

Helpdesk Overview

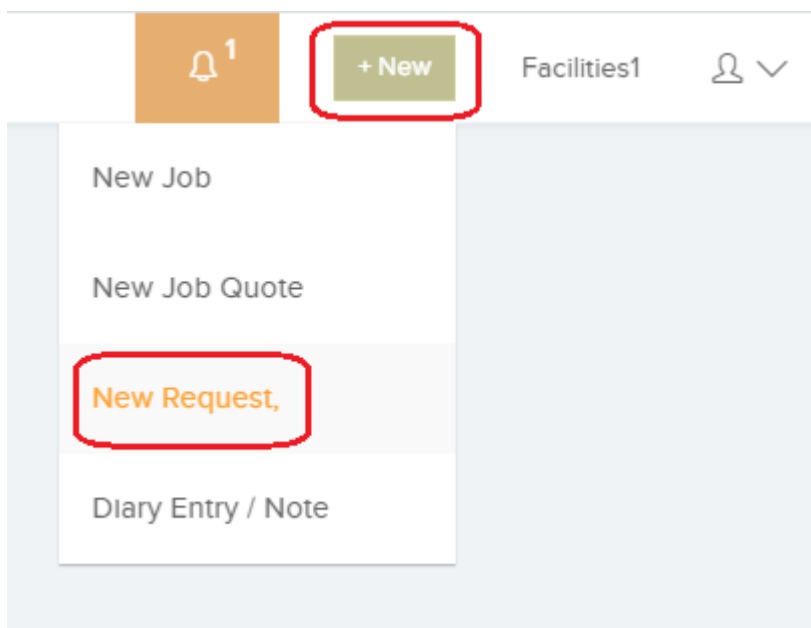
Clients and end users can create “job requests” which the central team or helpdesk can then review and approve into full reactive jobs. These jobs can then be managed through a life-cycle from issuing the work to a contractor or internal engineer through to completion.

Email notifications can be sent to the client and helpdesk through the journey of the job request through to the completed job.

The highly configurable system gives you lots of options and flexibility.

Creating Job Requests

Requests can be created by logging to Trackplan’s web-based application, and selecting the **+NEW** button at the top-right of the page:



Requests can also be created by selecting the *New Request* button at the top-right of the *Requests* page:



This will bring you to the *Create a New Request* page:

New Request,▶ Save

Details

Contract.

(please select) ▼

Site Name

(please select) ▼

Location.

(please select) ▼

Sub Location

(please select) ▼

Raised By

Job Type

(please select) ▼

Sub Type

(please select) ▼

Expected Start By

You will be asked for the job details, site name, location, sub location, job type and expected date. As a new request is being created, a list of similar recently raised job requests will appear on the right-hand side on the same screen.

The new request screen can be configured to ask for information you want. For example, you can choose not to ask for the job priority or expected date:

New Request Screen Settings

New request on one page or wizard

- ☒ Single Page
☐ Wizard (multi-page)

Expected Date Or Job Priority

Ask For Expected Start Date

Ask For Job Type in New Request

Yes

Is Job Type Required

No

Ask For Single Asset

No

Is Location Required

No

Ask for Duration and # Resources Required

No

Can Request Quote

No

[? Help](#)

Job requests can also be created by sending in an email. The responsive design means that requests can be created by using a phone or tablet device with Trackplan. As soon as the request is created, then an email is sent to the client with confirmation of their new request and a new job request number. A similar email is sent to helpdesk users informing them of a new request.

Job Request Details

2649 Job Request No.	Castle View Site	Pending Status	Broken Window Details
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Details Documents Assets

Back Add Delete Decline Approve

Details
Broken Window

Site Reference cc8

Site Name [Castle View](#)

Location - First Floor

Sub Location - Lecture theatre

Job Type - Incidents - H & S

Sub Type

Raised By Facilities1
Deren

Raised By - Email markecochrane@gmail.com

Team - Incident Team

Job Request Status Pending

Date Raised 08/09/2021 09:51

Expected Start By 08/09/2021 15:00

Priority Emergency

Job Request Notes
Excel Add Note

Note	By	Date/Time	Last Email Sent
No Job Notes			

10 Items per page

No items to display

Once the initial job request is created, you then have the option to add photos or documents to the job request. You can also associate the job request to one or more assets if they have been set up on the system.

