SAP Training Reference Guide

Estates Web Notification Version
## Contents

Section 1: User Guide Overview ........................................................................................................... 3
  1.1 Introduction ..................................................................................................................................... 3
  1.2 Guide Focus .................................................................................................................................... 3
  1.3 Guide Objectives ............................................................................................................................ 3
  1.4 Provisos when using the Estates Web Notification Application .................................................... 3

Section 2: Log onto the Estates Web Notification .................................................................................. 4
  2.1 How to log onto the Estates Web Notification ................................................................................. 4
  2.2 Additional Functionality .................................................................................................................. 4

Section 3: Creating a Work Request ..................................................................................................... 5
  3.1 Click on the Create Work Order tab .............................................................................................. 5
  3.2 Primary Contact - Name, Department & Telephone Number ....................................................... 5
  3.3 Secondary Contact - Name, Department & Telephone Number .................................................. 5
  3.4 Report Date / Time ......................................................................................................................... 6
  3.5 Location of Issue ............................................................................................................................ 7
  3.5 Type of Issue .................................................................................................................................. 8
  3.6 Description of Issue ....................................................................................................................... 8
  3.7 Additional Comments ..................................................................................................................... 8
  3.8 Account/Recharge Code ................................................................................................................ 8
  3.9 Customer Reference ....................................................................................................................... 8
  3.10 Permit Required? ......................................................................................................................... 8
  3.11 Submit Work Order ....................................................................................................................... 9

Section 4: Using the Search Work Orders tab ....................................................................................... 10
  4.1 Click on the Search Work Order tab ............................................................................................. 10
  4.2 Additional Functionality ................................................................................................................ 12
Section 1: User Guide Overview

1.1 Introduction

In the following Sections, we will begin the process of learning how to use the Web based SAP application called Estates Web Notifications. In the application we will look at how to create requests for work and monitor their progress. We will also look at how to search for particular details of a specific request and the additional information that is available to the user.

1.2 Guide Focus

Our focus in this Reference Guide, will be on how to enter your information so that a Web Work Order & Notification can be created. How to search for details of a PM Work Order using the Search Facility functionality of the application and a look at what Information is available for viewing by the SAP Web User.

1.3 Guide Objectives

This Reference Guide takes a User through the processes involved in using the SAP Estates Web Notifications application. The areas this guide will cover are detailed below;

- Learn how to Login and Log Out of the SAP Estates Web Notifications application.
- Insert information into a record creating a Work Request
- Navigate through the SAP Estates Web Notification application and its associated Screens.
- Use the Search Facility to generate details about a particular Work Order.

1.4 Provisos when using the Estates Web Notification Application

Estate Services will treat every Departmental SAP Estates Web Notifications submitted Work Request as a genuine authorized request for work.

- It is the responsibility of each department to monitor their own submitted requests.
- It is the responsibility of departments to police the use of the SAP Estates Web Notifications Application by their nominated departmental authorized persons only.
- This guide is only to be used as a reference to the SAP Estates Web Notifications Application it pertains to.

If you have a problem

- If it is Network Related or the Operating System contact the IT Service Desk.
- If your problem is related to not being able to log-on to the SAP Estates Web Notifications application or a forgotten password or username then call IT Service Desk (33333) itservicedesk@leeds.ac.uk
- Estate Services will endeavour to assist you with your query where it can. However, if the problem is related to an technical issue whilst you are in the SAP Estates Web Notifications Application then call the IT Service Desk (33333) itservicedesk@leeds.ac.uk
Section 2: Log onto the Estates Web Notification

2.1 How to log onto the Estates Web Notification

1. Go to https://facilitiesdirectorate.leeds.ac.uk/helpdesk/

2. Select REPORT VIA SAP ONLINE, then select

3. The following screen should be displayed:

![Image of Estate Services Web Notification]

4. In the Username and Password fields you will need to put the account details that IT/Estates have setup for your access (the username is your “Payroll No.”).

5. Following the input of the Username and Password, pressing RETURN on your keyboard has the same effect as clicking on the Login button.

2.2 Additional Functionality

- Clicking on the Customer Feedback Questionnaire hyperlink will take you directly to the Estates Questionnaire this allows you to provide feedback on the services provided by Estates.

- Clicking on the Change Password icon allows you to set your own password. It is recommended that you change the password the first time you log into the application.

- Clicking on the Contact Us icon takes you directly to the FD website.

- Clicking on the Help icon opens up a copy of this training document.
Section 3: Creating a Work Request

3.1 Click on the Create Work Order tab.

Following screen should be displayed –

![Diagram of the create work order screen](image)

3.2 Primary Contact - Name, Department & Telephone Number

<table>
<thead>
<tr>
<th>Primary Contact</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>1007008, Mark Ratcliffe</td>
</tr>
<tr>
<td>Department</td>
<td>SAP Finance</td>
</tr>
<tr>
<td>Telephone No</td>
<td>0113-34-37182</td>
</tr>
</tbody>
</table>

These fields are populated automatically with the details of the person logged into the system.

