Griffith Service Manager (GSM)

Work Order guide

Login to Griffith Service Manager (GSM)

1. Ensure you have an internet connection.
2. Login to GSM
   - **Browser Client** - enter the following address in a browser client https://griffith.cherwellondemand.com/CherwellClient/Access
   - **Desktop Client** - Open the Cherwell desktop client and select the GSM production icon.

     Note: If you do not have the client installed, you can download and configure it from here https://griffith.cherwellondemand.com/cherwellautodeploy then following the instructions in desktop client installation guide to configure here https://www.griffith.edu.au/__data/assets/pdf_file/0026/76148/GSM-Thick-Client-Installation.pdf

3. Log in using Griffith Single Sign-On with your Username and Password.

Your Dashboard

Upon logging in, the main window that displays is a dashboard which displays content relevant to you and your current role. For example, your default dashboard maybe '**Global Parking – Technician**' or '**Global Parking – Managers**'. You will have access to view Work Orders owned by you and your Team. Double-clicking a line opens a work Order record.

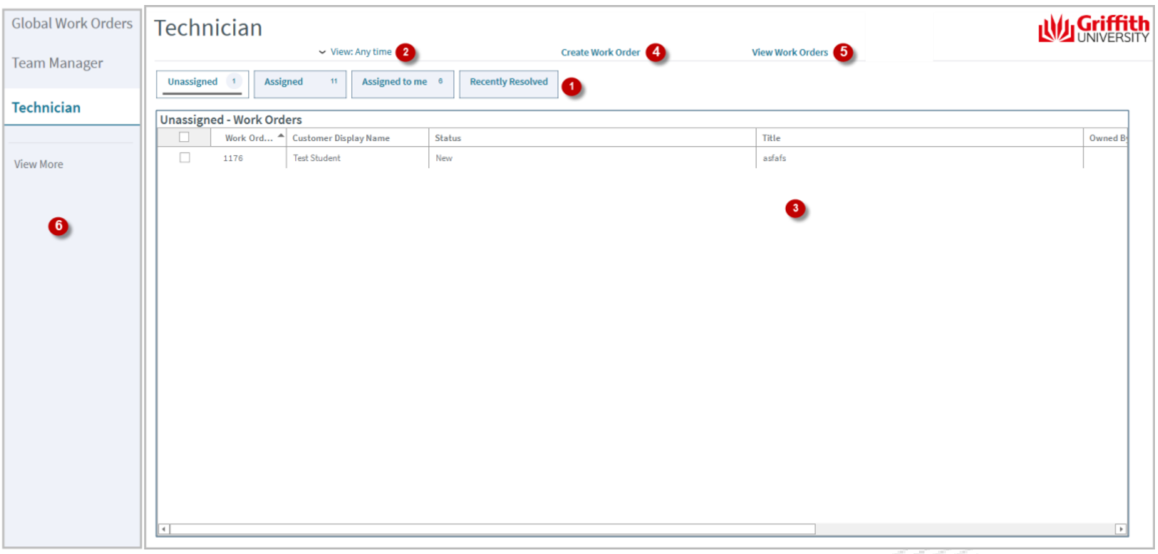


Figure 1 – Technician Dashboard

The dashboard displays:

1. **Assignment Status tabs**: Displays the Work Orders by assignment status.
2. **Dashboard Filter**: Filters Work Orders in the assignment status tabs by date range selected.

3. **Main Pane**: Displays Work Order records.
4. **Create Work Order**: Creates a new Work Order.
5. **View Work Orders**: Displays all the Work Orders in the system.
6. **Other Dashboards**: Links to other dashboards.

Create Work Orders

To create a Work Order (Technician Client)

1. From the Menu toolbar > click **New** > click **New Work Order**.
2. Select a **Call Source** from the drop-down menu.
3. Record **Requestor** details: enter snumber or customer name > press TAB
4. The Campus, Building and Room fields will self-populate with the customers location details.
5. Record basic details: enter **Title** > enter detailed information in **Description** field.
6. Classify: type a keyword in the **Quick classification** field > press TAB > select appropriate record line > Service/Category/Subcategory/Priority will self-populate. Ownership of the ticket will also default to the appropriate team based on the classification.
7. Select a Work Order type from the **Work Order Type** drop-down menu.
8. Select a priority from the **Priority** drop-down menu if you wish to change the default. The proposed start and completion dates will auto populate based on the priority chosen.
9. To assign the Work Order to another team > go to section **Assign To** > click the **Select Team** drop-down menu and select appropriate team.
10. The Work Order will now be in the assigned team queue for them to commence work.
11. Select Owner (or assign to me)

