Manager/Supervisor Review Channel

Each Manager/Supervisor has a “Review Needed” channel. This channel provides a big picture view of important performance metrics, pinpoints areas of inefficiency and more importantly alerts you to situations that need immediate attention. The color-coded indicators allow you to proactively improve operations, manage work orders within your shop, and monitor costs on billable work orders.

COLOR-CODED INDICATORS

- **GREEN**  
  **All Good.** On schedule, under budget, taking care of business.

- **YELLOW**  
  **Warning.** Potential issues with schedule, budget, and/or materials needed; immediate action is required.

- **RED**  
  **Priority.** Serious issues; overdue projects or cost overruns! Follow-up with Director and/or Campus requestor is needed.

QUERY DEFINITIONS

1. **Past Due Phases**  
   - **RED** indicates that work has not been completed by the scheduled date. Contact the Shop Workers and follow-up with the Customer immediately.
2. **Unassigned**
   Work not assigned to Shop person.

3. **Unscheduled Work**
   Events/Projects may require you to enter start and end dates. Coordinate with project managers, event coordinators and other shops as needed, and then add estimated start/end to your phase. **NOTE:** without dates, work orders will not be available for work assignment in AiM.

4. **Charge => $800**
   Within the zones, billable services cannot exceed $1000. For additional billable services provided by Facilities Management, estimates are required, every time! This query notifies you when costs exceed $800 of your estimate. This is just a warning, it may be the project is nearly complete and costs are on track. However, if you find that your costs have hit 80% and it appears that cost overruns are imminent, you must take corrective action immediately. Contact your director or the customer and upon agreement, you may update the estimate amount.

5. **Charge > $1000**
   **RED** indicates that your shop has exceed its budget and a Next Level requirement has been violated. Contact your director immediately to seek proper resolution.

6. **Awaiting Materials**
   Technicians will set this status via iDesk, if they need special order parts they will include a phase note and/or pictures indicating what is needed. Ensure that the SciQuest requisition is approved and that a PO has been issued. If material order will delay completion of the work order, contact the requestor to notify them of time delays, enter a phase note to confirm phone call to customer, and then adjust the estimated end date on the phase. Finally, update the phase status to MATERIALS ON ORDER.

7. **Materials on Order**
   When the product arrives, update the phase status to OPEN.

8. **Charge Errors**
   **This means the work order is complete, but could not be closed.** Contact Work Control and/or check for external charges not approved, parts not posted, time cards pending, etc.

9. **Reassign**
   Work orders that have been reassigned to your Shop.