

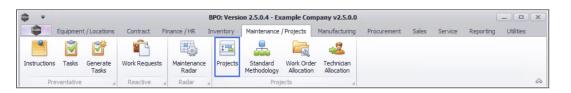
# **PROJECTS**

## **PROJECTS - TIME REVIEW**

Time review enables the Project Managers to allocate *regular* time logged by employees as *SLA* and / or *non billable* time. For example, if an employee books **4** hours against a work order and the manager knows that the task should only required **2** hours to complete, then the manager can allocate **2** hours as billable or *SLA* hours and the remaining **2** hours as *non billable* hours in the Time Review screen.

For this to work, the Time Review flag must be set to Yes in the Configurator.

#### Ribbon Access: Maintenance / Projects > Projects



- 1. The *Project Listing* screen will be displayed.
- 2. Select the *Site* where the project can be located.
  - The example has *Durban* selected.
- 3. Ensure that the *Status* has been set to *Open*.
- 4. Select the *row* of the project you wish to review time for.
- 5. Click on the *Time Review* tile.



### Projects - Time Review

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#### **INVOICE WORK ORDER**

A work order can be invoiced from the *Time Review* screen.

- 6. From the *Time Note Billed for Project Ref [project ref number]*screen,
- 7. Click on the *row* of the work order you wish to invoice.
- 8. Click on Invoice WO.

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



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- 9. The *Add New Customer Invoice* screen will be displayed.
- 10. Complete the Customer Invoice then click on *Save*.

For a detailed handling of this topic refer to Time Review - Invoice Work Order



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- 11. You will return to the *Time Not Billed for Project* screen.
- 12. Click on *Back* to return to the *Project Listing* screen.

For a detailed handling of this topic refer to Introduction to Invoices

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#### **INVOICE PROJECT**

- 1. From the *Time Note Billed for Project Ref [project ref number]*screen,
- 2. Click on the *row(s)* of the work order(s) you wish to invoice.
- 3. Click on *Invoice Project*.

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

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- 4. The *Add New Customer Invoice* screen will be displayed.
- 5. Complete the Customer Invoice then click on *Save*.

For a detailed handling of this topic refer to Time Review - Invoice Project



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- 6. You will return to the *Time Not Billed for Project* screen.
- 7. Click on *Back* to return to the Project Listing screen.

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#### **FLAG REVIEWED**

Note on the Time Review flag: Work orders created <u>after</u> the Time Review flag has been set to 'Yes' in the Configurator, will by default display as 'No' in the Billable column, yet all *Regular Hours* will be billed.

- 1. From the *Time Not Billed for Project Ref [project ref number]* screen,
- 2. Click on the *row* of the Work Order you wish to review the time for.
- 3. *Scroll* until you can view all the Time columns.
  - Billable: Labour time is displayed as billable or non-billable.
  - **Regular Hours:** The time logged against the work order. *(This field cannot be changed)*
  - **Overtime<sup>1</sup> Hours:** Overtime hours logged against the work order. (*This field cannot be changed*)
  - **SLA Hours:**<sup>2</sup> Time allocated to this field will be deducted from the service / support time from a customer's contractual agreement.
  - Non Billable Hours:<sup>3</sup> Time allocated to this field will <u>not</u> be billed.
  - Total Hours: = Regular Hours + Overtime Hours + SLA Hours+ Non Billable Hours. (This field cannot be changed)

<sup>3</sup>Adding Non Billable hours will deduct from Regular hours

<sup>&</sup>lt;sup>1</sup>Overtime hours will not be adjusted when changes are made to the Regular, SLA and/or Non-billable hours.

<sup>&</sup>lt;sup>2</sup>Time allocated to SLA hours will be deducted from Regular Hours. For example 8 Regular Hours booked, will be updated to 7 Regular Hours when you add 1 to the SLA Hours field.



