
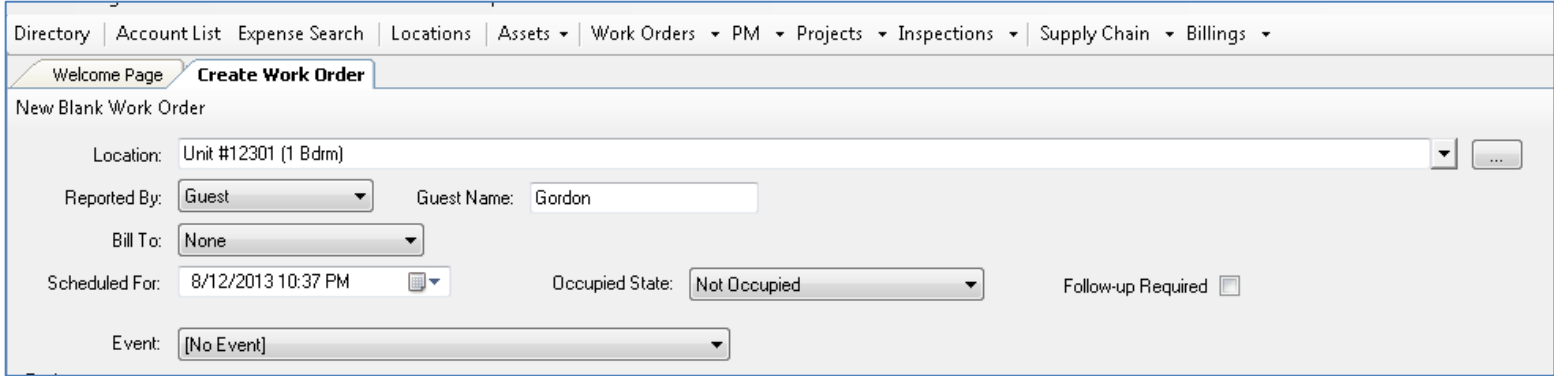




Work Order Management

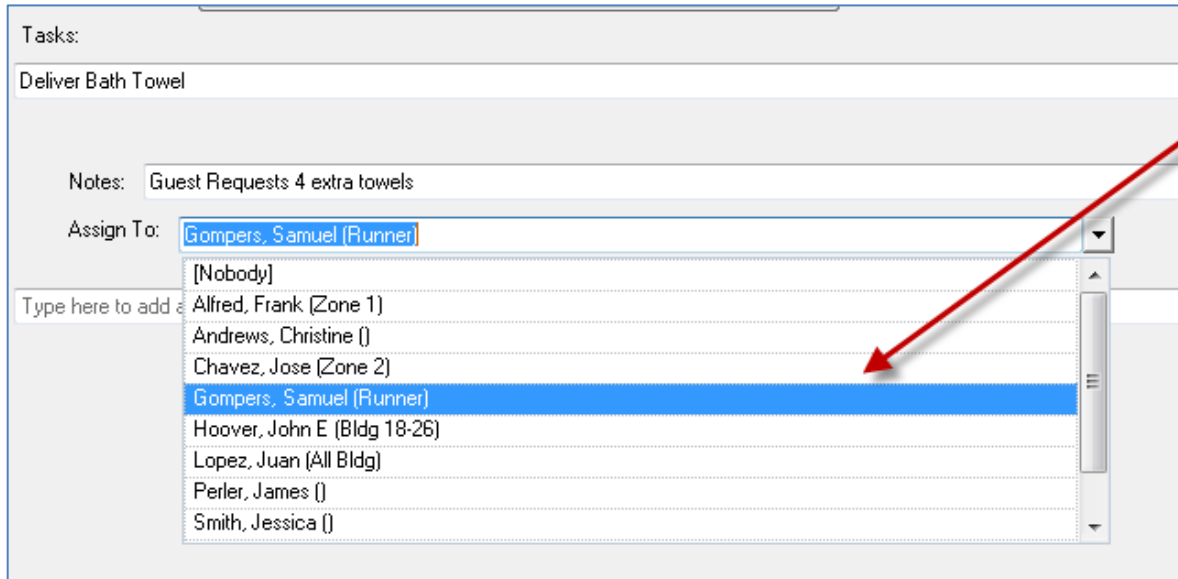
Assign During Create

Follow the steps below to assign a work order during the creation process to an associate on-shift.

	<p>Scenario: <i>A Guest, Terry Hatcher, is calling from unit #12301 to request 4 additional (extra) Bath Towels to be delivered immediately. You want to assign the work order to the current Runner.</i></p>
Step 1	<p>Open the Work Order Create screen, and begin entering the work order details:</p>  <p>The screenshot shows the 'Create Work Order' interface. At the top, there is a navigation menu with options: Directory, Account List, Expense Search, Locations, Assets, Work Orders, PM, Projects, Inspections, Supply Chain, and Billings. Below this is a breadcrumb trail: Welcome Page > Create Work Order. The main area is titled 'New Blank Work Order' and contains several input fields: 'Location' is set to 'Unit #12301 (1 Bdrm)'; 'Reported By' is a dropdown menu set to 'Guest'; 'Guest Name' is a text input field containing 'Gordon'; 'Bill To' is a dropdown menu set to 'None'; 'Scheduled For' is a date and time picker set to '8/12/2013 10:37 PM'; 'Occupied State' is a dropdown menu set to 'Not Occupied'; and 'Follow-up Required' is an unchecked checkbox. At the bottom, there is an 'Event' dropdown menu set to '[No Event]'.</p>

Step 2

When you get to the Tasks, select a task and then select an assignee from the drop down list:



The screenshot shows a web interface for task management. At the top, there is a 'Tasks:' section with a task titled 'Deliver Bath Towel'. Below this, there is a 'Notes:' field containing the text 'Guest Requests 4 extra towels'. The 'Assign To:' field is currently set to 'Gompers, Samuel (Runner)'. A dropdown menu is open, showing a list of potential assignees. The list includes '[Nobody]', 'Alfred, Frank (Zone 1)', 'Andrews, Christine ()', 'Chavez, Jose (Zone 2)', 'Gompers, Samuel (Runner)', 'Hoover, John E (Bldg 18-26)', 'Lopez, Juan (All Bldg)', 'Perler, James ()', and 'Smith, Jessica ()'. A red arrow points to the 'Gompers, Samuel (Runner)' option in the dropdown menu.

The associate's current work assignment shows in parentheses after his/her name.



Note: If you enter additional tasks, the system will intelligently update the assignee for each task.

- Tasks for the same department will auto-populate with the same assignee. *They can be changed to another assignee, or unassigned, manually.*
- Tasks for another department will show as unassigned, until you manually update them.

Step 3

When you have finished adding tasks and assignees, click Create Work Order(s) to generate the new item(s).

If any of the assigned users are carrying mobile devices, the work orders will automatically transmit at that time.