

PROJECTS

PROJECTS - LOG TRAVEL

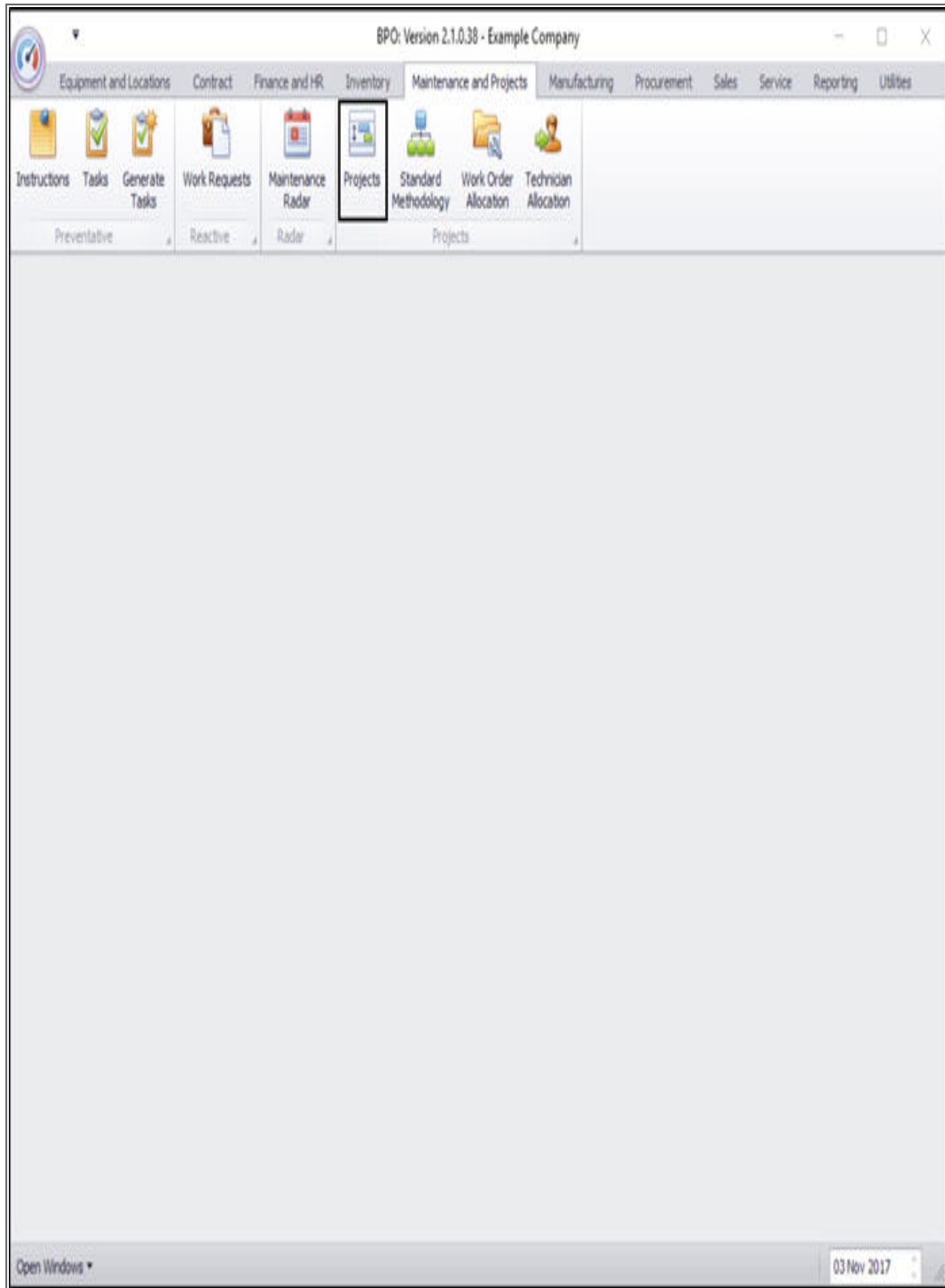
If you want to keep track of travel done by a technician, you can log this on the project.

The travel logged on a project will not be billed. The system previously used the 'billable' flag in order to invoice travel. However, travel is now billed via 'Travel Radii' or 'Travel Zones' - which will check the contract / asset configuration to see whether travel should be billed or not.

Travel can also be added to an invoice separately. **Travel Radii** must be set up correctly.

