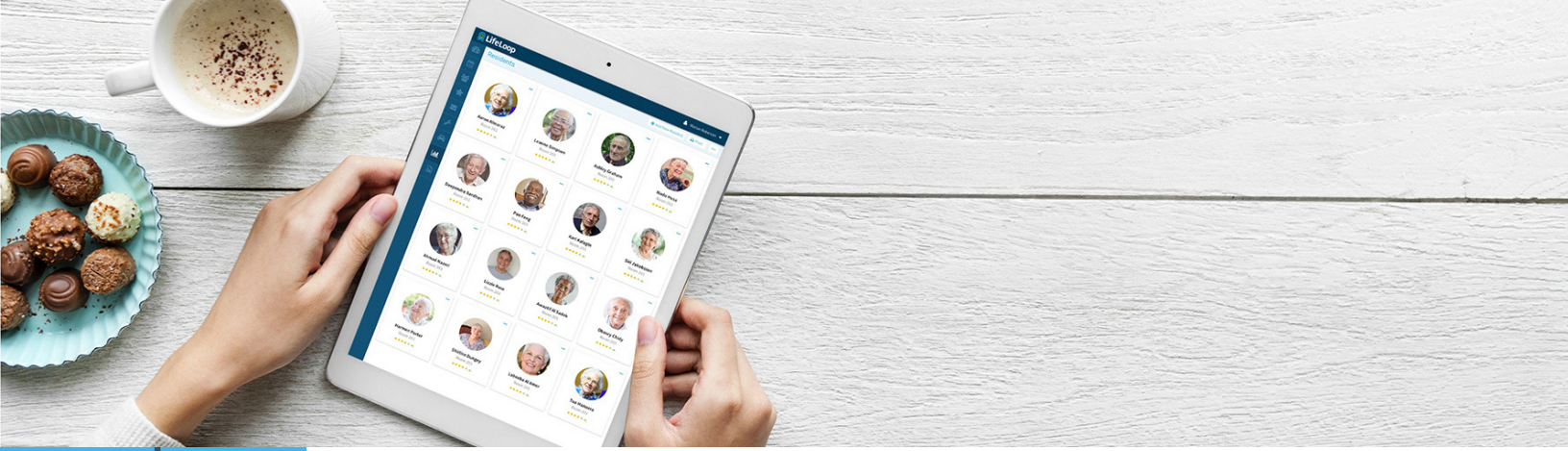


# WORK REQUESTS

How to create and manage work request teams.



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# WORK REQUESTS

## WORK REQUEST TEAMS FAQS

### ? WHERE CAN I EDIT, REMOVE OR ADD TEAMS?

Teams are setup when your LifeLoop account is setup. Only LifeLoop's Support Team can edit, remove or add Teams. Please reach out to [support@ourlifeloop.com](mailto:support@ourlifeloop.com) if you have any additional questions on this.

### ? HOW DO I ASSIGN A STAFF MEMBER TO A TEAM?

Assigning a staff member to a Team is done within the staff member's profile. Please see next page for step-by-step instructions on how to assign staff to a Team.

### ? IF A STAFF MEMBER IS ASSIGNED TO A TEAM WILL THEY BE ABLE TO SEE OTHER TEAM'S REQUESTS?

Staff will only see the requests for the Team or Teams they are assigned to.

### ? CAN STAFF CREATE A WORK REQUEST IF NOT ON A TEAM?

Staff can only create a work request for the Team or Teams they are assigned to and they must have the Create Work Requests permission.

# WORK REQUESTS

## WORK REQUEST TEAMS

### STEP 1

To assign a staff member to a team, locate and open the staff profile that you would like to assign to a Team.



Erin McGill 

### STEP 2

Once inside the staff profile, scroll down until you see "Work Request Teams".

#### Work Request Teams

Choose teams

### STEP 3

Click on **Choose Teams** to select one or multiple Work Request Teams for this staff member to be assigned to.

#### Work Request Teams

× Maintenance |

× | v

Housekeeping

IT

**Note:** If you do not see this Work Request Teams section in this staff member's profile, please check that their Permissions include "View Work Requests" at the minimum.

