

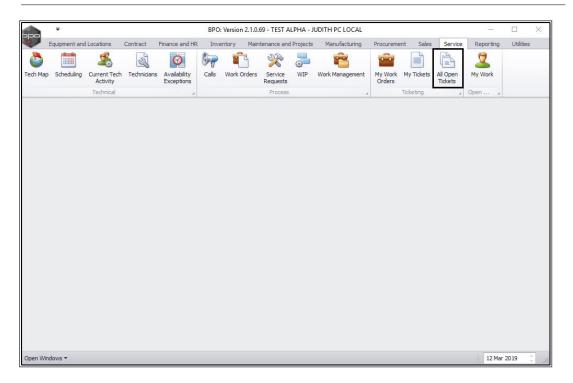
SERVICE

ALL OPEN TICKETS

BPO_Ticketing is an application that gives the user the ability to view and / or work on Calls and / or Projects where they are the owner (responsible person) for the Call or the Project's underlying work order.

It also gives the user the ability to create ticket assignments to pass the work to the next responsible person, as required.

Ribbon Access: Service > All Open Tickets



The All Open Tickets screen will be displayed.



- 1. A list of **all** tickets (Work Orders) for **all** users is displayed.
- 2. You can view tickets (Work Orders) that you have created and assigned to an employee. You can also see any tickets (Work Orders) that other employees have created and assigned.
- 3. All tickets (Work Orders) are listed, regardless of status.
- 4. This screen also lists the:
 - the Work Order Type
 - the Work Order Type Description
 - the work order **Priority** (1 = Most Important, 5 = Least Important)
 - any Notes linked to the work order
 - the Create Date of each work order

| Edit Save rocess WOCode • WOCode • WO0001694 W00001693 W00001687 W00001684 | er here to group by that column | SM SM DR | WOTypeDesc Scheduled Mai Scheduled Mai | Priority 2 2 | A Anufacturing | CreateDate 2018/08/ 2018/08/ | Sales Service 2 2 CreateBy Abigail Milne Abigail Milne | Reporting Utilities AssignedTo Belinda Sharman Belinda Sharman | 3 Status N | No |
|---|--|-------------------------------------|--|--------------------|--|------------------------------------|--|--|------------------|-------|
| woo woo sg a colume reade woo WOCcode woo WO0001694 woo WO0001687 woo WO0001684 woo | e Layout Workspaces Save Filter Format er here to group by that column Description TT009 - Daily, Mono 1000 - Call TT011 - Daily, Mono 1000, Colo Return machine from contract Return machine from contract | Current WOType SM SM DR | Export Export WOTypeDesc Scheduled Mai Scheduled Mai Select Call Type | 2 | Note Scheduled Service Scheduled Service | 2018/08/ 2018/08/ | Abigail Milne | Belinda Sharman | N | No |
| eg a colume reade WOCode • WO0001694 WO0001693 WO0001687 WO0001684 | er here to group by that column Description TT009 - Daily, Mono 1000 - Call TT011 - Daily, Mono 1000, Colo Return machine from contract Return machine from contract | WOType SM SM DR | WOTypeDesc Scheduled Mai Scheduled Mai Select Call Type | 2 | Scheduled Service Scheduled Service | 2018/08/ 2018/08/ | Abigail Milne | Belinda Sharman | N | No |
| WOCode WO0001694 WO0001693 WO0001687 WO0001684 | Description TT009 - Daily, Mono 1000 - Call TT011 - Daily, Mono 1000, Colo Return machine from contract Return machine from contract | SM SM DR | Scheduled Mai Scheduled Mai Select Call Type | 2 | Scheduled Service Scheduled Service | 2018/08/ 2018/08/ | Abigail Milne | Belinda Sharman | N | No |
| W00001694 W00001693 W00001687 W00001684 | TT009 - Daily, Mono 1000 - Call TT011 - Daily, Mono 1000, Colo Return machine from contract Return machine from contract | SM SM DR | Scheduled Mai Scheduled Mai Select Call Type | 2 | Scheduled Service Scheduled Service | 2018/08/ 2018/08/ | Abigail Milne | Belinda Sharman | N | No |
| W00001693 W00001687 W00001684 | TT011 - Daily, Mono 1000, Colo Return machine from contract Return machine from contract | SM DR | Scheduled Mai Select Call Type | 2 | Scheduled Service | 2018/08/ | | | | 1.0.1 |
| W00001693 W00001687 W00001684 | TT011 - Daily, Mono 1000, Colo Return machine from contract Return machine from contract | SM DR | Scheduled Mai Select Call Type | 2 | Scheduled Service | 2018/08/ | | | | |
| W00001687 W00001684 | Return machine from contract Return machine from contract | DR | Select Call Type | | | | Abigail Milne | Belinda Sharman | | |
| W00001684 | Return machine from contract | | | 2 | Poturn all from chort term | | | Sennas Sharman | N | No |
| | | DR | C L L C UT | | Recurr an north short term | 2018/07/ | Abigail Milne | Theo Peterson | N | No |
| W00001678 | Return machine from contract | | Select Call Type | 2 | Return all from short term | 2018/07/ | Abigail Milne | Theo Peterson | N | No |
| | | DR | Select Call Type | 2 | Return all from short term | 2018/07/ | Bianca Du Toit | Bianca Du Toit | N | No |
| W00001671 | Machine faulty, loan unit requ | REP | Repair | 2 | Machine faulty, loan unit r | 2018/07/ | Chris Haynes | Theo Peterson | N | No |
| W00001668 | SP240 New Deal. | DR | Select Call Type | 2 | SP240 New Deal. | 2018/05/ | Abigail Milne | Abigail Milne | N | No |
| W00001634 | Test call list refreshing after s | π | IT Requirement | 3 | Test call list refreshing aft | 2018/05/ | Abigail Milne | Abigail Milne | N | No |
| W00001626 | Test new swap out process on | INST | Installation | 3 | Test new swap out proces | 2018/01/ | Bianca Du Toit | Bianca Du Toit | N | No |
| W00001604 | Site Inspection required | DR | Select Call Type | 2 | Machine Installation | 2018/10/ | Abigail Milne | Theo Peterson | N | No |
| W00001600 | Test swap out with serialised s | INSP | Inspection | 2 | Test swap out with serialis | 2017/10/ | Bianca Du Toit | Chris Haynes | N | No |
| W00001596 | I dont understand this at all | INST | Installation | 2 | I dont understand this at all | 2017/10/ | Bianca Du Toit | Bianca Du Toit | N | No |
| W00001591 | RSI V1.27.0.0 - Issue - Part Cat | DR | Select Call Type | 2 | R5I V1.27.0.0 - Issue - Part | 2017/09/ | Bianca Du Toit | Belinda Sharman | N | No |
| W00001590 | Test Project for WebPortal bac | DR | Select Call Type | 2 | Test Project for WebPortal | 2017/09/ | Bianca Du Toit | Bianca Du Toit | N | No |
| W00001588 | Service required - check on so | TON | Toner Required | 2 | Service required - check o | 2017/09/ | Bianca Du Toit | Chris Haynes | N | No |
| W00001587 | Service required - remember t | TON | Toner Required | 2 | Service required - remem | 2017/09/ | Bianca Du Toit | Belinda Sharman | N | No |
| W00001567 | Return all from short term con | DR | Select Call Type | 2 | Return all from short term | 2017/08/ | Bianca Du Toit | Ed Jones | N | No |
| W00001550 | New deal rental contract | NDR | New Deal Rental | 2 | New deal rental contract | 2017/08/ | Bianca Du Toit | Bianca Du Toit | N | No |
| W00001546 | Machine service required - not | SERV | Service | 1 | Machine service required | 2017/08/ | Bianca Du Toit | Chris Haynes | N | No |
| W00001537 | 1234 | NDS | New Deal Sale | 2 | 1234 | 2017/08/ | Bianca Du Toit | Ed Jones | N | No |
| | | | | | | | | Count: 147 | | |
| < | | | | | | | | | | |

 Read: This column shows whether the ticket has been read (Yes) or not (No).



- Reference: This column shows whether the ticket is linked to a *Call*, a *Project* or a stand alone *Work Order*
- **Customer Code**: If a ticket is linked to a customer the customer code will be listed here.
- **Customer Name**: If a ticket is linked to a customer the customer name will be listed here.
- the number of **Days** that the ticket has been **Unattended**
- the number of **Days** that the ticket has remained **Open**
- the Elapsed Hours

| | l. | | | All Open Tickets - | BPO: Ve | rsion 2 | 1.0.69 - Exampl | e Company | | | | | \times |
|---------------|---------------|----------------|---------------------|--------------------|-----------|----------|-----------------|-----------------|--------------|----------------|---------------|-----------|----------|
| Home | Equipment a | nd Locations C | Contract Finance an | d HR Inventory M | laintenan | ce and F | Projects Manuf | facturing Procu | rement Sales | Service Report | ting Utilitie | s — | 8 |
| Edit | Save Layout | Workspaces 5 | Save Filter Refre | sh Export | | | | | | | | | |
| Process a | | Format | a Curren | t a Export a | | | | | | | | | |
| | | | | | | | | | | | | | |
| | | CreateDate | CreateBy | AssignedTo | Status | Read | Reference | CustomerCode | CustomerName | DaysUnattended | DaysOpen | ElapsedHo | ours |
| * | | | | | | | | | | | | | |
| led Service | e | 2018/08/07 | Abigail Milne | Belinda Sharman | N | No | CN0000582 | HOP001 | Hope Works | 246 | 246 | 1 58 | 86.50 |
| led Service | e | 2018/08/07 | Abigail Milne | Belinda Sharman | N | No | CN0000581 | HOP001 | Hope Works | 246 | 246 | 1 58 | 37.00 |
| all from sh | ort term c | 2018/07/24 | Abigail Milne | Theo Peterson | N | No | CN0000578 | HOP001 | Hope Works | 260 | 260 | 1 67 | 75.90 |
| all from sh | ort term c | 2018/07/19 | Abigail Milne | Theo Peterson | N | No | CN0000575 | DER001 | Derton Tec | 265 | 265 | 1 69 | 94.57 |
| all from sh | ort term c | 2018/07/19 | Bianca Du Toit | Bianca Du Toit | N | No | CN0000569 | HOP001 | Hope Works | 265 | 265 | 1 70 | 3.77 |
| e faulty, lo | an unit req | 2018/07/06 | Chris Haynes | Theo Peterson | N | No | CN0000567 | HOP001 | Hope Works | 278 | 278 | 1 78 | 85.07 |
| ew Deal. | | 2018/05/24 | Abigail Milne | Abigail Milne | N | Yes | PRJ0000071 | TIA001 | Titan Group | 321 | 321 | | 0.00 |
| ll list refre | shing after | 2018/05/29 | Abigail Milne | Abigail Milne | N | No | CN0000558 | HOP001 | Hope Works | 316 | 436 | 2 81 | 1.62 |
| w swap ou | t process o | 2018/01/22 | Bianca Du Toit | Bianca Du Toit | N | No | CN0000549 | HOP001 | Hope Works | 443 | 477 | 3 07 | 73.40 |
| e Installat | ion | 2018/10/29 | Abigail Milne | Theo Peterson | N | No | PRJ0000283 | HOP001 | Hope Works | 163 | 518 | | 0.00 |
| ap out wit | h serialise | 2017/10/30 | Bianca Du Toit | Chris Haynes | N | No | CN0000539 | HOP001 | Hope Works | 527 | 527 | 3 38 | 84.28 |
| understand | l this at all | 2017/10/25 | Bianca Du Toit | Bianca Du Toit | N | No | CN0000532 | BEA001 | Bearing and | 532 | 532 | | 0.00 |
| 27.0.0 - Iss | sue - Part C | 2017/09/19 | Bianca Du Toit | Belinda Sharman | N | No | PRJ0000098 | HOP001 | Hope Works | 568 | 568 | | 0.00 |
| oject for W | /ebPortal b | 2017/09/14 | Bianca Du Toit | Bianca Du Toit | N | No | PRJ0000276 | GDB0001 | Good Books | 573 | 573 | | 0.00 |
| required - | - check on | 2017/09/13 | Bianca Du Toit | Chris Haynes | N | No | CN0000533 | HOP001 | Hope Works | 574 | 574 | | 0.00 |
| required - | remembe | 2017/09/13 | Bianca Du Toit | Belinda Sharman | N | No | CN0000533 | HOP001 | Hope Works | 574 | 574 | | 0.00 |
| all from sh | ort term c | 2017/08/14 | Bianca Du Toit | Ed Jones | N | No | CN0000522 | SAM001 | Samanthas | 604 | 604 | | 0.00 |
| al rental co | ontract | 2017/08/07 | Bianca Du Toit | Bianca Du Toit | N | No | CN0000518 | HOP001 | Hope Works | 611 | 611 | | 0.00 |
| e service r | equired - n | 2017/08/03 | Bianca Du Toit | Chris Haynes | N | No | CN0000514 | WE5001 | Westwood | 615 | 615 | | 0.00 |
| | | 2017/08/01 | Bianca Du Toit | Ed Jones | N | No | CN0000499 | OFF001 | Office Suppl | 617 | 617 | 1 | 0.00 |
| | | | | Count: 147 | | | | | | | | | |
| | | | | | | | | | | | | | - |
| Open Windows | s * | | | <u></u> | | | | | | | 10 A | or 2019 | |



IMPORTANT NOTES

Ownership

- 1. **Ownership**: If the user is <u>not</u> the responsible person:
 - i. That user can *take ownership* of the call in **BPO2** by selecting the call in the *Call Listing* screen and clicking on My Call.
 - ii. The Call Centre person can Assign you to be the responsible person in the *Call Listing* screen.

The My Tickets Screen

2. A User can see only tickets specifically assigned to them or what they have assigned to someone in the My Tickets screen.

Unread Tickets

 Unread tickets: these tickets have <u>not</u> been opened for viewing - the text will be in *bold* and the *Read* column will state *No*.

Read Tickets

 Read tickets: As soon as a ticket is opened for viewing – the text will <u>no</u> longer be in bold and the *Read* column will state *Yes*.



| Home | Francisco | - | abaat Faaaaaa | All Open Tickets - | | | • | | rement Sales | Service Report | ina Utilitie | |
|-----------------|-------------|---------------|-----------------|--------------------|----------------------|---------|----------------|-----------------|--------------|----------------|--------------|--------------|
| C/ Edit | Equipment a | Workspaces Sa | | sh Export | 3 | e and F | Projects Manuf | facturing Procu | rement Sales | Service Report | ang Utaita | <u>s – D</u> |
| Process " | | Format | a Current | Export | $\overline{\Lambda}$ | | | | | | | /// |
| arag a column l | | | | / | Υ \ | | | | | | | |
| | | CreateDate | CreateBy | AssignedTo | Status | Read | Reference | CustomerCode | CustomerName | DaysUnattended | DaysOpen | ElapsedHours |
| | | | | * | | 1 | | | | | | |
| led Service | | 2018/08/07 | Abigail Milne | Belinda Sharman | N | No | CN0000582 | HOP001 | Hope Works | 246 | 246 | 1 586.5 |
| led Service | : | 2018/08/07 | Abigail Milne | Belinda Sharman | N | No | CN0000581 | HOP001 | Hope Works | 246 | 246 | 1 587.0 |
| all from sh | ort term c | 2018/07/24 | Abigail Milne | Theo Peterson | N | No | CN0000578 | HOP001 | Hope Works | 260 | 260 | 1 675.9 |
| all from sh | ort term c | 2018/07/19 | Abigail Milne | Theo Peterson | N | No | CN0000575 | DER001 | Derton Tec | 265 | 265 | 1 694.5 |
| all from sh | ort term c | 2018/07/19 | Bianca Du Toit | Bianca Du Toit | N | No | CN0000569 | HOP001 | Hope Works | 265 | 265 | 1 703.7 |
| e faulty, lo | an unit req | 2018/07/06 | Chris Haynes | Theo Peterson | N | No | CN0000567 | HOP001 | Hope Works | 278 | 278 | 1 785.0 |
| ew Deal. | | 2018/05/24 | Abigail Milne 🔫 | Abigail Milne | N | Yes | PRJ0000071 | TIA001 | Titan Group | 321 | 321 | 0.0 |
| Il list refree | shing after | 2018/05/29 | Abigail Milne | Abigail Milne | N / | No | CN0000558 | HOP001 | Hope Works | 316 | 436 | 2 811.6 |
| w swap ou | t process o | 2018/01/22 | Bianca Du Toit | Bianca Du Toit | N | No | CN0000549 | HOP001 | Hope Works | 443 | 477 | 3 073.4 |
| e Installati | on | 2018/10/29 | Abigail Milne | Theo Peterson | 4 | No | PRJ0000283 | HOP001 | Hope Works | 163 | 518 | 0.0 |
| ap out wit | h serialise | 2017/10/30 | Bianca Du Toit | Chris Haynes | N | No | CN0000539 | HOP001 | Hope Works | 527 | 527 | 3 384.2 |
| inderstand | this at all | 2017/10/25 | Bianca Du Toit | Bianca Du Toit | N | No | CN0000532 | BEA001 | Bearing and | 532 | 532 | 0.0 |
| 27.0.0 - Iss | ue - Part C | 2017/09/19 | Bianca Du Toit | Belinda Sharman | N | No | PRJ0000098 | HOP001 | Hope Works | 568 | 568 | 0.0 |
| oject for W | ebPortal b | 2017/09/14 | Bianca Du Toit | Bianca Du Toit | N | No | PRJ0000276 | GDB0001 | Good Books | 573 | 573 | 0.0 |
| required - | check on | 2017/09/13 | Bianca Du Toit | Chris Haynes | N | No | CN0000533 | HOP001 | Hope Works | 574 | 574 | 0.0 |
| required - | remembe | 2017/09/13 | Bianca Du Toit | Belinda Sharman | N | No | CN0000533 | HOP001 | Hope Works | 574 | 574 | 0.0 |
| all from sh | ort term c | 2017/08/14 | Bianca Du Toit | Ed Jones | N | No | CN0000522 | SAM001 | Samanthas | 604 | 604 | 0.0 |
| al rental co | ntract | 2017/08/07 | Bianca Du Toit | Bianca Du Toit | N | No | CN0000518 | HOP001 | Hope Works | 611 | 611 | 0.0 |
| e service r | equired - n | 2017/08/03 | Bianca Du Toit | Chris Haynes | N | No | CN0000514 | WE5001 | Westwood | 615 | 615 | 0.0 |
| | | 2017/08/01 | Bianca Du Toit | Ed Jones | N | No | CN0000499 | OFF001 | Office Suppl | 617 | 617 | 0.0 |
| | | | | Count: 147 | | | | | | | | |
| | | | | | | | | | | | | |

