

## **Work Order (WO)**

### **Overview**

The Work Order process is used to assign and manage maintenance tasks, construction tasks and jobs for tenants, customers and clients. Work Orders are scheduled and assigned to staff such as engineers, janitorial personnel, or mechanics who are known as Facilities Maintenance Engineers in PHAZE. The work orders themselves are assigned by the Facilities Managers.

Work Orders can be initiated by different users both internal and external from the Account of the owner's organization. For example, a tenant in a residential tower can be setup in PHAZE with the privilege to create a Work Order request. Once a Work Order is submitted, it is then Facility Management's responsibility to assign personnel to the task. The individual in the Facilities Manager role selects a single Facilities Maintenance Engineer, who is referred to as the Lead Engineer, who then has Ball In Court responsibility for the work order. The assigned work order will have the option to have a Quality Control step (or not). If a Quality Control step is required, the Facilities Manager will assign a Quality Control specialist to review the engineer's work once completed. The Lead Engineer also has the option to add additional engineers to the task. Once the work order is designated as complete (by either the Facilities Maintenance Engineer [the Lead Engineer] or Quality Control) it is sent to the Facilities Manager to close the Work Order. Once closed by the manager, the initiator is notified, and the Work Order Process is complete.

***Note: Work Orders may be scheduled to be initiated automatically via Recurring Tasks.***

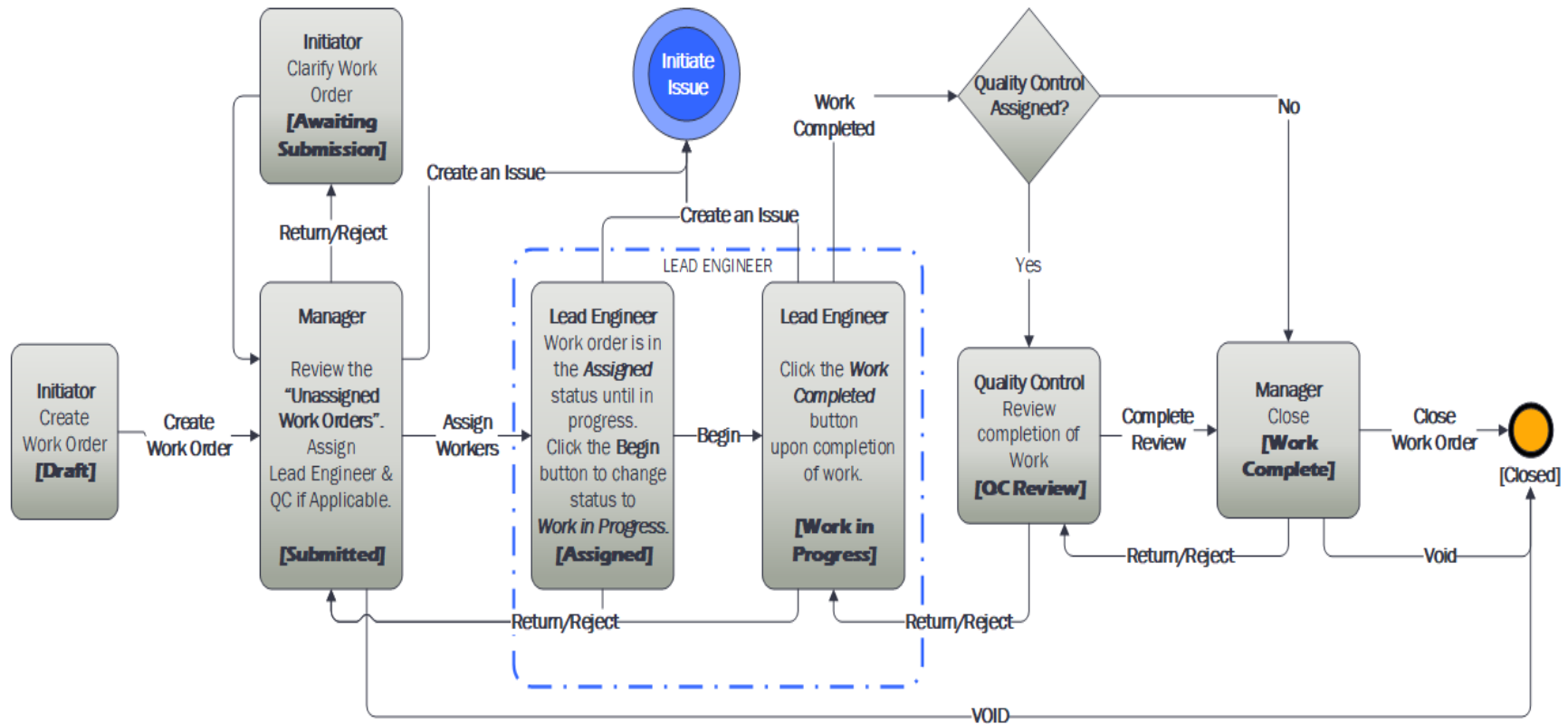
### **Participants**

The following project participants are involved in this process:

- **Initiator (Account Owner Admins, Account Owner Users, Project Managers, and Facilities Managers)** – Initiates the process.
- **Facilities Managers** – Assigns the initial Work Order Personnel.
- **Facilities Maintenance Engineers** – ONE Facilities Maintenance Engineer is selected by the Facilities Manager, and this user can add additional Facilities Maintenance Engineers.
- **Quality Control (optional)** – If Quality Control is desired, they are assigned by the Facilities Managers.

