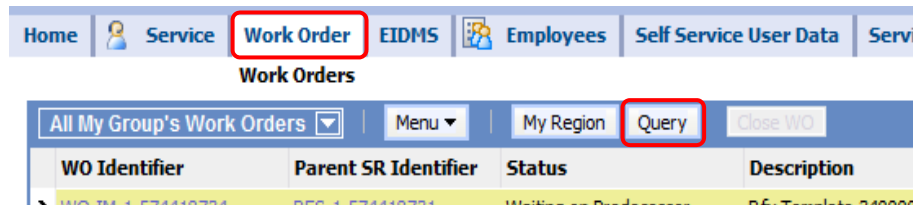
➢ Enter desired values and [Enter] or click Go
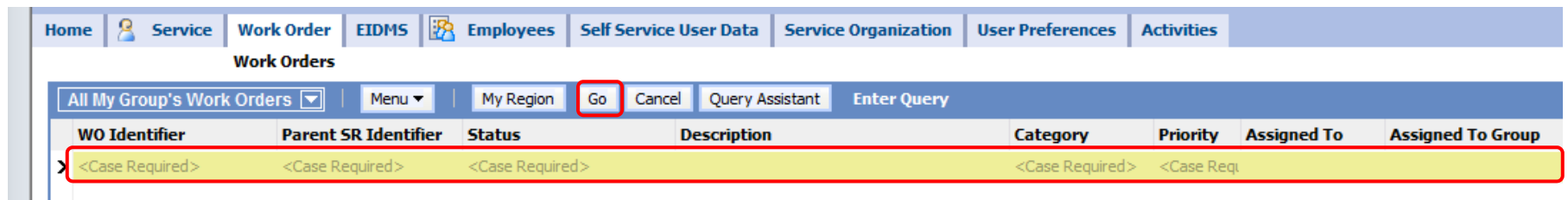
➢ To see the number of records in the list, select Menu->Record Count or press [ctrl-shift-3]
➢ Active query criteria can be revised with Query->Refine Query or [alt-r]
➢ Query criteria are case-sensitive where indicated (*Case Required*)
➢ Note the Pre-Defined Query field in the top right corner becomes *blank* when you use the 'Query' button.
➢ Wildcards and simple logic are recognized, see Examples, next page

Queries – Examples

➢ **WOs Created Yesterday for Accounts Payable**

   ▸ Status: <>Cancelled

   ▸ Created Date: =Today()-1

   ▸ Assigned To Group: Umoja Finance Accounts Payable

➢ **Open Banking Data WOs for UNIFIL**

   ▸ Status: <>Closed and <>Cancelled

   ▸ Assigned To Group: Umoja*Banking*UNIFIL

➢ **WOs Containing the phrase 'coding block' or 'crosswalk'**

   ▸ Description: *crosswalk* or *coding block*

➢ **Unassigned WOs**

   ▸ Status: <>Closed AND <>Cancelled

   ▸ Assigned to: is NULL

Queries – Query Assistant

➢ The Query Assistant provides a user interface for constructing multi-field queries. Note the ability to perform queries using AND or OR…

Queries – Saving Pre-Defined Queries (PDQs)

