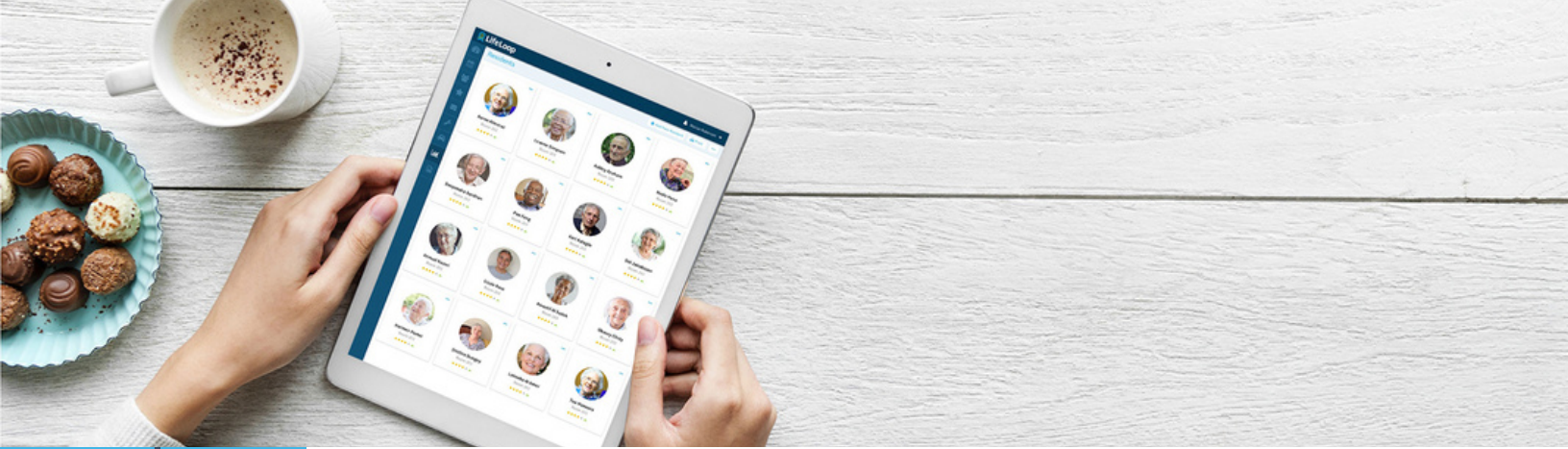


WORK REQUESTS

How to create and manage recurring and scheduled work requests.



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WORK REQUESTS

RECURRING REQUESTS

? WHAT ARE RECURRING REQUESTS USED FOR?

Recurring requests are great for work requests that need to be worked on once a week, once a month, every 6 months, etc. Several examples are changing AC filters, fire alarm checks, vacuuming the lobby etc. When referring to Maintenance Requests specifically these can be known as Preventative Maintenance Requests.


? WHY CAN'T I MOVE A RECURRING REQUEST TO THE TO-DO LIST?

Recurring requests will automatically move to the To-Do List on the recurring date, therefore you do not need to manually move them.

? WHAT HAPPENS TO MY TASKS ON A RECURRING REQUEST?

Any tasks added to a recurring request will stay attached to the request each time it is due. The tasks will show as incomplete until they have been completed for that single recurring occurrence.

? HOW CAN I EASILY IDENTIFY A RECURRING REQUEST?

This double sided arrow icon  will be next to any requests that are recurring.

WORK REQUESTS

RECURRING REQUESTS

CREATING A RECURRING REQUEST

STEP 1

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

STEP 2

Click on **+ New Request** on the top right-hand side.

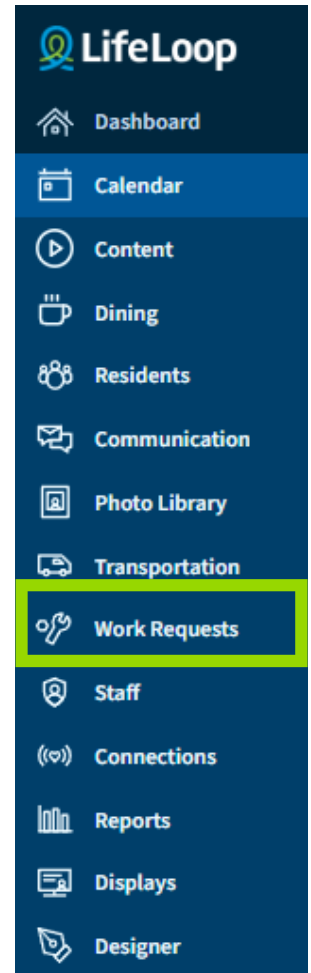
+ New Request

STEP 3

When creating your new request, click on **Setup Recurring**.

Recurring

[Setup Recurring](#)



WORK REQUESTS

RECURRING REQUESTS

CREATING A RECURRING REQUEST (CONT.)

STEP 4

Select your recurring pattern and how often you would like this request to recur. For example, a recurring request can be every day, once a week, or the first Monday of each month. Also select when this request series should start and end. By default, the last date extends two years from the start date.

