

SERVICE

WORK ORDERS – ADD A WORK ORDER

A Work order gets generated by various processes in BPO. When a call is logged the transactional data from the call is logged on the work order.

You may need to raise a work order **manually** for one of the following reasons:

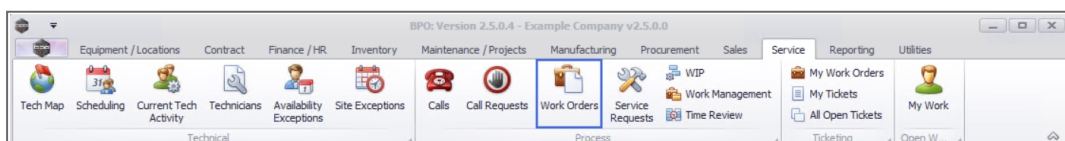
- ✔ To log employee time that is not related to a call, for instance a workshop machine repair.
- ✔ To raise service requisitions for company non-stock purchases, like building maintenance, or stationery if these are not processed through stock.

A Functional Location, e.g. **Workshop** or **Non-Stock Procurement** needs to be set up in order to create a manual work order.

If a repair is done on a machine that is your own stock and you wish to log labour, expenses and/or parts to the machine, then the work order should be linked to the machine instead of a functional location.

Projects can be set up to link work orders, for instance, you can create a work order per month for non-stock purchases. The Project will then group these work orders together. (This is not a requirement, however.)

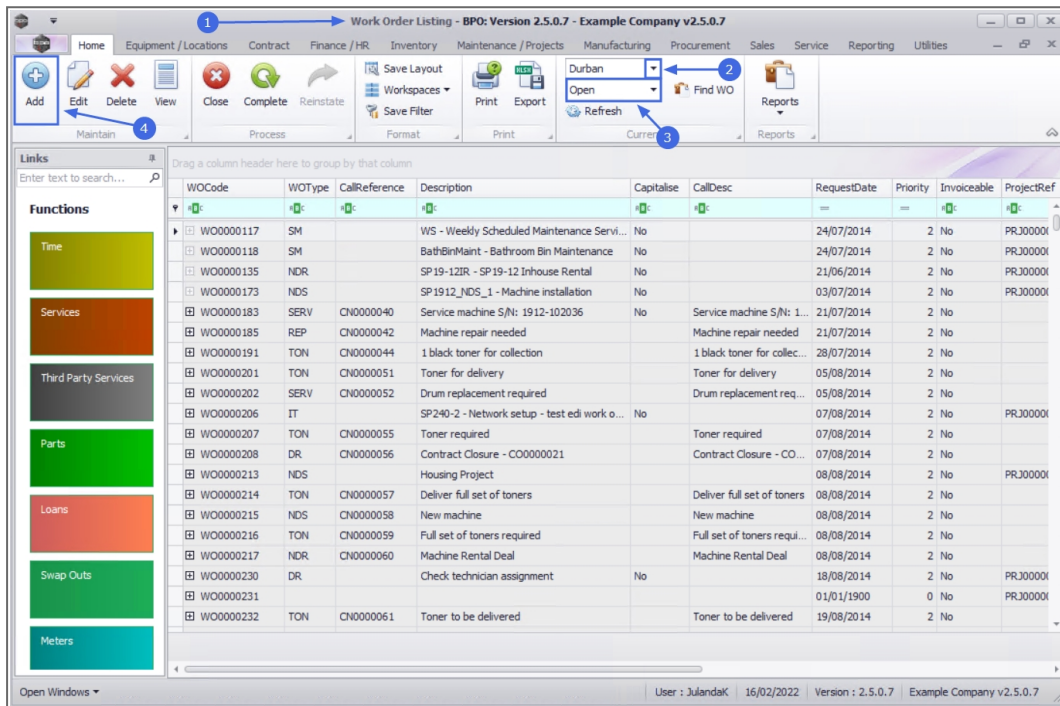
Ribbon Access: *Service > Work Orders*



1. The **Work Orders Listing** screen will be displayed.
2. Select the **Site** you wish to issue the work order for.
 - The example has **Durban** selected.
3. The **Status** will default to **Open**.
4. Click on **Add**.



Short cut key: **Right click** to display the **All groups** menu list. Click on **Add**.



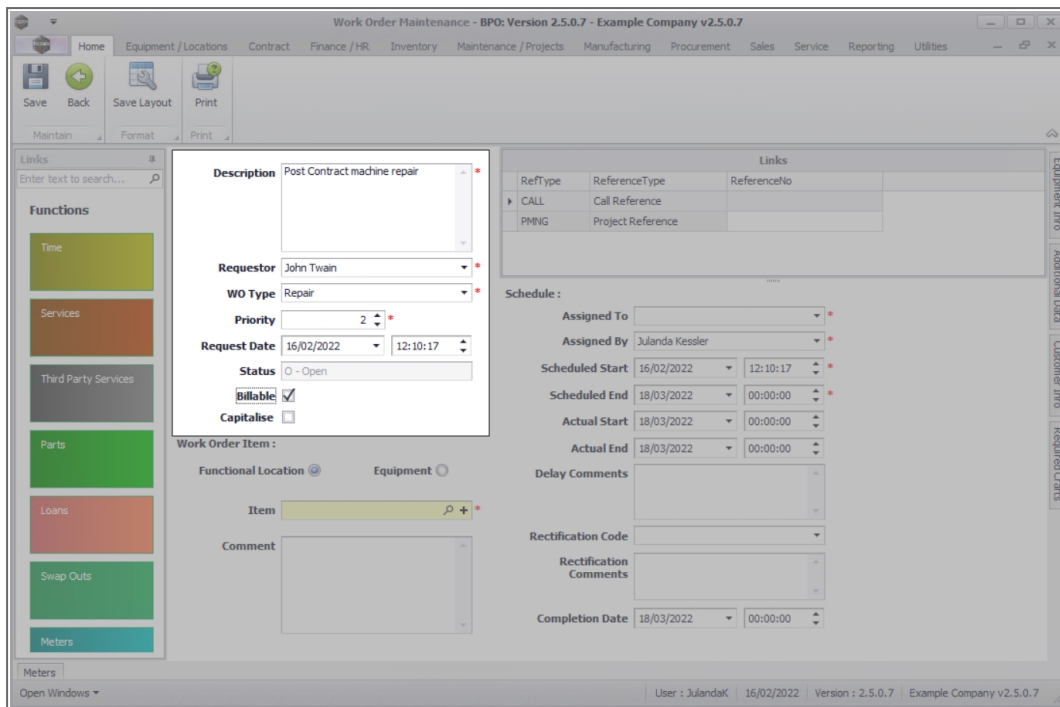
4. The **Work Order Maintenance** screen will be displayed.