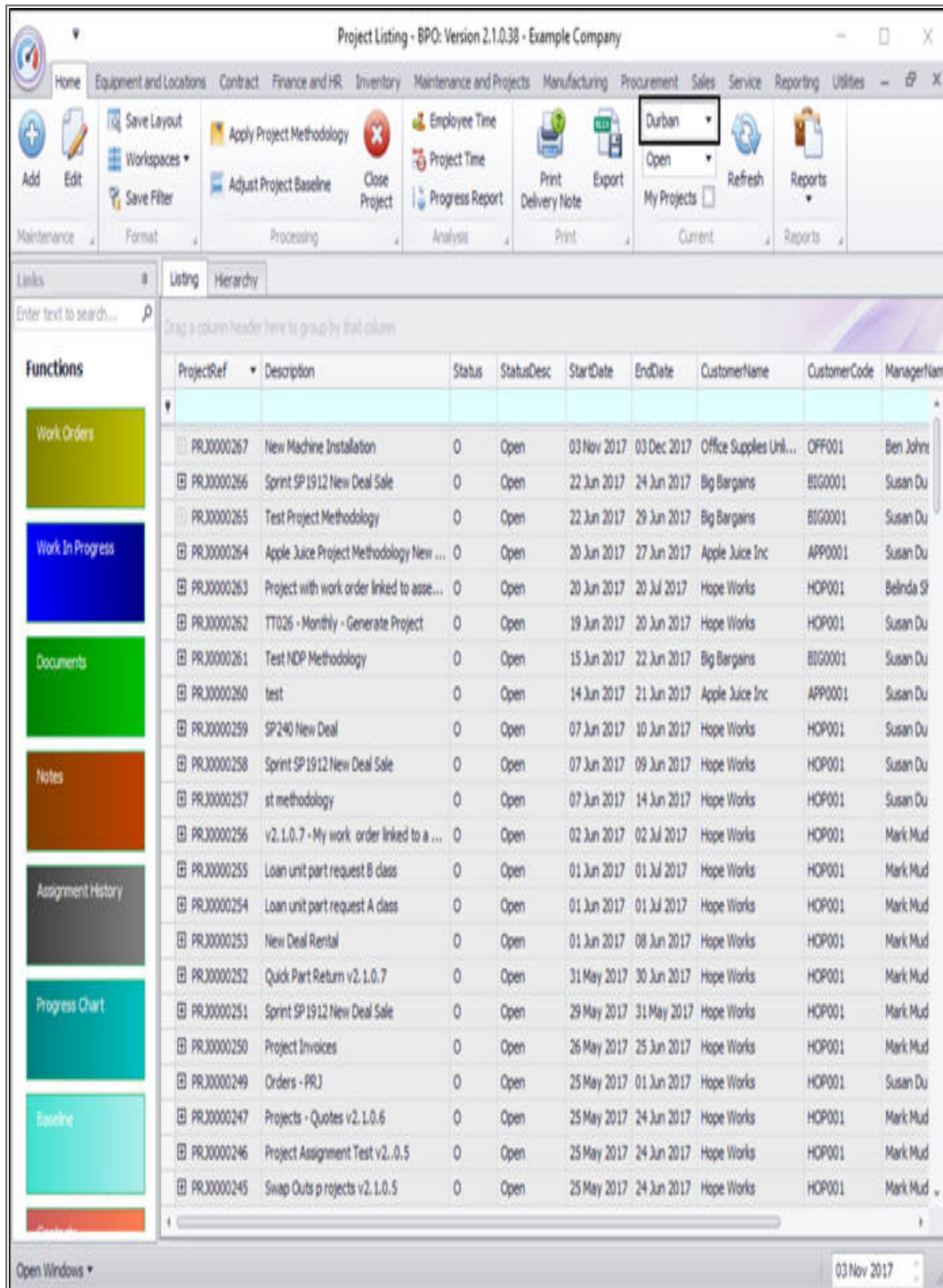
If you cannot link travel to the project due to the message: 'No items to select from', then an **Expense Allocation**, **Expense Type**, and Travel Rate must be configured.

Ribbon Access: *Maintenance/ Projects > Projects*



The ***Project Listing*** screen will be displayed.

- Select the **site**.
- In this image **Durban** has been selected.