TICKET COLOUR

- 1. Blue: The ticket has been assigned to *another* employee.
- 2. Red: The ticket has been assigned to *you* and is for your attention.



| Home Equipment and Locati | ons Contrac | | II Open Tickets - BP Inventory Maint | | | | ompany uring Procuren | ient Sales Se | ervice Reporting | Utilities | - 8 : |
|---------------------------------------|---------------|----------------|---|--------|------|------------|--------------------------|---------------|------------------|-----------|-------------|
| Edit Save Layout Worksp | aces Save Fil | ter Refresh | Export | | | | | | | | |
| Process | | Current | Export | | | | | | | | |
| | | a concito | a coport a | | | | | | | | |
| Trag a column header here to group by | onat column | | | | | | | | | | |
| | CreateDate | CreateBy | AssignedTo | Status | Read | Reference | CustomerCode | CustomerName | DaysUnattended | DaysOpen | ElapsedHour |
| | | <u> </u> | | | | | | | | | |
| eduled Service | 2018/08/ | Abigail Milne | Belinda Sharman | N | No | CN0000582 | HOP001 | Hope Works | 2 246 | 246 | 1 586. |
| eduled Service | 2018/08/ | Abigail Milne | Belinda Sharman | N | No | CN0000581 | HOP001 | Hope Works | 246 | 246 | 1 587 |
| urn all from short term contr | 2018/07/ | Abigail Milne | Theo Peterson | N | No | CN0000578 | H0P001 | Hope Works | 260 | 260 | 1 675 |
| urn all from short term contr | 2018/07/ | Abigail Milne | Theo Peterson | N | No | CN0000575 | DEROOT | Derton Tec | 265 | 265 | 1 694 |
| urn all from short term contr | 2018/07/ | Bianca Du Toit | Bianca Du Toit | N | No | CN0000569 | HOP001 | Hope Works | 265 | 265 | 1 703 |
| hine faulty, loan unit request | 2018/07/ | Chris Haynes | Theo Peterson | N | HO | CN0000567 | HOP001 | Hope Works | 278 | 278 | 1 785 |
| Ю New Deal. | 2018/05/24 | Abigail Milne | Abigail Milne 🛛 🖌 | N | Yes | PRJ0000071 | TIA001 | Titan Group | 321 | 321 | 0 |
| t call list refreshing after savi | 2018/05/ | Abigail Milne | Abigail Milne | N | No | CN0000558 | HOP001 | Hope Works | 316 | 436 | 2 811. |
| t new swap out process on te | 2018/01/ | Bianca Du Toit | Bianca Du Toit | N | No | CN0000549 | HOP001 | Hope Works | 443 | 477 | 3 073 |
| hine Installation | 2018/10/ | Abigail Milne | Theo Peterson | N | No | PRJ0000283 | HOP001 | Hope Works | 163 | 518 | 0. |
| t swap out with serialised sto | 2017/10/ | Bianca Du Toit | Chris Haynes | N | No | CN0000539 | HOP001 | Hope Works | 527 | 527 | 3 384 |
| nt understand this at all | 2017/10/ | Bianca Du Toit | Bianca Du Toit | N | No | CN0000532 | BEA001 | Bearing and | 532 | 532 | 0 |
| V1.27.0.0 - Issue - Part Cate | 2017/09/ | Bianca Du Toit | Belinda Sharman | N | No | PRJ0000098 | HOP001 | Hope Works | 568 | 568 | 0 |
| t Project for WebPortal back | 2017/09/ | Bianca Du Toit | Bianca Du Toit | N | No | PRJ0000276 | GDB0001 | Good Books | 573 | 573 | 0 |
| vice required - check on som | 2017/09/ | Bianca Du Toit | Chris Haynes | N | No | CN0000533 | HOP001 | Hope Works | 574 | 574 | 0 |
| /ice required - remember to | 2017/09/ | Bianca Du Toit | Belinda Sharman | N | No | CN0000533 | HOP001 | Hope Works | 574 | 574 | 0 |
| urn all from short term contr | 2017/08/ | Bianca Du Toit | Ed Jones | N | No | CN0000522 | SAM001 | Samanthas | 604 | 604 | 0 |
| deal rental contract | 2017/08/ | Bianca Du Toit | Bianca Du Toit | N | No | CN0000518 | HOP001 | Hope Works | 611 | 611 | 0 |
| hine service required - not s | 2017/08/ | Bianca Du Toit | Chris Haynes | N | No | CN0000514 | WE5001 | Westwood | 615 | 615 | 0 |
| 4 | 2017/08/ | Bianca Du Toit | Ed Jones | N | No | CN0000499 | OFF001 | Office Suppl | 617 | 617 | 0. |
| | | | Count: 147 | | | | | | | | |
| | | _ | | | | | | | | | |

VIEW A TICKET

Either,

- 1. Select a ticket.
- 2. The colour of the ticket will change to *grey*.
- You can *right click* anywhere on the selected ticket to display a *Process* menu.
- 4. from this menu, select *Edit* Edit Ticket.



| Pro | | quipment and Locations Contract F ve Layout Workspaces Save Filter Format | inance and H Refresh Current | R Inventory M | aintenanc | e and Projects Manufacturing Procur | ement Sales | Service Repor | ting Utilities — | 8 |
|-----|------------------|---|------------------------------------|--|-----------|--------------------------------------|-------------|----------------|------------------|-------|
| ra | ag a column head | er here to group by that column | | | | | | | | |
| 1 | WOCode 🔹 | Description | WOType | WOTypeDesc | Priority | Note | CreateDate | CreateBy | AssignedTo | Statu |
| | | | | | | | | | | |
| 1 | W00001694 | TT009 - Daily, Mono 1000 - Call | SM | Scheduled Mai | 2 | Scheduled Service | 2018/08/ | Abigail Milne | Belinda Sharman | N |
| 1 | W00001693 | TT011 - Daily, Mono 1000, Colo | SM | Scheduled Mai | 2 | Scheduled Service | 2018/08/ | Abigail Milne | Belinda Sharman | N |
| 1 | W00001687 | Return machine from contract | DR | Select Call Type | 2 | Return all from short term contr | 2018/07/ | Abigail Milne | Theo Peterson | N |
| 1 | W00001684 | Return machine from contract | DR | Select Call Type | 2 | Return all from short term contr | 2018/07/ | Abigail Milne | Theo Peterson | N |
| 1 | W00001678 | Return machine from contract | DR | Select Call Type | 2 | Return all from short term contr | 2018/07/ | Bianca Du Toit | Bianca Du Toit | N |
| 1 | W00001671 | Machine faulty, loan unit requ | REP | Repair | 2 | Machine faulty, loan unit request | 2018/07/ | Chris Haynes | Theo Peterson | N |
| ١ | WO0001668 | SP240 New Deal. | DR | Select Call Type | 2 | SP240 New Deal. | 2018/05/24 | Abigail Milne | Abigail Milne | N |
| 1 | W00001634 | Test call list refreshing after s | π | IT Requirement | 3 | Test call list refreshing after savi | 2018/05/ | Abigail Milne | Abigail Milne | N |
| 1 | W00001626 | Test new swap out process on | INST | Installation | 2 3 | Test new swap out process on te | 2018/01/ | Bianca Du Toit | Bianca Du Toit | N |
| 1 | W00001604 | Site Inspection required | DR | Select Call Type | 1 2 | Machine Installation | 2018/10/ | Abigail Milne | Theo Peterson | N |
| 1 | W00001600 | Test swap out with serialised s | INSP | Inspection | 2 | Test swap out with serialised sto | 2017/10/ | Bianca Du Toit | Chris Haynes | N |
| 1 | W00001596 | I dont understand this at all | INST | Installation | 2 | I dont understand this at all | 2017/10/ | Bianca Du Toit | Bianca Du Toit | N |
| 1 | W00001591 | RSI V1.27.0.0 - Issue - Part Cat | DR | Select Call Type | 2 | RSI V1.27.0.0 - Issue - Part Cate | 2017/09/ | Bianca Du Toit | Belinda Sharman | N |
| 6 | W00001590 | Test Project for WebPortal bac | DR | Select Call Type | 2 | Test Project for WebPortal back | 2017/09/ | Bianca Du Toit | Bianca Du Toit | N |
| 1 | W00001588 | Service required - check on so | TON | Process | 2 | Service required - check on som | 2017/09/ | Bianca Du Toit | Chris Haynes | N |
| 1 | W00001587 | Service required - remember t | TON | 📺 Edit 🔍 | 2 | Service required - remember to | 2017/09/ | Bianca Du Toit | Belinda Sharman | N |
| ١ | W00001567 | Return all from short term con | DP | Edit Ticket | 2 | Return all from short term contr | 2017/08/ | Bianca Du Toit | Ed Jones | N |
| 1 | W00001550 | New deal rental contract | NDR | a Clear | 2 | New deal rental contract | 2017/08/ | Bianca Du Toit | Bianca Du Toit | N |
| 1 | wp0001546 | Machine service required - ngc | SERV | Clear Filters | 1 | Machine service required - not s | 2017/08/ | Bianca Du Toit | Chris Haynes | N |
| 1 | W00001537 | 1234 | NDS | in the second se | 2 | 1234 | 2017/08/ | Bianca Du Toit | Ed Jones | N |
| | | 3 | | | | U | | | Count: 147 | |
| | - | | | | | | | | | |

Or,

- Select the ticket.
- Click on *Edit*.

Or,

- **Double click** on the selected ticket.
 - In this image, *DWO0000239* has been selected.



| | | | and HR Inventory Mainten | ance and Pi | ojects Manufacturing | Procurement | Sales Service Rep | orting Utilities — | 8 | |
|---|------------|-----------------------------------|--------------------------|-------------|----------------------|--------------|-------------------|--------------------|-----|-----|
| - | rocess 4 | Format _ Cun | rent a Export a | | | | | | | |
| | WOCode | Description | WOTypeDesc | Priority | Note | CreateDate | CreateBy | AssignedTo | St | atu |
| 7 | | | | | | | | | | |
| | DW00000151 | ndrm | New Deal Rental | | 2 ndrm | 2017/10/24 | Judith Mudzengi | Judith Mudzengi | N | |
| 1 | DW00000150 | ndrsa | New Deal Rental | | 2 ndrsa | 2017/10/24 | Judith Mudzengi | Judith Mudzengi | N | |
| 1 | DW00000149 | ndrmg | New Deal Rental | 1 2 | 2 ndrmg | 2017/10/24 | Judith Mudzengi | Judith Mudzengi | N | |
| | DW00000140 | nds | New Deal Sale | | 2 nds | 2017/10/24 | Judith Mudzengi | Judith Mudzengi | N | |
| | DW00000204 | nds | New Deal Sale | | 2 nds | 2017/10/24 | Judith Mudzengi | Belinda Sharmane | : N | |
| · | DW00000239 | TT072 - 2 Monthly - Call per WO | Scheduled Maintenance | (| 2 Scheduled Service | 2017/11/06 | Judith Mudzengi | Judith Mudzengi | N | |
| | DW00000240 | TT013 - Weekly Colour 1000 - Call | Scheduled Maintenance | | 2 Scheduled Service | 2017/11/06 | Judith Mudzengi | Judith Mudzengi | N | |
| | DW00000241 | TT021 - Yearly Mono 1000 - Call p | Scheduled Maintenance | | 2 Scheduled Service | 2017/11/06 | Judith Mudzengi | Judith Mudzengi | N | |
| | DW00000261 | Work Management - Call test 2 | Repair | | 3 Work Manageme. | . 2017/11/29 | Judith Mudzengi | Judith Mudzengi | N | |
| | DW00000260 | Work Management - Testing1 | Service | 1 | 3 Work Manageme. | . 2017/11/29 | Judith Mudzengi | Judith Mudzengi | N | |
| | DW00000255 | Loan Unit - Part Requests | Repair | 1. 8 | 3 Loan Unit - Part | 2017/11/29 | Judith Mudzengi | Judith Mudzengi | N | |
| | DWO000064 | TT002 - Weekly - Call per WO | Scheduled Maintenance | | 2 Scheduled Service | 2017/07/12 | Judith Mudzengi | Judith Mudzengi | С | |
| | DWO000064 | TT002 - Weekly - Call per WO | Scheduled Maintenance | | 2 test 2 | 2018/10/08 | Judith Mudzengi | Judith Mudzengi | N | |
| | DWO0000315 | test 1 | New Deal Sale | | 2 test 1 | 2018/11/19 | Judith Mudzengi | Judith Mudzengi | С | |
| | DW00000315 | test 1 | New Deal Sale | | 2 test 1 | 2018/11/19 | Judith Mudzengi | Belinda Sharmane | : N | |
| | | | | | | | | Count: 40 | E. | |
| X | C | | | | | | | | | |

THE TICKET MAINTAIN SCREEN

The Ticket Maintain Screen will open.

- 1. Work Order Description: This is the work order description.
- 2. **Search field**: To search for any ticket in the ticket thread; type in the text and click on *Find*. To clear the search; click on *Clear*.
- 3. **Customization bar**: You can customize the look of the ticket thread to your liking by clicking on any of the *icons*. If you *hover* any icon, the icon description will pop up.
- 4. **Ticket Thread**: This is where all tickets linked to the selected work order are displayed.
 - **Note**: The tickets are in inverse chronological order. The recently created ticket will always be on top of the list.
- 5. **Assignment**: You can see the assignor, assignee and the date the ticket was created.
- 6. **Comments**: These are the tickets (comments) related to the work order.



| Ticket Maintain - BPO: Version 2.1.0.69 - | TEST ALPHA - JU | JDITH PC LOCAL | | | | | × |
|---|--------------------------------|---------------------|------------|---------------|-------------|--------|-------|
| Home Equipment and Locations Contract Finance and HR Inventory Maintenance and I | rojects Manufa | cturing Procurement | t Sales Se | vice Reportin | g Utilities | - 8 | х |
| 1 📅 🥥 🔂 🔕 🖓 🔜 📰 | | | | | | | |
| Time Entry Complete Add New Close Refresh Save Layout Workspaces | | | | | | | |
| Process a Ticket Current Format a | | | | | | | |
| TT072 - 2 Monthly - Call per WO | | W0 Code | DWO0000239 |) | | | |
| | | WO Reference | DCN000083 | | | | |
| 2 | | WO Create Date | 2017/11/06 | | • | | |
| T | - | Work Order Cus | tomer Call | | | | |
| Ticket Thread | Work Order M | lotes | | | | C | 1 A |
| Enter text to search | | | | | | | |
| □ □□ ::: :: :: :: :: :: :: :: :: :: :: :: | Note | | | Date | Time | Creat | eDate |
| Assigned To: James Magombo Assigned By : Judith Mudzengi (Created: 2019/03/12) | Needed asa | ip | | 12 Mar 2019 | 14:36:17 | 20.19/ | 03/12 |
| Assigned to: James Magonibo (Assigned by Judita Mudzengi (Created, 2015/03/12) | * | • | | | | | , |
| 5 Please resolve this. | | | | | | | |
| | 4 | | | | | | |
| Assigned To: Judith Mudzengi Assigned By :Judith Mudzengi (Created: 2017/11/06) | | | | | | | |
| | | | | | | | |
| Scheduled Service | | | | | | | |
| | 4 | | | - | | | F |
| Open Windows 🕶 | | | | | 12 Mar 2 | 019 | 1 |

^{1.} TICKET MAINTAIN SCREEN TABS

- Work Order: Click on this tab to view the work order details.
- **Customer**: Click on this tab to view the customer details. All fields are populated if the work order is linked to a customer.
- **Call / Project**: Click on this tab to view the call/project details. All fields are populated if the work order is linked to a call / project.

