

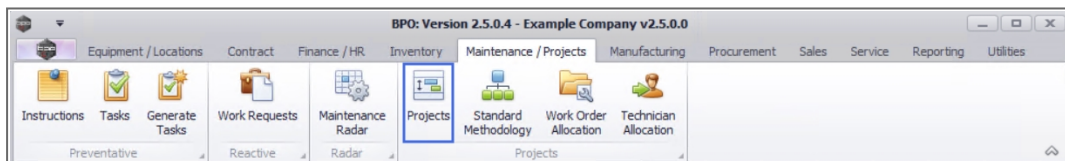
PROJECTS

PROJECTS – TIME REVIEW

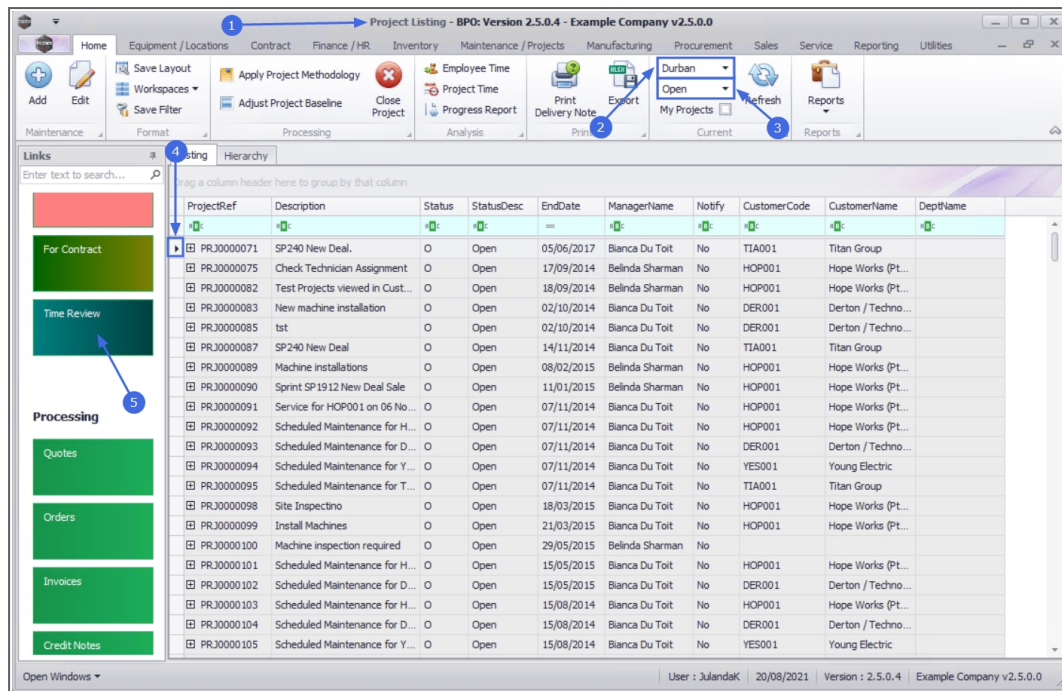
Time review enables the Project Managers to allocate **regular** time logged by employees as **SLA** and / or **non billable** time. For example, if an employee books **4** hours against a work order and the manager knows that the task should only required **2** hours to complete, then the manager can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