Project Listing - BPO: Version 2.1.0.38 - Example Company

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

Add Edit Save Layout Workspaces Save Filter Apply Project Methodology Adjust Project Baseline Close Project Employee Time Project Time Progress Report Print Delivery Note Print Export My Projects Refresh Reports

Links Listing Hierarchy

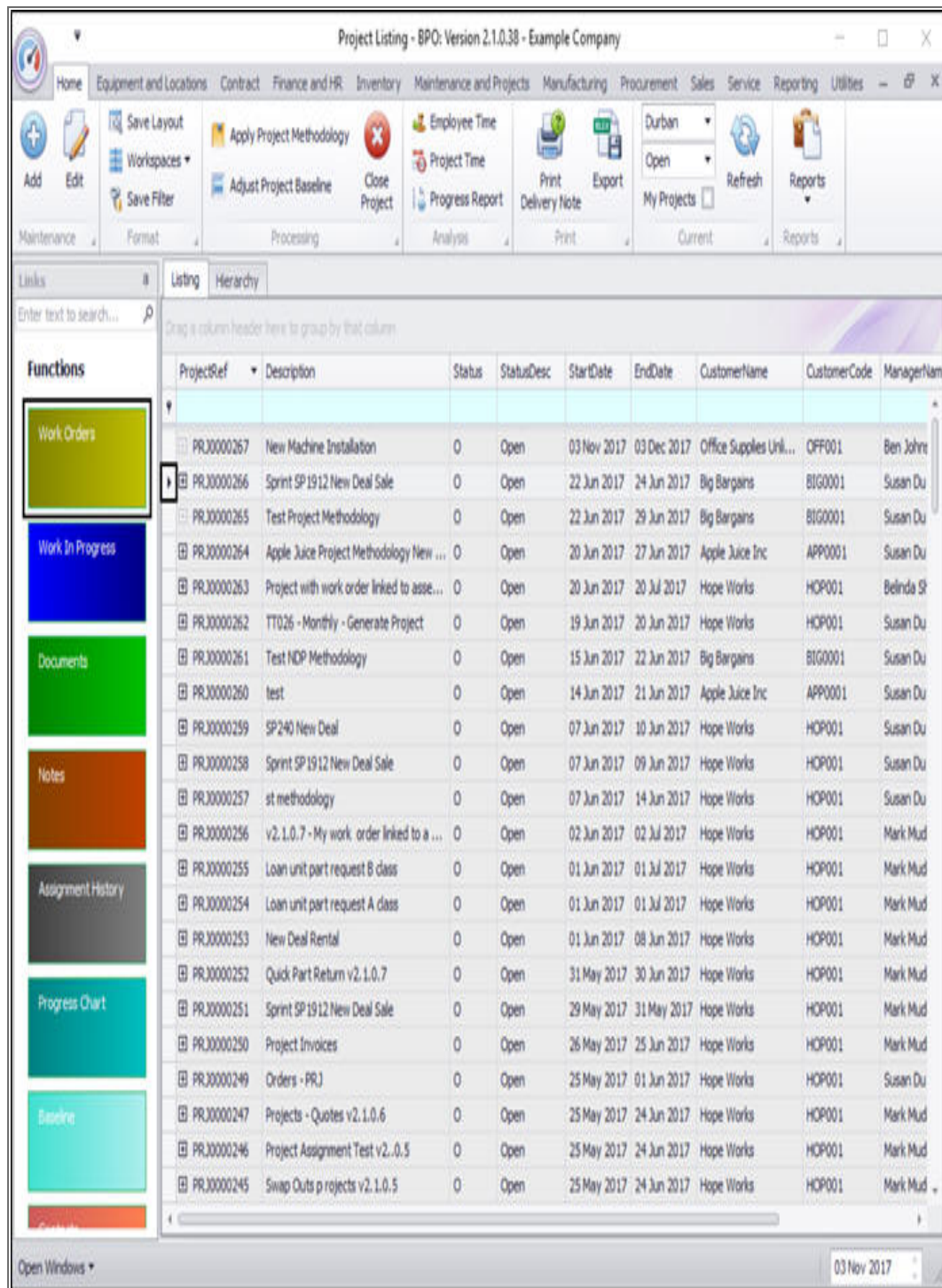
Enter text to search...

