

GCA: Processing Work Orders and Invoicing

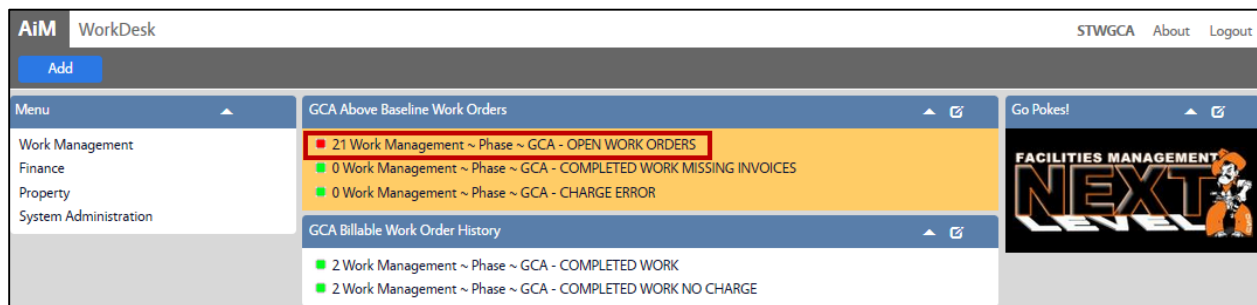
Work Orders

When baseline services are requested by the campus, GCA is simply notified by email. **OSU Facilities Management will assign GCA actual work orders for add-on services, including:**

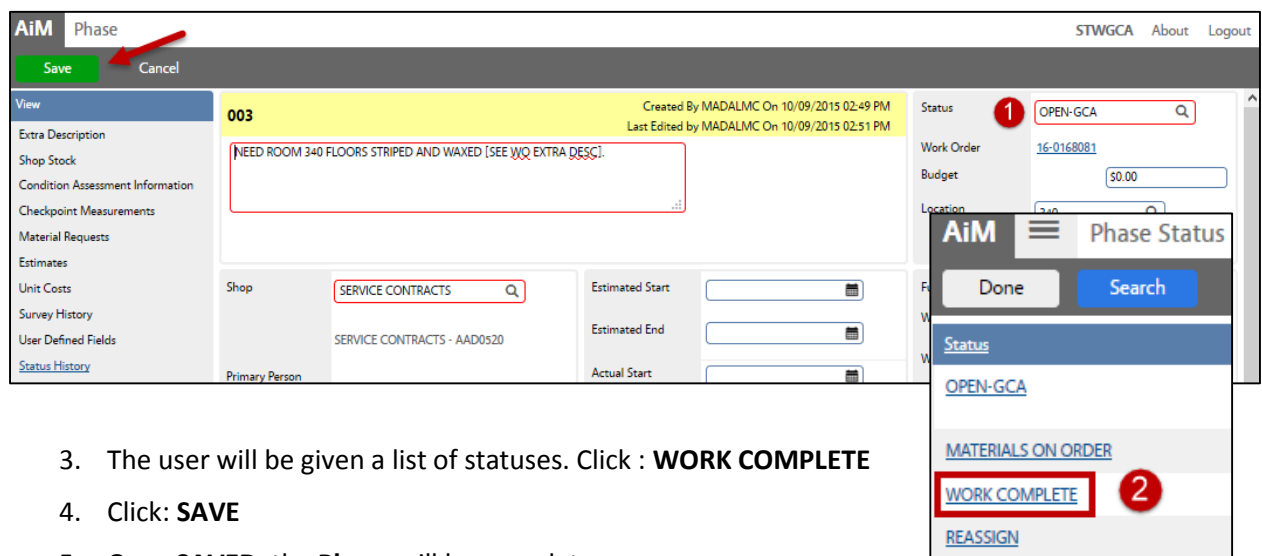
- After Hours Service
- Apartment Cleaning
- Construction Cleanup (requested by user)
- Event Services

Once add-on services have been completed, GCA will log-in to AiM to process their work orders by simply marking work orders as *complete* and submitting charges directly in AiM.

GCA users should have a query channel setup in their **Work Desk**. This channel will allow GCA users to pull up **Phases** associated to **GCA**.



1. To change a Phase status, click: **Edit**
2. Click: **Zoom** next to the **Status** field.



3. The user will be given a list of statuses. Click : **WORK COMPLETE**
4. Click: **SAVE**
5. Once **SAVED**, the **Phase** will be complete.

Invoicing

If the call is for a service request above baseline, a work order will be generated in **AiM**. Once the GCA user has set the phase from OPEN-GCA to WORK COMPLETE, **GCA** will be responsible for entering charges to the applicable phase in the work order.

1. Click: **External Charge** (*left side bar*)

The screenshot shows the AiM External Charges form. The interface includes a top navigation bar with 'AiM External Charges' and 'STWGCA About Logout'. A green 'Save' button is highlighted with a red circle and the number 6. The main form area is divided into several sections:

- Header:** '3162' and 'Last Edited by STWGCA On 11/14/2015 11:30 PM'. A red circle with the number 2 points to the description field containing 'GCA Charge - Work Order 16-0168081'.
- Left Sidebar:** 'View', 'Notes Log', 'User Defined Fields', and 'Related Documents'.
- Form Fields:**
 - Work Order: '16-0168081' (with a search icon).
 - Phase: '003' (with a search icon).
 - Work Code: 'FLOORS' (with a search icon).
 - Contractor: '7123' (with a search icon).
 - Shop: 'SERVICE CONTRACTS'.
 - Part, UOM, and Quantity fields are empty.
- Right Panel:**
 - Posted/Not Posted status.
 - Subledger: 'Contract' (selected in a dropdown menu, with a red circle and the number 3).
 - Total Amount: empty.
 - Currency: 'USD' (with a search icon).
 - Invoice Number: empty.
 - Invoice Date: empty.
 - Subtotal: '\$125.00' (with a red circle and the number 4).
 - Discount, Tax 1, Tax 2, Tax Rebate, and Markup fields are empty.

2. Enter a **Description** for the **External Charge**.
3. **Subledger**: Click on the drop down menu, select **Contract**.
4. **Subtotal**: Enter a dollar amount.
5. **Contractor**: Enter the GCA contractor number, **7123** and click: **ZOOM**
6. Review for accuracy, click: **SAVE**

Once GCA external charges for the phase are entered, **OSU Work Control will review and approve.**