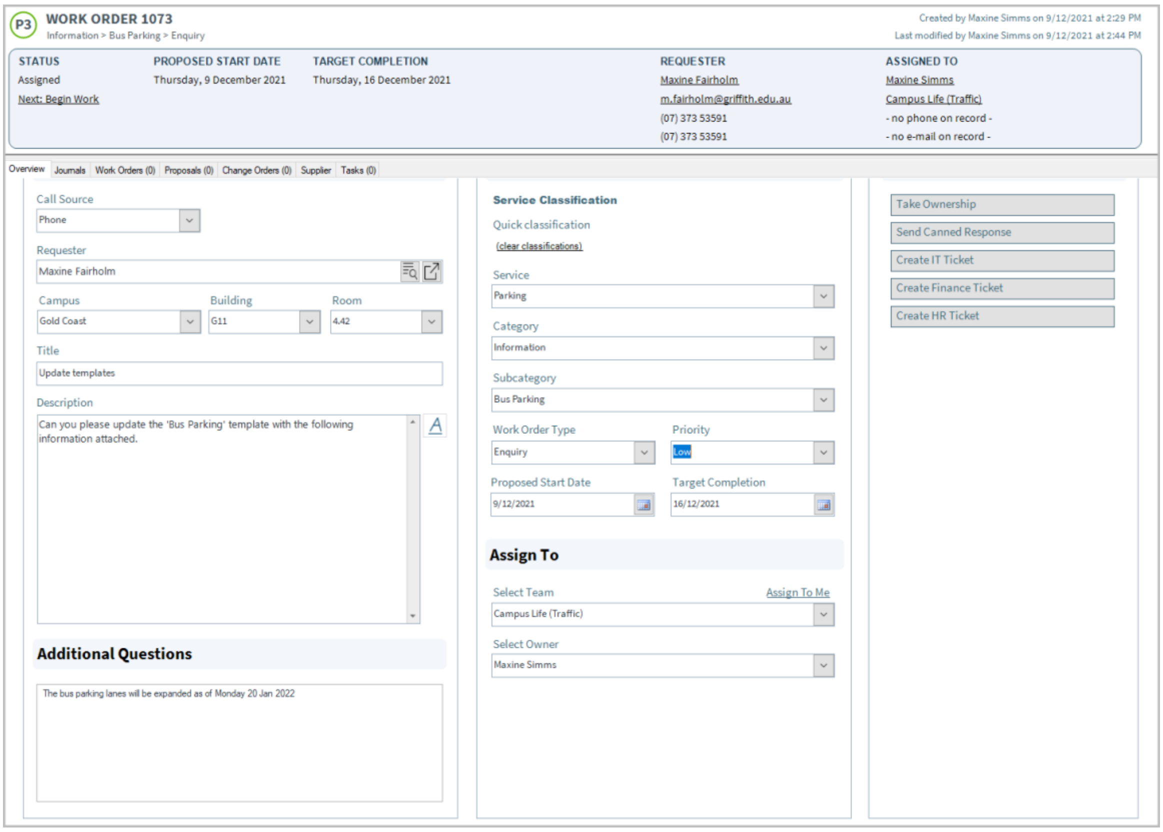


Figure 2 – Work Order form (technician client)

To create a Work Order (Customer Portal)

Customers can open a Work Order directly from the GSM Customer Portal.

1. Log in to the Work Orders GSM Portal
   https://griffith.cherwellondemand.com/CherwellPortal/GSMFacilities
2. Select **Create new Work Order**