Drag a column header here to group by that column

ProjectRef	Description	Status	StatusDesc	StartDate	EndDate	CustomerName	CustomerCode	ManagerName
PRJ0000267	New Machine Installation	O	Open	03 Nov 2017	03 Dec 2017	Office Supplies Unit...	OFF001	Ben John
PRJ0000266	Sprint SP1912 New Deal Sale	O	Open	22 Jun 2017	24 Jun 2017	Big Bargains	BIG0001	Susan Du
PRJ0000265	Test Project Methodology	O	Open	22 Jun 2017	29 Jun 2017	Big Bargains	BIG0001	Susan Du
PRJ0000264	Apple Juice Project Methodology New ...	O	Open	20 Jun 2017	27 Jun 2017	Apple Juice Inc	APP0001	Susan Du
PRJ0000263	Project with work order linked to asse...	O	Open	20 Jun 2017	20 Jul 2017	Hope Works	HOP001	Belinda Si
PRJ0000262	TT026 - Monthly - Generate Project	O	Open	19 Jun 2017	20 Jun 2017	Hope Works	HOP001	Susan Du
PRJ0000261	Test NDP Methodology	O	Open	15 Jun 2017	22 Jun 2017	Big Bargains	BIG0001	Susan Du
PRJ0000260	test	O	Open	14 Jun 2017	21 Jun 2017	Apple Juice Inc	APP0001	Susan Du
PRJ0000259	SP240 New Deal	O	Open	07 Jun 2017	10 Jun 2017	Hope Works	HOP001	Susan Du
PRJ0000258	Sprint SP1912 New Deal Sale	O	Open	07 Jun 2017	09 Jun 2017	Hope Works	HOP001	Susan Du
PRJ0000257	st methodology	O	Open	07 Jun 2017	14 Jun 2017	Hope Works	HOP001	Susan Du
PRJ0000256	v2.1.0.7 - My work order linked to a ...	O	Open	02 Jun 2017	02 Jul 2017	Hope Works	HOP001	Mark Mud
PRJ0000255	Loan unit part request B class	O	Open	01 Jun 2017	01 Jul 2017	Hope Works	HOP001	Mark Mud
PRJ0000254	Loan unit part request A class	O	Open	01 Jun 2017	01 Jul 2017	Hope Works	HOP001	Mark Mud
PRJ0000253	New Deal Rental	O	Open	01 Jun 2017	08 Jun 2017	Hope Works	HOP001	Mark Mud
PRJ0000252	Quick Part Return v2.1.0.7	O	Open	31 May 2017	30 Jun 2017	Hope Works	HOP001	Mark Mud
PRJ0000251	Sprint SP1912 New Deal Sale	O	Open	29 May 2017	31 May 2017	Hope Works	HOP001	Mark Mud
PRJ0000250	Project Invoices	O	Open	26 May 2017	25 Jun 2017	Hope Works	HOP001	Mark Mud
PRJ0000249	Orders - PRJ	O	Open	25 May 2017	01 Jun 2017	Hope Works	HOP001	Susan Du
PRJ0000247	Projects - Quotes v2.1.0.6	O	Open	25 May 2017	24 Jun 2017	Hope Works	HOP001	Mark Mud
PRJ0000246	Project Assignment Test v2.0.5	O	Open	25 May 2017	24 Jun 2017	Hope Works	HOP001	Mark Mud
PRJ0000245	Swap Outs p projects v2.1.0.5	O	Open	25 May 2017	24 Jun 2017	Hope Works	HOP001	Mark Mud

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- Click on the **row selector** in front of the **project** that you wish to log travel time to.
- Click on the **Work Orders** tile



Project Listing - BPO: Version 2.1.0.38 - Example Company

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

Add Edit Save Layout Workspaces Save Filter Apply Project Methodology Adjust Project Baseline Close Project Employee Time Project Time Progress Report Print Export Delivery Note My Projects Refresh Reports