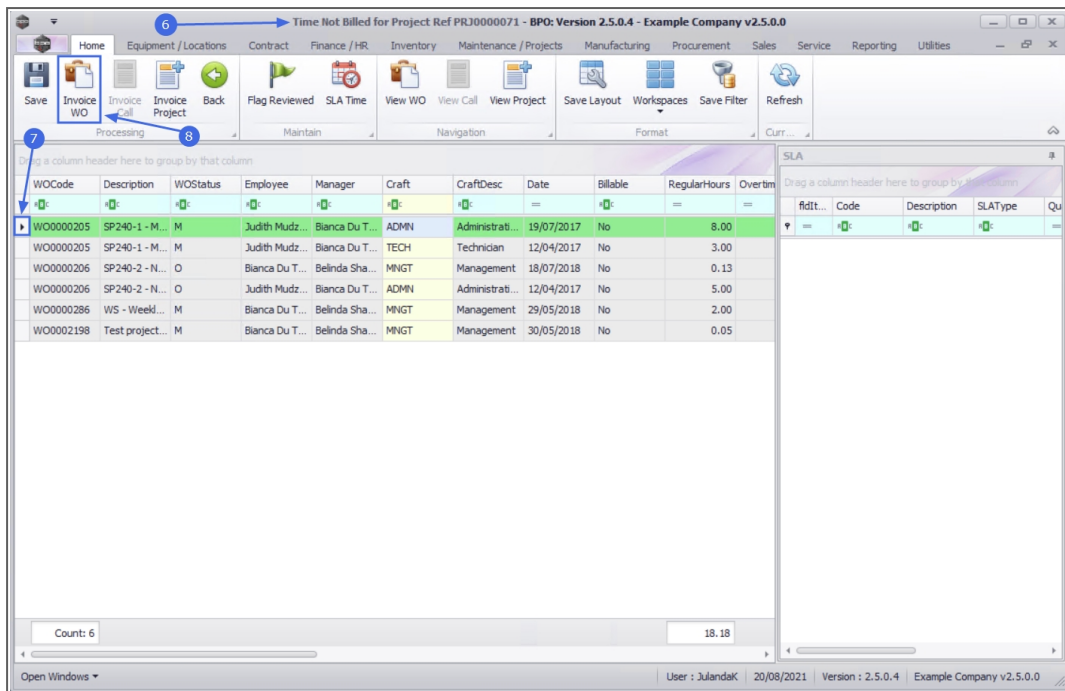
INVOICE WORK ORDER

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*.



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](#)

9 → Add new Customer Invoice - BPO: Version 2.5.0.4 - Example Company v2.5.0.0

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

Save Back Delete Item Save Layout

Customer Name: Apple Juice Inc
 Contact Name: Jessica Meadows
 Commercial: Type Class Commercial
 Salesman: Julanda Kessler
 Billing Customer: Apple Juice Inc
 Invoice Currency: South African Rand
 Tax Rate: 15.00

Reference: InvoicePRJ345
 Status: New
 Date & Time: 20/08/2021 15:40:00
 Billing Contact: Jessica Meadows
 Exchange Rate: 1

Billing address: 1234
 Shipping address: 65 Meadow Lane, New Heights, 1234

Suppress Line Detail on Print

SuppressOnPrint	Item Type	Item Code	Item Description	Invoice Line Description	Warehouse Name	Batch/Serial No	Quantity	Unit Cost	Markup	Discount	Unit Selling Price	Base Ccy Price	Tax
	Sub Contracts	INST	Installation Fee	Installation Fee			1.000	1,250.000	0.000	0.000	1,300.000	1,300.000	
	Warranty	24MSW	24 Month Suppl...	24 Month Supplier War...			1.000	0.000	15.000	0.000	0.000	0.000	
	Internal Service	DEL	Delivery Fee	Delivery Fee			1.000	0.000	10.000	0.000	88.000	88.000	
	Parts	SP2020	SP2020 Sprint C...	SP2020 Sprint Colour ...	Main Warehouse	cheesy1	1.000	4,500.000	15.000	0.000	5,175.000	5,175.000	
	Select type...												

Comment

Sub Total: 6,554.20
 VAT: 983.13
 Grand Total: 7,537.33

Open Windows User: JulandaK 20/08/2021 Version: 2.5.0.4 Example Company v2.5.0.0

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

11 → Time Not Billed for Project Ref PRJ0000071 - BPO: Version 2.5.0.4 - Example Company v2.5.0.0

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

Save Invoice WO Invoice Call Invoice Project Back Flag Reviewed SLA Time View WO View Call View Project Save Layout Workspaces Save Filter Refresh

Processing Navigation Format Curr...

Drag a column header here to group by that column

WOCode	Description	WOStatus	Employee	Manager	Craft	CraftDesc	Date	Billable	RegularHours	Overtime
WO0000205	SP240-1 - M...	M	Judith Mudz...	Bianca Du T...	ADMIN	Administrati...	19/07/2017	No	4.00	
WO0000205	SP240-1 - M...	M	Judith Mudz...	Bianca Du T...	TECH	Technician	12/04/2017	No	3.00	
WO0000206	SP240-2 - N...	O	Bianca Du T...	Belinda Sha...	MGNT	Management	18/07/2018	No	0.13	
WO0000206	SP240-2 - N...	O	Judith Mudz...	Bianca Du T...	ADMIN	Administrati...	12/04/2017	No	5.00	
WO0000286	WS - Week...	M	Bianca Du T...	Belinda Sha...	MGNT	Management	29/05/2018	No	2.00	
WO0002198	Test project...	M	Bianca Du T...	Belinda Sha...	MGNT	Management	30/05/2018	No	0.05	