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- 4. *Scroll* right until you can view the *Marked* column.
- 5. The Marked field for the work order will be checked when time is allocated to *SLA and/or Non Billable Hours*.

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- 6. Click on *Flag Reviewed*, when you have completed reviewing the time for the work order.
- 7. When you receive the *Input Validation* message to confirm;
  - Are you sure you want to flag the following items.
- 8. Click on Yes.

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- 9. The *Is Reviewed* field will now be checked.
- 10. Click on Save.



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	MNGT	Management		No	0.05	0.00					TIA001						
4					14.18		1.00	3.00	20.18								

- 11. When you receive the *Time Review Processing* message to confirm; *Time Review processing successfully updated.*
- 12. Click on *OK*.

Note that for a record to be <u>removed</u> from this screen, the Work Order has to be *closed*.



	Ŧ				Time No	ot Billed for Proj	ect Ref PRJ00	00071 - BPO: V	ersion 2.5.0.4	- Example	Company va	.5.0.0					X
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-	TECH	Technician	12/04/2017	No	3.00	0.00					TIA001	Ľ	-	- U.	- <b>U</b> -	- <b>-</b>	
	MNGT	Management	18/07/2018	No	0.13	0.00					TIA001						
	ADMN	Administrati		No	5.00	0.00		0.0			TIA001						
	MNGT	Management	29/05/2018	No	2.00	0.00	0.00	0.0	2.00		TIA001						
	MNGT	Management	30/05/2018	No	0.05	0.00	0.00	0.0	0.05		TIA001						
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#### **SLA TIME**

**SLA**<sup>1</sup> is the <u>Service Level Agreement</u> that you have signed with your customer. It is a contract of performance that you have agreed to. For example, if your customer calls with a requirement for a part or service request and your agreed response time to this customer (SLA) is 5 hours then you are required to have the part or technician on site within that time frame. Failing which, the client can receive compensation of a preagreed type (usually also set up in the SLA).

1. From the *Time Not Billed for Project Ref [project ref number]* screen will be displayed.

<sup>&</sup>lt;sup>1</sup>This is the Service Level Agreement that you have signed with your customer. It is a contract of performance that you have agreed to. For example, if your customer calls with a requirement for a part or service request and your agreed response time to this customer (SLA) is 5 hours then you are required to have the part or technician on site within that time frame. receive compensation of a pre-agreed type (usually also set up in the SLA).



- Click on the *row(s)* to select the Work Order(s) you would like to adjust Regular Hours booked, to SLA Time.
  - Any <u>contract inclusions</u> linked to an item on the selected work order will be displayed in the SLA section.
- 3. Use the *scroll bar* to scroll until you are able to see the hours booked for the Work Order(s).
- 4. Click on *SLA Time* to convert the Regular Hours to SLA Hours.

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/udz	Bianca Du T	TECH	Technician	12/04/2017	No	3.00	0.00	0.00	0.00	3.	00					
Du T	Belinda Sha	MNGT	Management	18/07/2018	No	0.13	0.00	0.00	0.00	0.	13					
1udz	Bianca Du T	ADMN	Administrati	12/04/2017	No	5.00	0.00	0.00	0.00	5.	00					
Du T	Belinda Sha	MNGT	Management	29/05/2018	No	2.00	0.00	0.00	0.00	2.	00					
Du T	Belinda Sha	MNGT	Management													
			Management	30/05/2018	No	0.05	0.00	0.00 . <b>-7</b>	0.00	0.	05	-				
			management	30/05/2018	No	0.05	0.00		0.00	0.1	05	_				
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			8	30/05/2018	NO	0.05	0.00		3.00	1						

- 5. When you receive the *Input validation* message to confirm;
  - Are you sure you want to move all the regular hours to SLA for the selected items.
- 6. Click on Yes.



