Umoja Production Support

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

<table>
<thead>
<tr>
<th>Ver</th>
<th>Author</th>
<th>Date</th>
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<tbody>
<tr>
<td>01 - 05</td>
<td>H.Hendler</td>
<td>April 2014</td>
<td>First versions, revisions not tracked</td>
</tr>
<tr>
<td>06</td>
<td>H.Hendler</td>
<td>19-May-2014</td>
<td>Added revision history; using updated Umoja design template; updated support model graphic; added iSeek URL for additional iNeed guides; added work order Cancellation</td>
</tr>
<tr>
<td>07</td>
<td>H. Hendler</td>
<td>29-May-2014</td>
<td>Modified Triage guidelines, added Umoja iNeed Support email (<a href="mailto:UmojaiNeedSupport@un.org">UmojaiNeedSupport@un.org</a>)</td>
</tr>
<tr>
<td>08</td>
<td>H. Hendler</td>
<td>4-Jun-2014</td>
<td>Updated Umoja Support Model graphic</td>
</tr>
</tbody>
</table>
| 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  
  • Miscellaneous 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.                                                         |
## Revision History (cont.)

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<tbody>
<tr>
<td>19</td>
<td>H. Hendler</td>
<td>19-Nov-2015</td>
<td>Misc updates and clarifications</td>
</tr>
<tr>
<td>20</td>
<td>H. Hendler</td>
<td>24-Nov-2015</td>
<td>Added Work Order Status slide</td>
</tr>
<tr>
<td>21</td>
<td>H. Hendler</td>
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<td>Changed <a href="mailto:UmojaiNeedSupport@un.org">UmojaiNeedSupport@un.org</a> references to <a href="mailto:umojaiNeedConfig@un.org">umojaiNeedConfig@un.org</a></td>
</tr>
</tbody>
</table>
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**
- Training Material
- 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 Support Model**
Umoja Support Model - Definitions

• 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

Tier 1
Local Service

• 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

Tier 2a
Umoja Support Centre (ICC)

Brindisi (UNLB) New York (UNHQ)

• 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 2b
Process Experts

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

Tier 3 - Umoja Team
Configuration Enhancements/Break-Fix

‘Tier 0’
Training Materials, Job Aids, LPEs

End-User

Updates and Service Request closure

Updates and Work Order closure

Updates and Work Order closure

Updates and Work Order closure

Updates and Work Order closure
Prerequisites/Logging In

- iNeed requires IE9+ or other common browser (Chrome, Firefox, etc.)
- iNeed Agent access established (request via umojaNeedConfig@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
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 WO contain **Activities**
- SRs, WOs and Activities may contain **Attachments**
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

Object Tabs

List applet

Form applet (Detail View)
A menu button appears in each form and list in the application window, providing options available based on context and Agent permissions.
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]
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 column’s position in the list.
- Click ‘Save’ when done.
- Note the ‘Reset Defaults’ button.

![Columns Displayed screen with options to move columns up, down, to top, or to bottom.](image-url)
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 UmojaNeedConfig@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.
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

**Unique SR Number:**... here too

**SR Categorisation**
- **Area:** Unoa
- **Sub Area:** Master Data Management
- **Sub Area 1:** BP Individual Person
- **Sub Area 2:** General Data

**SR Ownership/Origination**
- **Assigned To:** ESPOSTO, Antonio
- **Assigned To Group:** Unoa Support Centre

**Status**
- **Point of Contact** = Requestor/End User

**Attachments are here**

**SR Priority**
- **Impact/Urgency:** Medium
- **Agent Priority:** Medium

**Key dates**

**Exploded view of text**

**SR activities reflect all actions taken at the SR level (work orders have their own)**

**View Work Order(s) for this SR**

*umija* be the change
Work Order Details

Unique WO Number: WO-RFS-1-586676583

Status: In Progress
Category: Enhancement Request
Priority: 3-Medium
Assigned To: SCIANCEPLORE, Ar
Assigned To Group: Umoja Real Estate Mgmt
Owned By: FANTASIA, Anton
Owned By Group: Umoja Support Centre

WO Description
As all Real Estate rolled mapped staff are allowed to make changes in RECs or in leases. We need a report to track what changes were done in which RECs or in Leases, which has done changes and when these changes were made. This will help the facility manager and Lease approver to keep eye on thousands RECs or leases and identify if unauthorized / wrong changes are made.

Requested For (RF)
Pick RF: SABIR, Muhammad

Attachments
Attachments would be here

Activities
Activities are the primary entity used to record all actions taken on the WO

Carried over from SR POC

Assigning to "person" always belongs to "group"
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
The Query Assistant provides a user interface for constructing multi-field queries. Note the ability to perform queries using AND or OR...
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 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 for Umoja
- See Support Guidelines/SOPs at iSeek link given above for more detail

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

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

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

With kind regards,

Stella

Work Order Notification to Individual

When the agent to whom the work order is assigned begins reviewing it, he or she should change the Status to “In Progress”
Used properly, the Status field is a useful indicator of the current state of a Work Order.

<table>
<thead>
<tr>
<th>Status</th>
<th>Definition</th>
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<tbody>
<tr>
<td>Open</td>
<td>Initial status upon initial WO creation.</td>
</tr>
<tr>
<td>Transfer</td>
<td>Set when the Assigned To Group is changed.</td>
</tr>
<tr>
<td>In Progress</td>
<td>Set by the Assigned-To agent as the first step when reviewing or acting on the Work Order.</td>
</tr>
<tr>
<td>Pending</td>
<td>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. <strong>NOTE:</strong> 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.</td>
</tr>
<tr>
<td>Cancelled</td>
<td>Set when the WO was created in error or otherwise not actionable.</td>
</tr>
<tr>
<td>Closed</td>
<td>Set by the Assigned To agent when work on the WO is complete including any required action in Umoja.</td>
</tr>
<tr>
<td>Awaiting Approval</td>
<td>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’</td>
</tr>
</tbody>
</table>
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.
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 its 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

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**, select 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)

![Work Order Details](image)

- 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
Startup view and tab layout can be customised under User Preferences. For example, you may 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.

- 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).

Check to Hide, Uncheck to Show.
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

![Table: My Master Organization's Work Orders](image-url)
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’)