^{2.} WORK ORDER NOTES

• In this frame, you can view the linked work order notes and the date and time that they were created.



| Ticket Maintain - BPO: Version 2.1.0.6 | 9 - TE | ST ALPHA - JU | IDITH PC LOCAL | | | - | | × |
|---|---------|--------------------------------|--------------------|--------------------|---------------|-------------|------------|----|
| Home Equipment and Locations Contract Finance and HR Inventory Maintenance and | nd Proj | ects Manufa | cturing Procuren | nent Sales Ser | vice Reportin | g Utilities | - 8 | × |
| 📅 🥝 🚱 🥸 🖾 📰 | | | | | | | | |
| Time Entry Complete Add New Close Refresh Save Layout Workspaces | | | | | | | | |
| Process a Ticket a Current a Format a | | | | | | | | |
| TT072 - 2 Monthly - Call per WO | | (A) | WO Co | de DWO0000239 | | 1 | | |
| | | | 5280505050 | ce DCN0000083 | | | | |
| | | | | te 2017/11/06 | | - | | |
| | | | | | | | | _ |
| | | Ψ. | | Customer Call | | | | |
| Ticket Thread | - | Work Order N | lotes | | | | 0 | 甲 |
| Enter text to search | - | Drag a column i | header here to gro | oup by that column | | 1 | - / | |
| | _ | Note | | | Date | Time | CreateDate | è. |
| | | ٩ | | | | | | |
| Assigned To: James Magombo Assigned By :Judith Mudzengi (Created: 2019/03/12) | - | Needed asa | p | | 12 Mar 2019 | 14:36:17 | 2019/03/1 | 2 |
| | 2 | * | | | | | | |
| Please resolve this. | 65 | | | 1 | | | | |
| | | | | | | | | |
| Assigned To: Judith Mudzengi Assigned By :Judith Mudzengi (Created: 2017/11/06) | | | | | | | | |
| | | | | 2 | | | | |
| Scheduled Service | | | | | | | | |
| | | | | | | | | |
| | - | 4 ⊂ | | | | | | + |
| Open Windows 🔻 | | | | | | 12 Mar | 2019 | 11 |

ASSIGN A TICKET

In the All Open Tickets screen;

- 1. Select the ticket you wish to assign to *another* employee.
 - In this image, *DWO000264* was selected.
- 2. You will note that the current *Status* of the ticket is **N** New.
- 3. Click on *Edit*



| | ipment and Locations Contract Finance | I Open Tickets - BPO: Version and HR Inventory Mainten Siftesh Export ent a Export a | | | | Procurement | Sales Service Repo | rrting Utilities — | 8 : |
|------------|---------------------------------------|---|----------|------------|---------------|-------------|--------------------|--------------------|--------|
| WOCode | Description | WOTypeDesc | Priority | Note | | CreateDate | reateBy | AssignedTo | Status |
| | | | | | | | | | 1 |
| DWO000089 | TT002 - Weekly - Call per WO | Scheduled Maintenance | | 2 Schedul | ed Service | 2017/07/12 | Judith Mudzengi | Judith Mudzengi | С |
| DW0000089 | TT002 - Weekly - Call per WO | Scheduled Maintenance | 1 | 2 Look a | t this ticke | 2019/03/12 | Judith Mudzensi | Judith Mudzengi | N |
| DW00000138 | ndr1 | New Deal Rental | 1 | 2 ndr1 | | 2017/10/24 | Judith Mudzengi | Judith Mudzengi | N |
| DWO0000239 | TT072 - 2 Monthly - Call per WO | Scheduled Maintenance | 1 | 2 Schedul | ed Service | 2017/11/06 | Judith Mudzengi | Judit Mudzengi | С |
| DW00000239 | TT072 - 2 Monthly - Call per WO | Scheduled Maintenance | 3 | 2 Please | resolve th | 2019/03/12 | Judith Mudzengi | James Magombo | N |
| DW00000257 | Parial Issue | Select Call Type | - 3 | 2 Parial 1 | issue | 2017/11/23 | Judith Mudzengi | Belinda Sharmone | Ν |
| DW00000264 | Project Work Order - Pretoria | Select Call Type | 2 | 2 Project | t Work Ord | 2017/11/29 | Judith Mudzengi | Judith Mudzengi | N |
| DW00000233 | Project Invoices | Select Call Type | 1 | 2 Project | Invoices | 2017/11/29 | Judith Mudzengi | Belinda Sharmane | N |
| DWO0000254 | new deal project rental | New Deal Rental | 1 | 2 new dea | al project re | 2017/11/29 | Judith Mudzengi | Judith Mudzengi | Ν |
| DW00000242 | TT033 - Daily Colour 1000 - Gener | Scheduled Maintenance | 1 | 2 TT033 | - Daily Col | 2017/11/29 | Judith Mudzengi | Judith Mudzengi | N |
| DW00000265 | TT033 - Daily Colour 1000 - Gener | Select Call Type | 1 | 2 TT033 | - Daily Col | 2017/11/29 | Judith Mudzengi | Belinda Sharmane | N |
| DW00000232 | Project - Quotes | Select Call Type | | 2 Project | t - Quotes | 2017/11/29 | Judith Mudzengi | Judith Mudzengi | N |
| DWO0000266 | Project Assignment Test 1 | Select Call Type | 1 | 2 Project | Assignment | 2017/11/29 | Judith Mudzengi | Judith Mudzengi | N |
| DW00000273 | Auto Apply Task Confiuration to | Select Call Type | 1 | 2 Auto A | pply Task | 2018/01/16 | Judith Mudzengi | James Magombo | N |
| DWO0000267 | Project Assignment Test 3 | Select Call Type | | 2 Project | Test Test 3 | 2017/11/29 | Judith Mudzengi | Judith Mudzengi | С |
| DW00000267 | Project Assignment Test 3 | Select Call Type | 4 | test 3 | | 2018/10/08 | Judith Mudzengi | James Magombo | N |
| 0 | | | | | | | | Count: 41 |] |

The *Ticket Maintain* screen will be displayed.

• Click on Add New Ticket.

| Ticket Maintain - BPO: Version 2.1.0.69 - 1 | rest alpha - Ju | JDITH PC LOCAL | 2 | | | 812 | | × |
|--|-----------------|--------------------|---------|----------|---------------|--------------|------|----------|
| Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Pr | ojects Manufa | cturing Procuren | ment Sa | ales Ser | vice Reportir | ng Utilities | - | 8 x |
| Time Entry Complete Work Close Process Ticket Close Ticket Current Current Format | | | | | | | | |
| Project Work Order - Pretoria | | WO Co | de DW | 00000264 | | - | | |
| | | WO Referen | | | | - | | |
| | | WO Create Da | | | | • | | |
| | | WO Priori | | | | | | |
| | | WO Ty | pe DR | | | | | |
| | | Work Order | Custome | r Proje | ct | | | |
| Ticket Thread | Work Order I | lotes | | | | | | • |
| Enter text to search Find Clear | Drag a column | header here to gro | | | | | | |
| □ □ ※ # 号 ⑦ & | Note | | | | Date | Time | Cr | eateDate |
| Assigned To: Judith Mudzengi Assigned By : Judith Mudzengi (Created: 2017/11/29) | ÷ | | | | | | | |
| Project Work Order - Pretoria | 4 | | | | | | | Þ |
| Open Windows 🕶 | | | | | | 13 Mar | 2019 | 1 |



The *Add New Ticket* screen will pop up.

- **Assigned by**: This will auto-populated with the name of the user currently logged onto the system.
- Assigned To: Click on the drop-down arrow and select the employee that you wish to assign the ticket to.
- Note: Type in the notes or instructions that you wish to relay to the person that you are assigning the ticket to.

| | Ticket Maintain - F | 3PO: Version 2.1.0.69 - TEST AL | PHA - JUDITH P | CLOCAL | | | | | | X |
|--|-------------------------------------|-------------------------------------|--------------------|------------|----------------------------------|-------------|------------|-----------|------|----------|
| Home Equipment and Locations Contract Fir | | | | | Salar | Service | Peporting | Utilities | | 8 X |
| Time Entry Complete Work Work Close | Save Layout Wo | | Hand dearing. | Trocurence | - Juica | Jervice | httporting | Geneca | | |
| Process a Ticket a Current Project Work Order - Pretoria | a Format | 4 | | | | | | | | |
| - | Add New Ticket Home Save Back | | - | W0 Code | PRJ00000 2017/11/2 2 DR | 033 | 7 | | | |
| Ticket Thread | Processing a | | | | | | | | | п # |
| Enter text to search | Assigned By Assigned To | Judith Mudzengi Belinda Sharmane | | • | | umri Dat | e | Time | Cr | eateDate |
| C DD C D | Note | Carry out scheduled maintenar | nce on the machine | 2 | | | | | | |
| | | | | | | | | | | ÷ |
| Open Windows 🕶 | | | | | | | | 13 Mar 3 | 2019 | 1 |

• Click on *Save*.

The *Add New Ticket* screen and *Ticket Maintain* screen will close.

- 1. You will return to the *All Open Tickets* screen.
- 2. The selected ticket's status will change to **C** closed.
- A *new ticket* will be displayed assigned to the *new employee* and set to status N - New.



| Home | 6 | | Refresh Export | aintenance and Projects Manufacturing | Procurement 5 | iales Service Repo | rting Utilities — | 8 |
|-----------|---------|---------------------------------|-----------------------|---------------------------------------|---------------|--------------------|-------------------|-------|
| Process 🔒 | eader h | Format a | Current 4 Export 4 | | | | | |
| WOCode | | Description | WOTypeDesc | Note | CreateDate | CreateBy | AssignedTo | Statu |
| | | | | | | | | |
| DW000000 | 89 | TT002 - Weekly - Call per WO | Scheduled Maintenance | Look at this ticket later | 2019/03/12 | Judith Mudzengi | Judith Mudzengi | N |
| DW000001 | 38 | ndr1 | New Deal Rental | ndr1 | 2017/10/24 | Judith Mudzengi | Judith Mudzengi | N |
| DW0000023 | 9 | TT072 - 2 Monthly - Call per WO | Scheduled Maintenance | Scheduled Service | 2017/11/06 | Judith Mudzengi | Judith Mudzengi | с |
| DW000002 | 39 | TT072 - 2 Monthly - Call per | Scheduled Maintenance | Please resolve this. | 2019/03/12 | Judith Mudzengi | James Magombo | N |
| DW000002 | 57 | Parial Issue | Select Call Type | Parial Issue | 2017/11/23 | Judith Mudzengi | Belinda Sharmane | N |
| DW000002 | 33 | Project Invoices | Select Call Type | Project Invoices | 2017/11/29 | Judith Mudzengi | Belinda Sharmane | N |
| DW0000025 | 4 | new deal project rental | New Deal Rental | new deal project rental | 2017/11/29 | Judith Mudzengi | Judith Mudzengi | N |
| DW000002 | 42 | TT033 - Daily Colour 1000 - G | Scheduled Maintenance | TT033 - Daily Colour 1000 - Gener | 2017/11/29 | Judith Mudzengi | Judith Mudzengi | N |
| DW000002 | 65 | TT033 - Daily Colour 1000 - G | Select Call Type | TT033 - Daily Colour 1000 - Gener | 2017/11/29 | Judith Mudzengi | Belinda Sharmane | N |
| DW000002 | 32 | Project - Quotes | Select Call Type | Project - Quotes | 2017/11/29 | Judith Mudzengi | Judith Mudzengi | N |
| DW0000026 | 6 | Project Assignment Test 1 | Select Call Type | Project Assignment Test 1 | 2017/11/29 | Judith Mudzengi | Judith Mudzengi | N |
| DW000002 | 73 | Auto Apply Task Confiuration | Select Call Type | Auto Apply Task Confiuration to | 2018/01/16 | Judith Mudzengi | James Magombo | N |
| DW0000026 | 7 | Project Assignment Test 3 | Select Call Type | Project Test Test 3 | 2017/11/29 | Judith Mudzenni | Judith Mudzengi | С |
| DW000002 | 67 | Project Assignment Test 3 | Select Call Type | test 3 🕨 | 2018/10/08 | Judith Mudzengi | James Magombo | N |
| DW0000026 | 4 | Project Work Order - Pretoria | Select Call Type | Project Work Order - Pretoria | 2017/11/29 | Judith Mudzengi | Judith Mudzengi | C |
| DW000002 | 64 | Project Work Order - Pretoria | Select Call Type | Carry out scheduled maintenance | 2019/03/13 | Judith Mudzengi | Belinda Sharmane | N |
| | | | | | | | Count 42 |] |

ADD WORK ORDER NOTES

- Select the ticket that you wish to add work order notes to.
 - In this image, *DWO000232* was selected.
- Click on *Edit*.



| DV | W00000089 | Description | WOTypeDesc | | | | | | |
|----|-----------|-----------------------------------|-----------------------|------------------|---------------------|------------|-----------------|--|--------|
| | | | | Priority | Note | CreateDate | CreateBy | AssignedTo | Status |
| | | Sectores and sectors and sector | | Description of C | | | | The second s | |
| DI | W0000138 | TT002 - Weekly - Call per WO | Scheduled Maintenance | 2 | Look at this ticke | 2019/03/12 | Judith Mudzengi | Judith Mudzengi | N |
| DV | | ndr1 | New Deal Rental | 2 | ndr1 | 2017/10/24 | Judith Mudzengi | Judith Mudzengi | N |
| DW | NO0000239 | TT072 - 2 Monthly - Call per WO | Scheduled Maintenance | 2 | Scheduled Service | 2017/11/06 | Judith Mudzengi | Judith Mudzengi | С |
| DV | W00000239 | TT072 - 2 Monthly - Call per WO | Scheduled Maintenance | 2 | Please resolve th | 2019/03/12 | Judith Mudzengi | James Magombo | N |
| DV | W00000257 | Parial Issue | Select Call Type | 2 | Parial Issue | 2017/11/23 | Judith Mudzengi | Belinda Sharmane | Ν |
| DV | W00000233 | Project Invoices | Select Call Type | 2 | Project Invoices | 2017/11/29 | Judith Mudzengi | Belinda Sharmane | N |
| DW | NO0000254 | new deal project rental | New Deal Rental | 2 | new deal project re | 2017/11/29 | Judith Mudzengi | Judith Mudzengi | N |
| DV | W00000242 | TT033 - Daily Colour 1000 - Gener | Scheduled Maintenance | 2 | TT033 - Daily Col | 2017/11/29 | Judith Mudzengi | Judith Mudzengi | N |
| DV | W00000265 | TT033 - Daily Colour 1000 - Gener | Select Call Type | 2 | TT033 - Daily Col | 2017/11/29 | Judith Mudzengi | Belinda Sharmane | N |
| DW | WO0000232 | Project - Quotes | Select Call Type | 2 | Project - Quotes | 2017/11/29 | Judith Mudzengi | Judith Mudzengi | N |
| DW | NO0000266 | Project Assignment Test 1 | Select Call Type | 2 | Project Assignment | 2017/11/29 | Judith Mudzengi | Judith Mudzengi | N |
| DV | W00000273 | Auto Apply Task Confiuration to | Select Call Type | 2 | Auto Apply Task | 2018/01/16 | Judith Mudzengi | James Magombo | N |
| DW | WO0000267 | Project Assignment Test 3 | Select Call Type | 2 | Project Test Test 3 | 2017/11/29 | Judith Mudzengi | Judith Mudzengi | C |
| DV | WO0000267 | Project Assignment Test 3 | Select Call Type | 2 | test 3 | 2018/10/08 | Judith Mudzengi | James Magombo | N |
| DW | NO0000264 | Project Work Order - Pretoria | Select Call Type | 2 | Project Work Order | 2017/11/29 | Judith Mudzengi | Judith Mudzengi | С |
| DV | W00000264 | Project Work Order - Pretoria | Select Call Type | 2 | Carry out schedul | 2019/03/13 | Judith Mudzengi | Belinda Sharmane | N |
| | | | | | | | | Count: 42 | |

The *Ticket Maintain* screen will be displayed.

- 1. In the Work Order Notes frame,
- 2. Type in the *Note* column in the *first row* of the data grid (not the filter row).
- 3. The *Date*, *Time* and *Create Date* will auto populate with the current date and time.
- 4. If you wish to create another note, press *Enter* on your keyboard and a new row will be created. Type the next note in this new row. You can add multiple notes.
- 5. *Close* the screen when you are done.



| Ticket Maintain - BPO: Version 2.1.0.69 - T | EST ALPHA - JU | DITH PC LOCAL | | | 3 | |
|--|-----------------|-----------------------|-------------|----------------|---------------------|------------|
| Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Pro | ojects Manufac | turing Procurement | Sales Ser | vice Reporting | g Utilities | - 8 × |
| Time Entry Complete Work Process Ticket Ticket Current Current Current | | | | | 5 | |
| Project - Quotes | . A | W0 Code | DWO0000232 | 1 | 1 | |
| | | WO Reference | | | | |
| 0 | = | WO Create Date | | 3 | • | |
| | | WO Priority | | | | |
| N N | <hr/> | WO Type | DR | | 3 | |
| | × - | Work Order Cus | tomer Proje | ct | $\langle I \rangle$ | 6 |
| Ticket Thread | Work Order N | - | | / | | |
| Enter text to search Find Clear | Drag a column i | neade to group | | * | | X |
| □ •• 日 \$* \$* 晕 ◇ & | Note | 1 | | Date | Time | CreateDate |
| Assigned To: Judith Mudzengi Assigned By :Judith Mudzengi (Created: 2017/11/29) | Change price | es before sending quo | ite | 13 Mar 2019 | 10:38:18 | 2019/03/13 |
| | * | | | | | |
| Project - Quotes | 1 | | | | | |
| | | | | | | |
| | 4 | | | | | |
| | | | | | | |
| | | | | | | |
| · · · · · · · · · · · · · · · · · · · | 4 @ | | | - | | Þ |
| Open Windows 🕶 | | | | | 13 Mar 2 | 019 🔅 // |

TIME BOOKING

The system will log your time as you work based on you Starting and Ending work.

