




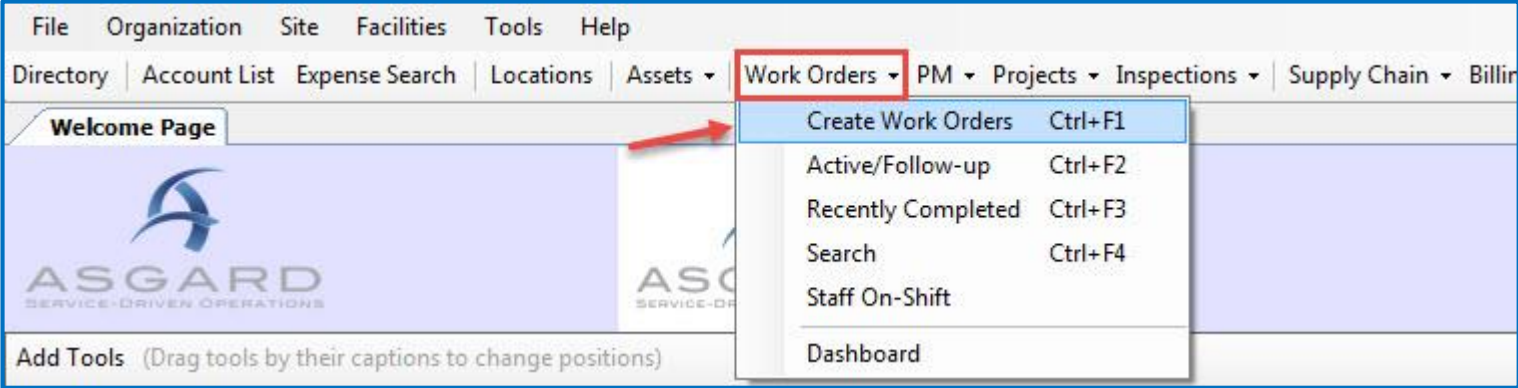
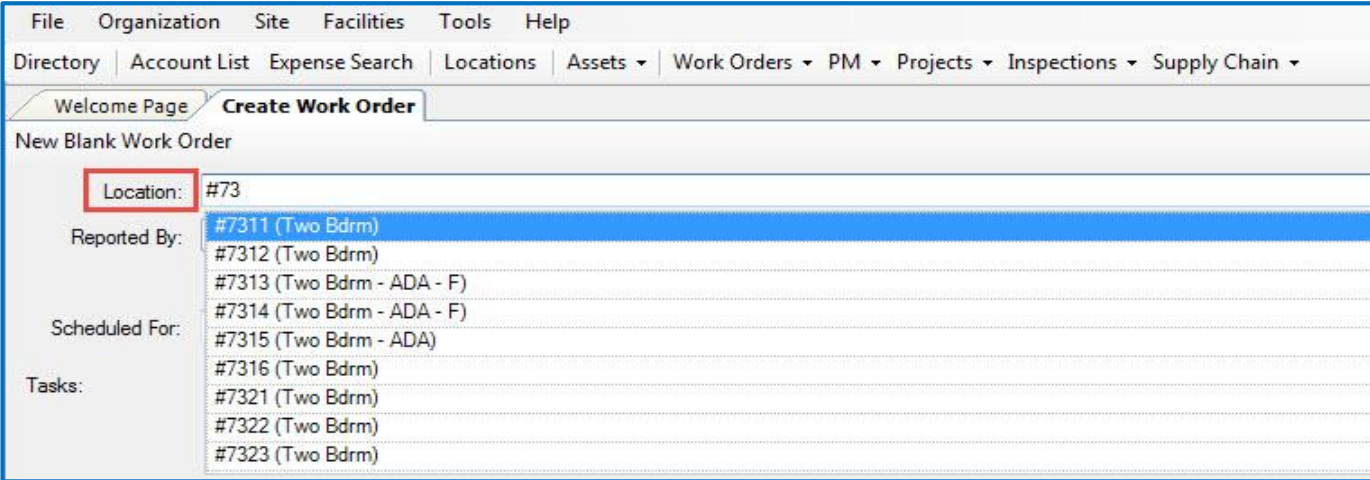
Category-Specific Actions Taken

Actions Taken are a site-specific work order functionality designed to close the loop between what a guest requests/reports and the work that is actually completed, especially for tasks that require specialized knowledge to investigate.

Actions Taken can be configured for all work order types, or limited by Category. This Job Aide addresses the use of Category-Specific Actions Taken. In this set-up, the user is prompted during work order completion to enter an “Action Taken” only on some work order tasks.