➢ Often-used queries can be saved for repeated use.
➢ From the application menu, choose Query ->Save Query As… or [alt-s]
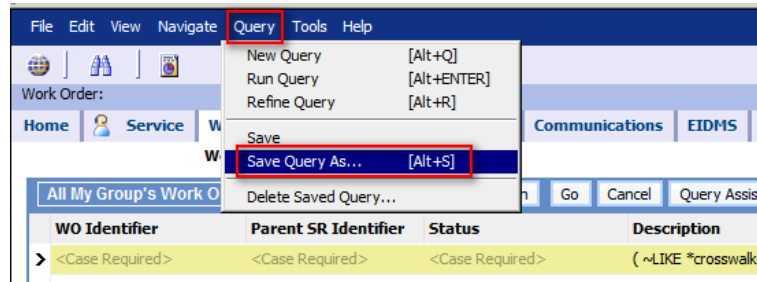
➢ Enter a new Query Name or select an existing Query to overwrite and click OK.
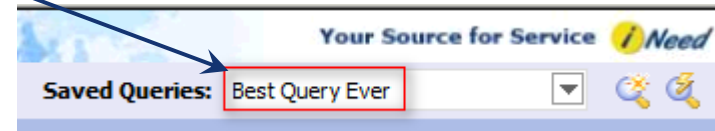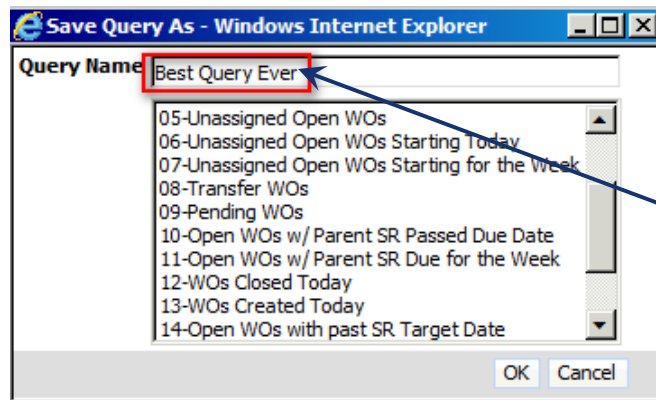
➢ The saved query now appears in the Saved Queries drop-down list.
➢ Note that only you can view your saved queries.

Activities

➢ Record of actions taken in connection with a work order or Service Request

➢ Can be at both SR and WO level

➢ Can be manual or created automatically by iNeed (upon WO assignment, closure, by inbound/outbound e-mail, etc.)

➢ Activities should be used liberally to record work performed, additional notes, comments, solutions, workarounds, etc.

Creating Activities

➢ Click 'New', typically only need to enter Comments and Status

➢ When recording an activity that's already been performed (usually the case), set Status to 'Closed' or just check "Done" straight away.

▸ Because work orders can only be closed if all activities are closed.

➢ Ctrl-S or click in a different view to save

iNeed Assigned-To Groups for Umoja Support

➢ Every Work Order is a assigned to a group ("Assigned-To Group" field).

➢ The *Umoja Support Centre* group is the sole Tier 2a group

➢ At the Tier 2b and higher support levels, group names generally designate both tier level and functional or technical Umoja area (*Umoja T2B – Funds Management, Umoja T3 – Security*)

➢ T2b groups refer to Business Process Owner/Process Experts; T2b groups generally escalate (by creating a new work order – discussed below) to T3 groups.

➢ T3 groups refer to Umoja team process/technical experts; T3 groups may escalate to an 'SI' group if necessary

➢ SI groups refer to the System Integrator (e.g. Accenture) and are considered Tier 3 for the Umoja support model but contain only members of the external consultants. The distinction between U.N. Umoja team members and external consultants at the Tier 3 level helps for monitoring and reporting.

Tier-Based Assigned-To Groups

➢ Partial list of escalation Assign-To Groups in iNeed <u>for Umoja</u>

➢ See Support Guidelines/SOPs at iSeek link given above for more detail

Umoja T2b - Treasury & Cash Management	Umoja SI – Security
Umoja T2b - Investment Management & Accounting	Umoja SI - Services Delivery
Umoja T2b - Cost Center Accounting	Umoja SI - Supply Chain
Umoja T2b - Financial Accounting	Umoja SI – Travel
Umoja T2b - Asset Accounting	Umoja T3 - Benefits Management
Umoja T2b - Taxes & Insurance Accounting	Umoja T3 - Central Master Data
Umoja T2b - Budget Management	Umoja T3 - Config Management
Umoja T2b - Grants Management	Umoja T3 - FRICEW Development
Umoja T2b - HR Management	Umoja T3 - Financial Accounting
Umoja T2b - Uniformed Personnel Management	Umoja T3 - Fixed Assets
Umoja T2b - Organization & Position Management	Umoja T3 - Funds Management
Umoja T2b - Payroll Management	Umoja T3 - Grants Management
Umoja T2b - Real Estate Management	Umoja T3 - HR Management
Umoja T2b - Logistics Execution	Umoja T3 - Logistics Execution
Umoja T2b - Services Delivery	Umoja T3 - Payroll Management
Umoja T2b - Fixed Assets	Umoja T3 - Plant Maintenance
Umoja T2b - Plant Maintenance	Umoja T3 - Procurement
Umoja T2b - Procurement	Umoja T3 - Project Management
Umoja T2b - Travel Management	Umoja T3 - Real Estate Management
Umoja T2b - Medical & Life Insurance	Umoja T3 - Services Delivery
	Umoja T3 - Training
Umoja T2b – CMT	Umoja T3 - Travel Management
Umoja T2b - Workflow Admin	Umoja T3 - Treasury & Cash Management
Umoja SI - Business Intelligence	Umoja T3 - BASIS Support
Umoja SI - FRICEW Development	Umoja T3 - Business Intelligence
Umoja SI - Finance	Umoja T3 - Data Conversion
Umoja SI - Funds - Cost - Grants	Umoja T3 - Interfaces
Umoja SI - HR	Umoja T3 - Security
Umoja SI - Payroll	Umoja T3 - Support Admin - iNeed
Umoja SI - Real Estate	Umoja T3 - Workflow Admin