- In the *All Open Tickets* screen, select the ticket that you wish to book time for.
 - In this image, *WO0001748* is selected.
- Click on *Edit*



| Edit Sa | ave Layout Workspaces Save Filter | Refresh | Export | | | | | | | |
|-----------|---------------------------------------|---------|------------------|----------|--|------------|-----------------|-----------------|--------|-----|
| rocess a | Format a | Current | a Export a | | | | | | | |
| | | | | | | | | | | |
| WOCode | Description | WOType | WOTypeDesc | Priority | Note | CreateDate | CreateBy | AssignedTo | Status | Rea |
| | | | | | | | | | | |
| WO0001202 | Unresolved client, completed and r | DR | Select Call Type | 2 | Unresolved client, completed and rea | 2017/03/30 | Judith Mudzengi | Judith Mudzengi | С | Yes |
| WO0001202 | Unresolved client, completed and r | DR | Select Call Type | 2 | Unresolved | 2017/03/30 | Judith Mudzengi | Judith Mudzengi | N | Yes |
| WO0001207 | Location - Unresolved dient, compl | DR | Select Call Type | 2 | Location - Unresolved client, complete | 2017/03/30 | Judith Mudzengi | Judith Mudzengi | С | Yes |
| W00001207 | Location - Unresolved client, c | DR | Select Call Type | 2 | Unresolved client | 2017/03/ | Judith Mudze | Belinda Sharman | N | No |
| WO0001198 | Resolved and reassigned | DR | Select Call Type | 2 | Resolved and reassigned | 2017/03/30 | Judith Mudzengi | Judith Mudzengi | С | Yes |
| W00001198 | Resolved and reassigned | DR | Select Call Type | 2 | Resolved and reassigned | 2017/03/ | Judith Mudze | Bianca Du Toit | N | No |
| WO0001213 | work order linked to asset unresolv | DR | Select Call Type | 2 | work order linked to asset unresolved | 2017/03/31 | Judith Mudzengi | Judith Mudzengi | С | Yes |
| W00001213 | work order linked to asset unr | DR | Select Call Type | 2 | Unresolved and reassigned | 2017/03/ | Judith Mudze | Belinda Sharman | N | No |
| WO0001217 | work order linked to location - resol | DR | Select Call Type | 2 | work order linked to location - resolve | 2017/03/31 | Judith Mudzengi | Judith Mudzengi | С | Yes |
| W00001217 | work order linked to location | DR | Select Call Type | 2 | Location - resolved and reassign | 2017/03/ | Judith Mudze | Belinda Sharman | N | No |
| WO0001219 | work order linked to location | DR | Select Call Type | 2 | work order linked to location | 2017/03/31 | Judith Mudzengi | Judith Mudzengi | N | Yes |
| W00001226 | Test ticketing time. | DR | Select Call Type | 2 | Test ticketing time. | 2017/04/ | Bianca Du Toit | Bianca Du Toit | N | No |
| WO0001227 | Test ticketing multiple time logs | DR | Select Call Type | 2 | Test ticketing multiple time logs | 2017/04/03 | Bianca Du Toit | Bianca Du Toit | Ν | Yes |
| WO0001311 | A new assignment that needs to be | DR | Select Call Type | 2 | A new assignment that needs to be $f \ldots$ | 2017/04/20 | Bianca Du Toit | Bianca Du Toit | N | Yes |
| W00001395 | Swap out WO from project | DR | Select Call Type | 2 | Swap Outs p rojects v2.1.0.5 | 2017/06/ | Judith Mudze | Judith Mudzengi | N | No |
| W00001212 | work order linked to asset - re | DR | Select Call Type | 2 | Resolved and reassigned | 2017/03/ | Judith Mudze | Belinda Sharman | N | No |
| WO0001212 | work order linked to asset - resolve | DR | Select Call Type | 2 | work order linked to asset - resolved \ldots | 2017/03/31 | Judith Mudzengi | Judith Mudzengi | С | Yes |
| W00001746 | SP240 New Deal. | DR | Select Call Type | 2 | SP240 New Deal. | 2019/04/ | Abigail Milne | Belinda Sharman | N | No |
| WO0001748 | Work Order 1 | DR | Select Call Type | 2 | Installation Project 2 | 2019/04/12 | Abigail Milne | Abigail Milne | N | Yes |
| W00001751 | Installation Project 1 | DR | Select Call Type | 2 | Installation Project 1 | 2019/04/ | Abigail Milne | Belinda Sharman | | No |
| W00001754 | Installation Project 4 | DR | Select Call Type | 2 | Installation Project 4 | 2019/04/ | Abigail Milne | Belinda Sharman | N | No |
| | | | | | | | | Count: 147 | | |

The *Ticket Maintain* screen will be displayed.

• Click on *Time Entry*.



| Ticket Maintain - BPO: \ | /ersion 2.1.0. | .69 - Exam | iple Company | ŝ. | | | | | - | | × |
|---|----------------|------------|--|--------|--------|-------|---------|-----------|-----------|--------|-----|
| Home Equipment and Locations Contract Finance and HR Inventory Maintena | ance and Proj | jects Ma | anufacturing | Procur | ement | Sales | Service | Reporting | Utilities | - | 8 × |
| Time Entry Complete Work Close Ticket Ticket Save Layout Workspaces | | | | | | | | | | | |
| Process a Ticket a Current a Format a | | | | | | | | | | | |
| Work Order 1 | | - | woo | Code | WO000 | 1748 | | | | | |
| | | | WO Refere | ence | PRJ000 | 0302 | | | | | |
| | | | WO Create | Date | 2019/0 | 4/12 | | • | | | |
| | | | WO Prie | | | | | | | | |
| | | | wor | Гуре | DR | | | | | | |
| Ticket Thread | | | Work Order der Notes umn header he | | | | | | / | 6 | • # |
| | | Note | | | | Date | Time | CreateDa | te Amer | ndDate | |
| Assigned To: Abigal Milne Assigned By :Abigal Milne (Created: 2019)04/12) | | * | | | | | | | | | |
| Open Windows 🕶 | | | | | | | | 1 | 10 Apr | 2019 | - |

The Time Logging Express screen will be displayed.

- **Employee**: This will auto populated with the person currently logged on to the system.
- **Call**: This will auto populate with the call number and description if the work order is linked to a call.
- Work Order: This will auto populate with the work order number and description.
- **Equipment**: This will auto populate with the serial number and description if a machine is linked to the work order.
- **Location**: This will auto populate with the location if a functional location is linked to the work order.
- **Status**: The final unlabelled text box will contain a description of the current status of the work e.g. *"Work not started"*.



| | Ŧ | | | | | | | Ti | ime Loggii | ng Exp | ress - BPO: | Version 2.1.0 | D.69 - I | xample Com | ipany | | | | | | × | = |
|---------------|-------------|--------|---------|----------|-----|----------|------|------------|------------|--------|-------------|---------------|----------|---------------|------------|----------|---------|-----------|-----------|------|-----|----|
| 0 | Home | | | Locatio | ons | Contract | Fin | ance and H | R Inven | ntory | Maintenan | ce and Projec | ts M | lanufacturing | Procuremen | it Sales | Service | Reporting | Utilities | - | 8) | ¢ |
| \checkmark | \otimes | | 3 | | | | | | | | | | | | | | | | | | | |
| Start Work | End Worl | | | | | | | | | | | | | | | | | | | | | |
| Pro | Cess | J Prin | | | | | | | | | | | | | | | | | | | | _ |
| | Emp | oloyee | Abiga | il Milne | | 597 | • | | | | _ | | | | | | | | | | | |
| | | Call | | | | • | | | | | | * | | | | | | | | | | |
| | Work | Order | WOOD | 01748 | 8 | • | Work | Order 1 | | | _ | - | | | | | | | | | | |
| | | | | | | | | | | | | ·*· | | | | | | | | | | |
| | Equip | pment | | | | | | | | | | * | | | | | | | | | | |
| | In | cation | Hillcre | st | | | 9 | | | | | * | | | | | | | | | | |
| | LU | cación | | | | | | | | | | | | | | | | | | | | |
| Work | not started | d. | | | | | | | | | | - | | | | | | | | | | |
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Start Work

• Click on Start Work.



| | - | | | Tim | ie Logging Ex | press - BPO: Version 2.1.0.6 | 9 - Example Com | pany | | | | 1 | | × |
|---------------|--------------|-----------------|----------|----------------|---------------|------------------------------|-----------------|-------------|-------|---------|-----------|-----------|------|-----|
| 0 | | | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities | - | 8 × |
| Start Work | | 9 | | | | | | | | | | | | |
| Start Work | End Work | Print | | | | | | | | | | | | |
| Proc | cess " Pr | int " | | | | | | | | | | | | |
| | Employee | e Abigail Milne | | • | | | | | | | | | | |
| | Ca | 1 | • | | | | | | | | | | | |
| | | - | | | | | | | | | | | | |
| | Work Orde | r WO0001748 | • | Work Order 1 | | | | | | | | | | |
| | Equipmen | | | | | | | | | | | | | |
| | | | | | | - | | | | | | | | |
| | Location | Hillcrest | | 9 | | - | | | | | | | | |
| Street | | | | | | * | | | | | | | | |
| WORK | not started. | | | | | | | | | | | | | |
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The *Time Logging Express* screen will close and you will return to the *Ticket Maintain* screen.

- A *Call Processing* message box will pop up informing you that;
 - Call No: [] has been released.
- Click on *Ok*.



| - · | | | Ti | cket Maintai | n - BPO: Versio | n 2.1.0.69 - I | xample Company | 1 | | | | | a 1 | | × |
|-----------------------------|--------------------------------|--------------------|-------------------|--------------|-----------------|----------------|--|--------|--------|---------|---------|-------------|-----------|------|------------|
| Home Equi | oment and Locations | Contract | Finance and HR | Inventory | Maintenance a | nd Projects | Manufacturing | Procur | rement | Sales | Service | Reporting U | tilities | - 1 | 8 x |
| Time Entry Complete Work | Add New Close Ticket Ticket | Refresh Current | | Workspaces | 5 | | | | | | | | | | |
| Vork Order 1 | | | | | | | wo | Code | WO000 | 1748 | | | | | |
| | | | - | | | | WO Refe | | | | | - | | | |
| | | | Call Proce | essing | | \times | W0 Create | | | | | • | | | |
| | | | | | | | wo Pr | iority | 2 | and the | | - | | | |
| | | | | Call No: ha | as been release | d. | wo | Туре | DR | | | | | | |
| Ticket Thread | | | • | Find | Clear | Drag | c Order Notes a column header he | | | | | | | | — 4 |
| | ₽ ⊘ ₽ | | | | | P N | ote | | | Date | Time | CreateDate | Amend | Date | |
| Assigned To: Abigail N | tilne Assigned By :Abig | jail Milne (Cre | ated: 2019/04/12) | | ^ | * | | | | | | | | | |
| Installation | Project 2 | | | | | | | | | | | | | | |
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- The message box will close.
- To exit the screen, click on *Close*.



| - | | | | | | Ticket Main | tain - | BPO: Version 2.1 | .0.69 - Exan | nple Compan | 1 | | | | | - | | × |
|-------------------------|-------------|-------------------|-----------------|----------------|----------------|-------------|--------|-------------------|--------------|---------------------|-------|--------|---------|-----------|------------|----------|-------|------------|
| Home | Equipme | ent and Loc | ations | | | Inventory | e M | aintenance and Pr | ojects M | anufacturing | Procu | rement | Sales ! | Service R | eporting U | tilities | - | ъ × |
| ١ | work | Add New Ticket | Close Ticket | Refresh | Save Layo | ut Workspa | ces | | | | | | | | | | | |
| Process Work Order 1 | | Ticket | 4 | Current | a Fi | ormat | | | - | | | | | | | | | |
| | | | | | | | | | | 2000 CONTRACTOR 100 | | WOOOd | | | | | | |
| | | | | | | | | | | WO Refe | | | | | | | | |
| | | | | | | | | | | WO Create WO Pr | | | 4/12 | | | | | |
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| | | | | | | | | | | Work Order | Cus | stomer | Project | | | | | |
| Ticket Thread | | | | | | | | | Work Or | der Notes | | | | | | | | □ # |
| Enter text to | search | | | | • | Find | Cle | ar | Drag a cr | | | | | | | | | |
| | | | | | | | | | Note | | | | Date | Time | CreateDate | Amen | dDate | |
| | | | | | | | | | 9 | | | | | | | | | |
| Assigned To: A | bigail Miln | e Assigne | d By :Abigi | ail Milne (Cre | ated: 2019/04/ | 12) | | ^ ^ | * | | | | | 1 | | | | |
| Inst | allation Pr | oject 2 | | | | | | | | | | | | | | | | |
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Important Note:

You <u>cannot</u> start work on a new ticket before <u>ending work</u> on the previous ticket.

- Although details of the current ticket will be displayed in the *Time Logging Express* screen,
- 2. the Start Work button will be greyed out
- and the work status of the *previous* ticket will be displayed in the *Work Status* text box.
- If this is the case take note of the work order number at the bottom of the screen, close this screen and go and end work on the previous ticket.

Note : You can **Print the Work Order Report** from this screen.



| | | Time Logging | j Express - E | 3PO: Version 2.1.0.69 - TEST | ALPHA - JUDIT | H PC LOCAL | | | | S1 | | × |
|-------------------------|------------------------------------|-------------------|---------------|------------------------------|---------------|-------------|-------|---------|-----------|-----------|------|-----|
| | nt and Locations Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities | | 品 X |
| Employee | Judith Mudzengi | • | | 1 | | | | | | | | |
| Call | DCN0000053 - | ndr 1 | | * | | | | | | | | |
| Work Order | DWO0000138 - | ndr 1 | | * | | -0 | | | | | | |
| Equipment | | | | * | | | | | | | | |
| Location | | | | 4. | | | | | | | | |
| Work Started on work or | rder <u>DWO0000089</u> on the 13 M | ar 2019 at 11:42: | 17. | | | | | | | 13 Mar (| 2010 | * |

End Work or Complete Work

If you need to *stop* the current work, use the *End Work* process. This will book your time for the current work. Remember to type in a **note** regarding what work was done during this time.

If the work is done, then use the *Complete Work* process.

End Work

• In the *Ticket Maintain* screen, click on *Time Entry*.



| Ticket Maintain - BPO: Versio | on 2.1.0.69 - Exan | mple Company | | | | - 0 | 1) 3 |
|---|--------------------|-----------------------------|---------------|-------------|-------------|-------------|------|
| Home Equipment and Locations Contract Finance and HR Inventory Maintenance a | and Projects M | lanufacturing Procu | urement Sa | les Service | Reporting | Utilities — | . 8 |
| Image: Complete Work Image: Complete Work <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> | | | | | | | |
| Process a Ticket a Current a Format a ork Order 1 | | 1 | | | | | |
| IK GOEF I | <u>^</u> | W0 Code | WO000174 | 3 | | | |
| | | WO Reference | PRJ0000303 | 2 | | | |
| | | WO Create Date | | | • | | |
| | | WO Priority | | | | | |
| | | W0 Type | DR | | | | |
| icket Thread Enter text to search Find Clear | Drag a co | Work Order Cu rder Notes | group by that | | - Instances | | |
| □ co B 20 兆 早 ② <i>②</i> | Note P | | Dat | e Time | e CreateDa | te AmendDa | ate |
| Assigned To: Abigal Mine Assigned By :Abigal Mine (Created: 2019/04/12) | * | | | | | | |
| | | | | | | | |

The *Time Logging Express* screen will be displayed.

• Click on *End Work*.



| | Ŧ | | | Tim | ie Logging Ex | press - BPO: Version 2.1.0.6 | 9 - Example Com | pany | | | | - | | × |
|---------------|--------------------|-------------------|------------|-------------------|---------------|------------------------------|-----------------|-------------|-------|---------|-----------|-----------|------|------|
| Q | | ent and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities | - | ₽ × |
| \bigcirc | 🕴 🕒 | 9 | | | | | | | | | | | | |
| Start Work | End Work Pr | int | | | | | | | | | | | | |
| Pro | cess " Prin | t " | | | | | | | | | | | | |
| | Employee | Abigail Milne | | • | | | | | | | | | | |
| | Call | | • | | | ·* | | | | | | | | |
| | | 10 | | | | ~ | | | | | | | | |
| | Work Order | WO0001748 | • | Work Order 1 | | - | | | | | | | | |
| | Equipment | 71 | | | | - | | | | | | | | |
| | | | | | | | | | | | | | | |
| | Location | Hillcrest | | | | · · · · | | | | | | | | |
| Work | Started on work or | der WO0001748 or | the 12 Apr | 2019 at 11:37:00. | | * | | | | | | | | |
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| Open W | /indows 🕶 | | | | | | | | | | | 10 Apr 2 | 2019 | ÷ // |

The Close Open Work screen will be displayed.

Ticket Details:

- **Employee** : This will auto populated with the person currently logged on to the system.
- **Call** : This will auto populate with the call number and description if the work order is linked to a *call*.
- Work Order : This will auto populate with the work order number and description.
- **Equipment** : This will auto populate with the serial number and description of the equipment item if such an item is linked to the work order.
- Location : This will auto populate with the location if a functional location is linked to the work order.



| | | Close Open Work | - BPO: Ver | sion | 2.1.0.69 - Exar | nple Company | 1 | | | - 1 | |
|----------------------|---------------------------|-----------------------------------|-------------|------|-------------------------|---------------------|--------------------------|---------|--------------------|--------------|---------------------|
| | | ntract Finance and HR Inventory M | Maintenance | and | Projects Ma | inufacturing | Procurement | Sales S | Service Reporting |) Utilities | _ & x |
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| End Work Save La | ayout | | | | | | | | | | |
| Process "Forma | t " | | | | | | | | | | |
| Employ | ee Abigail Milne | 9.1621 | | | rior Work | | | | | | |
| 8 | roje PR30000302 | Installation Project 2 | | 6 | rag a column he | | | | | | // |
| 12 0 | | | 7 | | ParentRef PR30000302 | WOCode WO0001748 | Description Work Orde | Status | StatusDesc Open | Rectificatio | WorkDate 1900/01/01 |
| Work Ore | WO0001748 | Work Order 1 | | | | | | | | | |
| Equipmo | unt . | | | | | | | | | | |
| cquipin | | | + | | | | | | | | |
| Locat | ion Hillcrest | | .4. | | | | | | | | |
| r Work State | | | 1 | | | | | | | | |
| O Unresolved | Client O Unresol | ved O Resolved | | | | | | | | | |
| Rectification Co | de | | - | | | | | | | | |
| Comme | nts | | (de) | 4 | <u></u> | | | | | | Þ |
| | | | | P | Fech Comment - | | | | | | |
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| | | | | F | Rectification Cor | nment | | | | | |
| | | | | | | | | | | | |
| Work Started on work | order WO0001748 on the 12 | Apr 2019 at 11:37:00. | * | 1 | | | | | | | |
| | | | | | | | | | | | |
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Prior Work, Tech Comments and Rectification Comments

• In this frame you can view prior work done and any Technician or Rectification comments logged.