<b>₽</b> . <del>-</del>				Time No	t Billed for Pro	ject Ref PRJ0	000071 - BPO:	Version 2.5.0	4 - Example	Company v	2.5.0.0					
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ee	Manager	Craft	CraftDesc	Date	Billable	RegularHours	OvertimeHo	SLAHours	NonBillableH	TotalHours	1					
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Audz	Bianca Du T	ADMN	Administrati	i 19/07/2017	No	4.00	2.00	1.00	3.00	10	00	-	8 <b>0</b> 0	* <b>0</b> ¢	REC.	
/udz	Bianca Du T	TECH	Technician	12/04/2017	No	3.00	0.00	0.00	0.00	3	00					
Du T	Belinda Sha	MNGT	Managemen	nt 18/07/2018	No	0.13	0.00	0.00	0.00	0	13					
1udz	Bianca Du T	ADMN	Administrat	12/04/2017	No	5.00	0.00	0.00	0.00	5	00					
Du T	Belinda Sha	MNGT	Managemer	nt 29/05/2018	No	2.00	0.00	0.00	0.00	2	00					
Du T	Belinda Sha	MNGT	Managemen	nt 30/05/2018	No	0.05	0.00	0.00	0.00	0.	05					
				? Are you s selected i		o move all the	regular hours t <u>Y</u> es	o SLA for the <u>N</u> o								
4	⊂ ndows ▼					14.18		1.00	3.00	20.		4		_		

7. The selected *work order(s)* have been updated and the Regular Hours have been moved or added to the SLA Hours.

Note that only Regular Hours have been moved. Overtime and Non-Billable Hours were not affected.

8. Click on *Save* to save the changes.



1				Time No	Billed for Proj	ect Ref PRJ0	000071 - BPO:	Version 2.5.0	.4 - Example	Company v2	2.5.0.0					
-	Home	Equipment / Lo	cations Cont	ract Financ	e / HR Inver	ntory Maint	enance / Projec	ts Manufac	turing Proc	urement S	iales	Servi	ce Repor	ting Utilities	- 6	2 2
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ee	Manager	Craft	CraftDesc	Date	Billable	RegularHours	OvertimeHo	SLAHours	NonBillableH	TotalHours	1					
9	REC	8 <b>0</b> 0	R <b>O</b> C	-	* <b>0</b> :	-	- 14.	-	-	-		fldIt.	Code	Description	SLAType	Q
Judz	Bianca Du T	. ADMN	Administrati	19/07/2017	No	0.00	2.00	5.00	3.00	10.0	10 9		RBC	REC	RBC	-
/udz	Bianca Du T	. TECH	Technician	12/04/2017	No	3.00	0.00	0.00	0.00	3.0	0					
Du T	Belinda Sha	MNGT	Management	18/07/2018	No	0.13	0.00	0.00	0.00	0.1	13					
1udz	Bianca Du T	ADMN	Administrati	12/04/2017	No	5.00	0.00	0.00	0.00	5.0	0					
Du T	Belinda Sha	MNGT	Management	29/05/2018	No	2.00	0.00	0.00	0.00	2.0	0					
Du T	Belinda Sha	MNGT	Management	30/05/2018	No	0.05	0.00	0.00	0.00	0.0	15					
4						14.18		1.00	3.00	20.1	8					

- 9. When you receive the *Time Review Processing* message to confirm; *Time Review processing successfully updated.*
- 10. Click on *OK* to confirm.
- 11. Click on **Back** to return to the Project Listing screen.

\$	Ŧ				Time Not	t Billed for Pr	oject Ref PRJ00	000071 - BPO:	Version 2.5.0	.4 - Example	Company v2	2.5.0.0					x
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F	Du T	Belinda Sha	MNGT	Management	29/05/2018	No	2.00	0.00	0.00	0.00	2.0	0					
	Du T	Belinda Sha	MNGT	Management	30/05/2018	No	0.05	0.00	0.00	0.00	0.0	15					
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C	pen Wi	ndows 🕶								User	: JulandaK	25/08/	2021	version: 2.5.0	0.4 Example Co	mpany v2.5.0	1.0 /1



#### **VIEW WORK ORDER**

- 1. From the *Time Not Billed for Project Ref [project ref number]* screen,
- 2. Click on the *row* of the Work Order you wish to view.
- 3. Click on *View WO*.