WORK ORDER DETAILS

- **Description:** Type in the description for the work that needs to be performed.
- **Requestor:** This field will populate with the person currently logged on to the system. Click on the down **arrow** to select an alternative person, if required.

- **Work Order Type:** Click on the down **arrow** to select the Work Order type from the drop-down menu. Additional work order types can be set up depending on your requirements.
- **Priority:** Type in or use the **arrow** indicators to set the **priority level**¹ for the work order.
- **Request Date:** The request date will auto populate with the current date and time.
 - **Date:** Click to type in or use the down **arrow** to select an alternative date using the calendar function.
 - **Time:** Click to type in or use the directional **arrows** to select an alternative time.
- **Status:** The status for the work order will be set to **Open** by default and cannot be changed.
- **Billable:** Click to select the text box if the work scheduled on the work order is Billable.
- **Capitalise:** This functionality is not currently available in BPO2.

¹1 = Most Important 5 = Least Important



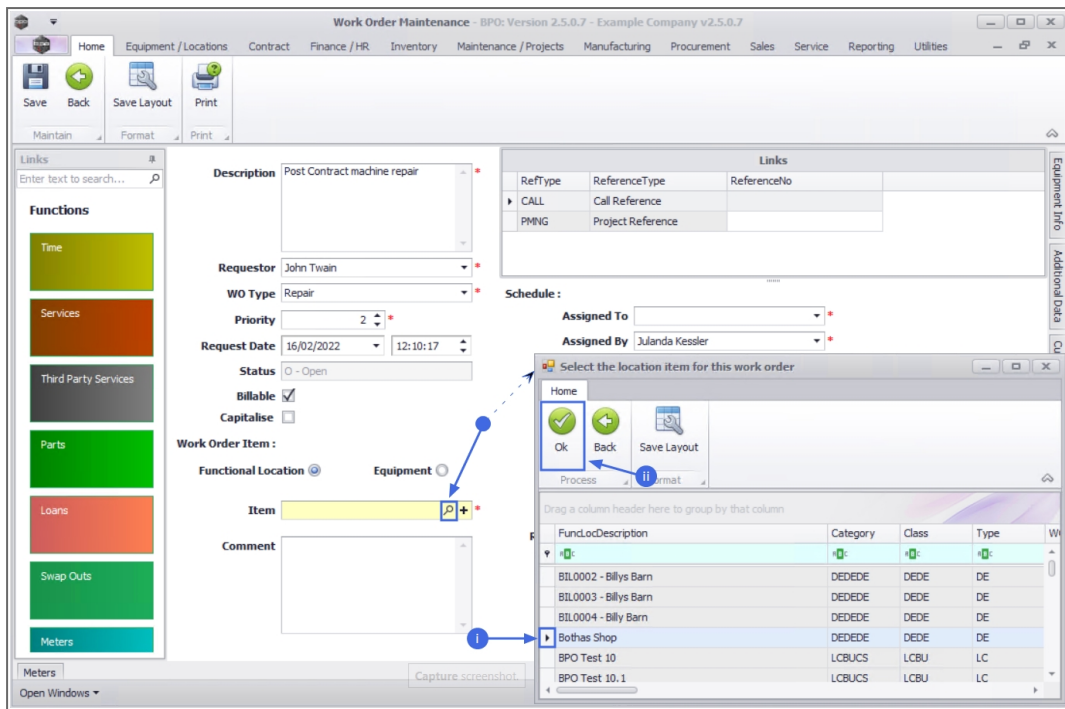
WORK ORDER ITEM

- **Functional Location:** Click to select the functional location if the work order needs to be linked to the *location*.
- **Equipment:** Click to select the equipment if the work order needs to be linked to a *machine* or *serial number*.
- **Item:** Click on the *search* button to display the *Select the [location or equipment] item for this work order* screen.



The screen will be relevant to the check box that was selected.

- Click on the *row* of the *location* or *equipment* you wish to assign to this Work Order.
- Click on **OK**.



Work Order Maintenance - BPO: Version 2.5.0.7 - Example Company v2.5.0.7

Links

RefType	ReferenceType	ReferenceNo
CALL	Call Reference	
PMING	Project Reference	

Description Post Contract machine repair

Requestor John Twain

WO Type Repair

Priority 2

Request Date 16/02/2022 12:10:17

Status O - Open

Billable ☒

Capitalise ☐

Work Order Item :

Functional Location ☐ **Equipment** ☒

Item

Comment

Schedule :

Assigned To

Assigned By Julanda Kessler

Select the location item for this work order

Drag a column header here to group by that column

FuncLocDescription	Category	Class	Type	W
BIL0002 - Billys Barn	DEDEDE	DEDE	DE	
BIL0003 - Billys Barn	DEDEDE	DEDE	DE	
BIL0004 - Billys Barn	DEDEDE	DEDE	DE	
Bothas Shop	DEDEDE	DEDE	DE	
BPO Test 10	LCBUCS	LCBU	LC	
BPO Test 10.1	LCBUCS	LCBU	LC	

Equipment Info Panel

1. The **Equipment Info** panel will expand if you are assigning the work order to **Equipment**.
2. From this panel you can view additional information related to the item selected, including any **Warranties** and **Equipment Notes**.
3. Click outside the panel to retract the frame.

Work Order Maintenance - BPO: Version 2.5.0.7 - Example Company v2.5.0.7

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Save Layout Print

Maintain Format Print

Links
Enter text to search...

Functions

- Time
- Services
- Third Party Services
- Parts
- Loans
- Swap Outs
- Meters

Description: Post Contract machine repair

Requestor: John Twain

WO Type: Repair

Priority: 2

Request Date: 16/02/2022 12:10:17

Status: O - Open

Billable: ☒

Capitalise: ☐

Work Order Item:

Functional Location: ☐ Equipment ☒

Item: Drum-01

Comment:

Reftype: CALL ReferenceType: Call Reference

Reftype: PMNG ReferenceType: Project Reference

Schedule:

Assigned To: Julanda

Assigned By: Julanda

Scheduled Start: 16/02/2022

Scheduled End: 18/03/2022

Actual Start: 18/03/2022

Actual End: 18/03/2022

Delay Comments:

Rectification Code:

Rectification Comments:

Completion Date: 18/03/2022

Equipment Info

Part No: 17-856

Part Desc: Drum for SP1717

Model No:

