Creating Work Orders using Work Order Templates

Work Order Templates are used for request types that have new services created or to update existing services.

Smart Recorder

Smart Recorder uses a free-form text entry field to help you focus on what the customer is saying, instead of filling out fields in a structured form. This way of creating a ticket helps you to capture information in real time, directly from the customer and in their own words. Smart Recorder helps you to create tickets of all kinds more quickly and with greater accuracy.

SEARCH SYMBOLS

» To help Smart Recorder recognize keywords on which it will run searches, type a special character in front of the keyword.

Symbol	What follows is
@	A person or asset
!	A template

1. Click Smart Recorder in the Remedy toolbar.



2. Beginning with the @ symbol and a letter, enter the beginning of the customer's name, Employee ID, or email address, then select the customer from the list of all possible matches that pops up.



(Optional) Identify additional people by using the @ symbol again. Using the menu next to each person's name, identify one (and only one) person as the customer, and all others as contacts or persons mentioned in the issue.

3. Start describing the issue by typing the ! symbol and then entering an issue type, term, or phrase. The system will search for suggested resources. Select the appropriate Work Order Template from the drop-down list.

<u>Sean H Yuan</u>	lorder
	"order" matches 0 incident template, 0 service request templates and 4 work order templates
Cust Sean H Yuan ITD Enterpris Information LAUSD	Work Order Template Welligent - Creating/Changing Student Record
	Work Order Template Cellular Order Request
	Work Order Template Application Work Order Template
	Work Order Template Inbound Work Order

4. After selecting the appropriate Work Order Template from the drop-down list, click on the Create Work Order button.

Sean H Yuan Welligent - Creating/Changing Student Record				We found several helpful resources related to your issue.		
Customer ~ Sean H Yuan Hide Details		Hide Details	Templates (26)			
Sean H Yuan	### sean.yuan@lausd.net	Site ITD-Decision Support System 333 S Beaudry Ave		Incident Template Welligent - Student De-duplication Priority: Low Category: Record		
ITD Enterprise Reporting & Integration Information Technology Division LAUSD		Los Angeles, CA 90017 United States Get Directions		C Incident Template Welligent - Bug Priority: Low Category: Defect (Bug)		
Service Rating	0 Escalations in Last Month			Incident Template Welligent Support INC Priority: Medium		
Corporate ID 01112363	VIP No	Client Type Office-Based Employee		C Incident Template Welligent - Calendar Issues Priority: Low Category: Calendar		
Support Staff Yes	Login ID sean.yuan@lausd.net			Show more		
Site Group LAUSD HQ	Region East			Recommended Knowledge (15)		
				Create Work Order Start Over		

5. If necessary, edit ticket information by clicking on the pencil icon next to the corresponding section.



6. Click the Confirm+Save button to save the ticket.

Assigned to None Yet Support Group Welligent Support	Request Manager None Yet Support Group Welligent Support & Assign to me	🖌 Edit	⊖ Ç	KBA00000718 RECORDS REQUEST Updated: Sep 6, 2017 ▶ 0% ● 13 views % 0 linked tickets		
Assign to me			○Q	KBA00001101 Update Student Home Language Updated: Sep 6, 2017 → 0%		
Additional Info PEdit This section is currently empty. You may edit the section to fill in additional fields.			○ ₽	KBA00000710 UPDATE A STUDENT'S ENROLLMENT RECORD Updated: Aug 8, 2017		
Tasks (0)	ks (0) Related Items (0)			070 0 13 VIEWS SO INITIAL LICKELS		
+ Add Task Tasks are ordered within each section by sequence (first to last). Tasks can't be moved into or out of task groups. You have not saved any task vet				KBA00000711 WITHDRAW A STUDENT ENROLLMENT RECORD Updated: Sep 6, 2017 0% Ø 7 views % 0 linked tickets		
			Show more			
✓ All Required fields complete! Confirm + Save Cancel						