) <del>-</del>		(	1	> Time	e Not Billed for	Project Ref	PRJ0000071 -	BPO: Versio	a 2.5.0.4 - Exa	mple Compan	y v2.5.	0.0					X
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	206 SP240-				Bianca Du T		Administrati		No	5.00		-	_		- <b>U</b>	- <b>-</b>	
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WO0000	205 SP240-	1-M I	4	Judith Mudz	Bianca Du T	TECH	Technician	12/04/2017	No	3.00	,						
Cou	int: 5									10.18							

- 4. "The Work Order Maintenance screen will be displayed. " on page 2
- From here you can add to or edit the Work Order details, Customer Info, the Required Crafts, Additional Data or the Equipment Info for the work order, or update the work order using the Function and Processing tiles.
- 6. When you have completed making the changes to the maintenance screen, click on *Save*.



Home Equipment / Locations Contra	Maintain WO - Ref W00000206	- BPO: Version 2.5.0.4 - Ex enance / Projects Manufac			e Reporting Utilitie	
Back Save Layout Print Mantain Omat Print						- -
inks # Inter text to search P	SP240-2 - Network setup - test edi 🔹 🔹	RefType Referen	eType Re	Links		
	work order nom project	I CALL Call Refe				
Functions				J0000071		
Time	Belinda Sharman 👻 *					
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Services Priority	2 🔹 *	Assigned To	Bianca Du Toit	- *		
Request Date		Assigned By	Belinda Sharman	•		
	0 - Open	Scheduled Start	07/08/2014 -	16:16:24 🛟 *		
Third Party Services Billable		Scheduled End	08/08/2014 -	16:16:24 🛟 *		
Capitalise		Actual Start	07/09/2014 -	12:00:00		
Parts Work Order Item :		Actual End	07/09/2014 -	12:00:00		
Functional Loca	ation   Equipment	Delay Comments	Currently on Schedule	*		
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Swap Outs	SP240-2	Rectification Comments		*		
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pen Windows 🔻			User : JulandaK	26/11/2021 V	ersion : 2.5.0.4 Examp	le Company v2.5.0.0

#### **VIEW PROJECT**

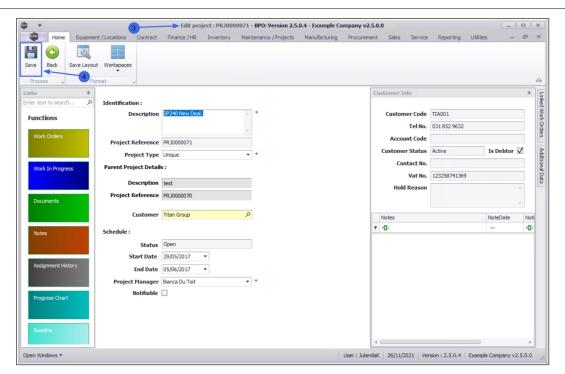
- 1. From the *Time Not Billed for Project Ref [project ref number]* screen,
- 2. Click on View Project.



Ho Ho	En inner	t / Locations	-	Not Billed fo				2.5.0.4 - Exar	mple Company		.0 Servi	n Deneti			
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	Test project			Belinda Sha		Management		No	0.05	_					
WO00002190				Belinda Sha		-	29/05/2018	No	2.00						
	SP240-1 - M			Bianca Du T		Technician	12/04/2017		3.00	_					

- 3. "The Edit project : [project ref number] screen will be displayed." on page 2
- 4. Make the required changes to the project information and click on *Save*.





MNU.058.030