Category: Spare Parts

Warranties

WarrantyC...	Description	SupplierCode	SupplierName	St

Equipment Notes

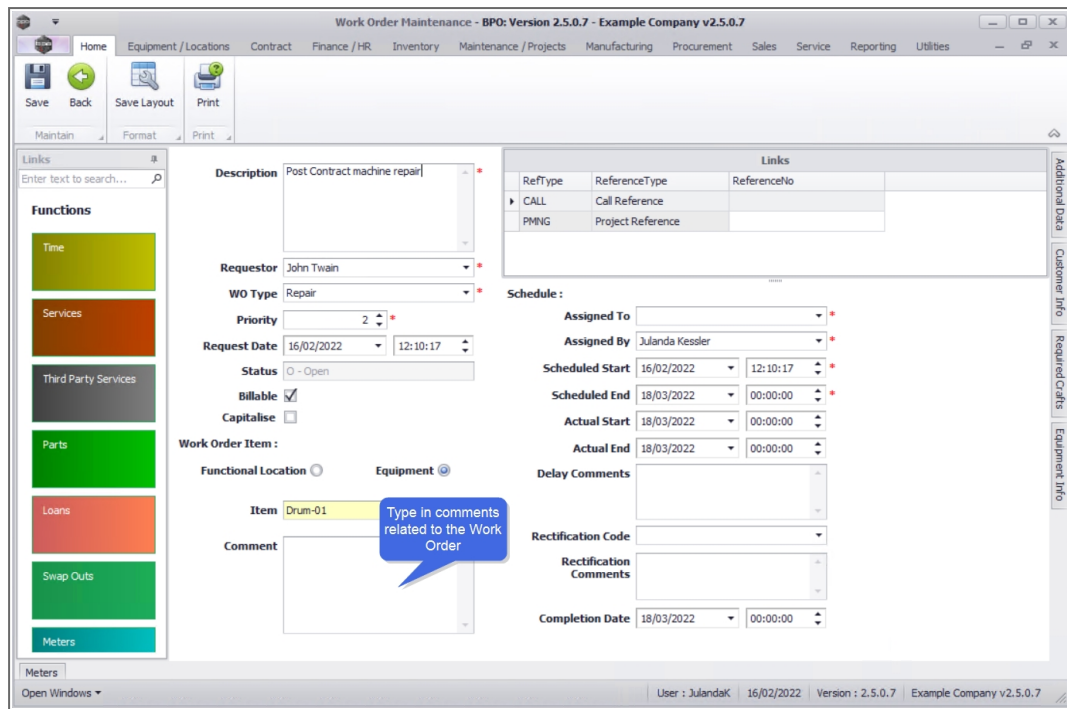
Comment	Date	FullName

Click outside the panel to retract

User: JulandaK 16/02/2022 Version: 2.5.0.7 Example Company v2.5.0.7

COMMENTS

- **Comments:** Type in comments related to the Work Order, if required.

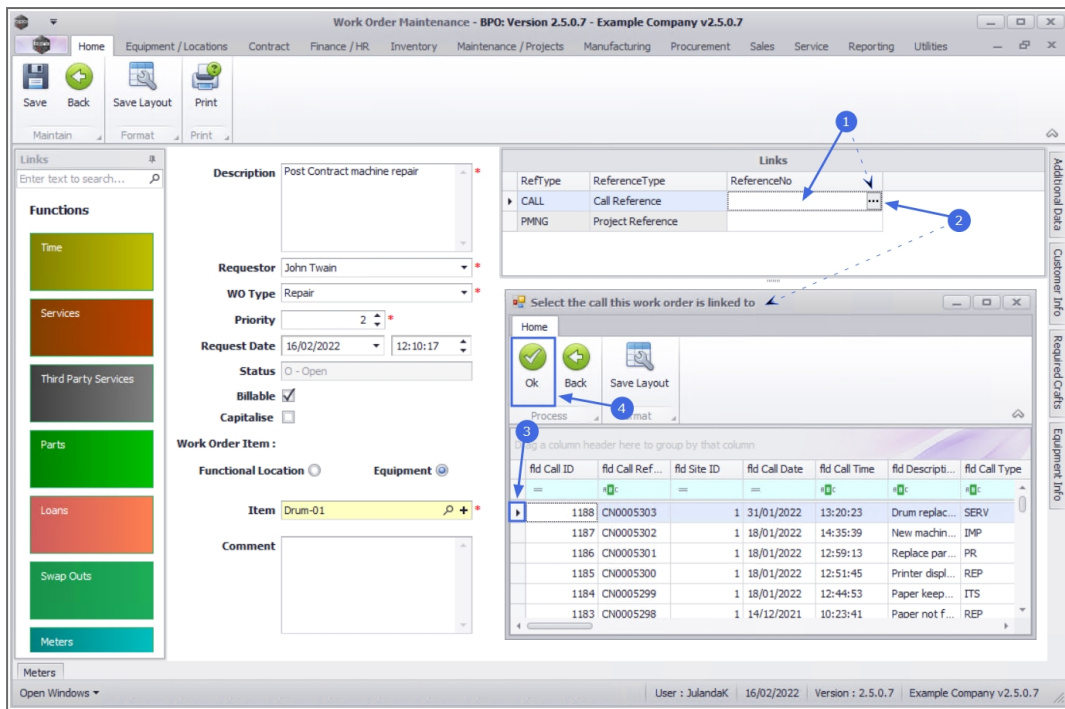


LINKS FRAME

The Links frame is used to link the Work Order to a **Call** or a **Project**. If you do not need to link the Work Order to a Call or Project, then leave this section blank.

Link a Call

1. Click in the **Reference No.** text box in the **Call** row to display the **ellipsis** button.
2. Click on this button to display the **Select the call this work order is linked to** screen.
3. Click on the **row** of the **Call** you wish to link to this Work Order.
4. Click on **OK**.



Work Order Maintenance - BPO: Version 2.5.0.7 - Example Company v2.5.0.7

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Save Layout Print

Links Enter text to search...

Functions

Time Services Third Party Services Parts Loans Swap Outs Meters

Description Post Contract machine repair

Requestor John Twain

WO Type Repair

Priority 2

Request Date 16/02/2022 12:10:17

Status Open

Billable ☒

Capitalise ☐

Work Order Item:

Functional Location Equipment

Item Drum-01

Comment

Links

RefType	ReferenceType	ReferenceNo
CALL	Call Reference	
PMING	Project Reference	

Select the call this work order is linked to

Home

Ok Back Save Layout

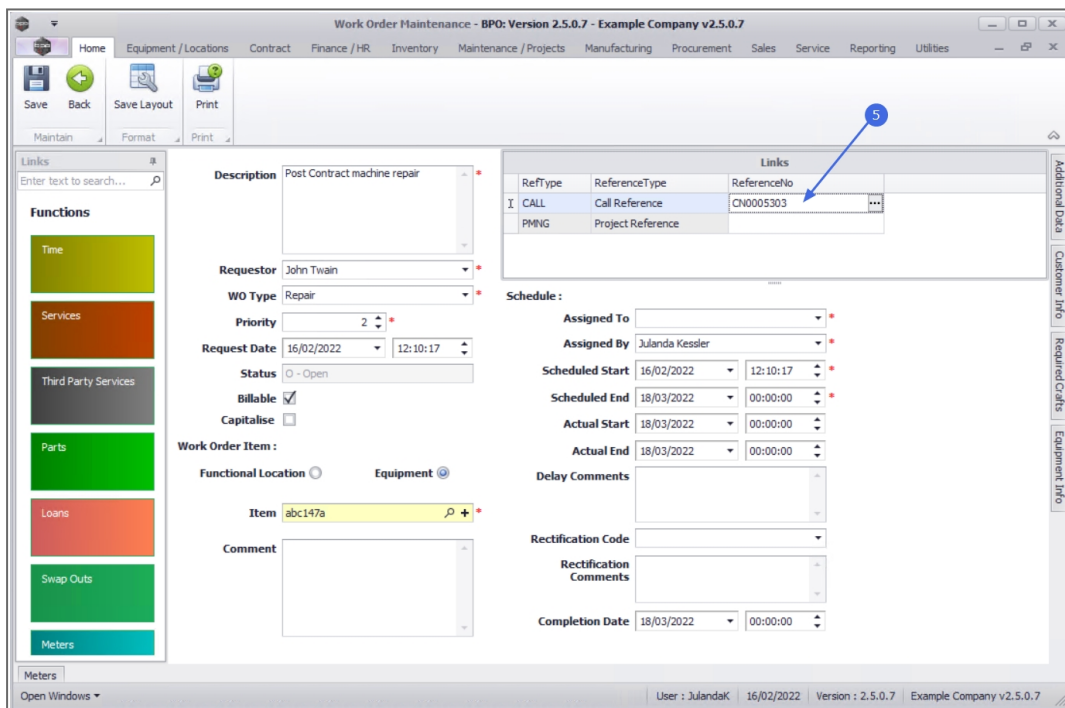
Process

Using a column header here to group by that column

fid Call ID	fid Call Ref...	fid Site ID	fid Call Date	fid Call Time	fid Descripti...	fid Call Type
1188	CN0005303	1	31/01/2022	13:20:23	Drum replac...	SERV
1187	CN0005302	1	18/01/2022	14:35:39	New machin...	IMP
1186	CN0005301	1	18/01/2022	12:59:13	Replace par...	PR
1185	CN0005300	1	18/01/2022	12:51:45	Printer displ...	REP
1184	CN0005299	1	18/01/2022	12:44:53	Paper keep...	ITS
1183	CN0005298	1	14/12/2021	10:23:41	Paoer not f...	REP

User : JulandaK 16/02/2022 Version : 2.5.0.7 Example Company v2.5.0.7

5. The **call reference no.** selected, will display in the **Reference No.** text box.



Work Order Maintenance - BPO: Version 2.5.0.7 - Example Company v2.5.0.7

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Save Layout Print

Links Enter text to search...

Functions

Time Services Third Party Services Parts Loans Swap Outs Meters

Description Post Contract machine repair

Requestor John Twain

WO Type Repair

Priority 2

Request Date 16/02/2022 12:10:17

Status Open

Billable ☒

Capitalise ☐

Work Order Item:

Functional Location Equipment

Item abc147a

Comment

Links

RefType	ReferenceType	ReferenceNo
CALL	Call Reference	CN0005303
PMING	Project Reference	

Schedule:

Assigned To

Assigned By Julanda Kessler

Scheduled Start 16/02/2022 12:10:17

Scheduled End 18/03/2022 00:00:00

Actual Start 18/03/2022 00:00:00

Actual End 18/03/2022 00:00:00

Delay Comments

Rectification Code

Rectification Comments

Completion Date 18/03/2022 00:00:00

User : JulandaK 16/02/2022 Version : 2.5.0.7 Example Company v2.5.0.7



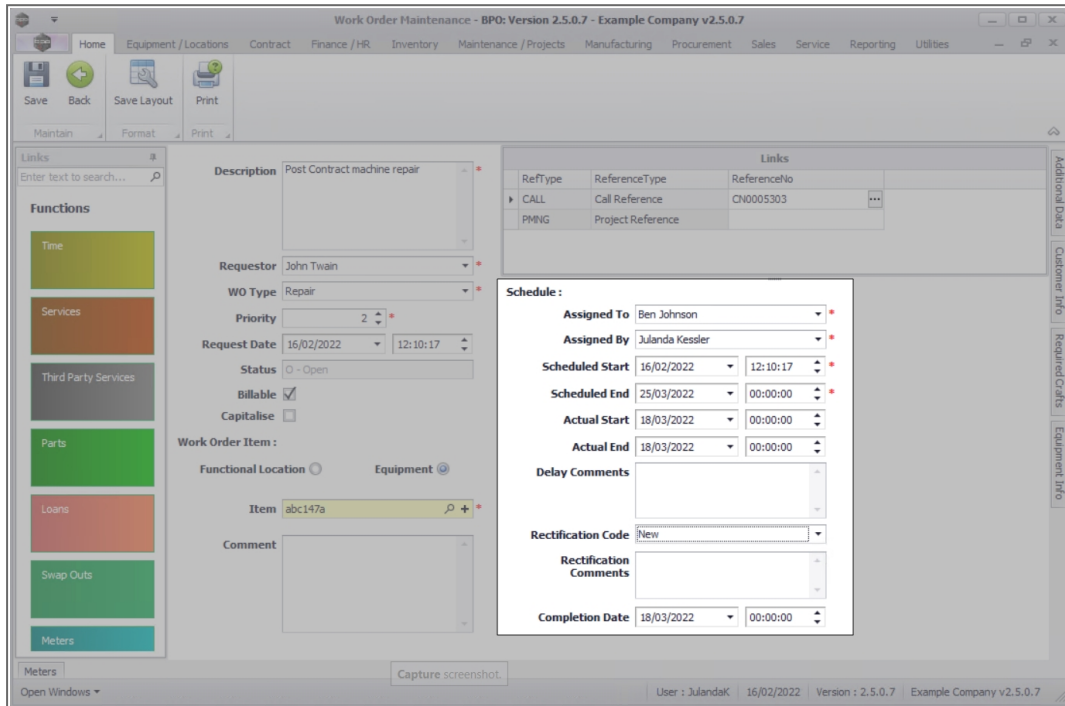
Follow the same procedure if you wish to link a ***Project Reference No.*** to the Work Order.