Notes can be added to the job request, either at the time of creation, or later on. The user who created the request is able to follow the progress of the job requests by the helpdesk (for example: approval, completion etc.). They can also see all job requests previously made. They can be restricted to seeing only their own requests, or all job requests. You can even restrict by location

You can also ask specific customized questions dependent on the type of job request they are raising (e.g. parking permits or catering requests)

Job Request No 2449 - Custom Fields

2449 Job Request No.	Ceredigion Hospital Site
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Details

Documents

Assets

Parking Permit

Parking Permit
Enter your parking permit details here.

Main

Vehicle Registration

Vehicle Model

Colour of Vehicle

<Please Select>

Helpdesk approval

Once the request is created, the helpdesk will receive notification of the job request by email. They can also tell from the job request list or the dashboards if there are any “pending” requests that need their approval:



Requests can also be assigned to “Teams”, which is determined by the job type. For example, the plumbing team or electrical team. Helpdesk users can then be restricted to only view requests for their team(s).

The helpdesk user can then go to the request details page and choose to Approve, Decline or Delete the request. The client will be updated in either case. The helpdesk can also send the job request for authorization by a manager before it can be approved:



Once the job request is approved, a new reactive job is created – it has the same job number as the job request. From the reactive job details page, the helpdesk user can then choose and instruct the work to a contractor or internal engineer. The job then goes through a series of steps before being completed.

The client / end user can receive email notifications on all key stages of this process. For example, once the request is approved, issued to a contractor, and of course completed. You can configure user by user what emails they receive, and you can also design the emails that get sent out including a client logo.

Further, the job request notes that they will be able to see will also keep them updated.

Feedback by client / end user on work done

Once the job is completed, the client / end user can give feedback on the work done, and either confirm it is done or reject the work done. At this stage they can also add a note. If the work is rejected, then an email can be sent to the helpdesk. The helpdesk can then take appropriate action. For example, they can reopen the job.

The screenshot displays a web interface for managing job requests. At the top, a header bar contains the job request number '2042', the site name 'Castle View', the status 'Approved', and the issue description 'lift not working'. Below this, a navigation bar includes tabs for 'Details', 'Documents', and 'Assets'. The main content area is divided into several sections. On the left, a 'Details' section shows 'lift not working'. Below this, a table lists site information: Site Reference (cc8), Site Name (Castle View), Location (- Ground Floor), and Sub Location (23 - Room 23). To the right of this, another table shows job details: Job Type (- Lifts), Sub Type, and Raised By (Facilities1 Mark). Further right, a 'Job Request Status' section shows 'Approved' with a list of dates and times for raising, expected start, and approval. Below the status section, a 'Job Request Notes' section features a table with columns for Note, By, Date/Time, and Last Email Sent. Two notes are visible: 'job done' and 'Contractor fred4 confirms complete by completing task no 2042-001, completion date: 19/07/2019 14:47'. To the right of the notes, a 'Job Number' section shows '2042' and 'Job Status' as 'Resource Confirmed Complete'. At the bottom right, a 'Feedback' section contains two buttons: 'Confirm Work Done' and 'Reject Work Done'. A red box highlights these buttons. Another red box highlights the 'Add Note' button in the 'Job Request Notes' section.

Job Request No.	Site	Status	Details
2042	Castle View	Approved	lift not working

Details	Documents	Assets
Details		

Site Reference	cc8
Site Name	Castle View
Location	- Ground Floor
Sub Location	23 - Room 23

Job Type	- Lifts
Sub Type	
Raised By	Facilities1 Mark

Job Request Status	Approved
Date Raised	19/07/2019 14:21
Expected Start By	19/07/2019 17:21
Priority	Emergency
Approved by	Facilities1
Date Approved	19/07/2019 14:25

Job Number	2042
Job Status	Resource Confirmed Complete
Assigned To	- Facilities Manager
Resource	- francois
Expected Start By	19/07/2019 17:25

Note	By	Date/Time	Last Email Sent
job done	francois	19/07/2019 14:47	Send Email
Contractor fred4 confirms complete by completing task no 2042-001, completion date: 19/07/2019 14:47	francois	19/07/2019 14:47	Send Email