| | | Clo | se Open Work | c - BPO: Ver | ion 2.1.0.69 - Exar | nple Compan | y | | | | |
|---------------------------|----------------------------|------------------------|--------------|--------------|---------------------|--------------|-------------|--------|------------------|--------------|-----------|
| Home Equip | ment and Locations Contr | act Finance and HR | Inventory | Maintenance | and Projects Ma | anufacturing | Procurement | Sales | Service Reportin | g Utilities | - 8 3 |
| End Work Save Layor | ut | | | | | | | | | | |
| Process 🖌 Format | Abigail Milne | | | | Prior Work | | | | | | |
| | And the second second | Installation Project 2 | | | Drag a column he | | | | | | |
| Proj | je PR.30000302 | Installaborr Project 2 | | | ParentRef | WOCode | Description | Status | StatusDesc | Rectificatio | WorkDate |
| | ä n | Work Order 1 | | | PRJ0000302 | | | | Open | | 1900/01/0 |
| Work Order | WO0001748 | work Order 1 | | - | | | | | | | |
| Equipment | ð | -1 | | | | | | | | | |
| Equipment | | | | - | | | | | | | |
| Location | Hillcrest | | | * | | | | | | | |
| Work State | | | | | | | | | | | |
| O Unresolved Cli | ent O Unresolve | d 🔘 Res | olved | | | | | | | | |
| Rectification Code | (| | | • | | | | | | | |
| Comments | | | | - | ۰ | | | | | | |
| | | | | | Tech Comment | | | | | | 12 |
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| | | | | | Rectification Cor | nment | | | | | |
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| Work Started on work or | der WO0001748 on the 12 Ap | r 2019 at 11:37:00. | | | | | | | | | |
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Work State and Resolution Actions

- 1. In the Work State frame, select one of the 3 listed *Work States*:
 - Unresolved (Client) once processed, this call will move to On Hold.
 - Unresolved once processed, this call will move to Pending.
 - Resolved once processed, this call will move to Complete.
- 2. Click on the *drop-down arrow* in the *Rectification Code* field.



| - | | Clo | ose Open Worl | k - BPO: Ver | sion | 2.1.0.69 - Exan | nple Company | 1 | | | | - | | × |
|--------------------------|----------------------------|------------------------|---------------|--------------|------|------------------|--------------|-------------|--------|---------|-----------|--------------|-------|-------|
| Home Equipr | ment and Locations Contra | ct Finance and HR | Inventory | Maintenance | and | Projects Ma | nufacturing | Procurement | Sales | Service | Reporting | Utilities | - 8 | х |
| End Work Save Layou | it. | | | | | | | | | | | | | |
| Process " Format | | | | | | | | | | | | | | |
| Employee | Abigail Milne | | | | Pr | ior Work | | | | | | | | |
| Proj | PR30000302 | Installation Project 2 | | | Dr | | | | | | | | | |
| | | | | 1 | | ParentRef | WOCode | Description | Status | | tusDesc | Rectificatio | | 2020 |
| Work Order | WO0001748 | Work Order 1 | | * | • | PR30000302 | WO0001748 | Work Orde | 0 | Ope | en | | 1900/ | 01/01 |
| | | | | | | | | | | | | | | |
| Equipment | | | • | | | | | | | | | | | |
| | | | ~ | + | | | | | | | | | | |
| Location | Hillcrest | , | / | 4 | | | | | | | | | | |
| Work State | ent O Unresolved | Re | solved | | | | | | | | | | | |
| Rectification Code | | | | - | - | | _2 | | | | | | | |
| Comments | | | | - | 4 | | - | | | | _ | | | F |
| | | | | | Т | ech Comment – | | | | | | | | |
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| | | | | | -R | ectification Con | ment | | | | | | | × |
| | | | | | ľ | | | | | | | | | * |
| The second second second | | 2010-11-27-02 | | | | | | | | | | | | |
| Work Started on work ord | er WO0001748 on the 12 Apr | 2019 at 11:37:00. | | * | | | | | | | | | | |
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- Select from the *Rectification Code* drop-down menu, a *Reason Code*.
- In this example, *Fixed* Fixed machine has been selected.



| | | Close Open We | ork - BPO: Ver | sion 2.1.0.69 - Exa | mple Compan | у | | | in the second se | o x |
|-------------------------|---------------------|--|----------------|---------------------|--------------|-------------|----------|------------------|--|----------|
| Home Equipr | ment and Locations | Contract Finance and HR Inventory | Maintenance | and Projects M | anufacturing | Procurement | Sales Se | ervice Reporting |) Utilities · | - 8 : |
| End Work Save Layou | ut | | | | | | | | | |
| Employee | Abigail Milne | | | Prior Work | | | | | | |
| | PR30000302 | Installation Project 2 | 1 | Drag a column h | | | | | | |
| | | | | ParentRef | WOCode | Description | Status | StatusDesc | Rectificatio | WorkDat |
| Work Order | WOD001748 | Work Order 1 | - | PR30000302 | WO0001748 | Work Orde | 0 | Open | | 1900/01/ |
| | | | | | | | | | | |
| Equipment | | | 4 | | | | | | | |
| | | | - | | | | | | | |
| Location | Hillcrest | 10 | | | | | | | | |
| | | | 19 | | | | | | | |
| Work State | ent O Un | resolved Resolved | | | | | | | | |
| Rectification Code | | | - | | | | | | | |
| Comments | ReasonCode | A Description | ÷ | | | | | | | |
| comments | FIXED PDI | Fixed machine Parts Delivered and Installed | | Tech Comment | | | | | | |
| | RC | Replaced components | | | | | | | | |
| | RM SM | Replaced Machine Serviced Machine | U | | | | | | | |
| | IR RP | IT Related Replaced Parts | + | | | | | | | |
| | x | | 1. | | | | | | | |
| | | | | Rectification Co | mment | | | | | |
| | | | | | | | | | | |
| ork Started on work ord | ler WO0001748 on th | ne 12 Apr 2019 at 11:37:00. | | | | | | | | |
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- 1. Type in any relevant information in the *Comments* text box this is mandatory.
- 2. Click on End Work.



| - | | Close Open Work | c - BPO: Ver | rsior | n 2.1.0.69 - Exan | nple Company | 1 | | | _ | | × |
|--|-----------------------------|----------------------------|--------------|-------|-------------------|--------------|-------------|--------|-------------------|--------------|--------|-----|
| Home Equipm | ent and Locations Contra | t Finance and HR Inventory | Maintenance | e ani | d Projects Ma | inufacturing | Procurement | Sales | Service Reporting | g Utilities | - 8 | х |
| (20 | | | | | | | | | | | | |
| End Work Save Layout | | | | | | | | | | | | |
| Process Format | 2 | | | | | | | | | | | |
| Employee | Abigail Milne | 1 | | FF | Prior Work | | | | | | | _ |
| | PR30000302 | Installation Project 2 | | 3 | | | | | | | | |
| (1) (1) | | | | | ParentRef | WOCode | Description | Status | StatusDesc | Rectificatio | WorkDa | ate |
| Work Order | WO0001748 | Work Order 1 | - | 1 | PR30000302 | WO0001748 | Work Orde | 0 | Open | | 1900/0 | 1/0 |
| | | | | | | | | | | | | |
| Equipment | | 1 | | 1 | | | | | | | | |
| | | | 7 | | | | | | | | | |
| Location | Hillcrest | | - | 1 | | | | | | | | |
| Work State | | | | | | | | | | | | |
| O Unresolved Clier | nt O Unresolved | Resolved | | | | | | | | | | |
| Rectification Code | Fixed machine | | • | 1 | | | | | | | | |
| Hardeland Carlos Carlos Contra Contra Contra | Machine was fixed as per ma | nufacturer instructions. | | 1. | • | | | | | | | |
| * | | | | F | Tech Comment - | | | | | | | _ |
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| | | | | ųĽ | D | | | | | | | 7 |
| | | | | IF | Rectification Con | nment | | | | | | 4 |
| | | | | | | | | | | | | |
| Work Started on work orde | er WO0001748 on the 12 Apr | 2019 at 11:37:00. | × | | | | | | | | | |
| | | | | | | | | | | | | .v |
| Open Windows - | | | | | | | | | | 10 Apr 20 | 19 | |

You now need to decide whether to end the work without assigning any work to the next person or whether to end the work and assign it to the next person.

End Work <u>Without</u> Assigning to the Next Person

• A Work Process message will pop up asking;

• Do you wish to assign this to the next person?

• Click on *No*.



| ÷ | | Close Open Worl | k - BPO: Vers | sion | 2.1.0.69 - Exan | nple Company | 1 | | | - | | \times |
|---------------------------|-----------------------------|-----------------------------|---------------|------|-------------------------|----------------|----------------|-------------|--------------------|--------------|-----------|----------|
| Home Equipm | nent and Locations Contra | ct Finance and HR Inventory | Maintenance | and | Projects Ma | nufacturing | Procurement | Sales Se | rvice Reportin | g Utilities | - 6 | р ж |
| End Work Save Layou | t | | | | | | | | | | | |
| Process "Format | | | | | 04 - 1940 - 1941 | | | | | | | |
| | Abigail Milne | 1467 | | | rior Work | 12 AL 2 | 20 40 X 10 | | | | | 1 |
| Proje | PR30000302 | Installation Project 2 | ~ | 3 | rag a column he | | | | | | / | |
| | | | ·* | | ParentRef PR30000302 | WOCode | Description | Status | StatusDesc Open | Rectificatio | Work 1900 | |
| Work Order | WO0001748 | Work Order 1 | · · · | | 1100000002 | 100001710 | THUR OLDER | 0 | open | | 1000, | 10110 |
| Equipment | |] | | | Work Proce | 55 | | | × | | | |
| Location | Hillcrest | | Ψ | | 0 | | 10 1.6627475 | 80.0 80 | | | | |
| Location | | | | | | Do you wish to | assign this to | the next pe | rson? | | | |
| Work State | nt O Unresolved | Resolved | | | | | Yes | | No | | | |
| Rectification Code | Fixed machine | | • | | | | | | | | | |
| Comments | Machine was fixed as per ma | nufacturer instructions. | * | -1 | Cech Comment | | | | | | | • |
| | | | | | | | | | | | | |
| | | | * | | | | | | | | | - |
| | | | | 7 | Rectification Con | nment | | | | | | 4 |
| Vork Started on work orde | er WO0001748 on the 12 Apr | 2019 at 11:37:00. | * | | | | | | | | | |
| | | | | | | | | | | | | |

The *Close Open Work* screen will close.

- 1. The *Time Logging Express* screen will re-open.
- The *Start Work* button will be active while the *End Work* button is greyed out.
- 3. The work status message will display as *Last worked on [] ending at []* (This will be the current date and time.)

Note: The work status message may also display as *Work* <u>started</u> on work order [] on the [], even though the End *Work* button was clicked on in the previous step.

4. Close the Time Logging Express screen.



| – | 1 | | ► Tim | e Logging Ex | press BPO: Version 2.1.0.6 | - Example Com | pany | | | | - | | 5 |
|------------------|---|----------|----------------|--------------|----------------------------|---------------|-------------|-------|---------|-----------|-----------|------|---|
| Home Ec | | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities | - 6 | 7 |
| \otimes | P | | | | | | | | | | | / | ~ |
| End Work | Print | | | | | | | | | | A | / | |
| ocess " | Print _ | | | | | | | | | | • | | |
| Emplo | yee Abigail Milne | | • | | | | | | | | | | |
| 1 | Call | • | | | -A. | | | | | | | | |
| 9 | | | | | * | | | | | | | | |
| Work O | der WO0001748 | • | Work Order 1 | | | | | | | | | | |
| | 10 | | | | * | | | | | | | | |
| Equipm | ient | | | | - | | | | | | | | |
| | [| | 9 | | * | | | | | | | | |
| Loca | tion Hillcrest | | | | * | | | | | | | | |
| worked on the | 12 Apr 2019 ending at 11 | ·43·54 | | | | | | | | | | | |
| | in the second | | | | | | | | | | | | |
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| | | | | | | | | | | | | | |
| /indows * | | | | | | | | | | | 10 Apr | 2019 | 2 |

The *Ticket Maintain* screen will be displayed. Close this screen.



| - | | | Ticket Maintain - | BPO: Version 2.1 | .0.69 - Example C | ompany | | | - | | × |
|-----------------------------|----------------------|-----------------|---------------------|-------------------|-------------------|--------------------|------------|-------------|------------------|--------|------|
| Home Equipm | ent and Locations Co | ontract Financ | e and HR Inventory | Maintenance and P | rojects Manufact | turing Procurement | Sales Se | ervice Repo | orting Utilities | - | 8 × |
| Time Entry Complete Work | Add New Ticket | Refresh | Save Layout Workspa | ices | | | | | | | |
| Process a Work Order 1 | Ticket 4 | Current 🦼 | Format | | | | | | | | |
| WOR Older 1 | | | | | | WO Code | WO00017 | | | | |
| | | | | | | WO Reference | PRJ000030 | | | | |
| | | | | | | WO Create Date | 2019/04/12 | | * | | |
| | | | | | | WO Priority | | | | | |
| | | | | | | WO Type | DR | | | | |
| Ticket Thread | | | ▼ Find | Clear | Work Order No | | | nject | | | - + |
| | | | | | Note | | Date | Time | CreateDate | Amendi | Date |
| | | | | | 9 | | | | | | |
| Assigned To: Abigal Mi | | al Mine (Create | d: 2019(04/12) | | * | | | | | | |
| | | | | + | • | | | | | | ⇒ → |
| Open Windows 🕶 | | | | | | | | | 12 Apr | 2019 | 0 // |

The *All Open Tickets* screen will be displayed. Here you can see that the work order has been removed from the list.

You can now decide whether or not to print the work order report.



| Home Edit | Equipment and Locations Contract | Finance ar | | Mail Itel | ance and Projects Manufacturing F | rocurement | Sales Service | Reporting Utilities | | đ |
|--------------|---------------------------------------|------------|------------------|-----------|--|------------|-----------------|---------------------|--------|-----|
| ocess " | Format a | Current | a Export a | | | | | | | |
| | | | | | | | | | | |
| WOCode | Description | WOType | WOTypeDesc | Priority | Note | CreateDate | CreateBy | AssignedTo | Status | Rea |
| | | | | | | | | | | |
| WO0001200 | Unresolved,completed and rea | DR | Select Call Type | 2 | Unresolved | 2017/03/ | Judith Mudze | Belinda Sharman | N | No |
| NO0001202 | Unresolved client, completed and r | DR. | Select Call Type | 2 | Unresolved client, completed and rea | 2017/03/30 | Judith Mudzengi | Judith Mudzengi | С | Yes |
| VO0001202 | Unresolved client, completed and r | DR | Select Call Type | 2 | Unresolved | 2017/03/30 | Judith Mudzengi | Judith Mudzengi | N | Yes |
| VO0001207 | Location - Unresolved client, compl | DR | Select Call Type | 2 | Location - Unresolved client, complete | 2017/03/30 | Judith Mudzengi | Judith Mudzengi | С | Yes |
| WO0001207 | Location - Unresolved client, c | DR | Select Call Type | 2 | Unresolved client | 2017/03/ | Judith Mudze | Belinda Sharman | N | No |
| VO0001198 | Resolved and reassigned | DR | Select Call Type | 2 | Resolved and reassigned | 2017/03/30 | Judith Mudzengi | Judith Mudzengi | С | Yes |
| WO0001198 | Resolved and reassigned | DR | Select Call Type | 2 | Resolved and reassigned | 2017/03/ | Judith Mudze | Bianca Du Toit | N | No |
| NO0001213 | work order linked to asset unresolv | DR | Select Call Type | 2 | work order linked to asset unresolved | 2017/03/31 | Judith Mudzengi | Judith Mudzengi | С | Yes |
| W00001213 | work order linked to asset unr | DR | Select Call Type | 2 | Unresolved and reassigned | 2017/03/ | Judith Mudze | Belinda Sharman | N | No |
| VO0001217 | work order linked to location - resol | DR | Select Call Type | 2 | work order linked to location - resolve | 2017/03/31 | Judith Mudzengi | Judith Mudzengi | С | Yes |
| W00001217 | work order linked to location | DR | Select Call Type | 2 | Location - resolved and reassign | 2017/03/ | Judith Mudze | Belinda Sharman | N | No |
| VO0001219 | work order linked to location | DR | Select Call Type | 2 | work order linked to location | 2017/03/31 | Judith Mudzengi | Judith Mudzengi | Ν | Yes |
| W00001226 | Test ticketing time. | DR | Select Call Type | 2 | Test ticketing time. | 2017/04/ | Bianca Du Toit | Bianca Du Toit | N | No |
| NO0001227 | Test ticketing multiple time logs | DR. | Select Call Type | 2 | Test ticketing multiple time logs | 2017/04/03 | Bianca Du Toit | Bianca Du Toit | Ν | Yes |
| NO0001311 | A new assignment that needs to be | DR | Select Call Type | 2 | A new assignment that needs to be $f\ldots$ | 2017/04/20 | Bianca Du Toit | Bianca Du Toit | Ν | Yes |
| WO0001395 | Swap out WO from project | DR | Select Call Type | 2 | Swap Outs p rojects v2.1.0.5 | 2017/06/ | Judith Mudze | Judith Mudzengi | N | No |
| W00001212 | work order linked to asset - re | DR | Select Call Type | 2 | Resolved and reassigned | 2017/03/ | Judith Mudze | Belinda Sharman | N | No |
| VO0001212 | work order linked to asset - resolve | DR | Select Call Type | 2 | work order linked to asset - resolved \ldots | 2017/03/31 | Judith Mudzengi | Judith Mudzengi | С | Yes |
| W00001746 | SP240 New Deal. | DR | Select Call Type | 2 | SP240 New Deal. | 2019/04/ | Abigail Milne | Belinda Sharman | N | No |
| w00001751 | Installation Project 1 | DR | Select Call Type | 2 | Installation Project 1 | 2019/04/ | Abigail Milne | Belinda Sharman | N | No |
| WO0001754 | Installation Project 4 | DR | Select Call Type | 2 | Installation Project 4 | 2019/04/ | Abigail Milne | Belinda Sharman | N | No |
| | | | | | | | | Count: 146 | | |

End Work and Assign to the Next Person

• A Work Process message box will pop up asking;

• Do you wish to assign this to the next person?

