Service Request

The Service Request tab is designed to contain records such as customer complaints, breaks, cave ins, blockages, overflows, etc.

Service requests are unique from work order and inspections in that they do not need to be directly tied to a facility ID, but it is helpful to do so. Also unique to service requests is that they are stored as a feature class instead of an attribute table. This is so you can still see there geospatial location without them being tied to a facility.
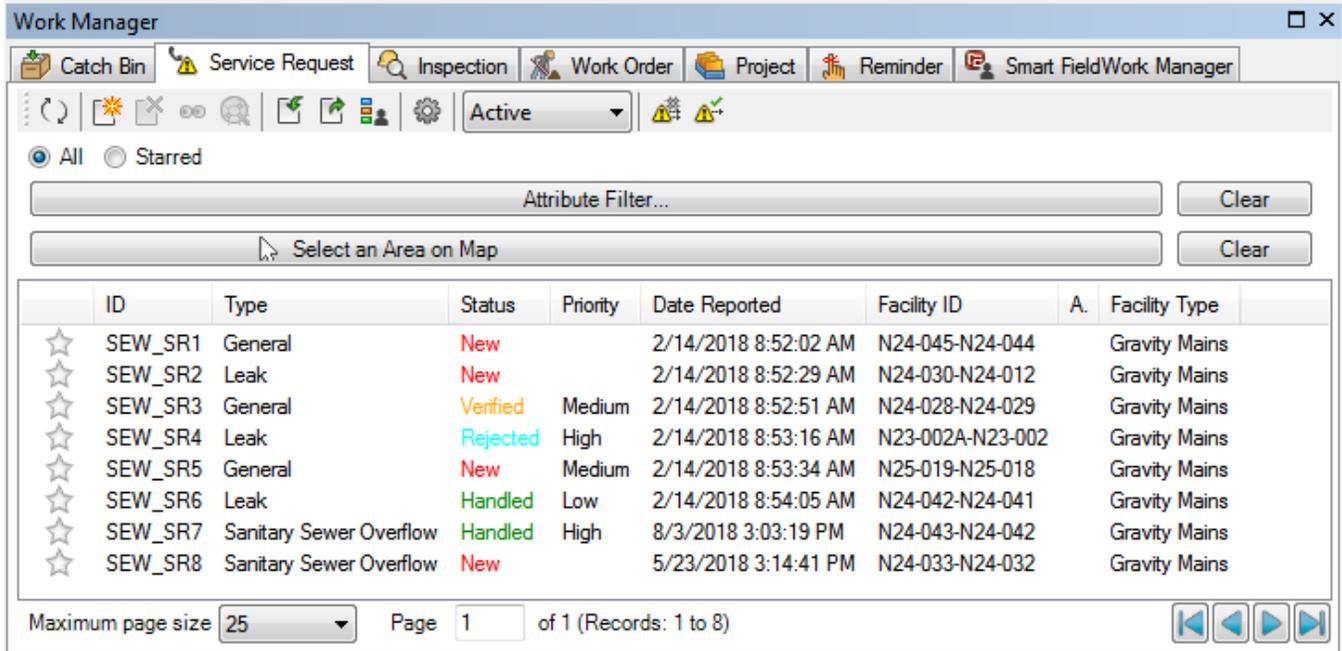
Within the Service Request tab (as well as the Inspection and Work Order tab) users may apply queries using the **Attribute Filter** button or select only service requests which appear within a selectable area of the map. Radio buttons are also available to view all or only starred service requests.

The toolbar at the top of the service request list is very similar to the Inspection and Work Order toolbar. It is shown below and explained from left to right.

Refresh - Refreshes the list. Remember to do this whenever the list appears empty.

Create - You can create new, independent service requests with this option.

Delete - Deletes the selected work item(s) entirely. If you want to only remove the work item from the Catch Bin, you should use another option.

Show Explorer - Opens the Work Explorer for the selected work items(s).

Zoom To - Zooms to the selected work items(s).

Import/Export - Opens up a three panel import or export interface so users can bring in or push out Work Manager data. These interfaces are very similar to other windows in InfoAsset Planner (Import Facility Data, Survey Import, etc.) except that they relate specifically to the Work Manager tables. You can also add and associate their own custom work items tables. For more information on how to import, see Import Using the Work Manager. For more information on how to create custom work item tables, login to the Innovyze Knowledge Base.

Type Manager - In this window, you have many customizable options. See the screenshot below and the numbered list for reference.

1. You can specify the different types of service requests they will be importing. Type Codes and their descriptions can be added and subtracted with the buttons at the top.

2. You may associate customized tables from within their project database to certain service request types. You can associate up to three separate customized tables for each service request type. The only requirement is that their must be at least one field with unique ID to differentiate service requests.

3. The Type Manager interface is also where you may make changes to the printable form describing their service request type. When you customize this form, you enter into the InfoAsset Planner Report Designer interface. For additional help with this interface, since it can be

complicated, see the Advanced Reports page and download the user guide.