SLA

Drag a column header here to group by that column

fldt...	Code	Description	SLAType	Qu

Count: 6 14.18

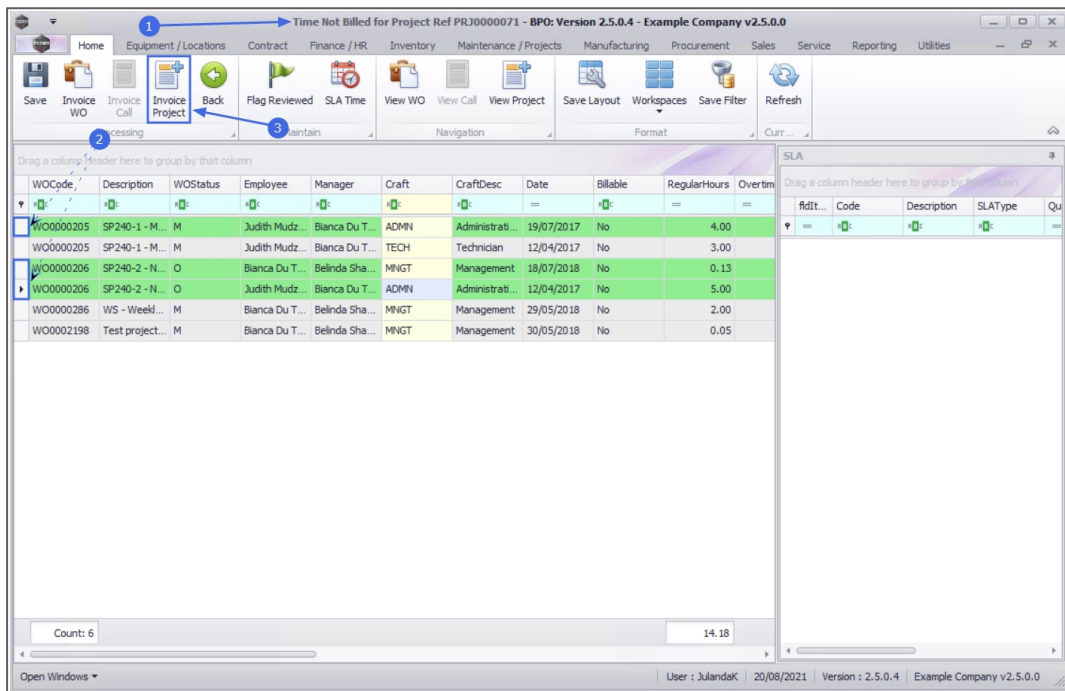
Open Windows User: JulandaK 20/08/2021 Version: 2.5.0.4 Example Company v2.5.0.0

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**.



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](#)

6. You will return to the **Time Not Billed for Project** screen.

7. Click on **Back** to return to the Project Listing screen.



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

WOCode	Description	WOStatus	Employee	Manager	Craft	CraftDesc	Date	Billable	RegularHours	Overtime
WO0000205	SP240-1 - M...	M	Judith Mudz...	Bianca Du T...	ADMN	Administrati...	19/07/2017	No	4.00	
WO0000205	SP240-1 - M...	M	Judith Mudz...	Bianca Du T...	TECH	Technician	12/04/2017	No	3.00	
WO0000206	SP240-2 - N...	O	Bianca Du T...	Belinda Sha...	MINGT	Management	18/07/2018	No	0.13	
WO0000206	SP240-2 - N...	O	Judith Mudz...	Bianca Du T...	ADMN	Administrati...	12/04/2017	No	5.00	
WO0000286	WS - Week...	M	Bianca Du T...	Belinda Sha...	MINGT	Management	29/05/2018	No	2.00	
WO0002198	Test project...	M	Bianca Du T...	Belinda Sha...	MINGT	Management	30/05/2018	No	0.05	