Triage/Assigning Work Orders

➢ **Proper work order triage and monitoring procedures are a crucial aspect of overall work order processing, particularly when volume is high and/or the group is relatively large.**

➢ Each iNeed group has a corresponding 'un.org' email address.

➢ When a WO is assigned to the group, iNeed sends an email to the group address, which is also configured in Lotus Notes to send individual email to everyone in the group.

➢ It is the group's responsibility to determine how best to assign WOs to individuals within the group. There are two primary options:

1. Designate one or more Triage Agents *(recommended)*, responsible for monitoring incoming work orders and assigning them to individual group members as appropriate. Triage agents may monitor iNeed regularly (via the 'My Group's Work Orders' or 'All My Group's Work Orders'), or they can be configured to receive personal emails for each incoming work order for the group, alerting them that their attention is required in iNeed.
   …OR…

2. All members of the group receive individual email when a work order is assigned to the group. The group determines it's own dynamics for who actions each work order (agents assign WOs to themselves and perform the required work)

Triage/Assigning Work Orders *(continued)*

➢ By default all group members are configured to receive notification of WO assignment.

➢ To assign a work order to an individual agent enter their name in the "Assigned To" field

➢ An agent can assign a WO to herself by entering their own name in the 'Assigned To' field.

▶ When a work order is assigned to an agent, iNeed sends an automated notification e-mail to the agent with subject "A work order has been assigned to you…"

▶ Triage Agents and managers may request the **Work Order Dashboard** view, which shows work order distribution by individual within each group (including unassigned work orders)

Work Order Dashboard ▼

Menu ▼

Group: Umoja T3 - Travel Management ▼   Assigned Group   Last Refreshed On: 15/07/2015 12:43:23 PM   By: TAT

Dashboard   Menu ▼   Refresh Dashboard   Query

Name	Availability Status	Last Login	Open WOs	Pending WOs	In Progress WOs	Transfer WOs	Total	Status Until
Unassigned			0	0	0	1	1	
TATSUKAWA, Emi	Online	17/09/2015 01:17:04 AM	0	0	0	4	4	
SEID, Huda	Online	28/09/2015 11:53:54 PM	0	0	0	0	0	
MARCOS, Alejandro	Online	09/10/2015 01:40:00 AM	0	0	0	7	7	
MALANA, Jyotiraj	Online	14/10/2015 06:57:27 PM	0	0	0	2	2	
KARLICA, Darko	Online	20/10/2015 01:35:00 PM	0	0	0	0	0	
FURMANSKI, Susan	Online	13/10/2015 05:05:08 PM	0	0	0	3	3	
ALVAREZ, Juan	Online	28/07/2015 06:14:23 PM	0	0	0	2	2	
			0	0	0	19	19	

Work Order Notification to *Group*

A Work Order has been assigned to your group. WO ID:WO-RFS-1-1562365260
Umoja T2b - Procurement   to: UmojaProcurement
Please respond to umojasupport

Dear Umoja T2b - Procurement,

The following Work Order has been assigned to your group: WO-RFS-1-1562365260.

Description: Request for: Procurement

It would be appreciated if at the PO Signatory under PO Header to apply the following changes:

1. Remove Mr. Balakrishnan's name as there is a new CPO

2. Include Ms. Sharon Y. Cornelius, CPO and Ms. Stacey Worthington, Procurement Assistant. Please do not remove the nam

Attached please find a screenshot where the change needs to be applied.

