

# After Hours Work Order Communication

## Updated 8/18/2020

### Promoting at Night and on Weekends Important Reminders

- Enter Customer request information through the Call Log ASAP. Can be entered while on the phone with the customer. This allows the request to be promoted timely Only 1 CR can be created from each log entry. Additional CRs must be created through AggieWorks/AiM
- Information to include in the description –
  - Detail of issue
  - Detail of location (outside building, ceiling, floor, etc)
  - Full Name of person dispatched/called out
- Promote all requests that get dispatched to Maintenance shops
  - FAS
  - All Zones
  - Nights
  - Trades
  - HVAC
  - Athletics
  - Rec Sports
  - Electric
  - Plumbing
- Promote requests that are dispatched to Structural Pest. **Promote as Type Grounds Category SR**
- Transfer requests that are dispatched to UES and Building Access. (For BA remember to use Problem Code of Building Access.)

### Choosing the shop person

- **On the Customer Request Approval Screen**
  - If you are dispatching a tech, then enter the primary tech as the Shop Person
  - If you are not dispatching a tech, then leave Shop Person blank.
  - If additional technicians are dispatched, add them directly to the phase. Only 1 technician can be marked as Primary. There must be a primary technician for each phase. This allows that technician to be able to complete the Phase.
- Anytime you are calling out another shop in addition to Night crew, you will need to update the Reference Data Shop to be the Day Shift shop.

## WOs responded to by Night Crew and Night Crew done with work Followup needed by another Shop. Additional Phase Needed

- Process should be completed by one of the following:
  - Night Coordinator
  - Night Supervisor
  - Comm Center employee - If Coordinator and Supervisor are not working the shift
- Technician saves Phase in the status of REQ ASSISTANCE
- Technician indicates in the Notes which shop the Work Order needs to be transferred to
- Phase appears in query – ADDITIONAL ASSISTANCE NEEDED
- Night Supervisor, Coordinator, Dispatcher does -
  - Look at Notes on the Phase
  - Note which Shop the Work Order needs to be transferred to
  - Click on the Work Order number under the Status
  - Edit at the Work Order level
  - Click Reference Data
  - Remove the Shop Person & shop
  - Change the Shop to the needed shop (as indicated in the Notes)
  - Disregard employee list if no one was dispatched by clicking Done
  - Click Done
  - Click on Phase 001
  - If Asset field is blank, enter the building number as the Asset
  - Change Phase 001 Status to PHS COMPLETE
  - Click COPY
  - Check Extra Descriptions
  - Check Related Documents
  - Click NEXT
  - Add to beginning of Description – “CALLOUT FOLLOWUP NEEDED”
  - Change the Shop on Phase 002 to the needed shop (as indicated in the Notes)
  - Set Priority to 1 *\*\*If on Friday and Saturday nights Set Priority to 2\*\**
  - Set status to REQ ASSISTANCE
  - Click SAVE
  - Then add any additional notes needed on the Note screen
  - Click DONE
  - Click SAVE



### Instructions for Shops

- Every morning check the ADDITIONAL ASSISTANCE NEEDED query
  - Any work orders that are being transferred from the Night crew should appear in this query with the words “CALLOUT FOLLOWUP NEEDED”
- Contact the customer first thing to discuss the next steps of the job.
- Change the priority if needed

## After Hour Work Orders Needing to be Transferred to Building Access

- Technician saves Phase in the status of REQ ASSISTANCE
- Technician indicates in the Notes that Building Access needs to be dispatched
- Technician notifies Comm Center verbally that Building Access needs to be dispatched
- Phase appears in query – ADDITIONAL ASSISTANCE NEEDED
- If available Night Supervisor or Coordinator does –
  - Look at Notes on the Phase
  - Note indicates that Building Access needs to be dispatched
  - Contact Comm Center to confirm transfer or call out for the Work Order
- Comm Center does –
  - Look at Notes on the Phase
  - Note indicates that Building Access needs to be dispatched
  - Dispatch Building Access technician on call
  - Enter information into Call Log regarding dispatching to Building Access.
  - Click on Work Order Number underneath the Phase Status
  - Click Customer Request number underneath the Work Order Status

### Open a 2<sup>nd</sup> browser – Must be different browsers. ie: Chrome and Firefox; Chrome and Internet Explorer

- Create CR in AiM
  - Click Customer Service on the Menu
  - Click New  next to Customer Request
  - Copy information from Original CR in 1<sup>st</sup> browser to New CR in 2<sup>nd</sup> browser
    - Description adding any actions already taken by Night Crew. **Add location to the Description.**
    - Contact's name
    - Contact's Phone
    - Contact's Email
    - Enter Building Number in Property field & click Magnify Glass  Disregard Location list and Click DONE
    - Extra Description
      - Click Extra Description in Original CR
      - Copy Extra Description
      - Click Extra Description in the New CR
      - Paste
      - Click Done
  - **Enter Problem Code of Building Access**
  - Transfer to Building Access by setting the Status of TRANSFER UES/BA
  - Click SAVE
  - Print copy of CR for BA tech
  - Click on the NOTE screen and Add – “Reference SSC WO .....”
  - Click Save
  - Click Done
- Return to 1<sup>st</sup> Browser
  - Click Back twice to return to the Work Order
  - Click EDIT
  - Click Notes and add
    - “New CR .... Created and sent to Building Access”
    - Click Save
    - Click Done
  - Click on Phase number
  - Change Phase Status to PHS COMPLETE
  - Click DONE
  - Change WO Status to TRANSFERRED TO BA
  - Click SAVE