FLAG REVIEWED

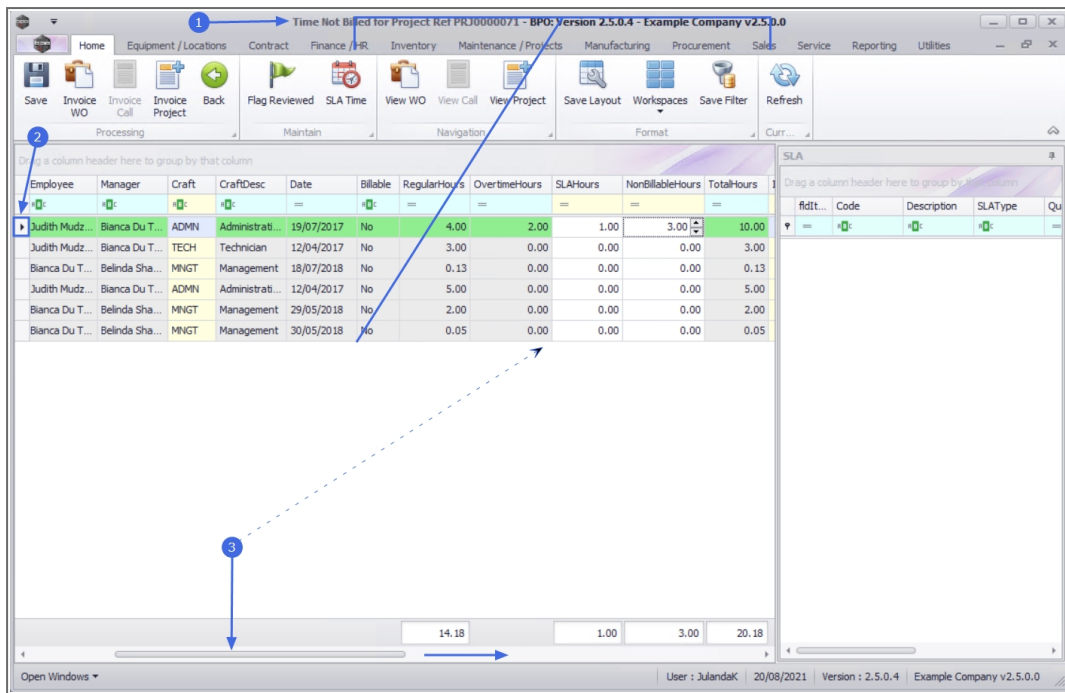
Note on the **Time Review flag**: Work orders created after the Time Review flag has been set to 'Yes' in the Configurator, will by default display as 'No' in the Billable column, yet all *Regular Hours* will be billed.

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)
 - **Overtime¹ Hours**: Overtime hours logged against the work order. (This field cannot be changed)
 - **SLA Hours²**: Time allocated to this field will be deducted from the service / support time from a customer's contractual agreement.
 - **Non Billable Hours³**: Time allocated to this field will not be billed.
 - **Total Hours**: = *Regular Hours + Overtime Hours + SLA Hours + Non Billable Hours*. (This field cannot be changed)

¹Overtime hours will not be adjusted when changes are made to the Regular, SLA and/or Non-billable hours.

²Time 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.