With kind regards,

Stella

Link:
https://ineed.un.org/epublicsector_enu/start.swe?SWECmd=GotoView&SWEView=UNIN+All+Work+Orders+Across+My+Master+Organiza
.un.org&SWEBU=1&SWEApplet0=UNIN+Master+Work+Order+List+Applet&SWERowId0=1-PU6WR0

Work Order Notification to *Individual*

A Work Order has been assigned to you. WO ID:WO-IM-1-1371017518
Umoja T2b - Procurement   to: nedelkova
Cc: umojaprocurement
Please respond to umojasupport

▼ 1 attachment

UNTSO.pdf

Dear   in Umoja T2b – Procurement,

The following Work Order has been assigned to you WO-IM-1-1371017518.

Description: Dear Procurement,

Kindly take care of the below request sent us from Ms. Galina NEDELKOVA:

I am writing to you regarding PO#2200015647 from 2014. After receiving the last invoice we figured out we are
Is it possible that funds are added to the PO and how? Our budget does not want us to have pending bills fro
 In Fund commitment module they created a new job aid that addresses the issue but I am wondering if there ar

Link:
https://ineed.un.org/epublicsector_enu/start.swe?SWECmd=GotoView&SWEView=UNIN+All+Work+Orders+Across+My+Maste
ed.un.org&SWEBU=1&SWEApplet0=UNIN+Master+Work+Order+List+Applet&SWERowId0=1-MO9NVY

Best regards,

➢ **When the agent to whom the work order is assigned begins reviewing it, he or she should change the Status to "In Progress"**

Setting Work Order Status

➢ Used properly, the Status field is a useful indicator of the current state of a Work Order.

Status	Definition
Open	Initial status upon initial WO creation.
Transfer	Set when the Assigned To Group is changed.
In Progress	Set by the Assigned-To agent as the first step when reviewing or acting on the Work Order.
Pending	Set when processing of the work order is awaiting further details or clarification or response from the requester or another party. Status should be set back to "In Progress" once the Assigned To agent resumes action on the work order. *NOTE: The amount of time a Work Order spends in a 'Pending' status is excluded from the 'Total Completion Time' field. The 'Total Pending Delay' field shows the amount of time a work order has spent in Pending Status.*
Cancelled	Set when the WO was created in error or otherwise not actionable.
Closed	Set by the Assigned To agent when work on the WO is complete including any required action in Umoja.
Awaiting Approval	When an SR has an approval workflow associated with it, Work Orders will be 'Awaiting Approval' until the approvals are achieved, after which the WO Status becomes 'Open'

Creating a Work Order

➢ From a Work Order screen, click the 'SR Identifier' link to view the SR Detail (See '*Work Order Details*' slide above)

➢ From the SR Detail screen, select the 'WO Details' tab, and click 'New' as shown below.

➢ Enter Priority, Description, and Assigned-To Group. Leave 'Assigned To' blank (the Assigned-to *group* is responsible for assigning their own work orders to individual agents)

➢ Save the record (ctrl-s or Menu->Save)

➢ To view the full WO Detail screen, click the WO Identifier link…

Escalation – Creating new WOs

➢ If an issue cannot be resolved it must be escalated the next support tier by creating a new work order

➢ *Example*: A Tier 2b agent cannot resolved an issue, or determines that it otherwise requires the attention of Tier 3 (Umoja Team), i.e. requires development, break-fix, enhancement, configuration or other technical work; that is, an actual change to the system.
The T2b agent should:

▸ Create an activity stating that the issue is being escalated and give the reason.

▸ Close the T2b work order.

▸ Create a new work order assigned to the appropriate Tier 3 group.