The use of Actions Taken for some categories of tasks, in combination with a simplification of model tasks available, reduces the need for a dispatcher to guess what the guest’s issue might be and expedites getting a tech en route.

Using Actions Taken on the Desktop Application

	<p>Scenario: <i>A Guest, Heather Hills, called from unit #7311 reporting several engineering tasks that need to be completed in her unit.</i></p>
<p>Step 1</p>	<p>Click the Work Order drop down menu from the Asgard tool bar and click Create Work Orders.</p> 
<p>Step 2</p>	<p>Enter the location. As you begin typing the location, Asgard will filter the possibilities. Select the location and use the tab key to move to the next field.</p> 

Step 3

Enter in the guest name and tab to the Task field.

The screenshot shows the 'Create Work Order' form in a web application. The form is titled 'New Blank Work Order'. It contains several fields: 'Location' (set to '#7311 (Two Bdm)'), 'Reported By' (set to 'Guest'), 'Guest Name' (set to 'HEATHER HILLS'), 'Scheduled For' (set to '12/31/2015 11:48 AM'), and 'Occupied State' (set to 'Occupied'). A red box highlights the 'Guest Name' field. A red arrow points to the 'Tasks' field, which is currently empty.

Step 4

When selecting a task that is associated with Actions Taken, there will be only one generic Model Task to select in that category.

The screenshot shows the 'Create Work Order' form with the 'Tasks' field populated. The 'Guest Name' field remains 'HEATHER HILLS'. The 'Scheduled For' field is now '1/ 4/2016 4:50 PM'. The 'Tasks' field contains the text 'AC|' and a blue highlight is under the option 'Repair AC / Air Conditioner'.

When selecting a task that is *not* associated with Actions Taken multiple tasks may be available. Select the appropriate model task from the drop down.

The screenshot shows a software interface for creating a work order. The top menu bar includes 'File', 'Organization', 'Site', 'Facilities', 'Tools', and 'Help'. Below the menu bar are navigation tabs: 'Directory', 'Account List', 'Expense Search', 'Locations', 'Assets', 'Work Orders', 'PM', 'Projects', 'Inspections', and 'Supply Chain'. The current page is 'Create Work Order'.

The form is titled 'New Blank Work Order' and contains the following fields:

- Location: #7316 (Two Bdm)
- Reported By: Guest (dropdown)
- Guest Name: HEATHER HILLS
- Scheduled For: 1/ 4/2016 4:50 PM (calendar icon)
- Occupied State: Occupied (dropdown)
- Follow-up Required: (checkbox)

The 'Tasks' section is titled 'Tasks:' and contains a list of tasks. The first task is 'Repair AC / Air Conditioner' with a 'Priority' dropdown set to 'High'. Below this are fields for 'Sublocation', 'Notes', and 'Assign To' (set to '[Nobody]').

A dropdown menu is open, showing a list of tasks. The task 'Repair Door - Broken Door Handle' is highlighted in blue. Other tasks in the list include:

- Repair Door - Battery Dead / Not Working (Dead Door)
- Repair Door - Battery Dead / Not Working (Dead Door) ENG
- Repair Door - Broken Door Handle
- Repair Door - Broken Lock
- Repair Door - Damaged / Broken
- Repair Door - Deadbolt Not Engaging
- Repair Door - Hard to Open / "Squeaky"
- Repair Door - Leaking / Bad Seal
- Repair Door - Locked

The work order now has three different Tasks. Two associated with Actions Taken.

Note: It is imperative to enter “Notes” to capture more specific details about the generic tasks to give Engineering or Housekeeping insight into the guest-reported issue(s).

Directory | Account List | Expense Search | Locations | Assets | Work Orders | PM | Projects | Inspections | Supply Chain

Welcome Page **Create Work Order**

New Blank Work Order

Location: #7316 (Two Bdrm)

Reported By: Guest Guest Name: HEATHER HILLS

Scheduled For: 1/ 4/2016 4:50 PM Occupied State: Occupied Follow-up Required

Tasks:

Action Taken Model Task

Repair AC / Air Conditioner

Priority: High

Sublocation: In the main location itself

Notes: !

Assign To: Sergio Flores

Standard Model Task

Repair Door - Broken Door Handle

Priority: High

Asset: FF&E-Ph. 4-Doors-Closet at Unit

Notes: !

Assign To: Sergio Flores

Action Taken Model Task

Repair / Replace Light Bulb

Priority: High

Sublocation:

Notes: !

Assign To: Sergio Flores



Note: The “Actions Taken” for the tasks will be entered by the Assignee, when the Work Order is completed.

Step 5

To complete the Work Order, double click on the Work Order itself or highlight and click the Complete button. When the Complete Work Order screen opens calculate the completion time. Select an Action Taken for the required fields.