• Click on Yes.



| - | | Close Open Worl | k - BPO: Version 2 | .1.0.69 - Example (| Company | | | - | | × |
|--------------------------|----------------------------|----------------------------|--------------------|--|------------------|------------------------|-----------|---------------------|----------|-------|
| Home Equipme | ent and Locations Contrac | t Finance and HR Inventory | Maintenance and | Projects Manufac | turing Procur | ement Sales | Service F | Reporting Utilities | - | ₽ × |
| End Work Save Layou | t | | | | | | | | | |
| | Abigail Milne | | | -Prior Work | | | | | | |
| | PRJ0000305 | Installation Project 5 | * | Drag a column he | | | | / | - | |
| | | | Ψ. | ParentRef | WOCode | Description | Status | StatusDesc | Rectific | atio |
| Work Order | WO0001755 | Work Order 1 | * | PRJ0000305 PRJ0000305 | | Work Orde Work Orde | | Open Open | | |
| Equipment | | | * Work Process | 2 | | | ~ | | | |
| Location Work State | | d O Resolved | ? D |) you wish to assig | In this to the n | next person? | | | | |
| Rectification Code | Requires Senior Tech | | | | Yes | No | | | | |
| Comments | Requires senior technician | on site. | | + - Tech Comment - | | | | | | 4 |
| | | | | Rectification Cor | nment | | | | | + |
| Work Started on work ord | er WO0001755 on the 12 Ap | m 2019 at 12:13:45. | * | | | | | | | |
| Open Windows 🕶 | | | | | | | | 12 Ap | 2019 | |

The **Project Assignment** or **Call Assignment** screen will be displayed.

• Assigned To : Click on the drop-down arrow and select the person you wish to assign the work order to.

Note: You can assign the work order to yourself, if required. For example, if you wished to add information to the detail below.

- **Detail** : This will auto populate with the information linked to the work order but you can edit the text, if required.
- Assignment Date and Time : This will auto populate with the current date and time.
 - **Date** : Either type in or click on the drop-down arrow and use the calendar function to select an alternative date, if required.



- **Time** :Either type in or use the arrow indicators to select an alternative time, if required.
- Assigned By : This will auto populate with the person currently logged on to the system. You can click on the drop-down arrow and select an alternative person, if required.

| | Ŧ | | | | Pr | oject Assignmen | t : Reference | No. : PRJ0000305 - BPO: V | ersion 2.1.0.69 - | Example Com | bany | | | | | × |
|---------------|----------------------|--------|--------------|----------|--------------|------------------|---------------|--|-------------------|-------------|-------|---------|-----------|-----------|------|-----|
| | Home | Equipm | ent and Loc | ations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities | - | ₽ × |
| Save Proce | Back ess | Save | E Layout | | | | | | | | | | | | | |
| | Assigne | ed To | | | | • | | | | | | | | | | |
| Ass | E | Detail | Installation | n Projec | t 5 | | | in a start way and a start way | | | | | | | | |
| Ass | ignment | Date | 12 Apr 201 | .9 | 12:17:5 | 9 🗘 | | | | | | | | | | |
| | Assigne | ed By | Abigail Miln | e | | | | | | | | | | | | |
| | | | Function | al Loca | tion () | Equipme | nt () | | | | | | | | | |
| | | Item | Kloof | | | | | | | | | | | | | |
| | Loc | ation | Kloof | | | | | | | | | | | | | |
| | | | Create no | ew Woi | rk Order | | | 5 | | | | | | | | |
| Open | Work O | rders | Drag a col | umn hei | ader here to | group by that co | umn | 1 | | | | | | | | |
| | | | | | Code | Description | | | | | | | | | | |
| | | | • | | 0001755 | Work Order 1 | | | | | | | | | | |
| | | | | WO | 0001756 | Work Order 2 | | | | | | | | | | |
| | | | 8 | | | | | | | | | | | | | |
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| Open W | Vindows * | | | | | | | | | | | | | 12 Apr | 2019 | 0 |

You can now decide whether to select an open work order or whether to create a new work order.

Select Open Work Order(s)

Go to the **Open Work Orders** frame and select the relevant work order.

 Important Note: You <u>cannot</u> select the current work order (the one that you are ending work on). If you do, you will receive an *error* message as shown below.



| 3 | | | | | | | | | | | | | | | | | _ | |
|---------------|-----------|--------|---------------|--------------|----------|-------------------|---------------|----------------------|-----------|----------------|-----------------------------|----------|----------|--------------|-----------|------|----|---|
| | Ŧ | | | | Pro | ject Assignmen | t : Reference | No. : PRJ0000305 - B | PO: Versi | ion 2.1.0.69 - | Example Com | ipany | | | - | | | × |
| 0 | Home E | quipme | ent and Loca | ations Cor | ntract | Finance and HR | Inventory | Maintenance and Pro | ijects M | Nanufacturing | Procurement | Sales | Service | Reporting | Utilities | - | æ | ж |
| Save Proce | Back | Save | ELayout | | | | | | | | | | | | | | | |
| | Assigne | d To | Belinda Sha | rman | | ¥. | | | | | | | | | | | | |
| | | | Installation | | | | | A. | | | | | | | | | | |
| Assi | | | 12 Apr 201 | | 12:17:59 | • ‡ | | | .Net Sql | Client Data P | rovider | | | | - | × | | |
| | Assigne | d By | Abigail Milne | e | | * | | | | | | | | | | | | |
| | | | Functiona | al Location | 0 | Equipmer | nt () | | | | order WO000 cannot be re | | | | | | | |
| | | Item | Kloof | | | | | | _ | order. | action ended i | | | | | | | |
| | Loca | tion | Kloof | | | | | ж. т | | aborted. | iction ended i | i the th | yyer. me | baten nas bi | cen | | | |
| | | | Create ne | w Work Or | rder 🗌 | 1 | | | | | | | | | OK | | | |
| Open | Work Or | ders | Drag a colu | ımn header i | here to | group by that col | umn | | | | | | | | | _ | | |
| | | | | WOCode | | Description | | | | | | | | | | | | |
| | | | • | W00001 | 755 | Work Order 1 | | | | | | | | | | | | |
| | | | | WO0001 | 756 | Work Order 2 | | | | | | | | | | | | |
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| Open W | lindows 🔻 | | | | | | | | | | | | | | 12 Apr | 2019 | Ċ. | 1 |

- 1. Click on the check box(es) in front of the **Open Work Order(s)** that you wish to designate to the **Assigned To** person.
 - In this example, **WO0001756** has been selected.
 - I have selected to assign it to myself.
- 2. Click on *Save*.



| · · | | | Pro | oject Assignmen | t : Reference | e No. : PRJ0000305 - BPO: | Version 2.1.0.69 - | Example Com | oany | | | - | | 3 | X |
|----------------|--------|----------------------|-----------|-----------------|---------------|---------------------------|--------------------|-------------|-------|---------|-----------|-----------|------|---|---|
| Home | Equipm | ent and Locations | Contract | Finance and HR | Inventory | Maintenance and Project | Manufacturing | Procurement | Sales | Service | Reporting | Utilities | - | Ð | х |
| | 1 | 2 | | | | | | | | | | | | | |
| Save Back | | e Layout | | | | | | | | | | | | | |
| Process | For | mat " | | | | | | | | | | | | | |
| | 1 | | | | | | | | | | | | | | |
| | | Abigail Milne | | • | | | | | | | | | | | |
| D | etail | Installation Project | :t 5 | | | * | | | | | | | | | |
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| | | | | | | | | | | | | | | | |
| Assignment | Date | 12 Apr 2019 | • 12:17:5 | 9 🗘 | | | | | | | | | | | |
| | | Abigail Milne | 12.17.5 | | | | | | | | | | | | |
| Assigne | u by | Functional Loca | N (2) | | | | | | | | | | | | |
| | - | Kloof | ation 🥥 | Equipme | nt () | | | | | | | | | | |
| | | Kloof | | - | | | | | | | | | | | |
| 100 | ation | NOOT | | | | | | | | | | | | | |
| | | Create new Wo | rk Order | | | | | | | | | | | | |
| Open Work Or | ders | Drag a column he | | | umn | - /) | | | | | | | | | |
| | | wc | Code | Description | | | | | | | | | | | |
| | | 2070 | 00001755 | Work Order 1 | | | | | | | | | | | |
| | | ► M MC | 00001756 | Work Order 2 | | | | | | | | | | | |
| | | 6 | | | | | | | | | | | | | |
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| Open Windows 🔻 | | | | | | | | | | | | 12 Apr | 2019 | - | |

The *Time Logging Express* screen will be displayed. *Close* this screen.



| Ŧ | | | Time l | .ogging Exp | ress - BPO: Version 2.1.0.69 | - Example Com | ipany | | | | - | | > |
|------------------------|-------------------|-----------|----------------|-------------|------------------------------|---------------|-------------|-------|---------|-----------|-----------|-----|---|
| | 10 | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities | - | 8 |
| 🧭 🔞 🛓 | 9 | | | | | | | | | | | | |
| | int | | | | | | | | | | | | |
| Process " Prin | t 4 | | | | | | | | | | | | |
| Employee | Abigail Milne | | ¥ | | | | | | | | | | |
| Call | | 2. | | | <u>.</u> | | | | | | | | |
| | | | | | - | | | | | | | | |
| Work Order | WO0001755 | | Work Order 1 | | | | | | | | | | |
| | | | | | | | | | | | | | |
| Equipment | | | 1 | | - | | | | | | | | |
| | | | | | * | | | | | | | | |
| Location | Kloof | | | | | | | | | | | | |
| ast worked on the 12 A | or 2019 ending at | 12:17:09. | | | ÷ | | | | | | | | |
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| en Windows 🔻 | | | | | | | | | | | 12 Apr 2 | 019 | 0 |

The *Ticket Maintain* screen will be displayed. *Close* this screen.



| | | | Ticket Maintain | - BPO: Version 2.1 | .0.69 - Example C | ompany | | | | | × |
|--|-----------------------------|--------------------|------------------------------|--------------------|-------------------|--------------------|---------------|------------|-------------------|-------|------------|
| Home Equipm | ent and Locations (| Contract Finan | ce and HR Inventory | Maintenance and I | Projects Manufac | turing Procurement | Sales S | ervice Rep | oorting Utilities | | 8 × |
| Time Entry Complete Work | Add New Ticket Ticket | Refresh Current | Save Layout Worksp Format | aces | | | | | | | |
| Work Order 1 | | | | | - | WO Code | WO000175 | 5 | | | |
| | | | | | | WO Reference | | | | | |
| | | | | | | WO Create Date | 2019/04/12 | 2 | • | | |
| | | | | | | WO Priority | 2 | | | | |
| | | | | | | WO Type | DR | | | | |
| Ticket Thread | W) | | ▼ Find | Clear | | | by that colum | | | | — 4 |
| | 0 | | | | Note | | Date | Time | CreateDate | Amend | ate |
| Assigned To: Abigail M Installation | | gail Mine (Create | :d: 2019/04/12) | | * | | | | | | |
| | | | | * | | | | | | | |
| Open Windows 🔻 | | | | | | | | | 12 Apr | 2019 | 0 |

The *All Open Tickets* screen will be displayed.

- 1. You will note that Work Order *WO0001755* has been removed from the list.
- 2. Work Order *WO0001756* has now been assigned.



| | - | | AI | l Open Tickets - B | PO: Versi | ion 2.1.0.69 - Example Company | | | - 0 | X |
|--------|--------------|-------------------------------------|--------------|--------------------|-----------|-------------------------------------|------------|-------------------|-----------------|------|
| Q | Home | Equipment and Locations Contract Fi | nance and HR | . Inventory Ma | intenance | and Projects Manufacturing Procurer | nent Sales | Service Reporting |) Utilities — 🗗 | 1.) |
| Pro | Edit | Save Layout Workspaces Save Filter | Refresh | Export | | | | | | |
| | | ader here to group by that column | Correne | a coport a | | | | | | |
| | WOCode | Description | WOType | WOTypeDesc | Priority | Note | CreateDate | CreateBy | AssignedTo | Sta |
| ۰ ۹ | | beaupton | nonpe | ino i jpebese | Thomey | | Cicocouc | cicutoy | hanghcuro | Ju |
| 1 | W00001537 | 1234 | NDS | New Deal Sale | 2 | 1234 | 2017/08/ | Bianca Du Toit | Ed Jones | N |
| ١ | W00001546 | Machine service required - not | SERV | Service | 1 | Machine service required - not s | 2017/08/ | Bianca Du Toit | Chris Haynes | N |
| ١ | W00001550 | New deal rental contract | NDR | New Deal Rental | 2 | New deal rental contract | 2017/08/ | Bianca Du Toit | Bianca Du Toit | N |
| ۱ | WO0001567 | Return all from short term con | DR | Select Call Type | 2 | Return all from short term contr | 2017/08/ | Bianca Du Toit | Ed Jones | N |
| ١ | W00001587 | Service required - remember t | TON | Toner Required | 2 | Service required - remember to | 2017/09/ | Bianca Du Toit | Belinda Sharman | N |
| ١ | WO0001588 | Service required - check on so | TON | Toner Required | 2 | Service required - check on som | 2017/09/ | Bianca Du Toit | Chris Haynes | N |
| ١ | WO0001590 | Test Project for WebPortal bac | DR | Select Call Type | 2 | Test Project for WebPortal back | 2017/09/ | Bianca Du Toit | Bianca Du Toit | N |
| ١ | WO0001591 | RSI V1.27.0.0 - Issue - Part Cat | DR | Select Call Type | 2 | RSI V1.27.0.0 - Issue - Part Cate | 2017/09/ | Bianca Du Toit | Belinda Sharman | N |
| ١ | WO0001596 | 5 I dont understand this at all | INST | Installation | 2 | I dont understand this at all | 2017/10/ | Bianca Du Toit | Bianca Du Toit | N |
| ١ | W00001600 | Test swap out with serialised s | INSP | Inspection | 2 | Test swap out with serialised sto | 2017/10/ | Bianca Du Toit | Chris Haynes | N |
| ١ | WO0001604 | Site Inspection required | DR | Select Call Type | 2 | Machine Installation | 2018/10/ | Abigail Milne | Theo Peterson | N |
| ۱ | WO0001626 | Test new swap out process on | INST | Installation | 3 | Test new swap out process on te | 2018/01/ | Bianca Du Toit | Bianca Du Toit | N |
| V | WO0001668 | SP240 New Deal. | DR 1 | Select Call Type | 2 | SP240 New Deal. | 2018/05/24 | Abigail Milne | Abigail Milne | N |
| ١ | WO0001671 | Machine faulty, loan unit requ | REP | Repair | 2 | Machine faulty, loan unit request | 2018/07/ | Chris Haynes | Theo Peterson | N |
| ١ | WO0001678 | 8 Return machine from contract | DR : | Select Call Type | 2 | Return all from short term contr | 2018/07/ | Bianca Du Toit | Bianca Du Toit | N |
| ۱ | W00001684 | Return machine from contract | DR | Select Call Type | 2 | Return all from short term contr | 2018/07/ | Abigail Milne | Theo Peterson | N |
| ١ | WO0001687 | Return machine from contract | DR : | Select Call Type | 2 | Return all from short term contr | 2018/07/ | Abigail Milne | Theo Peterson | N |
| ١ | W00001694 | TT009 - Daily, Mono 1000 - Call | SM | Scheduled Mai | 2 | Scheduled Service | 2018/08/ | Abigail Milne | Belinda Sharman | N |
| ١ | W00001746 | 5 SP240 New Deal. | DR | Select Call Type | 2 | SP240 New Deal. | 2019/04/ | Abigail Milne | Belinda Sharman | N |
| ۱ | W00001751 | Installation Project 1 | DR | Select Call Type | 2 | Installation Project 1 | 2019/04/ | Abigail Milne | Belinda Sharman | N |
| ١ | W00001754 | Anstallation Project 4 | DR | Select Call Type | 2 | Installation Project 4 | 2019/04/ | Abigail Milne | Belinda Sharman | N |
| 1 | W00001756 | Work Order 2 | DR | Select Call Type | 2 | Installation Project 5 | 2019/04/ | Abigail Milne | Abigail Milne | N |
| 4 6 | | | | | | | | - | Count: 147 | 1 |
| Dpe | en Windows ។ | | | | | | | 2 | 12 Apr 2019 | - |

Create New Work Order

In the Call Assignment or Project Assignment screen,

- 1. Tick the *Create new Work Order* box if you wish to create a *new* work order that you will designate to the selected *Assigned To* person.
- 2. Click on Save.



| | Ŧ | | | | Pre | oject Assignm | ent : Refer | ence No. | : PRJ0000305 - BP | O: Ver | sion 2.1.0.69 - | Example Com | pany | | | | | | × |
|--------|------------|---------|--------------|---------|-----------|---------------|-------------|----------|---------------------|--------|-----------------|-------------|-------|---------|-----------|-----------|------|---|---|
| | Home | Equipme | ent and Loc | ations | Contract | Finance and I | IR Inven | tory Ma | aintenance and Proj | ects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities | - | Ð | х |
| | \bigcirc | | a. | | | | | | | | | | | | | | | | |
| Save | Back | Save | Layout | | | | | | | | | | | | | | | | |
| Proce | ess " | For | mat " | | | | | | | | | | | | | | | | |
| | Assigne | ed To | Belinda Sha | arman | | • | | | | | | | | | | | | | |
| | C | Detail | Installation | Project | 5 | | | | -A | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | |
| Assi | innment | Date | 12 Apr 201 | 9 • | 13:08:2 | 5 🛟 | | | | | | | | | | | | | |
| | | | Abigail Miln | | 112010012 | + | | | | | | | | | | | | | |
| | - | | Function | | tion (a) | Equipr | nent () | | | | | | | | | | | | |
| | | Item | Kloof | | | | | | | | | | | | | | | | |
| | Loc | ation | Kloof | | | | | | | | | | | | | | | | |
| | | | | | | 7 | | | Ŧ | | | | | | | | | | |
| | Work O | | Create ne | ew Wor | k Order | | | | | | | | | | | | | | |
| Open | I WORK OI | raers | | | | | | | 1.1 | | | | | | | | | | |
| | | | | WOO | | Description | | | | | | | | | | | | | |
| | | | • | | 001755 | Work Order | | | _ | | | | | | | | | | |
| | | | | WOO | 001756 | Work Order | 2 | | | | | | | | | | | | |
| | | | 0 | | | | | | | | | | | | | | | | |
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| Open W | /indows 🔻 | | | | | | | | | | | | | | | 12 Apr 2 | 2019 | Ċ | |

