

SERVICE

INTRODUCTION TO WORK MANAGEMENT

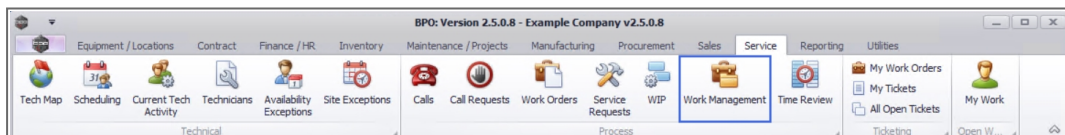
The Work Management screen is designed for Service and Technical Management to view, assign, complete and close work orders; and works much like the Call Centre screen.

Only Work Orders that have time records linked to them are listed. Of these, you can view the number of **Open** and **Completed** Work Orders per site, and by technician, for the date range selected.

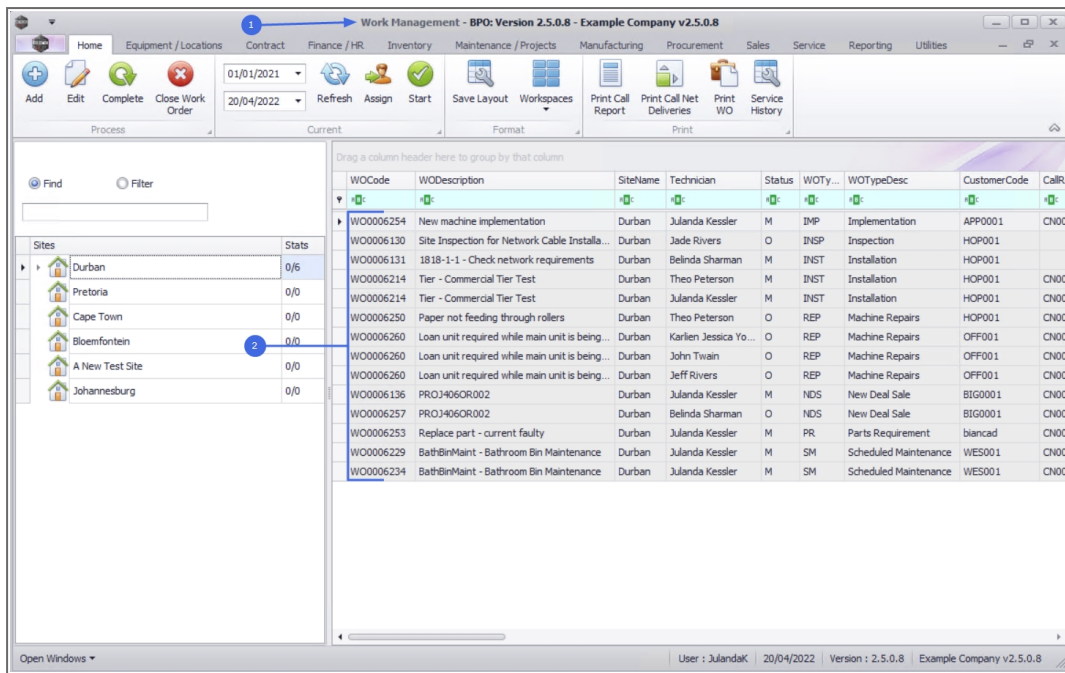


If you are using Tech Connect then the [Technician Activity](#) and [Last GPS Location](#) can be viewed, as with the Call Centre screen.