 ▸ Copy/paste the description from the T2b work order and add to it as needed

Reassigning Work Orders

➢ **If a WO is assigned to the wrong group, it can be reassigned by changing the 'Assigned To Group" field**

   ▶ **An Activity should be created to indicate the reason for the reassignment**

   ▶ **Once a WO is assigned to a different group, the original group and it's members will no longer be able to modify the work order.**
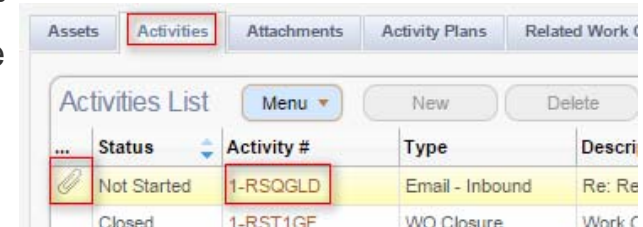
Attachments

➤ Documents may be attached to SRs ("Documentation" tab), WOs ("Attachments" tab), or Activities*
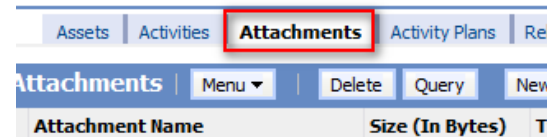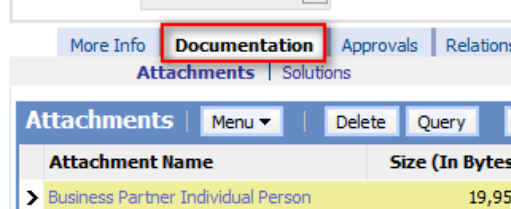
* Activities have one or more attachments if the paper clip icon is displayed.

To view attachments on an Activity, click the 'Activity #' link, and on the Activity detail screen, click the 'Attachments' tab

▸ To create an attachment, Click "New File"
▸ Browse to the desired file on the PC and click 'Open'
▸ Add comments as needed and save the record
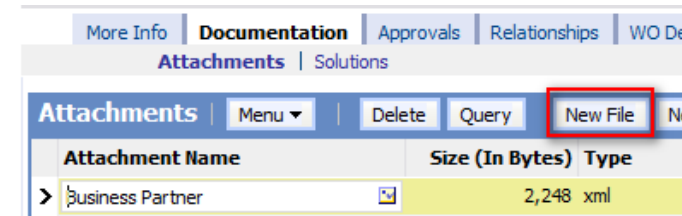
Notes for Data Maintainers

▸ Master data forms will be represented by both xml and html attachments. The xml file is the actual InfoPath form, the html version is identical and provided as a convenience for viewing within a browser and should be used exclusively.
▸ Click the attachment name to open and/or save it

'Predecessor' Concept - Work Order Dependency

▶ Work orders within a given SR can be set sequentially

▶ A WO having a "Predecessor WO" remains in status 'Waiting on Predecessor' until the Predecessor WO is closed

▶ When Predecessor WO is closed, the work order status becomes 'Open'

▶ For multiple work orders not dependent on one another Predecessor WO is left blank

▶ Predecessor WOs are used for Business Partner Forms that contain both general and banking data; the general/shell data WO is the predecessor of the banking data WO

▶ Two WOs are created, one for general/shell data maintenance, one for banking

▶ Banking data maintenance WO has the general data WO as it's Predecessor

Work Order Details

Menu ▾ | Query | Close WO

WO Identifier:* WO-IM-1-92214201
Status:* Open
Category: Other
Assigned To: FMS_AGENT_01, FMS
Assigned To Group: FMS Service Desk Ag
Owned By: FMS_AGENT_01, FMS
Owned By Group: FMS Service Desk Ag
Predecessor WO:
Bill To Organization:

Upon entry of the Predecessor WO, status of the current WO will be updated to 'Waiting on Predecessor' and all the fields except 'Predecessor WO' will become read-only.

Corresponding via iNeed

➢ Agents may need to communicate with others in the course of addressing a work order

➢ e-mail correspondence can *and should* be sent directly from iNeed

➢ Regular e-mail should *not* be used.

➢ e-Mails sent from (and replies back to) iNeed are stored as Activities on the work order (or SR) from which the e-mail was sent, facilitating business continuity, audit trail, follow-ups, etc.

➢ To send email from within a work order:

  ▸ Press **F9** or select **File** > **Send Email, s**elect desired recipient, or "(None)" and click OK; additional recipients can be entered on the next screen.

  ▸ Enter additional recipients as desired **(NOTE: cc yourself to receive a copy)**

  ▸ Use the **Body** dropdown to select an email template. Templates are a convenient way to pre-populate the e-mail subject and body with commonly-used text, which can then be modified as needed.