4. The last option in the Type Manager is specifying the facility types and the max distance allowable for association. For example, you would want to be sure that sanitary sewer overflows only are tied to gravity mains and manholes. This could be specified in the Facility Type drop-down menu, as shown below. The Max Distance specifies the tolerance when service requests without associated Facility IDs are spatially associated.


Field Settings - By default InfoAsset Planner sets only certain fields to be visible within each work item tab. You can easily alter this and even add custom fields if the table with the desired field has been associated via the Type Manager.

Active/Archived dropdown - Use to toggle in between the Active table list of service requests and the Archived table list.

Associate all unassociated service requests - This option conducts a spatial join between service requests and the closest applicable facility. If a facility is within the range as specified in the Type Manager for the particular Type Code, then the Facility ID field in the service request record is populated. Service requests with Facility ID's already populated are not affected.

Check all service requests - This option checks the distance of all service requests to their associated facility. If the facility is more than the allowable distance as specified by the Type Code, then a message is produced in the Message window. You may want to double-check these service requests as you may have been associated wrongly.
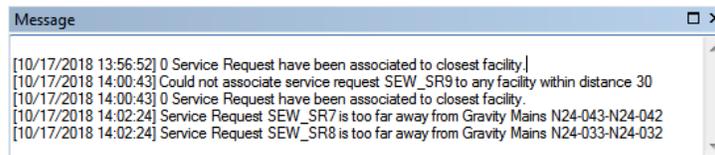
Service Request - Dropdown Options

In addition to the toolbar, options are available to you if you right-click any service request(s), whether you are in the Service Request tab or the Catch Bin. These right-click options shown are described below. Among all the work item tabs, these options are very similar.
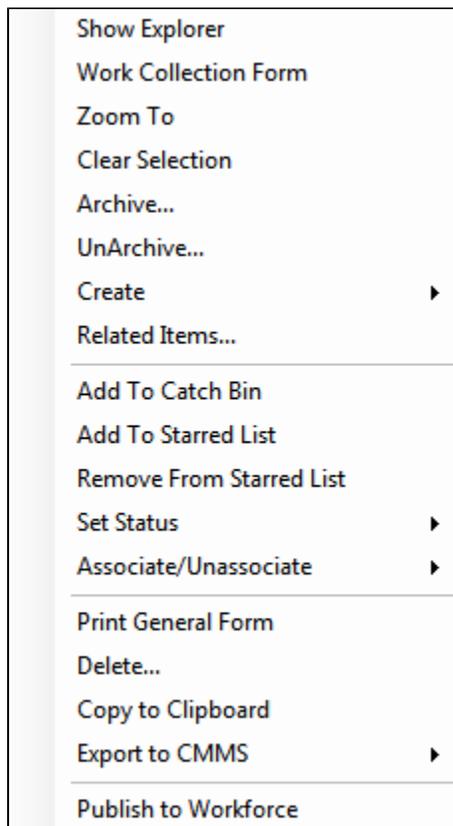
Show Explorer - Opens up the Work Explorer window so you can view all the attributes of the work item and make edits.

Work Collection Form - Opens the Work Collection form for the selected work item. These forms allow you to add information to a work item without having to enter the Work Explorer. Work Collection forms can be edited through the Work Management System WMS toolbar add on.

Zoom To - Zooms to the selected work item.

Clear Selection - Un-highlights any work items in the tab and on the map display.

Archive/UnArchive - These options can be used to send inspections to either the active or archived status. Active inspections may be considered inspections to be done, while archived inspection can be considered historical or retired inspections. However you wish to delineate the two categories is acceptable; InfoAsset Planner is simply giving you the options.

Create - Opens up a wizard for creating new inspections or work orders. The newly created inspection or work order will be related to the service request, inspection, or work order which was selected by the right-click. For example, if 'ServiceRequest1' were selected when a new work order was created with this method, 'ServiceRequest1' would be a related item to this work order.

Related Items - Opens up a window to display any related work items.

Add To/Remove From Catch Bin - You may see one of these two options depending on whether the Catch Bin tab is selected or not.

Add To/Remove From Starred List - Similar to the Archive/UnArchive options, this is another method users can apply to organize their Work Manager data. Starred work items may be easily queried and viewed using the radio button at the top of many of the available tabs.

Set Status - You may adjust service request statuses to one of the four built in status types: Verified, Handled, Resolved, Rejected. Updating the status will automatically add the selected value to the Status field in the attribute table.

Associate/Unassociate - Use these options to manually fill in or clear the Facility ID the service request is tied to.

Print Form - Opens up the InfoAsset Planner print preview for the form template which matches the Type Code. The selected work items will can be printed with their associated information.

Delete - Permanently deletes the work item.

Copy to Clipboard - Copies the visible fields and allows the user to paste them into a software like Excel.

Export to CMMS - Allows you to directly export to their CMMS software. Depending on the direct connection you have set up, you might see CityWorks, Lucity, etc. as options.

Publish to Workforce - Only for users using the SFWM toolbar add-on. This option allows you to push work items from the project database to ArcGIS Workforce. Refer to Basic - Smart FieldWork Manager, SFM for more information.