Ribbon Access: *Service > Work Management*

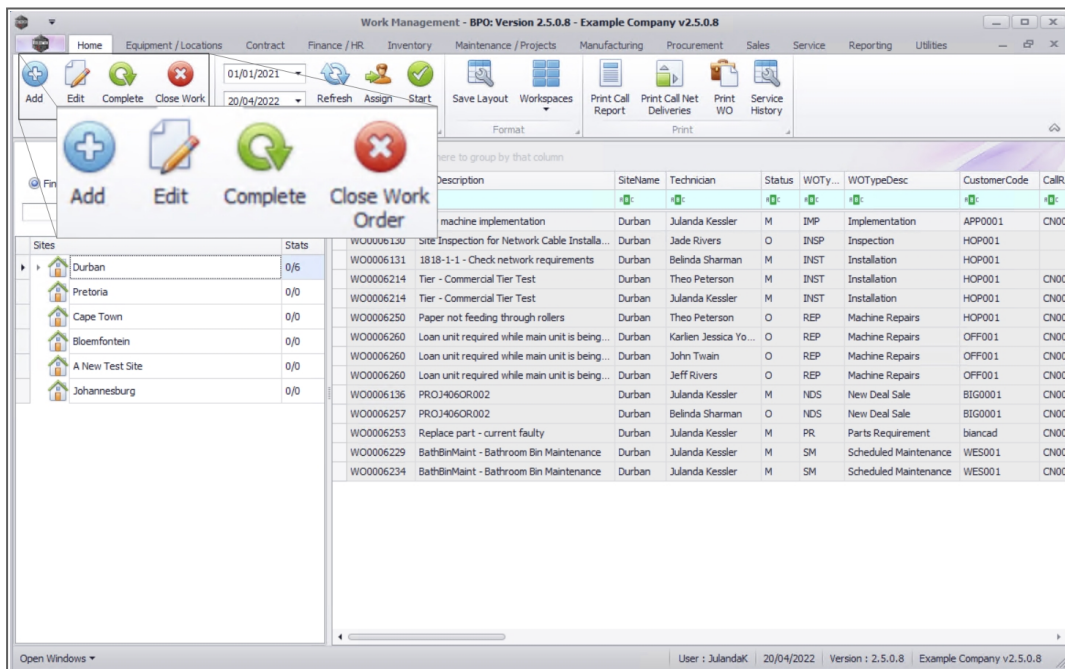


1. The **Work Management** screen will be displayed.
2. This screen lists all [time linked](#) Work Orders, dependant on the employee hierarchy.



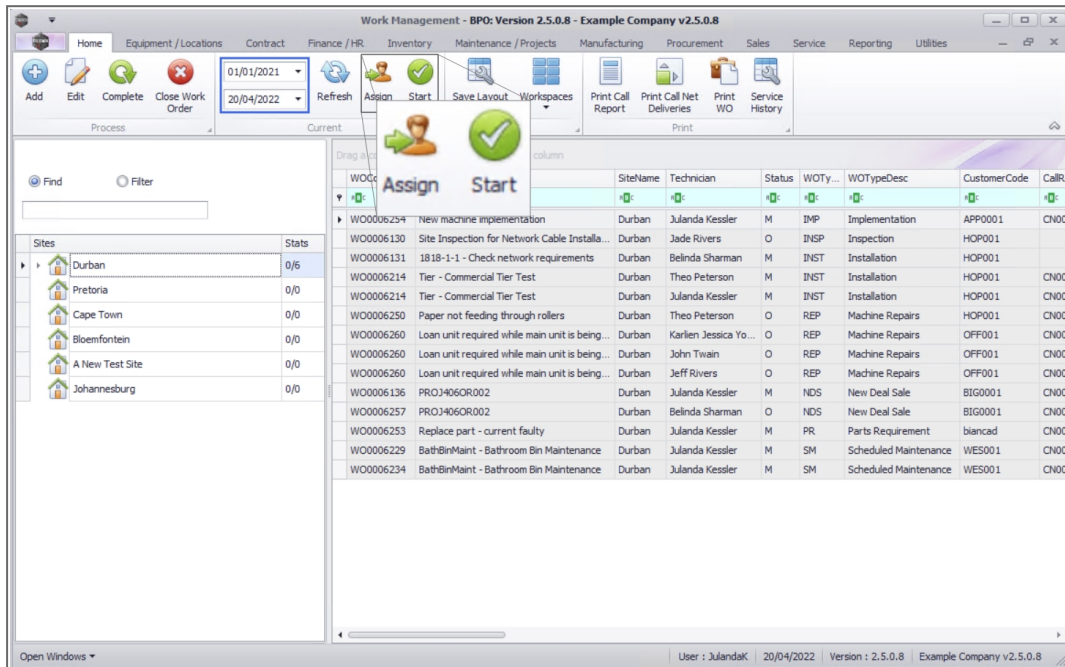
RIBBON ACTION BUTTONS

A work order can be Linked, Edited, Completed and Closed from the process buttons.