³Adding Non Billable hours will deduct from Regular hours



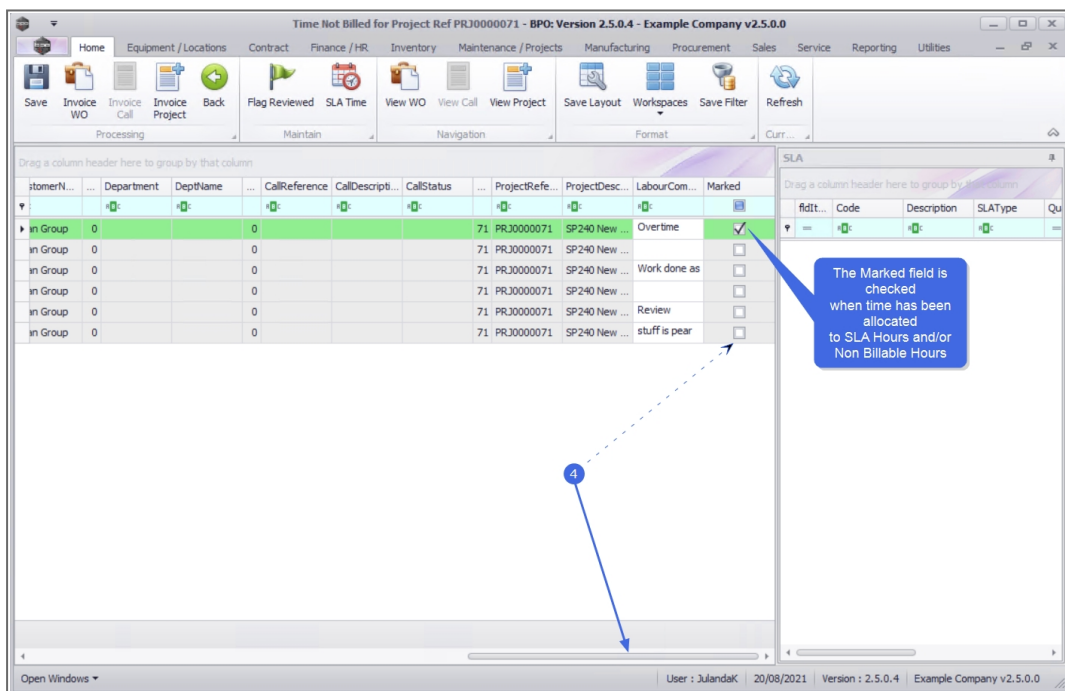
Time Not Billed for Project Ref PRJ0000071 - BPO: Version 2.5.0.4 - Example Company v2.5.0.0

Employee	Manager	Craft	CraftDesc	Date	Billable	RegularHours	OvertimeHours	SLAHours	NonBillableHours	TotalHours
Judith Mudz...	Blanca Du T...	ADMIN	Administrat...	19/07/2017	No	4.00	2.00	1.00	3.00	10.00
Judith Mudz...	Blanca Du T...	TECH	Technician	12/04/2017	No	3.00	0.00	0.00	0.00	3.00
Blanca Du T...	Belinda Sha...	MNGT	Management	18/07/2018	No	0.13	0.00	0.00	0.00	0.13
Judith Mudz...	Blanca Du T...	ADMIN	Administrat...	12/04/2017	No	5.00	0.00	0.00	0.00	5.00
Blanca Du T...	Belinda Sha...	MNGT	Management	29/05/2018	No	2.00	0.00	0.00	0.00	2.00
Blanca Du T...	Belinda Sha...	MNGT	Management	30/05/2018	No	0.05	0.00	0.00	0.00	0.05

14.18 1.00 3.00 20.18

User : JulandaK | 20/08/2021 | Version : 2.5.0.4 | Example Company v2.5.0.0

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**.



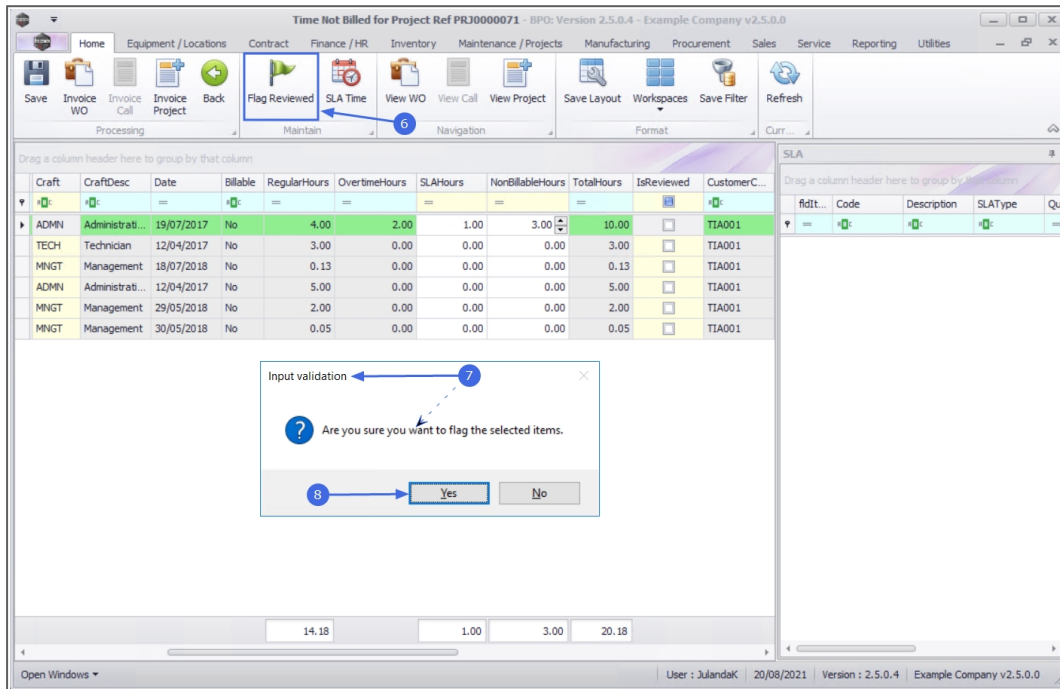
Time Not Billed for Project Ref PRJ0000071 - BPO: Version 2.5.0.4 - Example Company v2.5.0.0

