Subject: - Administrative - Aim Process for Work Orders | Approved: Patrick Bohlen

PROCEDURE: **LNR Aim Process for Work Orders**

INTENDED AUDIENCE: LNR personnel with access AIM System

PURPOSE: To define the processing of work orders entered into the AIM software system for LNR.

I.   Work Orders Received or Created:

    1. Work order status "New".

    2. Enter Employee name and hours worked.

    3. Enter Materials Used.

    4. Add Note of Acton Taken in the phase.

    5. Check Transaction List.

    6. Change Status

      a. If work was conducted by LNR, Supervisor changes phase status to "WORK COMPLETE".

      b. If no work was completed (no physical work was completed by LNR), change status to "HOLD FOR CUSTOMER".

    7. Supervisor approves timecards and external charges if applicable.

    8. Administrative Assistant performs the following:

    a. Checks 'COST ANALYSIS" and if external charges are listed on work order, changes the phase to "READY FOR BILLING".

    b. If there are no external charges, and work has been performed, moves status to "CLOSED".

    c. If in "HOLD FOR CUSTOMER", call or email customer and inform them work was not complete and reference notes log. Once the customer is contacted, move phase status to "CANCELLED".

    d. Ensures work order is accurate and complete. If work order needs corrections or additions, (e.g. no notes listed in phase; external charges not approved) administrative assistant moves status to "FOLLOW-UP REQUIRED" for Supervisor to make necessary corrections.

II.   Reassigning Work Orders

    1. Within LNR:

      a. Change shop and save work order.

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    2.   Outside of LNR:
      a. Change shop to "WCC".
      b. Add a note to the Phase "Dispatched to Wrong Shop".
      c. Save and Close.

III.   **External Requests**
    1.   To request work from another department, follow FO-SOP-05 "Creating a Customer Request

IV.   **Billing**
    1.   DSO/Non E & G – Need to be billed by the end of the month.

Note: The only exception to step IV-1. June charges will be billed on May 15th.