SCHEDULE

- **Assigned To:** Click on the down ***arrow*** to select the person who will be responsible for carrying out the work.
- **Assigned By:** This field will be populated with the name of the person logging the call.
- **Scheduled Start:** The current date and time will be displayed.
 - **Date:** Type in or click on the down ***arrow*** to select an alternative date using the calendar function.
 - **Time:** Type in or use the ***arrow*** indicators to select an alternative time.
- **Scheduled End:** The date scheduled one month from the current date will be displayed. Adjust the scheduled end date and time as required.
- **Actual Start:** This field will be auto populated with the original scheduled end date. The actual start date can be edited at a later stage, if the work has been delayed.
- **Actual End:** The original scheduled end date will display. The actual end date can be edited at a later stage, if the work has been delayed.
- **Delay Comments:** Comments can be added as to the reason the work was delayed. (This can be done at a later stage, if required).
- **Rectification Code:** Click on the down ***arrow*** to select the rectification type from the menu. When adding a work order, ***New*** is normally selected as the rectification code, for a new work order.
- **Rectification Comments:** Type in the work resolution when the work has been completed. If you are adding the work order, then this field will be updated at a later stage. (If the work order is

linked to a call, then the rectification information will pull through to the call closure comments).

- **Completion Date:** Type in or click on the down **arrow** to select the completion date for the work order using the calendar function. (This will be done when the work has been completed).



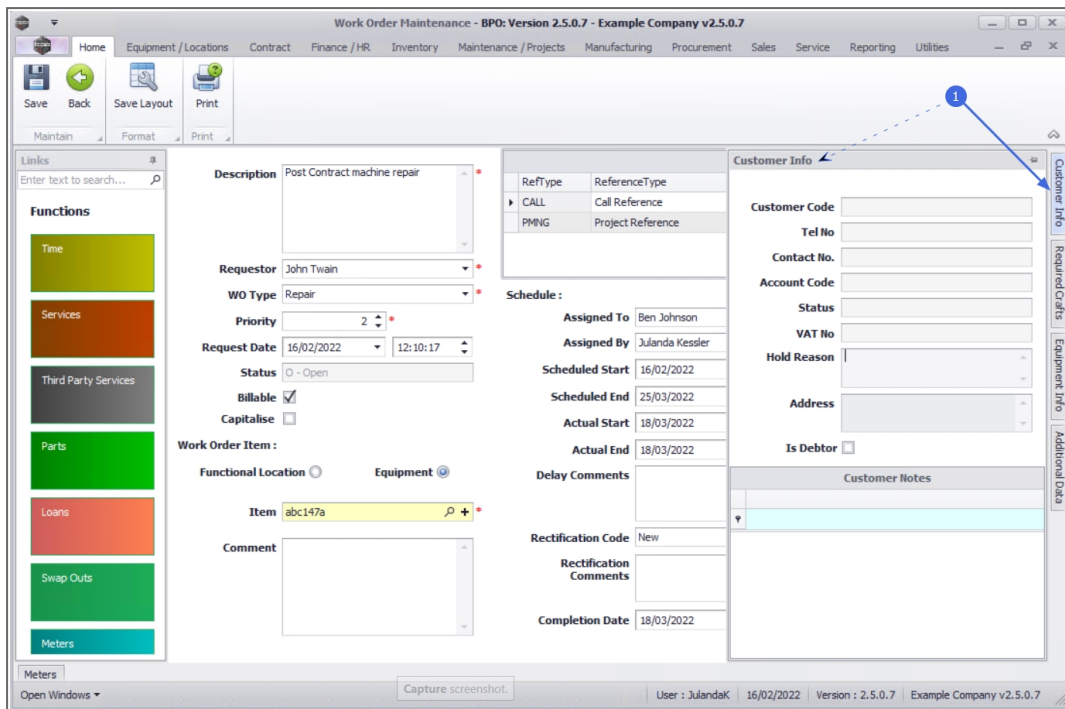
CUSTOMER INFO

1. Click on the **Customer Info** tab to expand the **Customer Info** frame.



This panel can be docked to make it easier to work in. Undock the panel when done to retract it.

2. From this panel you can view additional information for the **customer** linked to the work order.



The screenshot shows the 'Work Order Maintenance' interface. The 'Additional Data' tab is highlighted on the right side of the form. The form contains various fields for work order details, including Description, Requestor, WO Type, Priority, Request Date, Status, Billable, Capitalise, Work Order Item, Functional Location, Equipment, Item, Comment, Schedule, Assigned To, Assigned By, Scheduled Start, Scheduled End, Actual Start, Actual End, Delay Comments, Rectification Code, Rectification Comments, Completion Date, Customer Info, and Customer Notes.

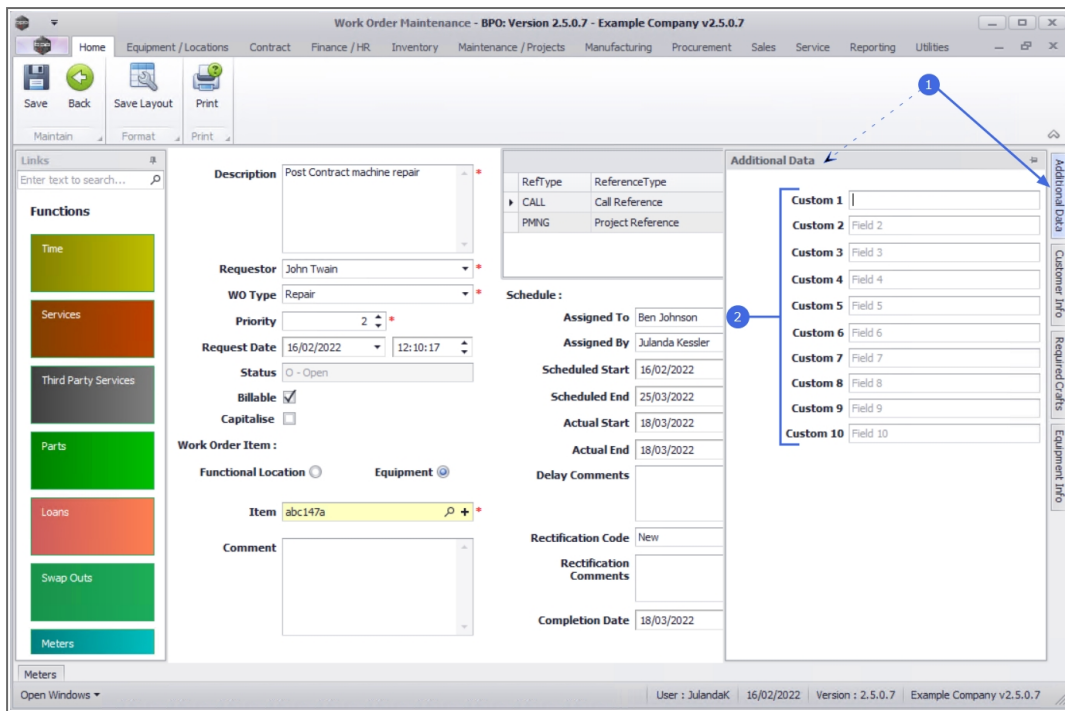
ADDITIONAL DATA

1. Click on the **Additional Data** tab to expand the **Additional Data** panel.



This panel can be docked to make it easier to work in. Undock the panel when done to retract it.

