Work Order: Workflow

Chad Tramp – Client Advisor
Introduction
Overview

• Introduction
• Common Workflows
• Email Notifications
• Routing
• Conclusion
Common Workflows

• Administrator/Supervisor Homepage
  • New Request Sub-Statutes:
    • “Unassigned:”
    • “In Approval Process:”

• Requester>Supervisor 2>Technician
• Clerk>Supervisor 2
• Requester>Administrator>Supervisor 1
Email Notifications

• Requester
  - Send Requester Work Request Receipt Notification? Sample
  - Notify Requester of Work Request Assignment? Sample
  - Notify Requester of Work Request Change in Status? e.g. On
  - Notify Requester of Work Request Completion? Sample
  - Notify Requester of Work Request Closure? Sample
  - Notify Requester of Work Request = Void? Sample
  - Notify Requester of Work Request = Duplicate? Sample
  - Notify Requester of Work Request = Declined? Sample

• Technician
  - Notify of Work Order Assignment? Sample
  - Notify of Work Request Change in Status?
Email Notifications

- Administrator and Supervisor I/II

- Notify of NEW Work Request? Sample
- Notify Supervisor I of Work Request Routed for approval or review?
- Notify of Work Order Assignment? Sample
- Notification of Direct Reports Work Request Assignments? Sample
- Notify of Work Complete? Sample
- Notify of Work Closure? Sample
Routing

• One stage:

<table>
<thead>
<tr>
<th>Location Bldg./Unit</th>
<th>Craft Purpose</th>
<th>When Approved By Route/Assign To Next</th>
<th>Stop Routing</th>
</tr>
</thead>
<tbody>
<tr>
<td>On Any</td>
<td>Heating/Ventilation /Air Conditioning</td>
<td>--No One--</td>
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</tr>
<tr>
<td>On Any</td>
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Routing

- Two stage:

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Review

• Common Workflows
• Email Notifications
• Routing
Thank you so much for attending!

Please visit the learning lab for additional training and support.