• The *Call Assignment* or *Project Assignment* screen will close and the *Time Logging Express* screen will be displayed. *Close* this screen.



| - | | | Time | .ogging Exp | ress - BPO: Version 2.1 | 0.69 - Example Cor | npany | | | | 100 | | |
|----------------------|-------------------|-----------|----------------|-------------|-------------------------|--------------------|-------------|-------|---------|-----------|-----------|---|---|
| | | Contract | Finance and HR | Inventory | Maintenance and Proje | cts Manufacturing | Procurement | Sales | Service | Reporting | Utilities | - | Ð |
| | 9 | | | | | | | | | | | | |
| t End Work Pr | int | | | | | | | | | | | | |
| k | | | | | | | | | | | | | |
| Process " Prin | it u | | | | | | | | | | | | |
| Employee | Abigail Milne | | • | | | | | | | | | | |
| Call | | | 1 | | <u></u> | | | | | | | | |
| | | | | | * | | | | | | | | |
| Work Order | WO0001756 | | Work Order 2 | | - | | | | | | | | |
| | | | | | | | | | | | | | |
| Equipment | | | | | | | | | | | | | |
| | | | | | * | | | | | | | | |
| Location | Kloof | | | | - | | | | | | | | |
| | I | | | | * | | | | | | | | |
| t worked on the 12 A | pr 2019 ending at | 13:08:20. | | | - | | | | | | | | |
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• The *Ticket Maintain* screen will be displayed. *Close* this screen.



| Ticket Maintain - BPO: Ver | sion 2.1 | .0.69 - Example C | Company | | | | | × |
|---|----------|-------------------|-------------------------|----------|------------|------------------|--------|------------|
| Home Equipment and Locations Contract Finance and HR Inventory Maintenan | ce and I | Projects Manufac | turing Procurement | Sales S | ervice Rep | orting Utilities | - 0 | 8 × |
| Time Entry Complete Work Work Ticket Ticket Current Format | | | | | | | | |
| Work Order 2 | | | wo c-d- | | | | | |
| | | | WO Code WO Reference | WO000175 | | | | |
| | | | WO Create Date | | | - | | |
| | | | WO Priority | | 2 | | | |
| | | | WO Type | | | _ | | |
| Ticket Thread | | Work Order N | | | oject | | | - 4 |
| | | Note | | Date | Time | CreateDate | AmendD | Date |
| | | 9 | | | | | | |
| Assigned To: Abigail Milne Assigned By :Abigail Milne (Created: 2019/04/12) | | * | | | | | | |
| l | ¥. | | | | | | | |
| Open Windows 🔻 | | | | | | 12 Apr | 2019 | - 1 |

The *All Open Tickets* screen will be displayed.

- 1. You will note that Work Order *WO0001756* has been removed from the list.
- 2. A new Work Order *WO0001757* has now been created.



| Home | Equipment and Locations Contract | 2 | | intenance | and Projects Manufacturing Procurer | nent Sales | Service Reporting | g Utilities — 🗗 | 3 |
|-----------|------------------------------------|------------|------------------|-----------|-------------------------------------|------------|-------------------|-----------------|-----|
| Process 🦼 | Format | .a Current | a Export a | | | | | | |
| WOCode | Description | WOType | WOTypeDesc | Priority | Note | CreateDate | CreateBy | AssignedTo | Sta |
| | | | | | | | | | |
| W0000153 | 7 1234 | NDS | New Deal Sale | 2 | 1234 | 2017/08/ | Bianca Du Toit | Ed Jones | N |
| W0000154 | 6 Machine service required - not. | SERV | Service | 1 | Machine service required - not s | 2017/08/ | Bianca Du Toit | Chris Haynes | N |
| W0000155 | 0 New deal rental contract | NDR | New Deal Rental | 2 | New deal rental contract | 2017/08/ | Bianca Du Toit | Bianca Du Toit | N |
| W0000156 | 7 Return all from short term con. | DR | Select Call Type | 2 | Return all from short term contr | 2017/08/ | Bianca Du Toit | Ed Jones | N |
| W0000158 | 7 Service required - remember t | TON | Toner Required | 2 | Service required - remember to | 2017/09/ | Bianca Du Toit | Belinda Sharman | N |
| W0000158 | 8 Service required - check on so. | TON | Toner Required | 2 | Service required - check on som | 2017/09/ | Bianca Du Toit | Chris Haynes | N |
| W0000159 | 0 Test Project for WebPortal bac | DR | Select Call Type | 2 | Test Project for WebPortal back | 2017/09/ | Bianca Du Toit | Bianca Du Toit | N |
| W0000159 | 1 RSI V1.27.0.0 - Issue - Part Cat | DR | Select Call Type | 2 | RSI V1.27.0.0 - Issue - Part Cate | 2017/09/ | Bianca Du Toit | Belinda Sharman | N |
| W0000159 | 6 I dont understand this at all | INST | Installation | 2 | I dont understand this at all | 2017/10/ | Bianca Du Toit | Bianca Du Toit | N |
| W0000160 | 0 Test swap out with serialised s. | INSP | Inspection | 2 | Test swap out with serialised sto | 2017/10/ | Bianca Du Toit | Chris Haynes | N |
| W0000160 | 4 Site Inspection required | DR | Select Call Type | 2 | Machine Installation | 2018/10/ | Abigail Milne | Theo Peterson | N |
| W0000162 | 6 Test new swap out process on . | INST | Installation | 3 | Test new swap out process on te | 2018/01/ | Bianca Du Toit | Bianca Du Toit | N |
| WO0001668 | SP240 New Deal. | DR | Select Call Type | 2 | SP240 New Deal. | 2018/05/24 | Abigail Milne | Abigail Milne | N |
| W0000167 | 1 Machine faulty, loan unit requ | . REP | Repair | 2 | Machine faulty, loan unit request | 2018/07/ | Chris Haynes | Theo Peterson | N |
| W0000167 | 8 Return machine from contract. | DR | Select Call Type | 2 | Return all from short term contr | 2018/07/ | Bianca Du Toit | Bianca Du Toit | N |
| W0000168 | 4 Return machine from contract. | DR | Select Call Type | 2 | Return all from short term contr | 2018/07/ | Abigail Milne | Theo Peterson | N |
| W0000168 | 7 Return machine from contract. | DR | Select Call Type | 2 | Return all from short term contr | 2018/07/ | Abigail Milne | Theo Peterson | N |
| W0000169 | 4 TT009 - Daily, Mono 1000 - Call | SM | Scheduled Mai | 2 | Scheduled Service | 2018/08/ | Abigail Milne | Belinda Sharman | N |
| W0000174 | 6 SP240 New Deal. | DR | Select Call Type | 2 | SP240 New Deal. | 2019/04/ | Abigail Milne | Belinda Sharman | N |
| W0000175 | i1 Installation Project 1 | DR | Select Call Type | 2 | Installation Project 1 | 2019/04/ | Abigail Milne | Belinda Sharman | N |
| W0000175 | 4 Installation Project 4 | DR | Select Call Type | 2 | Installation Project 4 | 2019/04/ | Abigail Milne | Belinda Sharman | N |
| W0000175 | 7 Installation Project 5 | DR | Select Call Type | 2 | Installation Project 5 | 2019/04/ | Abigail Milne | Belinda Sharman | N |
| 2 | × | | | | | | | Count: 147 | |

PRINT WORK ORDER REPORT

- In the *All Open Tickets* screen, select the ticket you wish to print the *Work Order Report* for.
 - In this image, *DWO0001668* is selected.
- Click on *Edit*.

Note 1: You can also do this process once you have started or ended work in the *Time Logging Express* screen.

Note 2: If you have not yet **started work** on the selected work order, the Work Order Report will be blank.



| | Edit Sav | ve Layout Workspaces Save Filter | Refresh | Export | | | | | | |
|-----|-----------------|-------------------------------------|---------|------------------|----------|--|------------|----------------|-----------------|-----|
| Pro | ocess 🚽 | Format | Current | ⊿ Export ⊿ | | | | | | |
| | g a column head | | | | | | | | | |
| N | WOCode | Description | WOType | WOTypeDesc | Priority | Note | CreateDate | CreateBy | AssignedTo | Sta |
| ٩ | | | | | | | | | | |
| ١ | W00001376 | Loan Unit - Project v2.1.0.5 | DR | Select Call Type | 2 | Project Assigned to you | 2017/05/ | Judith Mudze | Judith Mudzengi | N |
| ١ | W00001399 | Project Assignment test | DR | Select Call Type | 2 | Project assigned to you | 2017/05/ | Judith Mudze | Judith Mudzengi | N |
| ١ | W00001527 | Work Order to test financial po | DR | Select Call Type | 2 | Work Order to test financial post | 2017/07/ | Bianca Du Toit | Belinda Sharman | N |
| ١ | W00001533 | Time logging checks - with initi | DR | Select Call Type | 2 | Time logging checks - with initial | 2017/07/ | Bianca Du Toit | Bianca Du Toit | N |
| ۱ | W00001534 | Time log test with auto schedu | DR | Select Call Type | 2 | Time log test with auto scheduli | 2017/07/ | Bianca Du Toit | Bianca Du Toit | N |
| ١ | W00001535 | Auto Scheduling time entry ch | DR | Select Call Type | 2 | Auto Scheduling time entry chec | 2017/07/ | Bianca Du Toit | Bianca Du Toit | N |
| ١ | W00001590 | Test Project for WebPortal bac | DR | Select Call Type | 2 | Test Project for WebPortal back | 2017/09/ | Bianca Du Toit | Bianca Du Toit | N |
| ١ | W00001591 | RSI V1.27.0.0 - Issue - Part Cat | DR | Select Call Type | 2 | RSI V1.27.0.0 - Issue - Part Cate | 2017/09/ | Bianca Du Toit | Belinda Sharman | N |
| ١ | W00001604 | Site Inspection required | DR | Select Call Type | 2 | Machine Installation | 2018/10/ | Abigail Milne | Theo Peterson | N |
| ۶ V | NO0001668 | SP240 New Deal. | DR | Select Call Type | 2 | SP240 New Deal. | 2018/05/24 | Abigail Milne | Abigail Milne | N |
| ٧ | WO0000593 | Reorder Grids and rename captions | DR | Select Call Type | 2 | Reorder Grids and rename captions | 2015/09/23 | Bianca Du Toit | Bianca Du Toit | N |
| ٧ | NO0000595 | test work order for project without | DR | Select Call Type | 2 | test work order for project without cu | 2015/09/25 | Bianca Du Toit | Bianca Du Toit | N |
| ٧ | NO0000608 | Check 2nd assignment | DR | Select Call Type | 2 | Check 2nd assignment | 2015/10/07 | Bianca Du Toit | Bianca Du Toit | N |
| ٧ | WO0000612 | Test assignment delete | DR | Select Call Type | 2 | Test assignment delete | 2015/10/15 | Bianca Du Toit | Bianca Du Toit | С |
| ١ | W00000612 | Test assignment delete | DR | Select Call Type | 2 | test | 2017/12/ | Bianca Du Toit | Bianca Du Toit | N |
| ٧ | NO0000638 | Test project assignment | DR | Select Call Type | 2 | Tech v1.3.0.4 - project assignment fix | 2015/11/13 | Bianca Du Toit | Bianca Du Toit | N |
| ٧ | NO0000666 | Work Order A - subcon requests | DR | Select Call Type | 2 | Work Order A - subcon requests | 2015/11/19 | Bianca Du Toit | Bianca Du Toit | С |
| ١ | W00000666 | Work Order A - subcon requests | DR | Select Call Type | 2 | TEST | 2017/03/ | Bianca Du Toit | Belinda Sharman | N |
| ١ | W00000667 | Work Order B: Subcon Requests | DR | Select Call Type | 2 | Work Order B: Subcon Requests | 2015/11/ | Bianca Du Toit | Bianca Du Toit | N |
| ۱ | WO0000680 | Work order with serial number | DR | Select Call Type | 2 | Project with serial number | 2015/12/ | Bianca Du Toit | Bianca Du Toit | N |
| | | | | | | | | | Count: 146 | |

The *Ticket Maintain* screen will be displayed.

• Click on *Time Entry*.



| Ticket Maintain - BPO: Version 2.1 | 0.69 - Example Company | - 🗆 X |
|--|--|-------------------------|
| Home Equipment and Locations Contract Finance and HR Inventory Maintenance and P Time Entry Process Process Process Complete Process | ojects Manufacturing Procurement Sales Service Rep | porting Utilities — 쇼 X |
| SP240 New Deal. | WO Code W00001668 WO Reference PRJ000071 WO Create Date 2018/05/24 WO Priority 2 WO Type DR | • |
| Ticket Thread | Work Order Notes Drag a column header here to group by that column Note Date | CreateDate AmendDate |
| CO Co S | ▼ | |
| | 4 | 12 Apr 2019 |

- The *Time Logging Express* screen will be displayed.
- Click on *Print*.



| | | Time L | ogging Exp | ress - BPO: Version | 2.1.0.69 | - Example Con | npany | | | | | | | × |
|-------------------------|---------------------------|--------------------|------------|---------------------|----------|---------------|-------------|-------|---------|-----------|-----------|------|---|---|
| Home Equipmen | nt and Locations Contract | Finance and HR | Inventory | Maintenance and P | rojects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities | - | 8 | x |
| Start End Work Pri | | | | | | | | | | | | | | |
| Employee | Abigail Milne | - | | | | | | | | | | | | |
| Call | | | | - | I | | | | | | | | | |
| | | | | * | | | | | | | | | | |
| Work Order | WO0001668 | SP240 New Dea | i. | | 1 | | | | | | | | | |
| | | | | Ψ. | | | | | | | | | | |
| Equipment | | | | ÷ | Ī | | | | | | | | | |
| | | | | * | | | | | | | | | | |
| Location | Main | | | ÷ | | | | | | | | | | |
| Work Started on work on | der W00001668 on the 15 A | or 2019 at 19:31:1 | 5. | * | | | | | | | | | | |
| Open Windows • | | | | | | | | | | | 12 Apr 2 | 2019 | - | |

- A *Report Generation* message box will pop up asking;
 - Do you want to print the WO Report for WO []?
- Click on Yes.



| | | | Time L | ogging Exp | ress - BPO: Version 2.1.0 | 69 - Example Con | npany | | | | - | | > |
|-------------------------|------------------|---------------|------------------|---------------|---------------------------|------------------|-------------|-------|---------|-----------|-----------|------|---|
| Home Equipmen | t and Locations | Contract i | Finance and HR | Inventory | Maintenance and Projec | s Manufacturing | Procurement | Sales | Service | Reporting | Utilities | - | 8 |
|) 😢 🛃 | 9 | | | | | | | | | | | | |
| tart End Work Prin | | | | | | | | | | | | | |
| Process _ Print | | | | | | | | | | | | | |
| 1100030 2 1111 | | | | | | | | | | | | | |
| Employee | Abigail Milne | | • | | | | | | | | | | |
| Call | | • | | | - | | | | | | | | |
| | | | | | * | | | | | | | | |
| Work Order | WO0001668 | • | SP240 New Deal | | - 44 | | | | | | | | |
| | | | | | ·* | | | | | | | | |
| Equipment | | | | | · • · | | | | | | | | |
| | | | | | (*) (*) | | | | | | | | |
| Location | Main | | | | ÷ | | | | | | | | |
| /ork Started on work or | der W/00001668 a | on the 15 Anr | 2019 at 19:31:16 | | | | | | | | | | |
| | | | | | | | | | | | | | |
| | | | | | - | | | | | | | | |
| | | | | | | | - | | | | | | |
| | | | Report Ge | neration | | | | | | | | | |
| | | | Dovouw | vant to prin | t the WO report for WO | NO00016687 | | | | | | | |
| | | | Doyouv | vanie to prin | | | | | | | | | |
| | | | | | Yes | No | | | | | | | |
| | | | | | L | | J | | | | | | |
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| | | | | | | | | | | | | | |
| n Windows 🔻 | | | | | | | | | | | 12 Apr 3 | 2019 | * |

The *Report Preview* screen will be displayed.

- 1. From here, you can *View*, *Print*, *Export* or *Email* the Work Order Report.
- 2. *Close* the Report Preview screen when you are done.



| |) 📰 🖪 • 🖑 🔍 | | • | | 🖺 + 🐴 • 🔯 | | | | | |
|-------|---------------------------------|----------------------------|-------------|--|--|---------------------------------|-------------------------|---------|--|--|
| 1 | <u>> Co</u> | | <u>go (</u> | Example | COrder eCompany b and Road Name | PO Box 12 New Towr Durban | | | | |
| | 4 | | 9 | South Afr 0000 Reg No.: | 0000000asa4521 0000000 | South Afri 1234 | | | | |
| | WO Barcode | | | Customer : Code : Area : Billable : | TIA001 | | lo.: act: rity: 0 | | | |
| | Shipping Address | | | | Call Date : Call Ref. : Location : Model No. : Error Code : WO Code : | PRJ000007 Main W0000166 | 58 | | | |
| | Machine Location | C.O.D | | | WO Desc : Inclusions : | SP240 Nev | vDeal. | | | |
| | WO Events | 0.0.0 | | | inclusions : | | | | | |
| | Employee | Event | Date / Time | 0 | Odometer Co | mments | | | | |
| | Abigail Milne Technician Nam | Start Work e and Commer | 15 Apr 2019 | 19:31:16 | | | Meter 1 | Meter 2 | | |
| | PartDescription | | | | | Desc | | | | |
| 1 | Part No x Qty | x | | x | × | Value | | | | |
| 67 | Comment from cli | ent: | | | | | | | | |
| het a | | | | | | Clos | e Cal | | | |
| 1/10 | Client Comment | • | | | | | | | | |

COMPLETE WORK

You can use this functionality once your work has been completed, or if you can no longer continue with the work, for example there is a *'Parts Requirement'* or you are *'Awaiting Client Confirmation'*.