    ▸ The most important component of the template is the **REF: <WO ID>** tag, which iNeed uses to link outgoing and incoming e-mails as activities on the work order from which they originated.

    ▸ Other text in the subject or body of the message may be modified but the **REF** tag must remain intact.

    ▸ Templates can be created upon request to facilitate message content that is commonly used.

  ▸ Modify the subject and/or body of the message as necessary and click 'Send'
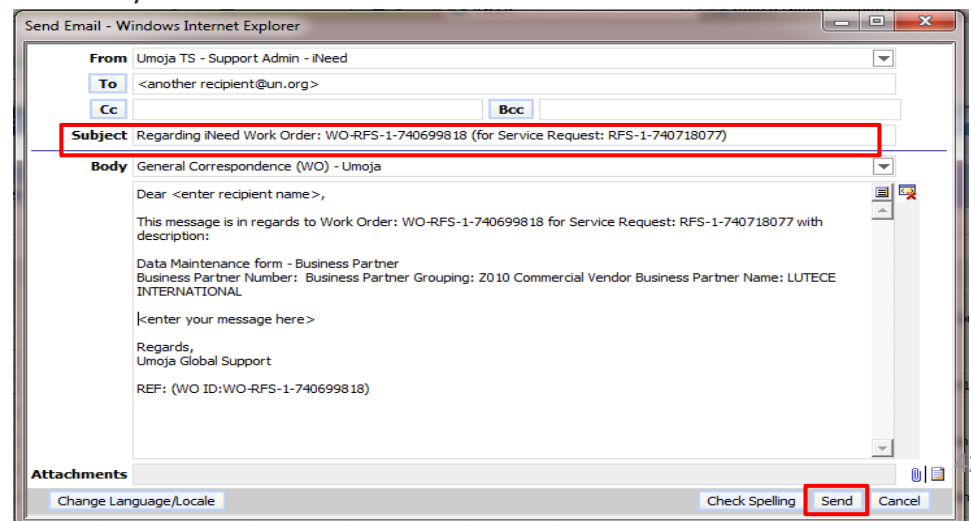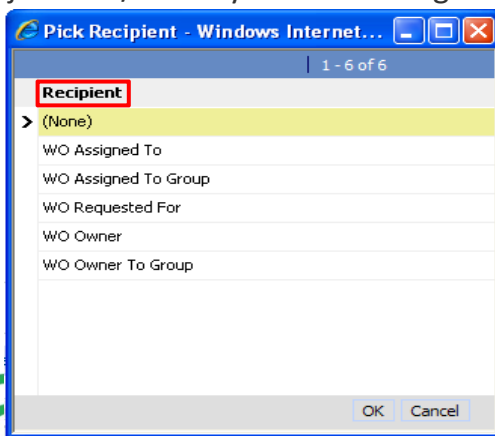
Closing or Cancelling a Work Order

➢ Once the required work is complete, an activity should be created describing the work performed (see "Activities" above).

➢ A work order can only be closed when it has at least one manually-entered activity or F9 email, and all activities have status *Closed* or *Cancelled*.

➢ Careful: WO is closed immediately upon clicking 'Close WO' (no confirmation)

➢ A notification email is automatically sent to the "WO Owner" (typically person/group who created the work order)

➢ Once closed, WOs are no longer editable and should not be re-opened except under exceptional circumstances.

➢ A work order may also be Cancelled by setting it's status to '*Cancelled*'. This should done with caution, only when it is clear that the work order was created in error or without justification

Exporting Data

➢ Within a list view, data can be exported via Menu->Export…

▶ Export Options

  ▶ all visible rows or only the currently highlighted row.