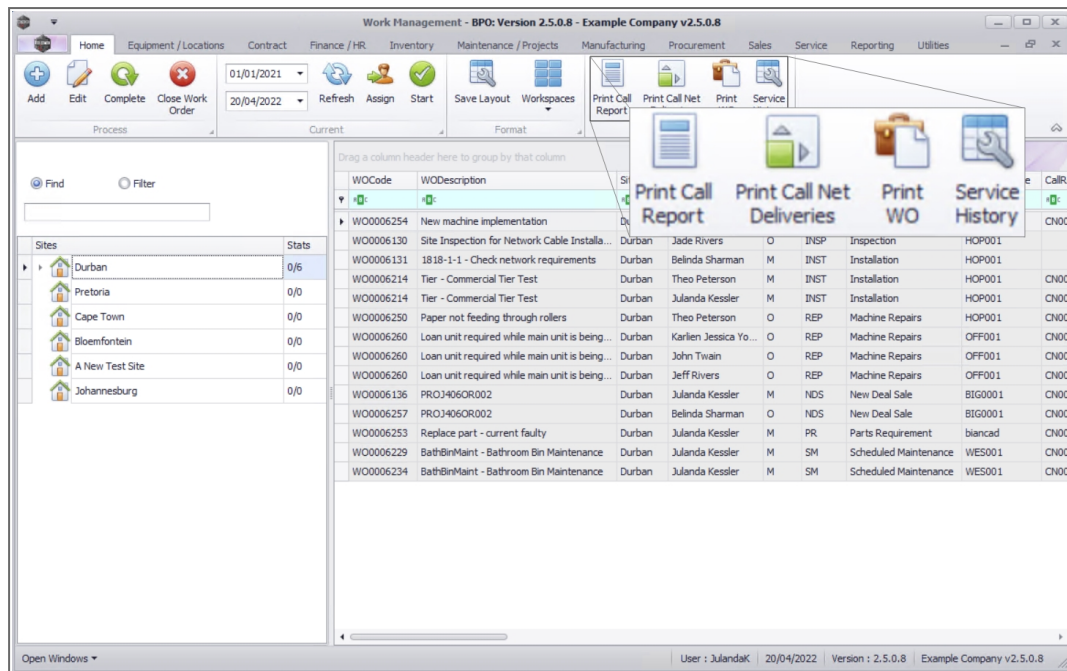


The ***date range*** fields will auto populate with an **8** day range up to and including, the current date. The date range can be changed.

From here a work order can also be Assigned. Use Started to End Work on a work order.