Note – You can amend the Department & Telephone Number if you know these are incorrect.

3.3 Secondary Contact - Name, Department & Telephone Number

1. Click on the Name search field icon

On selecting the Search Field Icon you will be presented with the screen below.
2. If you know the Users name then enter the Full details in the two fields –

E.g.

<table>
<thead>
<tr>
<th>Last name:</th>
<th>Ratcliffe</th>
</tr>
</thead>
<tbody>
<tr>
<td>First name:</td>
<td>Mark</td>
</tr>
</tbody>
</table>

Otherwise you can enter use Wildcards –

E.g.

<table>
<thead>
<tr>
<th>Last name:</th>
<th>Ratcl*</th>
</tr>
</thead>
<tbody>
<tr>
<td>First name:</td>
<td>Mark</td>
</tr>
</tbody>
</table>

Note - * is the Wildcard symbol.

3. Click on the **Start Search** button.

4. This will retrieve a list of all the records that match the criteria.

<table>
<thead>
<tr>
<th>Last name</th>
<th>First name</th>
<th>Birth date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ratcliffe</td>
<td>Mark</td>
<td></td>
</tr>
</tbody>
</table>

5. If you want to retrieve the first record displayed click on the **OK** icon otherwise click on the line that you want to retrieve.

6. This will return you to the initial screen and populate the Name, Department & Telephone Number.

Note – You can amend the Department & Telephone Number if you know these are incorrect.

### 3.4 Report Date / Time

| Report date / time | 06.12.2018 | 1 | 13:46.11 |

Note – These fields will be populated automatically with the current date and time.
3.5 Location of Issue

1. To search for a location click on the Search Field icon.

On selecting the Search Field Icon you will be presented with the screen below:

![Search Locations Screen]

2. You use this screen to filter out the location you wish to select by searching on the Description initially then using the Location Code to get the specific location information.

E.g. *Worsley* in the Location Description Field gives you the code 1-086-0137 (Generic Search). *0137* in the Location Code field gives you all Floors/rooms details (Specific Building Search)

Note - * is the Wildcard symbol.

3. Once you have selected the criteria Click on [Start Search] button.

4. This will produce a value list according to the Search Criteria you entered.

![Value List]

5. Double Click on the Location Code and the Value will be returned to the On Screen Form.
3.5 Type of Issue

1. Click on the first drop down list ▼ and select the appropriate code
2. Click on the second drop down list ▼ and select the appropriate code

3.6 Description of Issue

This is a Free Text Field (restricted to 40 characters) and is used to briefly describe the requirements.

3.7 Additional Comments

Enter any additional text relevant to the request. – Unlimited Text.

3.8 Account/Recharge Code

If the work is rechargeable enter your recharge or account code.

3.9 Customer Reference

This is an optional box and can be used for any reference number you wish to enter.

3.10 Permit Required?

If access restrictions apply then select the Permit – Tick box
3.11 Submit Work Order

To send the completed form to the SAP Database click on the Button

If there is already a request for the same location / type of issue then you will receive the following warning message -

The User can select Yes or Cancel

Yes Submits the current request and creates a new Work Order.

Cancel Returns you to the initial screen.

Otherwise the following message will appear -
Section 4: Using the Search Work Orders tab

The SAP Estates Web Notification application enables a User to search for previously submitted work requests and related Historical Information.

4.1 Click on the Search Work Order tab

Following screen should be displayed –

![Search Work Order Screen]

1. To display a list of Work Orders that you are searching for, you have to enter the appropriate criteria in the Search Work Order fields.

- **Work Order** – enter the Work Order No in full or enter part of the Work Order No within asterisk’s (e.g. 1502*)…..there is no search criteria for this field.

- **Reported By** - Click on the search icon

  This uses the same search criteria as Secondary Contact Name (section 3.3).

- **Priority** – Click on the drop down button and click on the relevant Priority.

- **Location of Issue** – Click on the search icon

  This uses the same search criteria as the one on the Create Work Order tab (section 3.4).

- **Status** – Select the relevant code from the drop down list.
• Reported date / end dates –

Reported date From: [ ]
To: [ ]

Req. end date From: [ ]
To: [ ]

Click on the icon and select the relevant dates.

Note – You can combine the search options to limit the results.

2. To retrieve the results click on the button.

3. After clicking on the Find Button the results of your search will be listed in the table below the Search Fields as displayed in the screen shot below.

The top part of the screen is the list of results.

The Order details will appear at the bottom of the screen and will require you to scroll down the page to view.

Note – If you cannot see the order details then you may need to click on the icon.
4.2 Additional Functionality

Clicking on the **Reset** icon will clear down the search criteria.

Clicking on the **Print Work Orders** icon will create a list of the orders listed and allow you to print the list to a network printer.