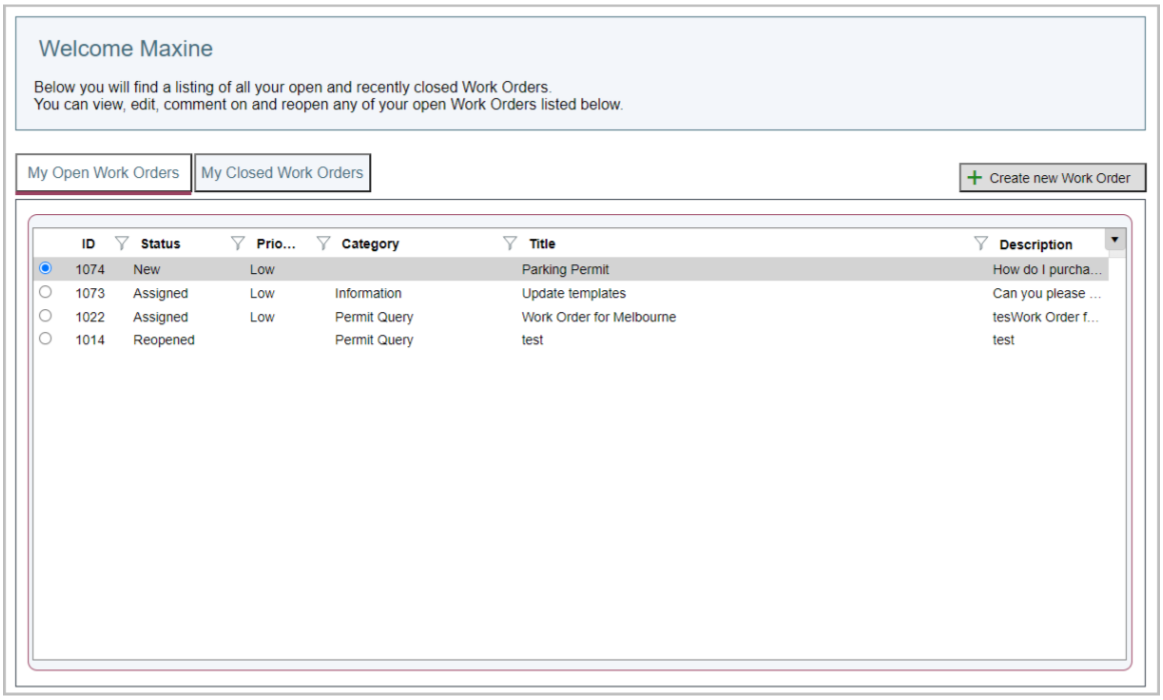


Figure 3 – Customer Portal

3. Enter information in the Work Order form fields.

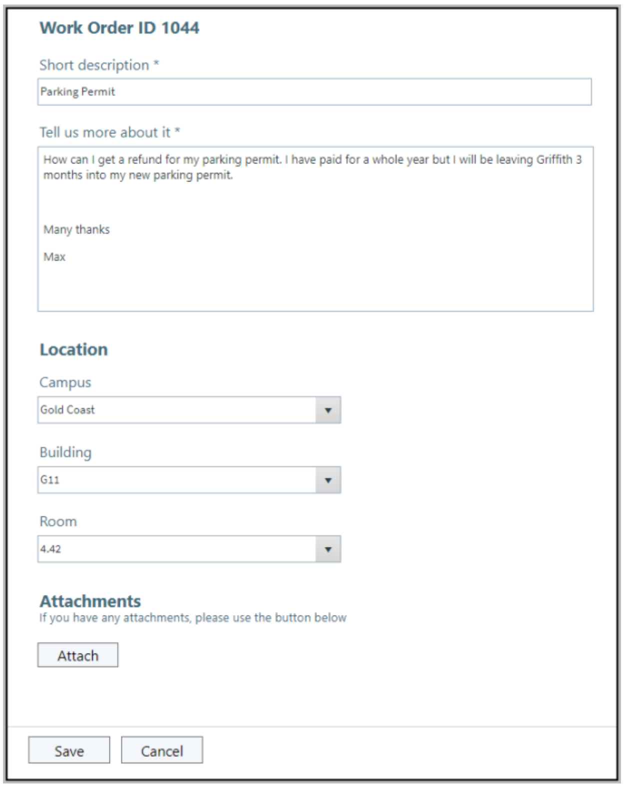


Figure 4 – Work Order form (customer portal)

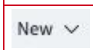
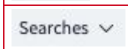
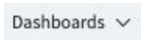
4. Select **Attach** to attach supporting documentation.
5. Select **Save** to complete and submit the Work Order.
6. The customer will receive a confirmation with the Work Order number.

Process Work Orders

1. When you are ready to commence the work, in the status menu, select **Next: Begin Work**. The status will change to **In Progress.**
2. When the work is complete, in the status menu, select **Next: Work Complete**.
3. In the close description box that appears, enter the resolution for the request. The customer will receive the close description in a work complete confirmation email. **Note**: if the customer is not happy with the resolution, they can reopen the Work Order from the customer portal within 3 business days from completion.
4. The Work Order will automatically close after 3 business days from completion if not reopened.

   Note: you can also complete the Work Order by selecting **send canned response** in the **I want to** section.