- Select the ticket you wish to complete work for.
- Click on *Edit*.
 - In this image, *DWO000242* is selected.



| Home | 2 | | and HR Inventory M | laintenance | and Pro | ojects Manufacturing | Procurement | Sales Service Rep | orting Utilities — | P |
|------------------------|----|---|--------------------------------------|-------------|---------|---|-------------|---|--|------|
| rocess 🔒 | | Format _ Curi | rent a Export a | | | | | | | |
| WOCode | | Description | WOTypeDesc | Pri | iority | Note | CreateDate | CreateBy | AssignedTo | Stat |
| DW000002 | | TT072 - 2 Monthly - Call per WO | Scheduled Maintena | nce | | Please resolve th | | Judith Mudzengi | James Magombo | |
| DW000002 | 33 | Parial Issue Project Invoices | Select Call Type Select Call Type | | 2 | Parial Issue Project Invoices | | Judith Mudzengi Judith Mudzengi | Belinda Sharmane Belinda Sharmane | N |
| DWO000025 | 42 | new deal project rental TT033 - Daily Colour 1000 - Gener | a second second second second second | nce | 2 | new deal project re TT033 - Daily Col | 2017/11/29 | Judith Mudzengi Judith Mudzengi | Judith Mudzengi Judith Mudzengi Belinda Sharmane | N |
| DWO000023 DWO000023 | 2 | TT033 - Daily Colour 1000 - Gener Project - Quotes Project Assignment Test 1 | Select Call Type Select Call Type | | 2 | TT033 - Daily Col Project - Quotes Project Assignment | 2017/11/29 | Judith Mudzengi Judith Mudzengi Judith Mudzengi | Judith Mudzengi Judith Mudzengi | N |
| DW0000028 | 73 | Auto Apply Task Confiuration to 1234 | Select Call Type New Deal Sale | | 2 | Auto Apply Task 1234 | | Judith Mudzengi Judith Mudzengi | James Magombo Judith Mudzengi | N |
| DWO000000 | 4 | 1234 2. Stock Procurement for Client D | New Deal Sale | | 2 | 1234 2. Stock Procure | 2018/02/11 | Judith Mudzengi Judith Mudzengi | Judith Mudzengi Judith Mudzengi | N |
| DWO000016 | 5 | 2. Stock Procurement for Client D 2. Stock Procurement for Client Deman Project Work Order - Pretoria | | | 2 | 2. Stock Procureme Project Work Order | 2018/09/21 | Judith Mudzengi Judith Mudzengi | Belinda Sharmane | N |
| DW000002 | | Project Work Order - Pretoria | Select Call Type | | | Carry out schedul | | Judith Mudzengi | Belinda Sharmane | - |
| | | | | | | | | | Count: 44 | |

- The *Ticket Maintain* screen will be displayed.
- Click on *Complete Work*.

| Ticket Maintain - BPO: Version 2.1.0.69 - T | TEST ALPHA - JU | DITH PC LOCAL | | | | - | | × |
|---|-----------------|---|----------|---------|-----------|-----------|------|------------|
| Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Pr | rojects Manufac | turing Procuremen | t Sales | Service | Reporting | Utilities | - | ъ х |
| Time Entry Complete Work Process Ticket Current Current Format | | | | | | | | |
| T033 - Daily Colour 1000 - Generate Project | 4 * | WO Code WO Reference WO Create Date WO Prioritic Work Order Cur | PRJ00000 |)30 | • |]] | | |
| Ticket Thread | Work Order N | otes | | | | | | — 4 |
| Enter text to search | | | | | | | | |
| 🗆 🚥 🔒 📰 詳 🗣 । 🖑 🥔 | Note | | | Dat | e | Time | Cre | eateDate |
| Assigned To: Judith Mudzengi Assigned By :Judith Mudzengi (Created: 2017/11/29) | * | | | | | | | |
| Open Windows 🕶 | | | | | | 15 Mar | 2019 | - |

The Complete Work - Work Order: [] screen will be displayed.



- 1. Complete Work Details:
 - **Employee**: This will auto populate with the name of the employee currently logged onto the system.
 - Call/Project: This will auto populate with the call/project number if the work order is linked to a project or call.
 - Work Order: This will auto populate with the work order number.
 - **Resolution Actions**: Select one of the 3 resolution actions
 - Resolved once processed, this call will move to *Complete*.
 - Unresolved once processed, this call will move to *Pending*.
 - Unresolved (Client) once processed, this call will move to *On Hold*.
 - **Reason Code**: Click on the down arrow and select the reason code.
 - **Notes**: Type in the relevant notes.
- 2. Click on Save.



| | | Comple | te Work - Work | Order : DWC | 00000242 - BPO: Version 2.1 | .0.69 - TEST ALP | PHA - JUDITH I | PC LOCA | AL | | <u></u> | | | × |
|----------------|------------------------------------|----------|----------------|-------------|-----------------------------|------------------|----------------|---------|---------|-----------|-----------|------|---|---|
| Home Ec | quipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities | - | 8 | > |
| Save | 2 | | | | | | | | | | | | | |
| 0 4 | U | | | | | | | | | | | | | |
| | Judith Mudzengi | | | | | | | | | | | | | Ī |
| Call / Project | PRJ0000030 | | | | | | | | | | | | | |
| Work Order | DWO0000242 | | | | | | | | | | | | | |
| | Unresolved Client (Unresolved | Resolved | - | | 0 | | | | | | | | | |
| Reason Code | Parts Requirement | | * * | | | | | | | | | | | |
| Notes | Waiting for parts to be s | hipped. | | | | | | | | | | | | |
| | | | | | | | | | | | | | | |
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| pen Windows 🔻 | | | | | | | | | | | 15 Mar | 2019 | | |

- A *Start Work* message box will pop up informing you that;
 - Work Order: [] Completed.
- Click on OK.

| | Ŧ | | | | Ti | cket Mai | intain - BP | 0: Versi | ion 2.1.0 | .69 - T | EST AL | PHA - JI | UDITH | PC LOCA | AL. | | | | 61 | | | | × |
|---------------|------------------|---------------------------------|-----------------|------------------|----|----------|-----------------------|----------|-----------|----------------|---------|----------|----------|--|------------|----------|--------|----------|----------|-------|-----|--------|------|
| Hor | Complete Work | Add New Ticket | Close Ticket | Refre Current | sh | Save Lay | Inventory out Work | | tenance | and Pro | ojects | Manufa | icturing | Procure | ement | Sales | Servio | ce Repor | ting Uti | ities | - | 8 | × |
| 11033 - Daily | Colour 100 | u - Generate I | Project | | | _ | | | | | | Ŧ | wo | WO C D Refere Create D WO Prior | nce ate | 2017/1: | 0030 | | • | | | | |
| Ticket Thr | ead | | | | | S | tart Work | | | | | | \times | | | | | | | | | | 4 |
| | | Q | | | | 2 | 1 | Work O | rder : D | WO000 | 00242 0 | omplete | :d. | ere to g | roup b | y that c | | Date | Time | | 0 | reateD |)ate |
| | | udzengi Assi İy Colour 100 | | | | Created | | | | E _n | | OK | |] | | | | | | | | | |
| Open Windo | ws ¥ | | | | | | | | | - | 4 ⊂ | | | | | | | 2 | 15 | Mar 2 | 019 | ÷., | × |



- The *Start Work* message box will close.
- *Exit* this screen.

| Ticket Maintain - BPO: Version 2.1.0.69 - | TEST ALPHA - JU | JDITH PC LOCAL | | | | | | × |
|--|-------------------|---|------------------------------|---------|-----------|-----------|-----|---------|
| Home Equipment and Locations Contract Finance and HR Inventory Maintenance and P | rojects Manufa | cturing Procuremen | t Sales | Service | Reporting | Utilities | - 1 | 5 X |
| Imme Entry Complete Cose Cose Mork Ticket Ticket Refresh Save Layout | | | | | | | | |
| Process a Ticket a Current a Format a | * | WO Code WO Reference WO Create Date | PRJ0000 | 030 | • |]] | | |
| Ticket Thread | - Work Order N | | and the second second second | Project | | 1 | | |
| Ticket Thread | | | | | | 12 | | - + |
| Enter text to search Find Clear | Note | | | Dat | - | Time | Cre | ateDate |
| 🗂 oo 🔒 🔐 👭 🥥 🤣 | 9 | | | Ud | ic . | nine | Cre | atebate |
| Assigned To: Judith Mudzengi Assigned By : Judith Mudzengi (Created: 2017/11/29) | * | | | | | | | |
| ∽ Open Windows ▼ | 1 | | | | | 15 Mar 2 | 019 | * |

CLOSE TICKET

Once all work has been completed, a *ticket thread* can be closed.

- Select the ticket you wish to complete work for.
 - In this image, *DWO0000170* was selected.
- Click on *Edit*.



| | Home Equ | ipment and Locations Contract Finance | | Maintenar | nce and Pr | ojects Manufacturing | Procurement | Sales Service Rep | orting Utilities — | 8 |
|------|--------------------|---------------------------------------|---------------------|-----------|------------|----------------------|-------------|-------------------|--------------------|--------|
| Edit | Save | ÷ | efresh Export | | | | | | | |
| | a j Jumn header | here to group by that column | indire al expose | 4 | | | | | // | |
| WOCo | de | Description | WOTypeDesc | | Priority | Note | CreateDate | CreateBy | AssignedTo | Status |
| | | | | | | | | | | |
| DWO | 0000066 | TT002 - Weekly - Call per WO | Scheduled Mainter | nance | 2 | Scheduled Service | 2017/07/12 | Judith Mudzengi | James Magombo | N |
| DWO | 0000067 | TT002 - Weekly - Call per WO | Scheduled Mainter | nance | 2 | Scheduled Service | 2017/07/12 | Judith Mudzengi | James Magombo | N |
| DWO | 0000106 | asset on contract- return | New Deal Rental | | 2 | asset on contract | 2017/08/04 | Judith Mudzengi | James Magombo | N |
| DWO | 0000107 | TT008 - Mono 1000, Colour 1000 | . Scheduled Mainter | nance | 2 | TT008 - Mono 10 | 2017/08/04 | Judith Mudzengi | Belinda Sharmane | N |
| DWO | 0000108 | TT009 - Daily, Mono 1000 - Call p | Scheduled Mainter | nance | 2 | TT009 - Daily, Mo | 2017/08/04 | Judith Mudzengi | James Magombo | N |
| DWO | 0000109 | TT002 - Weekly - Call per WO | Scheduled Mainter | nance | 2 | TT002 - Weekly | 2017/08/04 | Judith Mudzengi | James Magombo | N |
| DWO | 0000110 | TT003 - Monthly - Call per WO | Scheduled Mainter | nance | 2 | TT003 - Monthly | 2017/08/04 | Judith Mudzengi | James Magombo | N |
| DWO | 0000133 | 3MS - 3 Month Service | Scheduled Mainter | nance | 2 | Scheduled Service | 2017/09/18 | Judith Mudzengi | John Smith | N |
| DWOO | 0000170 | Third Party Procurement | Service | | 2 | Third Party Procure | 2017/10/24 | Judith Mudzengi | Judith Mudzengi | Ν |
| DWO | 0000169 | Deliveries - change unit cost | Repair | | 2 | Deliveries - chan | 2017/10/24 | Judith Mudzengi | Judith Mudzengi | N |
| DWO | 0000150 | ndrsa | New Deal Rental | | 2 | ! ndrsa | 2017/10/24 | Judith Mudzengi | Judith Mudzengi | N |
| DWO | 0000149 | ndrmg | New Deal Rental | | 2 | ndrmg | 2017/10/24 | Judith Mudzengi | Judith Mudzengi | N |
| DWO | 0000140 | nds | New Deal Sale | | 2 | nds . | 2017/10/24 | Judith Mudzengi | Judith Mudzengi | N |
| DWO | 0000204 | nds | New Deal Sale | | 2 | nds | 2017/10/24 | Judith Mudzengi | Belinda Sharmane | Ν |
| DWOO | 0000240 | TT013 - Weekly Colour 1000 - Call per | Scheduled Maintenan | ce | 2 | Scheduled Service | 2017/11/06 | Judith Mudzengi | Judith Mudzengi | N |
| | | | | | | | | | Count: 40 | 1 |
| 0 | | | | | | | | | Count: 40 | |

- The *Ticket Maintain* screen will be displayed.
- Click on *Close Ticket*.

| Ticket Maintain - BPO: Version 2.1.0.69 - | TEST ALPHA - JUDITH PC LOCAL - | - 🗆 🗙 |
|--|--|--------------|
| Home Equipment and Locations Contract Finance and HR Inventory Maintenance and P | rojects Manufacturing Procurement Sales Service Reporting Util | lities – 🗗 🗙 |
| Time Entry Complete Work Process Add New Ticket Ticket Ticket Close Ticket Cover Ticket Cover Ticket Cover Ticket Cover Ticket Cover Ticket Cover Ticket Cover Ticket Cover Ticket Cover Ticket | | |
| Third Party Procurement | WO Code DW00000170 WO Reference DCN0000065 WO Create Date 2017/10/12 • Work Order Customer Call | |
| Ticket Thread | Work Order Notes | D 4 |
| Enter text to search | Drag a column header here to group by that column | |
| I | v Note Date Time | CreateDate |
| Assigned To: Judith Mudzengi Assigned By : Judith Mudzengi (Created: 2017/10/24) | • | |
| Open Windows 🔻 | 15 | Mar 2019 |

- A *Ticket Thread* message will pop up informing you that;
 - Ticket Thread closed.



• Click on *Ok*.

| | Ŧ | | | | Ticket Ma | intain - E | PO: Versio | n 2.1.0.69 | - TEST A | .PHA - J | IUDITH P | PC LOCA | L | | | | | | × |
|----------------|------------------|-----------------|-----------------|----------------|--------------|--------------------|-------------|------------|------------|----------|----------|---|------------------|-----------|---------|-----------|-----------|------|------------|
| Hon | Complete Work | Ð | Close Ticket | Refresh | Save Lay | Invento vout Wo | | nance and | l Projects | Manuf | acturing | Procure | ement | Sales ! | Service | Reporting | Utilities | | 8 > |
| Third Party Pi | | - | | Current | 4 | - Connac | | | | * | woo | WO Co Refere Create D WO Prio k Order | nce Di ate 20 |)17/10/13 | 65 2 | , | | | |
| Ticket Thr | ead | | | | | | Ticket Thre | ad | | × | Notes | | | | | | | | D 4 |
| | t to search | 18 <i>Q</i> | 0 P | | • |] Fir | 0 | Ticket Thr | ead close | d.: | header | | | | Dat | e | Time | C | reateDat |
| | | | | Judith Mudzeni | gi (Created: | 2017/10 | | [| OK | | | | | | | | | | |
| | Third Part | v Procuremen | t | | | | | | - 40 | | | | | | | | | | |
| Dpen Windo | ws 🕶 | | | | | | | | | | | | | | | | 15 Mar | 2019 | * |

- The *Ticket Thread* message box will close.
- *Exit* the screen.

| Work Ticket Ticket Ticket Process Ticket Current Format w0 Code DW00000170 W0 Reference DCN000065 W0 Create Date 2017/10/12 Work Order Work Order cket Thread Vork Order Notes Prog a column header here to group by that column Enter text to search Find Clear Note Date Time CreateDate | Ticket Maintain - BPO: Version 2.1.0.6 | - TEST ALPHA - JUDITH PC LOCAL - 🗆 |
|--|--|---|
| wo Code DW000000170 W0 Reference DCN000065 W0 Reference DCN000065 W0 Create Date DCN000065 W0 Create Date DCN000065 Work Order Cal Color Bringthungthungthungthungthungthungthungthu | Image: Source of the | Projects Manufacturing Procurement Sales Service Reporting Utilities — 라 |
| Enter text to search Find Clear Trag a column header here to group by that column Note Date Time CreateDate Assigned To: Judith Mudzengi (Assigned By : Judith Mudzengi (Created: 2017/10/24) | rd Party Procurement | W0 Reference DCN0000065 W0 Create Date 2017/10/12 W0 Pringity 7 |
| Note Date Time CreateDia Assigned To: Judith Mudzengi (Assigned By :Judith Mudzengi (Created: 2017/10/24) • • | icket Thread | Work Order Notes |
| Assigned To: Judith Mudzengi Assigned By : Judith Mudzengi (Created: 2017/10/24) | Enter text to search Find Clear | |
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The ticket will no longer be displayed in the **All Open Tickets** screen.



1. In this example, the filter row has been used to search for the closed ticket thread but the data grid no longer contains that ticket.

| - | | | All Oper | Tickets - BP | O: Version 2.1.0.69 - | TEST ALPHA - JUDITH | PC LOCAL | | | 8 | | × |
|-------------------|------------------|------------------|-----------------|--------------|-----------------------|-----------------------|-------------|---------------|-----------|-----------|--------|------------|
| Home | Equipment and Li | ocations Contrac | t Finance and H | Inventory | Maintenance and P | rojects Manufacturing | Procurement | Sales Service | Reporting | Utilities | - | 8 X |
| Edit | Save Layout Wo | • | lter Refresh | Export | | | | | | | | |
| Process " | For | rmat | J Current | Applied Fill | 4 | ode], 'DW00000170' | N | | | | | |
| Disease and south | | | | Applied Fill | ter: contains([wo | .ode], DW00000170 |) | | | | | 1 |
| WOCode | P Description | / | WOT | peDesc | Priority | Note | CreateDate | CreateBy | Acc. | ignedTo | | Status |
| P DWO000017 | | ! | WOI | pebesc | Phoney | Note | Createbate | Createby | ASS | igneuro | | Status |
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| × 🗹 Contain | s([WOCode], 'DWO | 0000170') | | 2 | | | | | | | E | dit Filter |
| Open Windows | • | | | | | | | | | 15 Mar | 2019 | - 11 |

Related References

• My Tickets

CAP.001.001