## Work Order (WO)

### Workflow Diagram



## Work Order (WO)

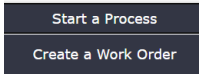
### Work Instruction

#### Initiator



The PHAZE user completes required fields and submits the Work Order process instance.

#### Initiator Starts WO



1. Click the **Create a Work Order** button in the main menu page. The new Work Order form displays. See Figure 1

**Note:** If you do not see the process that you want to create, you may not have permission to create it. Contact your administrator for assistance.

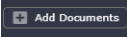

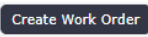
**Figure 1** - Initiate a Work Order form.

2. Enter the Work Order information into form fields. Fields shaded in red are required.

Subject	Enter a brief descriptive title for the process instance. Follow your organization’s naming convention if provided.
Work Order Type	Select the value from the picklist that best represents the type of Work Order that is being submitted. Use <i>Correspondence</i> if a more specific value is not available.
Priority	Select Urgent, High, or Normal from the picklist.

## Work Order (WO)


Requested On Behalf Of	If you are submitting the Work Order on behalf of a tenant, your organization, or someone else, provide who that is here.
Time For Service	Provide an ideal time for service for the Work Order. Morning, Afternoon, Evening, Night, or Anytime.

3. Optionally, attach any supporting documents.
  - 3.1. Click the  button and then the  button to attach documents. See the *Add Documents Quick Reference Guide* for detailed instructions on attaching documents.
4. When you have filled in all of the required form fields and attached all supporting information, click the  button to submit the process to the Facilities Manager.

### Facilities Managers

Submitted

The Work Order will then be available to the Facilities Managers, who will be responsible for assigning and dispatching personnel to perform the work.

- *The Facilities Manager can find the unassigned Work Orders in the left menu, near the top under **Activities**.* 

### Facilities Manager assigns the Work Order

1. Locate and open the process instance to be assigned.
  - 1.1. Click the process in the **Activities Unassigned Work Orders** list in the left menu.
  - 1.2. Review the Work Order. Read the information provided by the Initiator on the form, as attachments and comments.
  - 1.3. The Facilities Manager will either (See Figure 2):
    - 1.3.1. Use the **Assign Workers** button in the take action bar to assign BiC Responsibility to a PHAZE Facilities Engineer, and (optionally) assign Quality Control personnel to the Work Order. You will be provided a list of applicable Engineer personnel to assign the work order to. Select an engineer. You will then be asked if there is a quality control step. If you

## Work Order (WO)

select 'Yes' you will select an applicable Quality Control User. If you select no, you can proceed without.

or

1.3.2. Use the **Return / Reject** button on the form to route the Work Order back to the Initiator for revision after providing Return Notes, or

or

1.3.3. Use the **Collaboration Form** button in the take action bar to create a related Collaboration that corresponds to the Work Order, or

1.3.4. Use the **Void** button to void the work order.

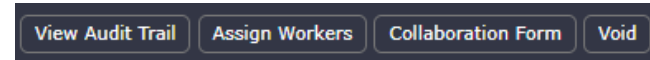
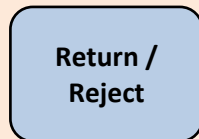


Figure 2 – Work Order Take action bar

### OPTIONAL

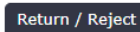
This step only occurs if the **Facilities Manager** is returning the WO to the Initiator.

#### Facilities Manager



If the process requires revisions, the Facilities Manager returns the process to the Initiator.

#### Return / Reject for Revision

1. Locate and open the Work Order that you wish to return.
2. Provide Return Notes in the form of the Work Order
3. Click the **Return Reject** button on the Work Order form:
 
4. The Work Order will be returned to the Initiator.

### OPTIONAL

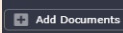
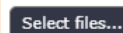
This step only occurs if the Facilities Manager has returned the WO to the Initiator.

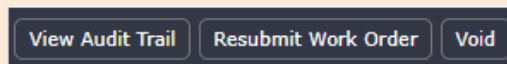
#### Initiator



If the Facilities Manager returns the process to the Initiator, the Initiator makes any corrections as required and resubmits.

