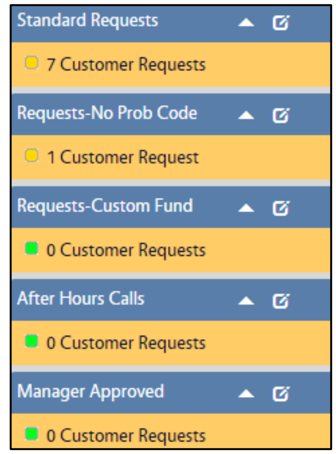
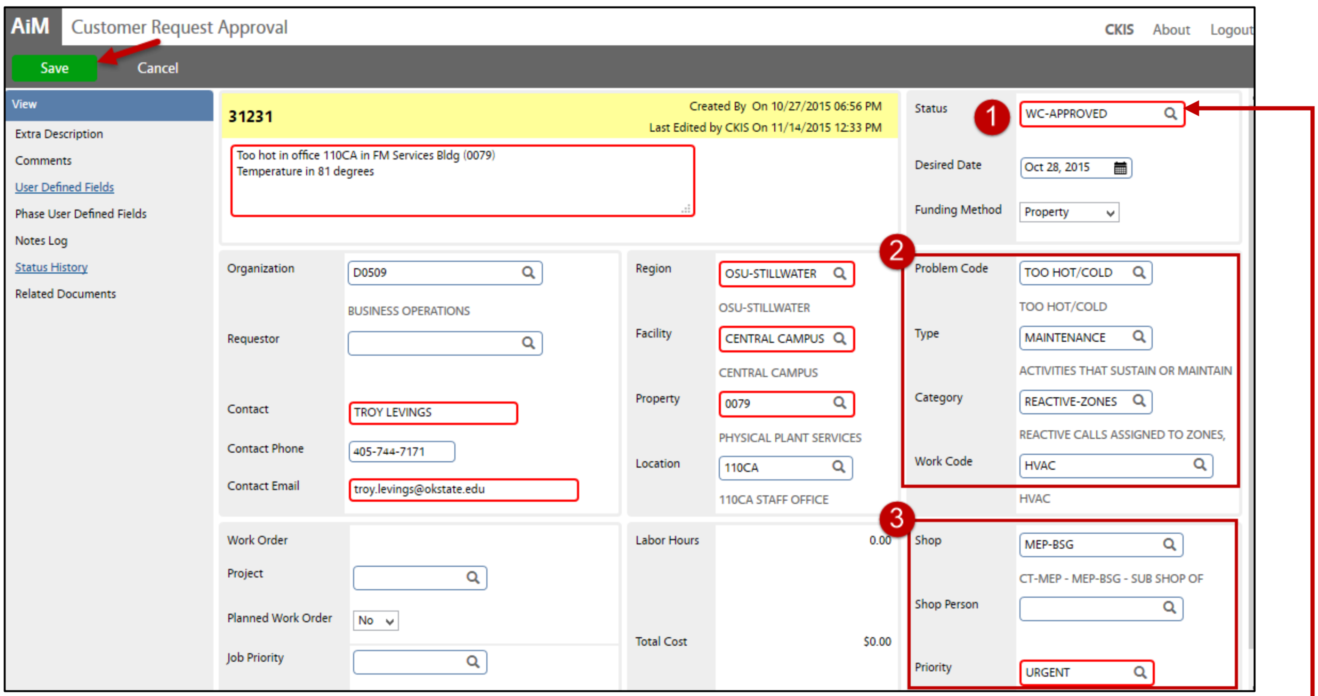
Work Control: Processing Non-Urgent Work Requests

There are four types of requests on your dashboard: Standard Requests, Requests with Custom Funding, Previously Reviewed and Approved Management Requests and After Hours Calls.

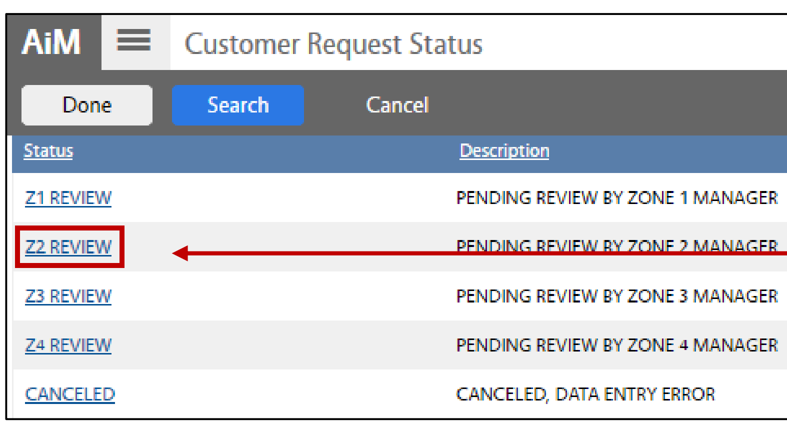


Standard Requests

1. If you have sufficient information to create a work order, set the **Status to WC APPROVED**.
    a. Depending on the problem code that the campus user selected, you'll find some or all of the Classification and Assignment sections completed.
    b. Review and complete information and then **SAVE changes to create the work order**.