Links Enter text to search... Listing Hierarchy

Functions

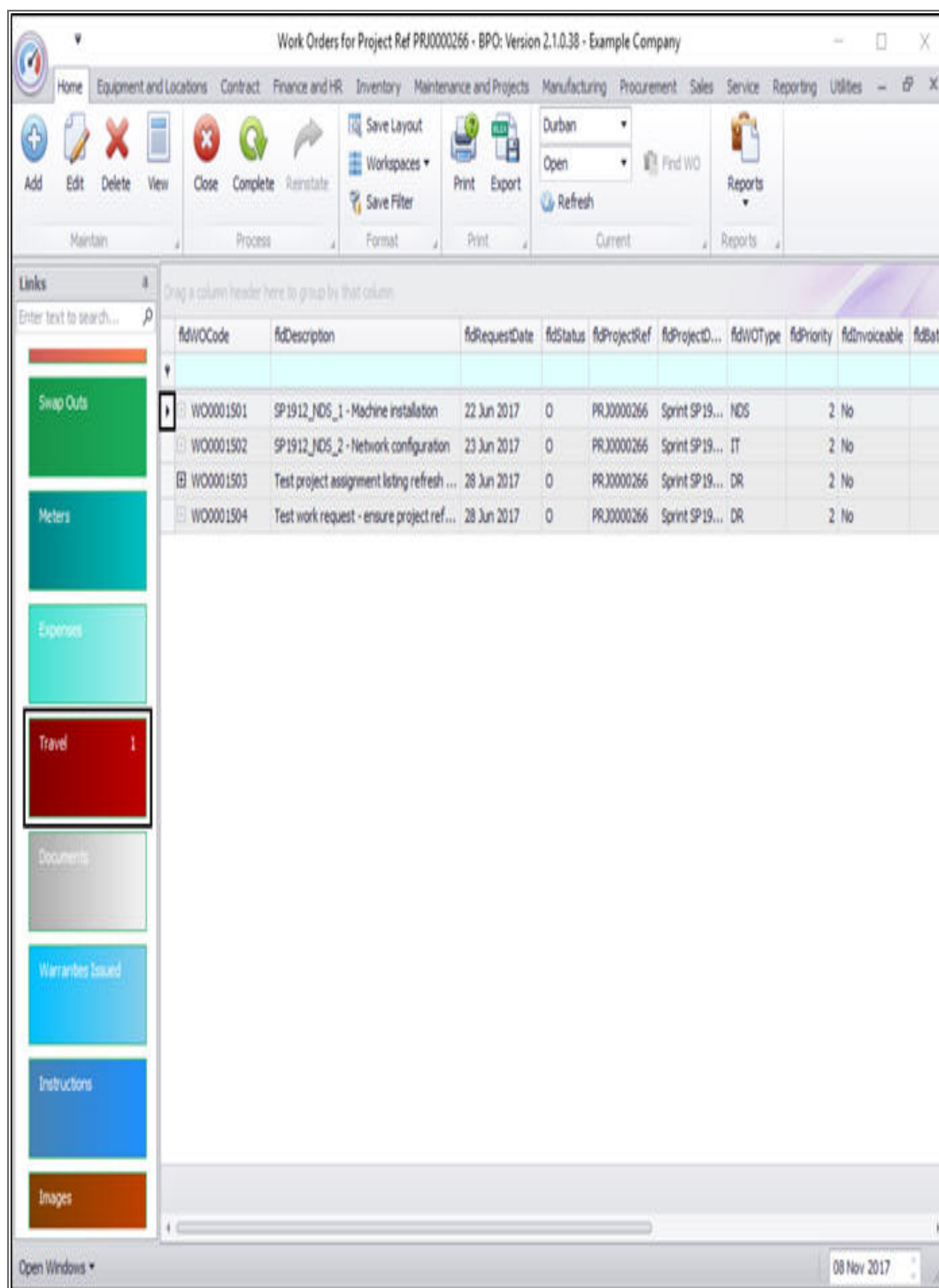
- Work Orders
- Work In Progress
- Documents
- Notes
- Assignment History
- Progress Chart
- Baseline

ProjectRef	Description	Status	StatusDesc	StartDate	EndDate	CustomerName	CustomerCode	ManagerName
PRJ0000267	New Machine Installation	O	Open	03 Nov 2017	03 Dec 2017	Office Supplies Unl...	OFF001	Ben Johns
PRJ0000266	Sprint SP1912 New Deal Sale	O	Open	22 Jun 2017	24 Jun 2017	Big Bargains	BIG0001	Susan Du
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PRJ0000253	New Deal Rental	O	Open	01 Jun 2017	08 Jun 2017	Hope Works	HOP001	Mark Mud
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PRJ0000251	Sprint SP1912 New Deal Sale	O	Open	29 May 2017	31 May 2017	Hope Works	HOP001	Mark Mud
PRJ0000250	Project Invoices	O	Open	26 May 2017	25 Jun 2017	Hope Works	HOP001	Mark Mud
PRJ0000249	Orders - PRJ	O	Open	25 May 2017	01 Jun 2017	Hope Works	HOP001	Susan Du
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PRJ0000245	Swap Outs p rojects v2.1.0.5	O	Open	25 May 2017	24 Jun 2017	Hope Works	HOP001	Mark Mud

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The **Work Orders for Project Ref []** listing screen will be displayed.