Menu bar items

	Home	Directs Users back to the default Home Dashboard
	New	Creates a new record (e.g., Work Order)
	Search Manager	Opens the Search Group Manager
	Dashboard Manager	Opens the Dashboard Manager to view preconfigured Dashboards
	Search widget	• Performs a Quick search or Specific search based on all or specific record types. Searches on word or phrase entered. • The drop-down displays the most recently entered search term
	Record type settings	Opens available search settings for the record type selected. *Note: not available for 'Quick searches'*

I Want To

Action	Description
Take Ownership	Assigns the Work Order to yourself
Send Canned Response	Email the customer with a canned response email template. You can also use a canned response email to complete the work order.
Create IT Ticket	Create a Service Request or Incident with the content of the current Work Order to IT.
Create Finance Ticket	Create a Finance Enquiry with the content of the current Work Order to Finance.
Create HR Ticket	Create a HR Case with the content of the current Work Order to HR.
Set to Pending	Sets the status to Pending. You will be prompted to set a pending reason and review date. When the review date is reached, pending is removed and you will be notified via email.
Reopen Work Order	Reopens the current Work Order

Canned Responses

To create a new Canned Response

1. From the Menu toolbar > click **New** > click **New Canned Response - Work Order**.
2. Record the details of the canned response
    - Template Name – the canned response name
    - Addressed To – who should the email be sent to
    - E-Mail Subject – the subject of the email
    - Canned Response – the email body
    - Managed By – Select the team the canned response will be managed by
3. If you would like the template to be used to automatically complete a Work Order, select **Enable Auto Resolve Pop-up** in the **I want to** section.
4. Select **Save** in the Menu toolbar.

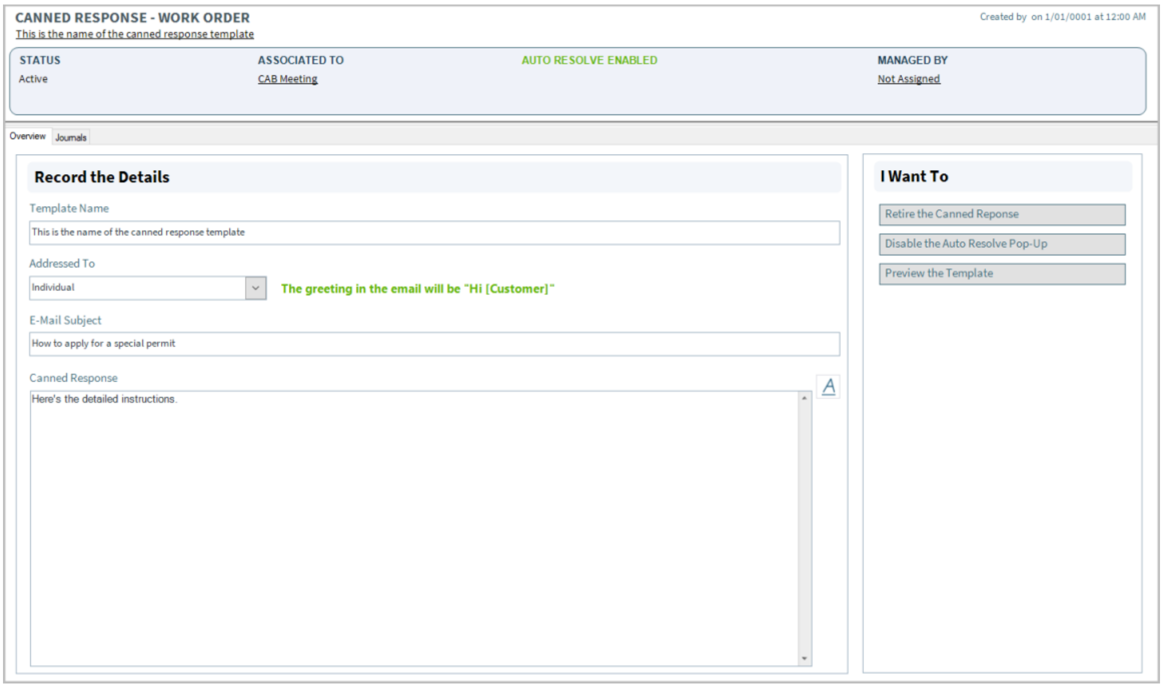


Figure 5 – New Canned Response

To edit an existing Canned Response

1. In the **Quick Search** menu, select **Canned Response - Work Order**
2. Enter the name of the canned response you want to edit or leave blank to bring up all the canned responses.
3. Press enter or select the magnifying glass icon to search.
4. Click the canned response you want to edit to open it.
5. Update the details then select **Save** in the Menu toolbar.
   Note: To retire a canned response, select **Retire the Canned Response** in the **I want to** section.

Support

Requirements

For additional inclusions for amendments to GSM:

- Contact the IT Service Centre to log a ticket (07) 3735 5555
- Log a ticket to the GSM Administration Team by using the following details to classify ticket
    - **Service**: Business Application
    - **Category**: Griffith Service Manager
    - **Subcategory**: Enhancement

Online resources

Visit the Service Management Office website: http://intranet.secure.griffith.edu.au/computing/service-management for self-help resources and reference guides

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