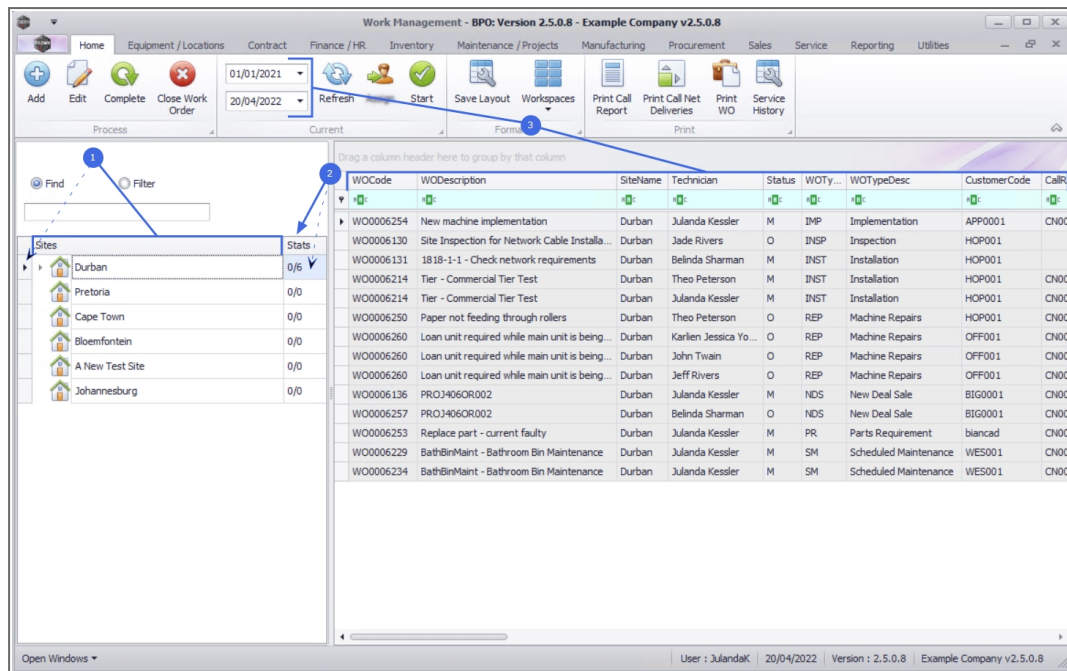


From the print buttons the Call Report , Call Net Deliveries, Work Order Report and Service History Report can be printed.



SITES FRAME

1. The **Sites** frame contains a list of all the sites currently on the system.
 - Upon opening this screen, the first site in the list will be selected, thereafter, you can select the site that you wish to work in.
2. The **Stats** column indicates the number of **Open** and **Completed** assignments for the site.
3. The Work Orders listed in the data grid will be filtered using the specified date range for the selected site.

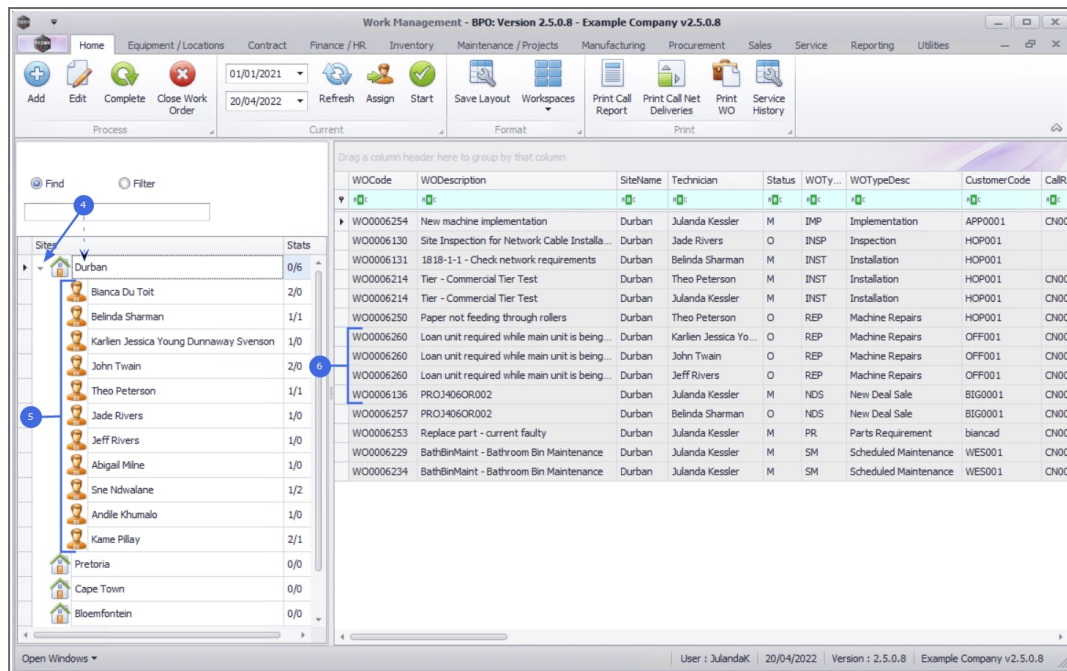


EMPLOYEE HIERARCHY

4. Click on the **tree view chevron node** of a site to expand the hierarchy view.
 - In this example **Durban** has been selected.
5. The employees listed will be those **linked** to that site and who have **recorded time** against their Work Orders.
6. A Work Order that has been assigned to more than one employee, that has **time recorded** against that work order, will be listed for each employee.