# WORK REQUESTS

## ASSIGNING TEAM MEMBERS

**Note:** Team members can be assigned to a request when it is created or they can be assigned after creation. This section reviews how to assign after creation.

### STEP 1

Go to Work Requests in the feature menu on the left-hand side.



Work Requests

### STEP 2

Click on **To-Do List** or **Backlog** located in the light blue menu on the left-hand side.

#### Work Requests

To-Do List

Backlog


Recurring



Calendar

Closed

### STEP 3

To assign a crew member to a request or multiple requests, click on the check box to the left of the request(s) you would like to assign them to.



<input type="checkbox"/>	REQUEST NAME	CREATED DATE
<input checked="" type="checkbox"/>	Maintenance · #MR000738 ● <b>change light NOW</b> 3 Team Members	5 days ago 
<input checked="" type="checkbox"/>	Maintenance · #MR000737 ● <b>Change Lightbulb</b> Katherine Monberg	13 days ago 

# WORK REQUESTS

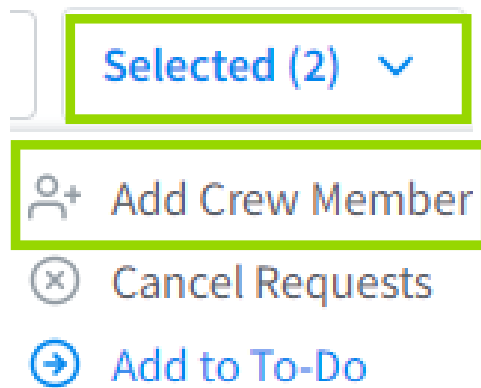
## ASSIGNING TEAM MEMBERS

### STEP 4

Click on Selected that now appears to the right of the search bar.

### STEP 5

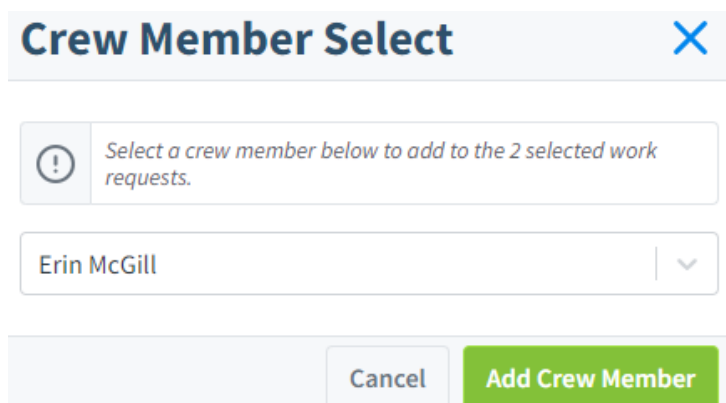
Click on **Add Crew Member**.



A screenshot of a software interface showing a dropdown menu. The top item is 'Selected (2)' with a downward arrow. Below it, 'Add Crew Member' is highlighted with a green box. Other visible options are 'Cancel Requests' and 'Add to To-Do'.

### STEP 6

Select the crew member you would like to assign to that request from the dropdown and click **Add Crew Member** once selected.



A screenshot of a 'Crew Member Select' dialog box. It has a title bar with a close button. Below the title is a message: 'Select a crew member below to add to the 2 selected work requests.' There is a dropdown menu showing 'Erin McGill'. At the bottom are two buttons: 'Cancel' and 'Add Crew Member'.

# WORK REQUESTS

## CONTINUED LEARNING

### ➤ **ATTEND A UNIVERSITY COURSE**

Don't forget about our complimentary LifeLoop University available to you and your team. Courses are provided weekly and cover all LifeLoop features. Emails with the topics and schedules are sent out monthly for you to register to attend.

### ➤ **VISIT THE LEARNING COMMUNITY**

Access LifeLoop marketing collateral and training resources at your convenience.

Find the Learning Community by clicking the "?" on the top right-hand side of your screen or going to <https://ourlifeloop.com/training/staff>.

### ➤ **FURTHER QUESTIONS?**

Reach out to [Support@OurLifeLoop.com](mailto:Support@OurLifeLoop.com) or your Customer Relationship Specialist.