2. **Custom Fields:** There are **10** fields in this screen that can be utilised for additional information that you would like to link to this Work Order. These field labels can be re-named to suit your company requirements. Please contact your BPO Specialist or CO3 Support for assistance.



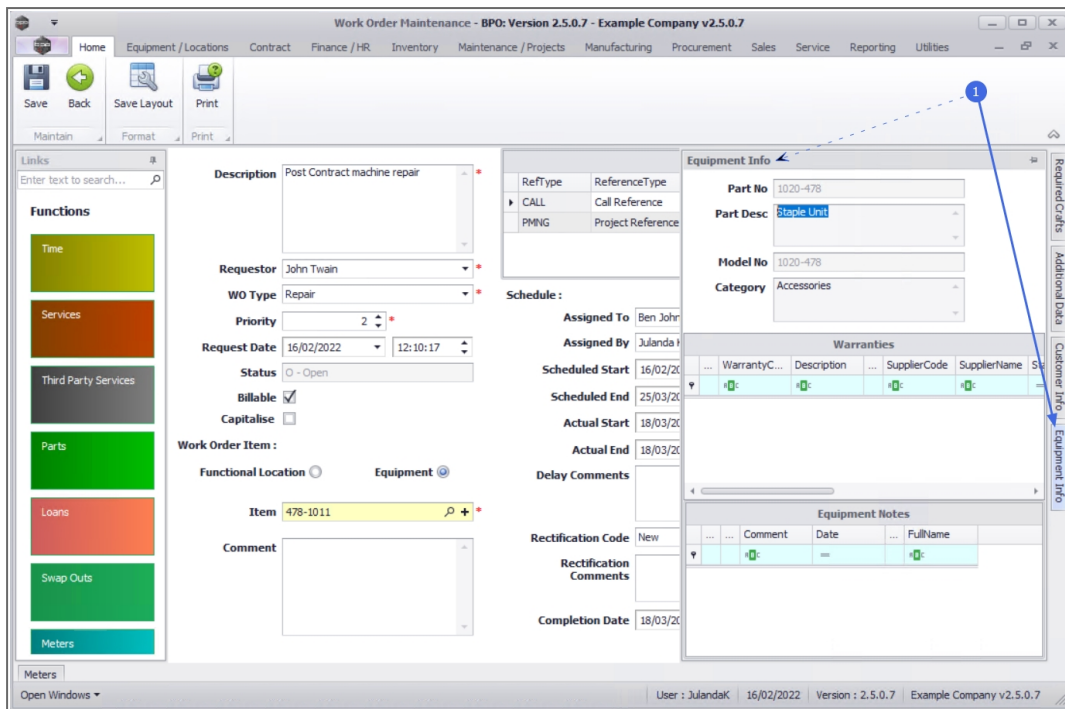
EQUIPMENT INFO

1. Click on the **Equipment Info** tab, or on the **[+]** icon in the **Item** field, to expand the **Equipment Info** docking panel.



This panel can be docked to make it easier to work in. Undock the panel when done to retract it.

2. From this panel you can view additional information about the selected **equipment item**, including any **Warranties** and **Equipment** notes.




REQUIRED CRAFTS

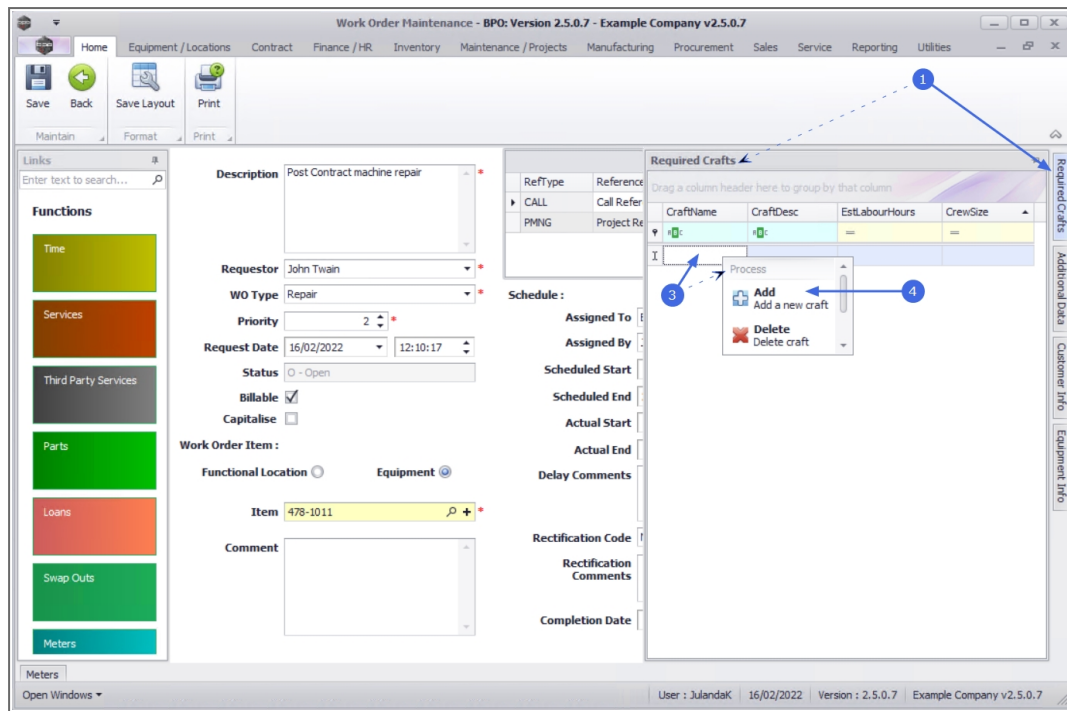
Crafts are skills or job title(s) **linked to employees**. Work Order schedule 'Required Crafts' details need to be configured on each work order.