CustomerN...	Department	DeptName	CallReference	CallDescripti...	CallStatus	ProjectRef...	ProjectDesc...	LabourCom...	Marked
in Group	0	0	0	0	0	71 PRJ0000071	SP240 New ...	Overtime	<input checked="" type="checkbox"/>
in Group	0	0	0	0	0	71 PRJ0000071	SP240 New ...	Work done as	<input type="checkbox"/>
in Group	0	0	0	0	0	71 PRJ0000071	SP240 New ...	Review	<input type="checkbox"/>
in Group	0	0	0	0	0	71 PRJ0000071	SP240 New ...	stuff is pear	<input type="checkbox"/>

The Marked field is checked when time has been allocated to SLA Hours and/or Non Billable Hours

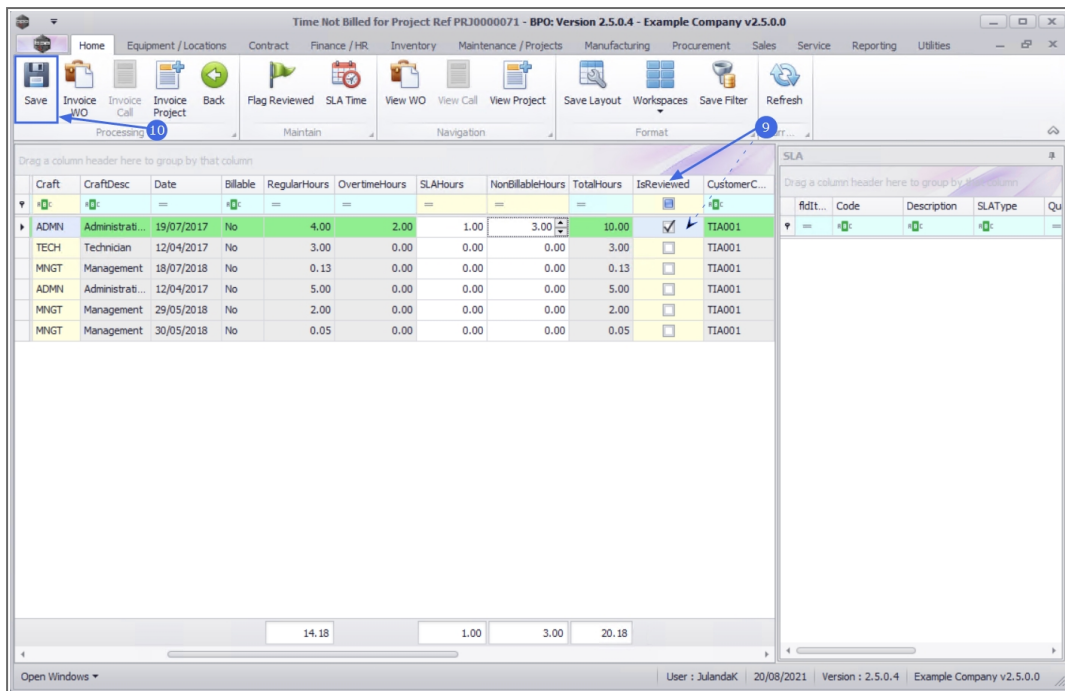
User : JulandaK | 20/08/2021 | Version : 2.5.0.4 | Example Company v2.5.0.0

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**.



