Create Reactive Job - Single Screen View

Fri, Jan 19, 2024 Create Reactive Job Tab

To create a Reactive Job using the Single Screen View, simply click the “Create Job” tab then the "Create Reactive Job" button and follows these steps:

1. Upon clicking the "Create Reactive Job" button, the first screen in the create reactive job process will begin. This will do one of two things, depending on whether the User is a single site user, or a multiple site user. For single site users it will automatically populate the "Your Building" textbox with the building assigned to the Users profile. Multiple site Users will be able to type in the textbox, which will populate a list for the User to choose the desired sight. After selecting the applicable site the "Do you have an asset number to hand for this job?" button should become available, if applicable please tick the box before clicking the "OK" button.

Note: If the "Do you have an asset number to hand for this job?" tickbox is ticked, please see the Create Job - Asset Available page.

2. Next is the the Task Search page. In the "Task Search" field, enter the item that needs attending to and click the "Search" button. This will display a list of faults/issues relating to the search criteria in which the User must select the correct fault/issue that is causing a problem. If the User selects a fault/issue that is not maintained, a message is displayed next to the task and will not allow the User to select it (this is permission based).

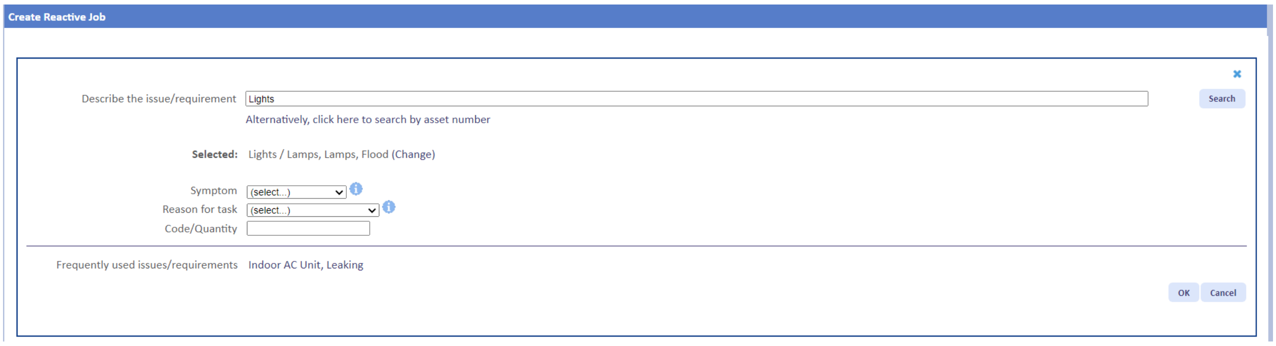
Once the fault/issue has been selected, the "Symptom" and "Reason for task" need to be determined. Both the "Symptom" and "Reason for task" fields are drop downs which the User can select from. Explanatory text may appear in relation to the "Reason for task" chosen (if configured by the System Administrator) providing detail on what each Reason should be used for. Also, if necessary, it is possible for the User to enter a "Quantity" (for example if there are multiple light bulbs blown) or a Code relating to the issue in the "Code/Quantity" field.

Once the Task has been selected, click the "OK" button to proceed.

Note: If there are Assets relating to the Task selected but the "Do you have an asset number to hand for this job?" tickbox was not ticked, any available Assets will be shown. Please see the Create Job - Asset Available page for further details.