  ▶ Displayed columns only or all available (SR: ~117 columns, WO: ~65 columns)

  ▶ Format: Tab delimited (typically opens directly in Excel), CSV, HTML, user-specified delimiter

User Preferences – Startup View

➢ Startup view and tab layout can be customised under User Preferences. For example you may pay prefer to go directly to the My Work Orders tab upon login...
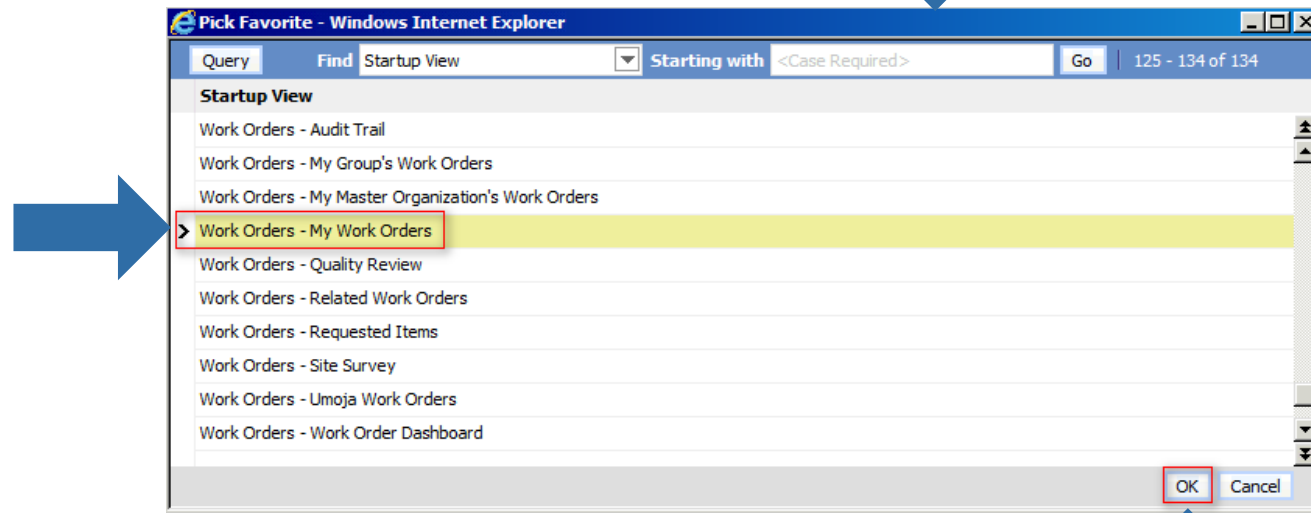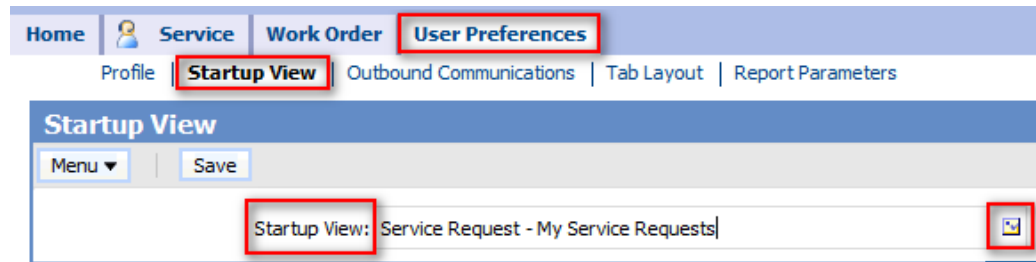
User Preferences – Tab Layout

➢ User Preferences->Tab Layout allows you to customise the visibility, order and default views for each tab

Check to Hide, Uncheck to Show

Controls the left-right tab order

Controls View dropdown list order for the highlighted tab (Work Order here)

Check the desired Default view for the highlighted tab (Work Order here)

Tip: Finding a Work Order

➢ **Scenario:** You received an email stating that a Work Order is assigned to you

1. Click or copy/paste the link in the e-mail.
2. Log in to iNeed if necessary
3. Locate the work order referred to in the email. Use 'Query' if necessary and query for the WO Identifier
4. Click on the WO Identifier view the details

Tip: Resolving/Closing a Work Order

➢ If you can resolve the issue, create an Activity explaining the resolution and close the Work Order

1. In the Activities Tab, click New
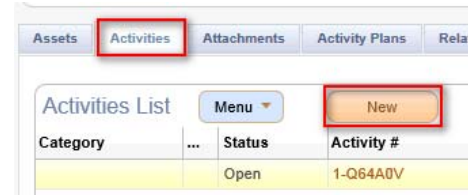
2. Use the Comments field to describe the resolution of the issue. Be specific and thorough, others can learn from your work…

3. Click "Done", then press Ctrl-S to save…

4. Close the Work Order (click 'Close WO')