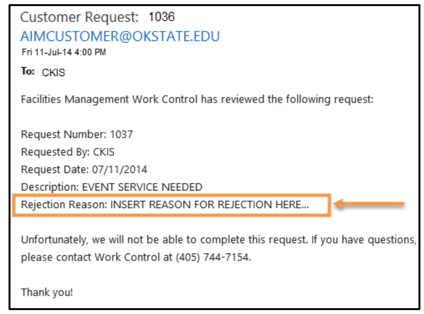


2. If you do not have sufficient information to create a work order (*e.g., request for paint services or other services which may or may not be billable*), simply update the customer request status to **route to the appropriate manager.**



    a. After the Manager reviews and updates the service request, they will set a status indicating their approval. Note that <u>Manager approval does NOT create a work order in AiM</u>. It simply routes the service request back to Work Control, who will review the Manager notes and process a work order.

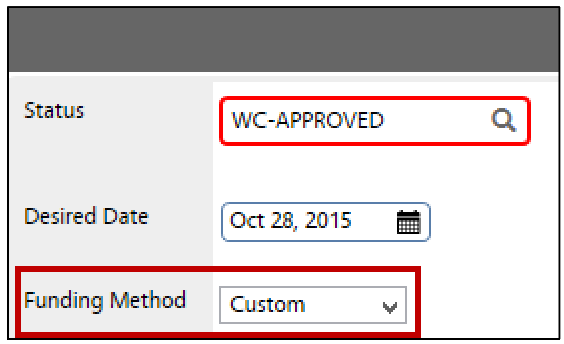
3. You can **reject or cancel a customer request** by setting one of these statuses:
    a. **CANCELED** Use this status if the user calls to cancel a request. A cancellation email will be auto-forwarded to the contact.
    b. **DUPLICATE** Use this status for duplicate requests, an email will be auto-forwarded to the contact letting them know that a technician has a been dispatched.
    c. **REJECTED** If rejected, **update "comments" with the reason the work cannot be completed.**
    Comments will be included in the rejection email to the requestor.
    Notes Log (*left sidebar*) > Click: **Add** > **Enter reason** > Click: **Done** > Click: **Save**



    d. **GCA REFERRAL** Use this status to close the request and send an email notification to the contact, as well as GCA…..

Custom Funding Requests

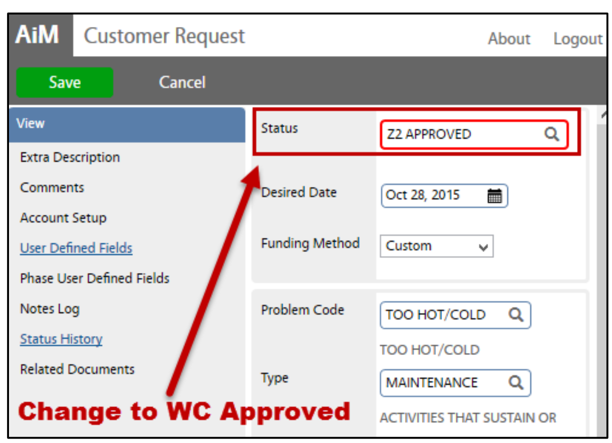
4. If the campus requestor has requested alternate funding for a billable service, check the Customer Request User Defined Fields to see an account was provided. Contact the end user, and setup the work order with appropriate funding. **The funding method must be set to Custom, and Account Setup must completed.**



5. Click: **Account Setup** (*left sidebar*)
    a. Add a Charge account, Click: **Add**, enter the following information:
        i. Account Enter the account and Subcode.
        ii. Percentage 100 (*unless otherwise specified*)
        iii. Subledger All (*unless otherwise specified)*
    b. Click: **Done**

Requests – Manager-Approved

6. Once approved by the Manager, create a work order. Set the **Status to WC APPROVED**.
    a. Open work order and add additional phases or information as instructed by approving manager. **To view notes,** click **Notes Log** (*left sidebar*). *View information indicating the nature of the phase required, which shops to assign, etc.*
    b. Depending on the problem code that the campus user selected, you'll find some or all of the Classification and Assignment sections completed.



7. Complete and review the information. **SAVE changes to create the work order.**