1. Click on the **Required Crafts** tab to expand the Required Crafts panel.

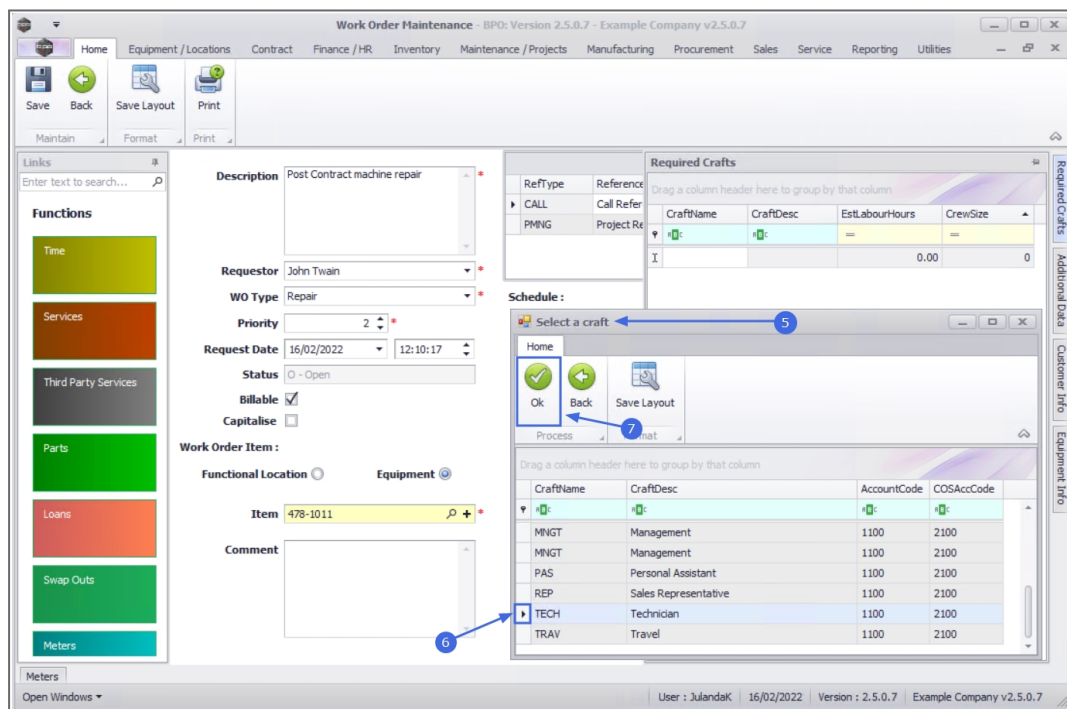


This panel can be docked to make it easier to work in. Undock the panel when done to retract it.

2. To add the required craft(s) needed by the person responsible for carrying out the Work Order,
3.  **Right click** in the **Craft Name** field to display the **Process** menu.
4. Click on **Add** - Add a new craft.



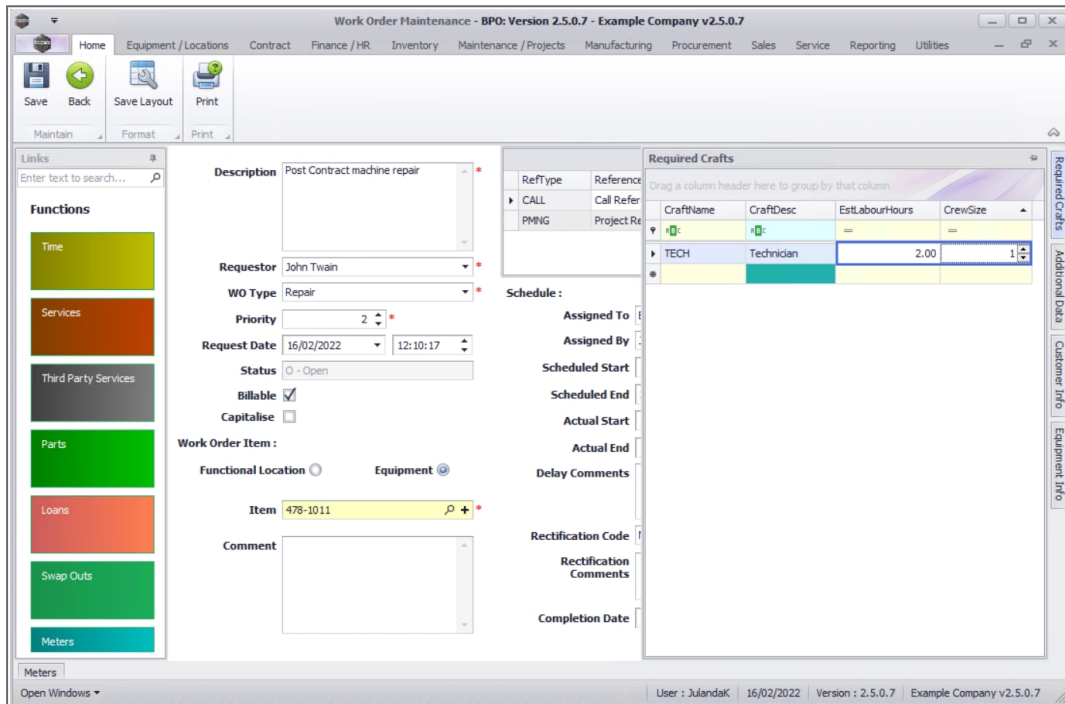
5. The **Select a craft** screen will be displayed.
6. Click on the **row** of the **craft** that will be required for the Work Order.
7. Click on **OK**.



- **Estimated Labour Hours:** Click in the text box to type in or use the directional **arrows** to select the number of labour hours required to complete the task.
- **Crew Size:** Click in the text box to type in or use the directional **arrows** to select the number of people required to do the task.



Continue adding the crafts required for the Work Order by following the process outlined above.



Work Order Maintenance - BPO: Version 2.5.0.7 - Example Company v2.5.0.7

Home | Equipment / Locations | Contract | Finance / HR | Inventory | Maintenance / Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Save | Back | Save Layout | Print

Maintain | Format | Print

Links
Enter text to search...

Functions

- Time
- Services
- Third Party Services
- Parts
- Loans
- Swap Outs
- Meters

Description: Post Contract machine repair

Requestor: John Twain

WO Type: Repair

Priority: 2

Request Date: 16/02/2022 12:10:17

Status: Open

Billable: ☒

Capitalise: ☐

Work Order Item:

Functional Location: Equipment

Item: 478-1011

Comment:

Required Crafts

CraftName	CraftDesc	EstLabourHours	CrewSize
TECH	Technician	2.00	1

Schedule:

Assigned To:

Assigned By:

Scheduled Start:

Scheduled End:

Actual Start:

Actual End:

Delay Comments:

Rectification Code:

Rectification Comments:

Completion Date:

User: JulandaK | 16/02/2022 | Version: 2.5.0.7 | Example Company v2.5.0.7

METERS

1. Click on the **Meters** tab.

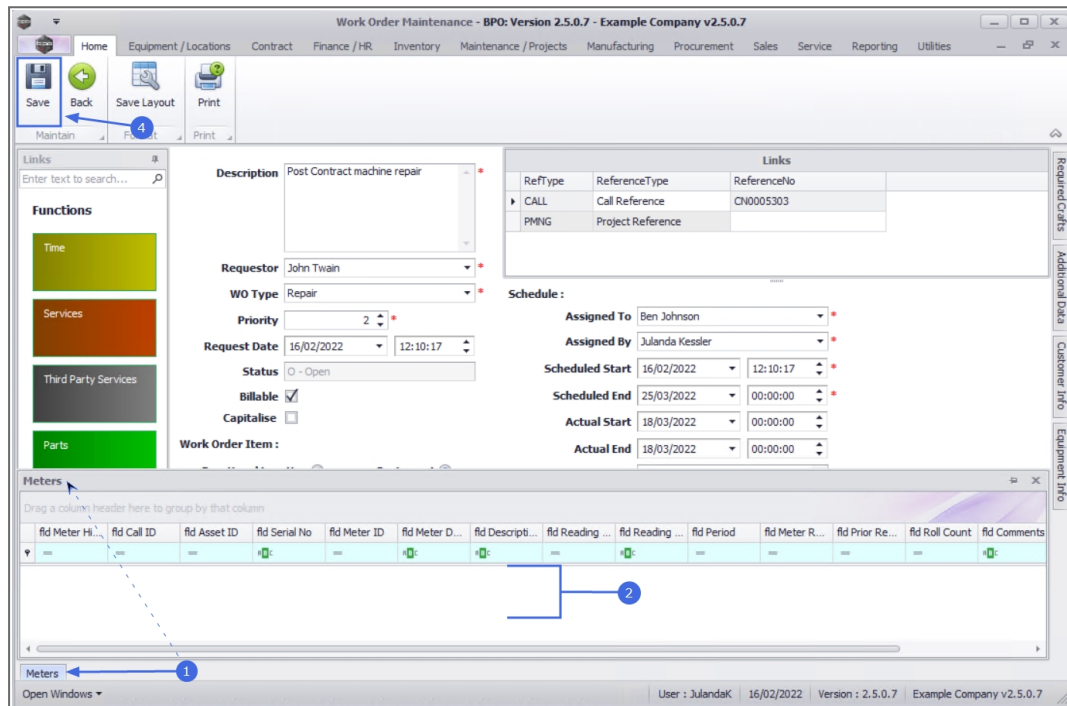


This panel can be docked to make it easier to work in. Undock the panel when done to retract it.

2. If the machine has meters linked, then the Meters previously captured will display in the Meter reading data grid.
3. Type in the meter reading, if required.

SAVE THE WORK ORDER

4. When you have finished adding details to the Work Order Maintenance screen, click on **Save**.



Work Order Maintenance - BPO: Version 2.5.0.7 - Example Company v2.5.0.7

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Save Layout Print

Links

Enter text to search...

Functions

Time

Services

Third Party Services

Parts

Description Post Contract machine repair

Requestor John Twain

WO Type Repair

Priority 2

Request Date 16/02/2022 12:10:17

Status O - Open

Billable ☒

Capitalise ☐

Work Order Item :

Links

RefType	ReferenceType	ReferenceNo
CALL	Call Reference	CN0005303
PMNG	Project Reference	

Schedule :

Assigned To Ben Johnson

Assigned By Julanda Kessler

Scheduled Start 16/02/2022 12:10:17

Scheduled End 25/03/2022 00:00:00

Actual Start 18/03/2022 00:00:00

Actual End 18/03/2022 00:00:00

Meters

Drag a column header here to group by that column

fId Meter H...	fId Call ID	fId Asset ID	fId Serial No	fId Meter ID	fId Meter D...	fId Descript...	fId Reading ...	fId Reading ...	fId Period	fId Meter R...	fId Prior Re...	fId Roll Count	fId Comments

Meters

Open Windows

User : JulandaK 16/02/2022 Version : 2.5.0.7 Example Company v2.5.0.7

5. You will return to the **Work Order Listing** screen where you can **view** the **work order** information.

Work Order Listing - BPO Version 2.5.0.7 - Example Company v2.5.0.7

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete View Close Complete Revert Save Layout Workspaces Save Filter Print Export Durban Open Find WO Reports

Links

Order text to search...

Drag a column header here to group by that column

WOCCode	WOType	CallReference	Description	Capitalise	CallDesc	RequestDate	Priority	Invoiceable	ProjectRef
WO0006259	REP	CN0005303	Post Contract machine repair	No	Drum replacement req...	16/02/2022	2	Yes	
WO0006258	SERV	CH0005303	Drum replacement required	No	Drum replacement req...	31/01/2022	2	No	
WO0006256	IMP	CH0005302	New machine implementation, Installation ...	No	New machine implemen...	24/01/2022	1	No	
WO0006257	NDG	CH0005274	PRO3406OR002	No	PRO3406OR002	19/01/2022	2	No	
WO0006255	REP	CH0005300	Repair required for Error Code	No	Printer displaying error...	19/01/2022	2	No	
WO0006253	PR	CH0005301	Replace part - current faulty	No	Replace part - current ...	18/01/2022	3	No	
WO0006252	REP	CH0005300	Printer displaying error code	No	Printer displaying error...	18/01/2022	3	No	
WO0006251	ITS	CH0005299	Paper keeps on jamming in machine	No	Paper keeps on jammin...	18/01/2022	3	No	
WO0006250	REP	CH0005298	Paper not feeding through rollers	No	Paper not feeding thro...	14/12/2021	3	No	
WO0006249	SH		BathRoom - Bathroom Bin Maintenance	No		23/11/2021	2	No	PR,300
WO0006248	SH		WS - Weekly Service	No		23/11/2021	2	No	PR,300
WO0006247	SH		BathRoom - Bathroom Bin Maintenance	No		23/11/2021	2	No	PR,300
WO0006246	SH		BathRoom - Bathroom Bin Maintenance	No		23/11/2021	2	No	PR,300
WO0006245	SH		WS - Weekly Service	No		23/11/2021	2	No	PR,300
WO0006243	SH		WS - Weekly Service	No		16/11/2021	2	No	PR,300
WO0006242	SERV	IMHS - 1 Month Machine Service		No		16/11/2021	2	No	PR,300
WO0006241	SH		WS - Weekly Service	No		16/11/2021	2	No	PR,300
WO0006240	SH		WS - Weekly Service	No		16/11/2021	2	No	PR,300
WO0006238	PR		Test PQ Source Type Work Order	No		14/11/2021	5	No	
WO0006239	PR		Rollers need replacing	No		11/11/2021	3	No	PR,300

Open Windows

User : JulandaK 16/02/2022 Version : 2.5.0.7 Example Company v2.5.0.7

MNU.072.001