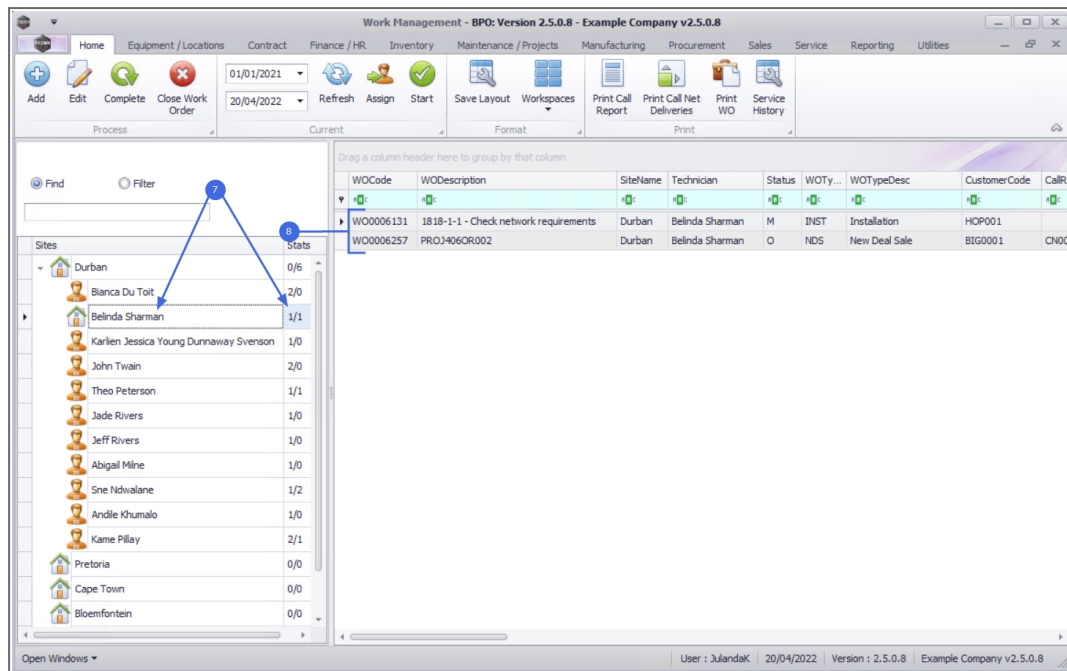


Note that the Technician column in the data grid is not the **Assigned to** person but the employee that has a **labour / time record** linked to the Work Order.



EMPLOYEE ASSIGNMENTS

- Click on the employee to view each employee's individual assignment stats.
- The **Open** and **Completed** Work Order assignments for the employee will be listed.



FIND A WORK ORDER

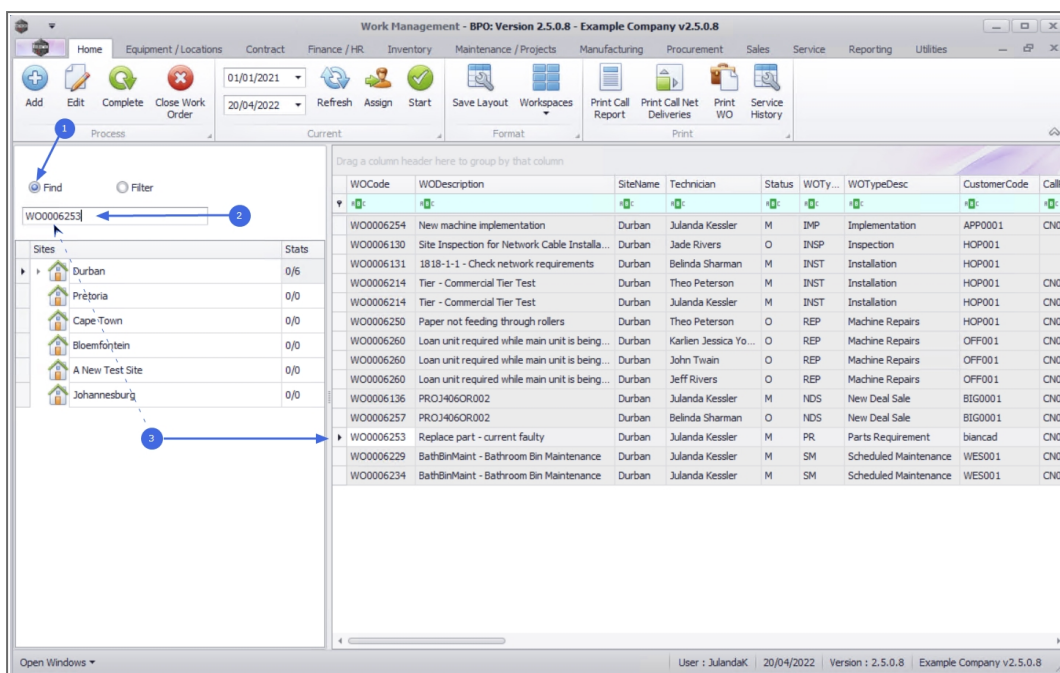
You can find an Open or Completed Work Order, regardless of the site or date range by using the Find radio button.