Recurring every...

weeks



Days of Week



Start Date (required)

Last Date

STEP 5

Click **Apply Changes** on the bottom right-hand side.

Apply Changes

WORK REQUESTS

RECURRING REQUESTS

CREATING A RECURRING REQUEST (CONT.)

STEP 6

Once you have completed filling out the New Request form, click **Create Request** on the bottom right-hand side.

A green rectangular button with the text "Create Request" in white.

Your new request has now been added to the Recurring section in the light-blue tool bar. Click on **Recurring** to view this request.

Work Requests

To-Do List

Backlog

Recurring

Calendar

Closed

Note: This request will automatically move to your To-Do list on the next recurring date. Once marked completed, a single occurrence of this recurring request will be moved to the closed list. The recurring pattern will continue and the request will remain in the Recurring tab until the pattern is complete.

WORK REQUESTS

SCHEDULED REQUESTS

? WHAT ARE SCHEDULED REQUESTS USED FOR?



Scheduled Requests are great for requests that you know can only be done on a specific day, or need to be done by a specific date.

? WHY CAN'T I MOVE A SCHEDULED REQUEST TO THE TO-DO LIST?

Scheduled requests are set to automatically move to the To-Do list when it is the scheduled date. You do not need to move them as they will do so themselves.

? WHY ARE MY SCHEDULED REQUESTS "MOVE TO TO-DO LIST" BUTTON GRAYED OUT ON MY BACKLOG?


This is grayed out on the backlog because it is scheduled for a specific day and will automatically move on that scheduled date.

☐ Maintenance - #MR000737
  Change Lightbulb
[Joey Carney](#)

13 days ago



? WHAT SYMBOLIZES A SCHEDULED REQUEST?

This calendar icon  will be next to any requests that have been scheduled.

WORK REQUESTS

SCHEDULED REQUESTS

CREATING A SCHEDULED REQUEST

STEP 1

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



Work Requests

STEP 2

Click on **+ New Request** on the top right-hand side.

+ New Request

STEP 3

When creating your new request, click on **Scheduled Date**.

Scheduled Date

mm/dd/yyyy

This will populate a calendar so you can easily select the specific date this request needs to be scheduled for.

February 2022						
Su	Mo	Tu	We	Th	Fr	Sa
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	1	2	3	4	5
6	7	8	9	10	11	12

WORK REQUESTS

SCHEDULED REQUESTS

CREATING A SCHEDULED REQUEST (CONT.)

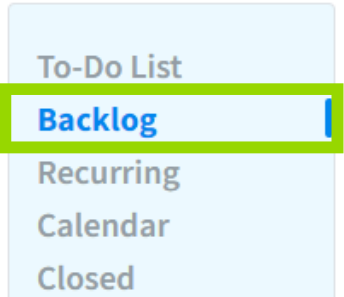
STEP 4

Once your request is completed, click **Create Request** on the bottom right-hand side.

A green rectangular button with the text "Create Request" in white.

Your new request has now been added to the Backlog tab on the light-blue tool bar. Click on **Backlog** to view this request.

Work Requests

A light blue dropdown menu with five options: "To-Do List", "Backlog", "Recurring", "Calendar", and "Closed". The "Backlog" option is highlighted with a green border.

To-Do List

Backlog

Recurring

Calendar

Closed

Note: This request will automatically move into your To-Do list on its scheduled date. Once marked completed, it will be moved to the closed list.

WORK REQUESTS

WORK REQUEST CALENDAR

? WHAT DOES THE CALENDAR SHOW?

The calendar will show you Recurring Requests up until the present date, any scheduled requests and completed requests.

? CAN I FILTER REQUESTS ON THE CALENDAR TO ONLY VIEW ONE TEAM MEMBERS REQUESTS?

Absolutely! Click on Filter and select the team member's calendar you would like to view.

? ARE THE REQUESTS ON THE CALENDAR CLICKABLE?

Yes! First select the day of the request you would like to view then click on the request. This will take you directly into the work request details.

WORK REQUESTS

WORK REQUEST CALENDAR



FILTERS

Use filters to show only specific types of work requests, specific crew members, or to search for a specific request.

The screenshot shows a filter panel with the following elements: a 'Filters (0)' label and a 'Show All' button at the top; a 'Type' dropdown menu with 'Choose Type' selected; a 'Crew' dropdown menu with 'Choose Crew Member' selected; a 'Search' input field with the placeholder text 'Search for request'; and two buttons at the bottom: 'Clear Filters' and 'Done'.



VIEWS

You can easily view your calendar differently by selecting Day, Week and Month view.

The screenshot shows three view selection buttons: 'Day', 'Week', and 'Month'. The 'Month' button is highlighted with a blue border and blue text, while 'Day' and 'Week' have grey borders and grey text.



COLORS

The color dots signify the status of the request.

- Open
- In Progress
- Completed
- Cancelled

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 or your Customer Relationship Specialist.