#### Initiator Updates WO

1. Locate and open the WO that needs revision.
2. Review the comment(s) explaining why the WO was returned.
3. Update any required information per the return comment(s).
4. Optionally, attach any supporting documents.
  - 4.1. Click the  button and then the  button to attach documents. See the *Add Documents Quick Reference Guide* for detailed instructions on attaching documents.
5. Click the **Resubmit Work Order** button in the take action bar:



6. Provide details of what changes you made with the pop up provided.

Facilities  
Maintenance  
Engineers

Assigned

### Assigned Engineer Reviews the Work Order

1. Locate and open the process instance routed to you.
  - 1.1. Click the process in the **Activities Processes in my Court** list in the left menu.
  - 1.2. Review the Work Order. Read the information provided in the form as well as attachments and comments.
  - 1.3. The Facilities Engineer will either (*Note: all buttons are found in the take action task bar in the bottom left corner.*)
    - 1.3.1. Use the **Assign Engineers** button to assign additional Engineers to the work order to assist. You will be presented a list to select engineers to add the Work Order.  
or
    - 1.3.2. Use the **Remove Engineers** button to remove engineers (if any) from the list of Assigned Engineers of the Work Order.  
or
    - 1.3.3. Use the **Collaboration Form** as described previously to create a Collaboration associated with the Work Order.  
or
    - 1.3.4. Use the **Begin** button to change the status of the Work Order to In Progress, indicating the work has begun.  
or
    - 1.3.5. Use the **Return / Reject** button as described previously above in the **Return / Reject for Revision** step to send the Work Order back to the Assigning Facilities Manager.

[View Audit Trail](#)

[Assign Engineers](#)

[Remove Engineers](#)

[Begin](#)

[Collaboration Form](#)

## Work Order (WO)

Facilities  
Maintenance  
Engineers

Work In  
Progress

### Assigned Engineer Performs Work / Completes

- 1 After the Engineer has performed the work required, locate the process instance that is complete.
  - 1.1 Click the process in the **Activities Processes In my Court** or alternatively, **My Tasks** from the home page menu options.
  - 1.2 Attach any documents and add any comments that are necessary.
  - 1.3 The Facilities Maintenance Engineer can either
    - 1.3.1 Use the **Assign Engineers** button while the process is still in progress for additional assistance  
or
    - 1.3.2 Use the **Remove Engineers** button while the process is still in progress to relieve engineers of the task.  
or
    - 1.3.3 Use the **Work Complete** button to indicate the work is complete and the Work Order is ready for either: Quality Control's review and assessment (if applicable) or route to the assigning Facilities Manager for their approval and closure.  
or
    - 1.3.4 Use the **Return / Reject** button as described previously above in the **Return / Reject for Revision** step to send the Work Order back to the Assigning Facilities Manager.

View Audit Trail

Assign Engineers

Remove Engineers

Work Completed



### OPTIONAL

This step only occurs if the **Facilities Manager** assigned a **Quality Control** Review step for the Work order.

Quality Control

If the process requires additional review, the Facilities Manager will have assigned a Quality Control user to assess the work performed after the **Work In Progress** step is complete.

QC Review

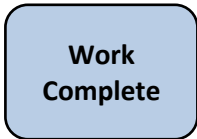
### Complete Review

1. Quality Control will find work orders that need their review in the **My Tasks, Processes in My Court, or Work Orders**.
  - 1.1 Locate the work order that is to be reviewed.
  - 1.2 Open the Work Order and review the comments, documents, and work performed in order to assess if the work is satisfactory.
  - 1.3 The Quality Control Users will either:

## Work Order (WO)

	<p>1.3.1 Use the <b>Complete Review</b> button located in the take action bar at the bottom of the form to move the process to the next step.</p> <p>or</p> <p>1.3.2 Use the <b>Return / Reject</b> button as described previously to send the Work order back to the Lead Engineer for further work or modifications.</p> <p>or</p> <p>1.3.3 Use the <b>Collaboration Form</b> button to create an Collaboration that is associated with this work order.</p>
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**Facilities Managers**



### Work Complete / Close Work Order

2. Locate and open the process instance routed to you.
  - 2.1. Click the process in the **Activities** area in *Processes in my Court* list in the left menu.
  - 2.2. Review the Work Order. Read the information provided in the form as well as attachments and comments.
  - 2.3. The Facilities Manager will either
    - 2.3.1. Use the **Return / Reject** button on the Work Order form discussed previously to send the Work Order back to the Quality Control user in order to further review or address the task.
    - or
    - 2.3.2. Use the **Close Work Order** button located in the take action bar to close the process and finish the work order.
    - or
    - 2.3.3. Use the **Collaboration Form** discussed previously to add a related Collaboration to Work Order
    - or
    - 2.3.4. Use the **Void** button to void the work order and ends the process.