1. Click on the **Find** radio button.
2. Type in the full **Work Order number** in the text box and press **Enter**.



Note that the Find function will only search for a Work Order that has been allocated and is either **Open** or **Completed**.

3. The system will **find** and **select** the Work Order.



FILTER BY WORK ORDER

Use the filter function to list a range of Open or Completed Work Orders, containing the prefix you have typed in.

1. Click on the **Filter** radio button.
2. Type in the **prefix** that you wish to filter by and press **Enter**.
3. The system will search for and display the Open and Completed Work Orders that **match** the prefix.
4. The **Edit Filter** row will list the text or number you typed in for filtering.
5. To remove the filter, click on the [X] in the Edit Filter row and the screen will refresh to display information in the data grid that was available before the filter.

Work Management - BPO: Version 2.5.0.8 - Example Company v2.5.0.8

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

Process: Add Edit Complete Close Work Order

Current: Refresh Assign Start

Format: Save Layout Workspaces

Print: Print Call Report Print Call Net Deliveries Print WO Service History

Applied Filter: [WCode] Like 'WO0006%'

Find Filter

W00006

WCode	WODescription	SiteName	Technician	Status	WOTy...	WOTypeDesc	CustomerCode	CallR
W00006254	New machine implementation	Durban	Julanda Kessler	M	IMP	Implementation	APP0001	CH00
W00006130	Site Inspection for Network Cable Installa...	Durban	Jade Rivers	O	INSP	Inspection	HOP001	
W00006131	1818-1-1 - Check network requirements	Durban	Belinda Sharman	M	INST	Installation	HOP001	
W00006214	Tier - Commercial Tier Test	Durban	Theo Peterson	M	INST	Installation	HOP001	CH00
W00006214	Tier - Commercial Tier Test	Durban	Julanda Kessler	M	INST	Installation	HOP001	CH00
W00006250	Paper not feeding through rollers	Durban	Theo Peterson	O	REP	Machine Repairs	HOP001	CH00
W00006260	Loan unit required while main unit is being...	Durban	Karlen Jessica Yo...	O	REP	Machine Repairs	OFF001	CH00
W00006260	Loan unit required while main unit is being...	Durban	John Twain	O	REP	Machine Repairs	OFF001	CH00
W00006260	Loan unit required while main unit is being...	Durban	Jeff Rivers	O	REP	Machine Repairs	OFF001	CH00
W00006136	PROJ406OR002	Durban	Julanda Kessler	M	NDS	New Deal Sale	BITG001	CH00
W00006257	PROJ406OR002	Durban	Belinda Sharman	O	NDS	New Deal Sale	BITG001	CH00
W00006253	Replace part - current faulty	Durban	Julanda Kessler	M	PR	Parts Requirement	biancad	CH00
W00006229	BathBinMaint - Bathroom Bin Maintenance	Durban	Julanda Kessler	M	SM	Scheduled Maintenance	WES001	CH00
W00006234	BathBinMaint - Bathroom Bin Maintenance	Durban	Julanda Kessler	M	SM	Scheduled Maintenance	WES001	CH00

Sites: Durban 0/5, Belinda Sharman 1/1, Karlen Jessica Young Dunnaway Svenson 1/0, John Twain 1/0, Theo Peterson 1/1, Jade Rivers 1/0, Jeff Rivers 1/0, Pretoria 0/0, Cape Town 0/0, Bloemfontein 0/0, A New Test Site 0/0, Johannesburg 0/0

Open Windows

User: JulandaK 20/04/2022 Version: 2.5.0.8 Example Company v2.5.0.8

BPO.MNU.074