- Click on the **row selector** in front of the **work order** that you wish to log travel time to.
- Click on the **Travel** tile.



Work Orders for Project Ref PRJ0000266 - BPO: Version 2.1.0.38 - Example Company

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

Links

Enter text to search...

Swap Outs

Meters

Expenses

Travel 1

Documents

Warrants Issued

Instructions

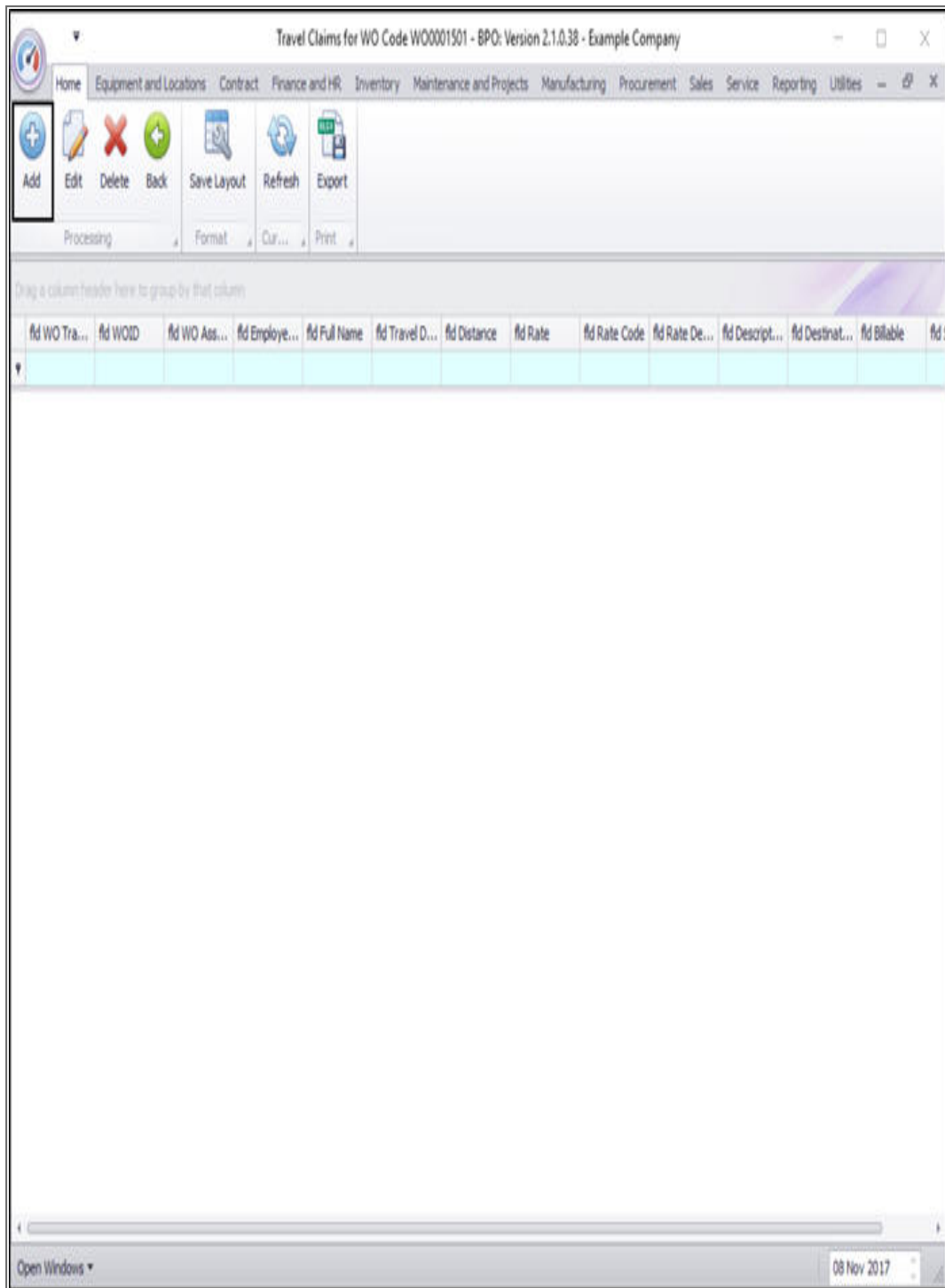
Images

fdWOCode	fdDescription	fdRequestDate	fdStatus	fdProjectRef	fdProjectID...	fdWOType	fdPriority	fdInvoiceable	fdBatch
WO0001501	SP1912_NDS_1 - Machine installation	22 Jun 2017	O	PRJ0000266	Sprint SP19...	NDS	2	No	
WO0001502	SP1912_NDS_2 - Network configuration	23 Jun 2017	O	PRJ0000266	Sprint SP19...	IT	2	No	
WO0001503	Test project assignment listing refresh ...	28 Jun 2017	O	PRJ0000266	Sprint SP19...	DR	2	No	
WO0001504	Test work request - ensure project ref ...	28 Jun 2017	O	PRJ0000266	Sprint SP19...	DR	2	No	

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The **Travel Claims for WO Code []** listing screen will be displayed.

- Click on **Add**.



Travel Claims for WO Code W00001501 - BPO: Version 2.1.0.38 - Example Company

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

Processing Format Cur... Print

Drag a column header here to group by that column

fld WO Tra...	fld WOID	fld WO Ass...	fld Employee...	fld Full Name	fld Travel D...	fld Distance	fld Rate	fld Rate Code	fld Rate De...	fld Descript...	fld Destin...	fld Billable	fld

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The **Travel Entry** screen will be displayed.

- **Work Order:** This will be auto populated with the Work Order you initially selected.
- **Employee:** Click on the drop-down menu and select the employee from the menu.
- **Travel Date:** This will auto populate with the current date, click on the drop-down menu and use the calendar function to select the date when the travel took place.
- **Type:** Click on the drop-down arrow and select the travel rate type from the menu.
- **Detailed Description:** Type in a description / reason for the travel.
- **Destination:** Type in the area travelled to.
- **Distance:** Type in the total travel in kilometers.

Travel Entry - BPO: Version 2.1.0.38 - Example Company

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

Save Back

Process

Work Order: W00001501

Employee: Sarah Milder

Travel Date: 08 Nov 2017

Type:

Detailed Description:

Destination:

Distance: 0

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- When you have finished adding the details, click on **Save**.

Travel Entry - BPO: Version 2.1.0.38 - Example Company

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

Save Back

Process

Work Order: WO0001501

Employee: Susan Du Toit

Travel Date: 08 Nov 2017

Type: Normal Travel Rate

Detailed Description: Drove with 2 colleagues to on-site client meeting from Hillcrest to PMB and back.