Complete Work Order

Actual Start and Completion:

Started: Calculate 1/ 4/2016 at 4 : 54 PM





Duration: Calculate Days: 0 Hours: 0 Minutes: 1

Completed: Calculate 1/ 4/2016 at 4 : 55 PM

This work order is being backdated (set Expected Start to Actual Start)

Comment:

Action Taken on each Task

Task	Action Taken
Repair AC / Air Conditioner	<input type="text"/>  
Repair Door - Broken Door Handle	<input type="text"/>
Repair / Replace Light Bulb	<input type="text"/>  

Asset Replacements

Check if Replaced	Asset
<input type="checkbox"/>	FF&E-Ph. 4-Doors-Closet

OK Cancel



Note: You can also create a new rework work order or suspend the work order for this task from this screen.

Complete Work Order

Actual Start and Completion:

Started: Calculate 1/ 4/2016 at 4 : 54 PM

Duration: Calculate Days: 0 Hours: 0 Minutes: 36

Completed: Calculate 1/ 4/2016 at 5 : 30 PM

This work order is being backdated (set Expected Start to Actual Start)

Comment:

Action Taken on each Task

Task	Action Taken
Repair AC / Air Conditioner	Compressor Not Working
Repair Door - Broken Door Handle	[Create new rework work order for this task]
Repair / Replace Light Bulb	[Create new suspended work order for this task]
	[Not applicable]
	Breaker Reset
	Change Filter
	Compressor Not Working
	Drain Clogged
	Drain Float Brake

Asset Replacements

Check if Replaced	Asset
<input type="checkbox"/>	FF&E-Ph. 4-Doors-Closet

OK Cancel

For the model task *not* associated with Actions Taken, no Action Taken is applicable. The user is not required to enter a value to complete the work order.

Complete Work Order

Actual Start and Completion:

Started: Calculate 1/ 4/2016 at 4 : 54 PM

Duration: Calculate Days: 0 Hours: 0 Minutes: 36

Completed: Calculate 1/ 4/2016 at 5 : 30 PM

This work order is being backdated (set Expected Start to Actual Start)

Comment:

Action Taken on each Task

Task	Action Taken
Repair AC / Air Conditioner	Compressor Not Working
Repair Door - Broken Door Handle	[Not applicable]
Repair / Replace Light Bulb	

Asset Replacements

Check if Replaced	Asset
<input type="checkbox"/>	FF&E-Ph. 4-Doors-Closet

OK Cancel

Step 6

After selecting the Actions Taken, click OK, to complete the work order and save the Actions Taken.

Complete Work Order

Actual Start and Completion:

Started: Calculate 1/ 4/2016 at 4 : 54 PM

Duration: Calculate Days: 0 Hours: 17 Minutes: 54

Completed: Calculate 1/ 5/2016 at 10 : 48 AM

This work order is being backdated (set Expected Start to Actual Start)

Comment:

Action Taken on each Task

Task	Action Taken
Repair AC / Air Conditioner	Compressor Not Working
Repair Door - Broken Door Handle	Not applicable
Repair / Replace Light Bulb	Breaker Reset

Asset Replacements

Check if Replaced	Asset
<input type="checkbox"/>	FF&E-Ph. 4-Doors-Closet

OK Cancel



To view the completed work order with the Actions Taken, open the Work Order Details screen.

Welcome Page | Recently Completed Work Orders | Active Work Orders/Follow-Up | [349594] Repair AC / Air Conditioner, Repair Do

Return to Incomplete | Rework | Create Template | Reports

Request: Repair AC / Air Conditioner, Repair Door - B | Reports | Handle,...

Location: #7314 (Two Bdm - ADA - F)

Reported By: Guest | Guest: HEATHER HILLS

Type: Repair (Engineering) | Priority: High | Follow-up Required

Occupied State: Occupied

Description:

Created by Pam Fullmer on 1/4/2016 4:50 PM | Expense:

Follow-Up Action Taken:

Tasks (3/3) | Costs | Comments (0) | Journal Entries | Log | Notifications

New | Edit | Delete | Move Up | Move Down | Select All | Deselect All | Change Selected Tasks to: | Add/Edit Notes on Selected

#	Completed	Name	Category	Action Taken	Summary	Notes
	<input checked="" type="checkbox"/>					
1	<input checked="" type="checkbox"/>	Repair AC / Air Conditioner	AC	Compressor Not Working		
2	<input checked="" type="checkbox"/>	Repair Door - Broken Door...	Door		FF&E-Ph. 4-Doors-Closet in Unit	
3	<input checked="" type="checkbox"/>	Repair / Replace Light Bulb	Light Bulbs	Breaker Reset		