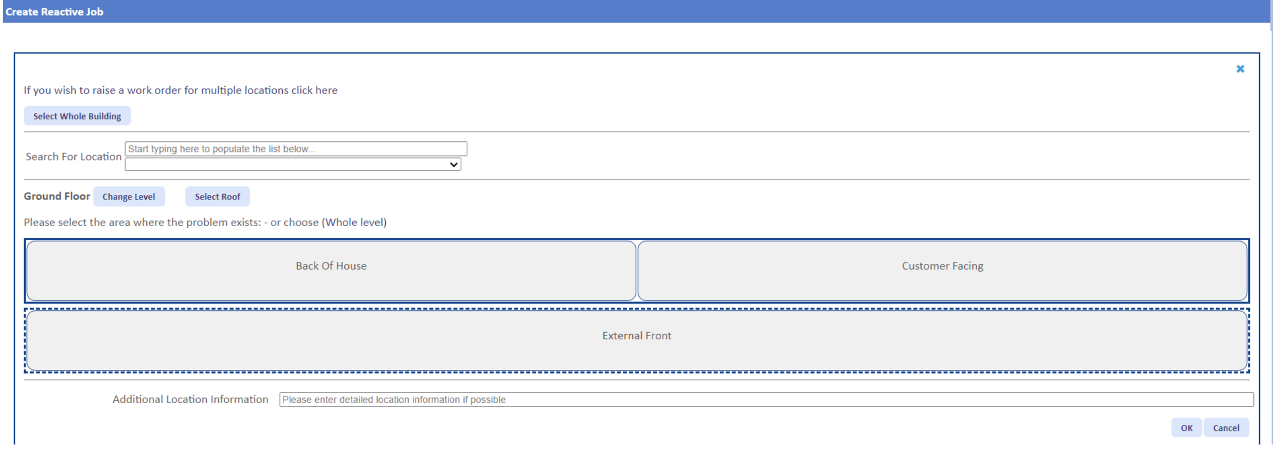
3. The next section is the Location section. This is where the location of the issue is entered. Start off by checking if the Level is correct by checking the Level located on the left. If this is incorrect, click the "Change Level" from the left hand side and this will display a number of Levels available at the Building. Choose the appropriate Level and the Level will be changed (if the desired Level is the "Roof", clicking "Select Roof" will automatically choose the location as Roof, Roof, Roof and will progress to the next section of the Create Job process).

Next, select an Area and a set of Location will appear (if the issue is across the entire Level, select the "Whole Level" button instead). If any further information about location can be provided then this can be added to the "Additional Information" field.
If there are many locations at the Building and the desired site is already known, the User can search for the Location using the "Search For Location" field. Searching in this field will display a list of locations as the User types. Select the desired Location from here to be progressed to the next step. If the issue happens to be round the entire Building, then the "Whole Building" button should be selected. This will also progress to the next step when selected.



Once the Location has been selected, click the "OK" button to proceed.

4. Next is the Contact Details page. This page is used to supply the contact details, should someone need to be contacted about the work. When this page is displayed, by default the details of the User creating the job automatically populate the fields along with a list of contacts to select from. Each Contact in the list has a Name, Job Title and Telephone Number. Select one of these by clicking the contact name and the "Contact Type", "Contact Name" & " Contact Telephone" fields are populated with the contacts details.



Once all the contact details have been provided, click "OK".

5. Once the contact is selected, the Response screen is displayed. This is where the User details the time the job needs to be completed by. They can determine whether a temporary fix is in place (using the "Is there a temporary solution in place?" tick box) and the priority of the job. The priority can be selected using the "Priority" drop down.
Note: Some priorities will display a Date/Time picker. When these are chosen, all the User needs to do is select the Date/Time accordingly. Other priorities will show the calculation of what the calculated SLA (based on the Contract) will be.

Note: In some cases, there maybe jobs previously raised that are classed as Duplicates, special Events or Upcoming PPMs that the job could relate to. These are described in more detail on the Duplicates/Events page.

Note: In some cases where the Priority is changed, depending on the settings for the Client, the Non-Default Priority Reason field will be displayed. Hovering over the "I" will displayed some information about this field. This is a mandatory field that must be completed before progressing with the job creation.

Once complete, click "OK" to progress to the final step.

6. Once all necessary sections have been completed, a summary of the job is displayed. From here, it is possible to check and change any details of the job to ensure they are correct. This is done by selecting the relevant section and clicking the "Change" button. Once all details are correct, select the "Submit Job" button to create the job.

Note: If there are any further notes to add regarding the job then these can be added in the "Notes" section.

Note: If there are changes required (and if the User has the relevant permissions) to the Resource that is being assigned to the job, please check the Create Job - Resource Selection page for more details.

It is only possible for this process to be used if the User has the permission "Can Use Single Screen Work Order Creation" turned on against their Profile. With the permission off, the usual tabbed creation process will be used.

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