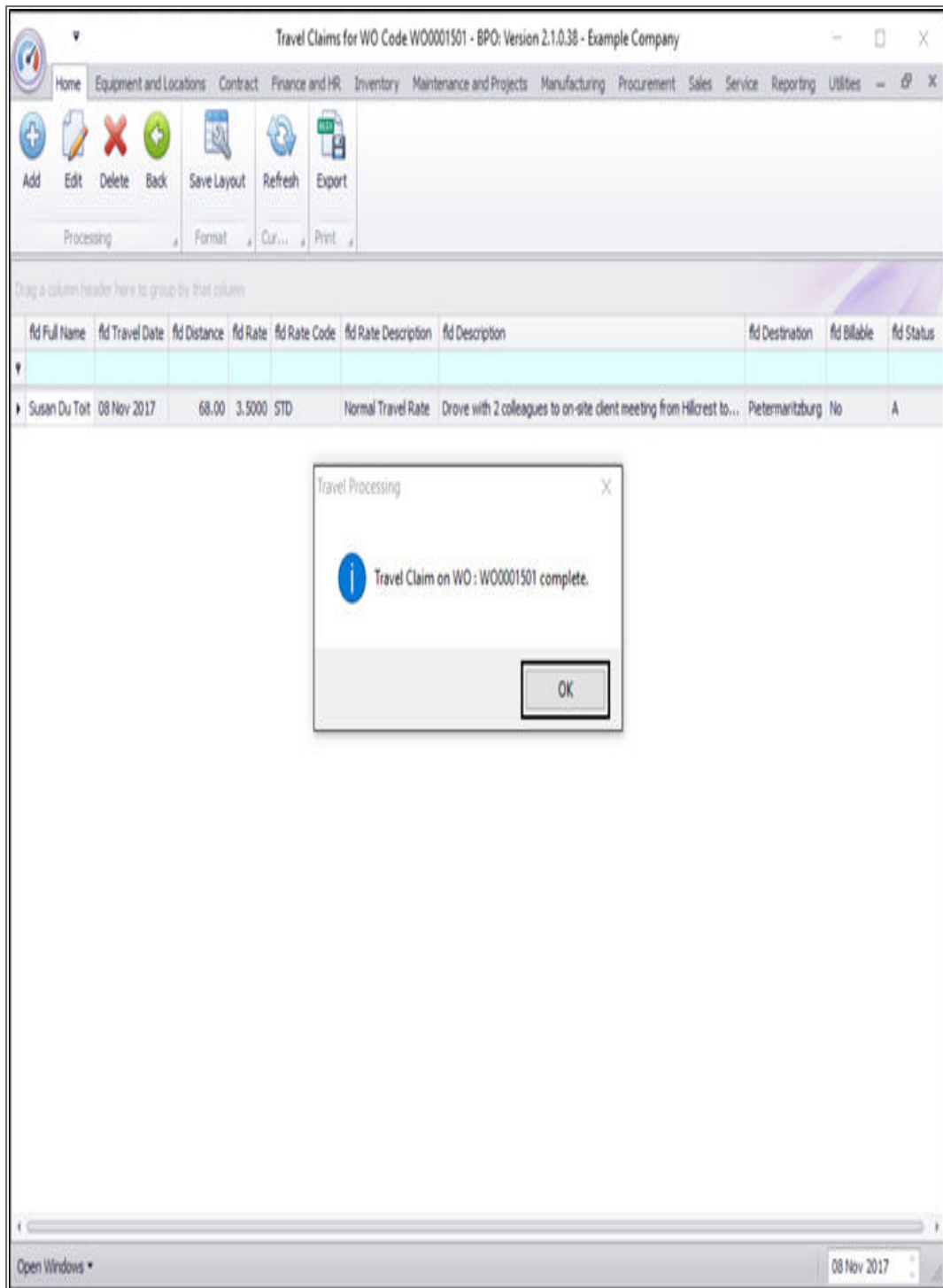
Destination: Pietermaritzburg

Distance: 68

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- A **Travel Processing** message box will pop up informing you that;
 - **Travel Claim on WO: [] complete.**

- Click on **OK**.



The screenshot displays the 'Travel Claims for WO Code WO0001501 - BPO: Version 2.1.0.38 - Example Company' window. The interface includes a menu bar with options like Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the menu is a toolbar with icons for Add, Edit, Delete, Back, Save Layout, Refresh, and Export. A data table is visible with columns for fId Full Name, fId Travel Date, fId Distance, fId Rate, fId Rate Code, fId Rate Description, fId Description, fId Destination, fId Billable, and fId Status. A single row of data is shown for Susan Du Toit on 08 Nov 2017. A 'Travel Processing' dialog box is open in the center, displaying an information icon and the message 'Travel Claim on WO : WO0001501 complete.' with an 'OK' button.

fId Full Name	fId Travel Date	fId Distance	fId Rate	fId Rate Code	fId Rate Description	fId Description	fId Destination	fId Billable	fId Status
Susan Du Toit	08 Nov 2017	68.00	3.5000	STD	Normal Travel Rate	Drove with 2 colleagues to on-site client meeting from Hilcrest to...	Pietermaritzburg	No	A

- You will return to the **Travel Claims** listing screen where you can view the logged travel details.

Travel Claims for WO Code WO0001501 - BPO: Version 2.1.0.38 - Example Company

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

Add Edit Delete Back Save Layout Refresh Export

Processing Format Cur... Print

Drag a column header here to group by that column

fid Full Name	fid Travel Date	fid Distance	fid Rate	fid Rate Code	fid Rate Description	fid Description	fid Destination	fid Billable	fid Status
Susan Du Toit	08 Nov 2017	68.00	3.5000	STD	Normal Travel Rate	Drove with 2 colleagues to on-site client meeting from Hillcrest to...	Pietermaritzburg	No	A

Open Windows ▾ 08 Nov 2017



MNU.058.009