Craft	CraftDesc	Date	Billable	RegularHours	OvertimeHours	SLAHours	NonBillableHours	TotalHours	IsReviewed	CustomerC...
ADMN	Administrati...	19/07/2017	No	4.00	2.00	1.00	3.00	10.00	<input type="checkbox"/>	TIA001
TECH	Technician	12/04/2017	No	3.00	0.00	0.00	0.00	3.00	<input type="checkbox"/>	TIA001
MNGT	Management	18/07/2018	No	0.13	0.00	0.00	0.00	0.13	<input type="checkbox"/>	TIA001
ADMN	Administrati...	12/04/2017	No	5.00	0.00	0.00	0.00	5.00	<input type="checkbox"/>	TIA001
MNGT	Management	29/05/2018	No	2.00	0.00	0.00	0.00	2.00	<input type="checkbox"/>	TIA001
MNGT	Management	30/05/2018	No	0.05	0.00	0.00	0.00	0.05	<input type="checkbox"/>	TIA001

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

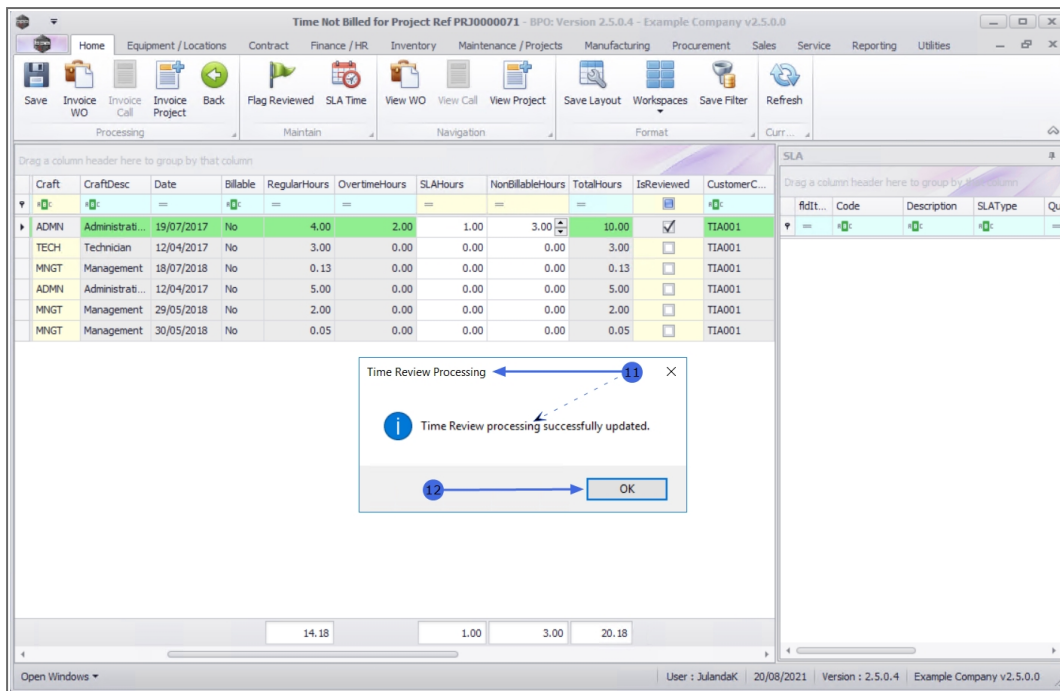


Craft	CraftDesc	Date	Billable	RegularHours	OvertimeHours	SLAHours	NonBillableHours	TotalHours	IsReviewed	CustomerC...
ADMIN	Administrati...	19/07/2017	No	4.00	2.00	1.00	3.00	10.00	<input checked="" type="checkbox"/>	TIA001
TECH	Technician	12/04/2017	No	3.00	0.00	0.00	0.00	3.00	<input type="checkbox"/>	TIA001
MNGT	Management	18/07/2018	No	0.13	0.00	0.00	0.00	0.13	<input type="checkbox"/>	TIA001
ADMIN	Administrati...	12/04/2017	No	5.00	0.00	0.00	0.00	5.00	<input type="checkbox"/>	TIA001
MNGT	Management	29/05/2018	No	2.00	0.00	0.00	0.00	2.00	<input type="checkbox"/>	TIA001
MNGT	Management	30/05/2018	No	0.05	0.00	0.00	0.00	0.05	<input type="checkbox"/>	TIA001

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 removed from this screen, the Work Order has to be *closed*.



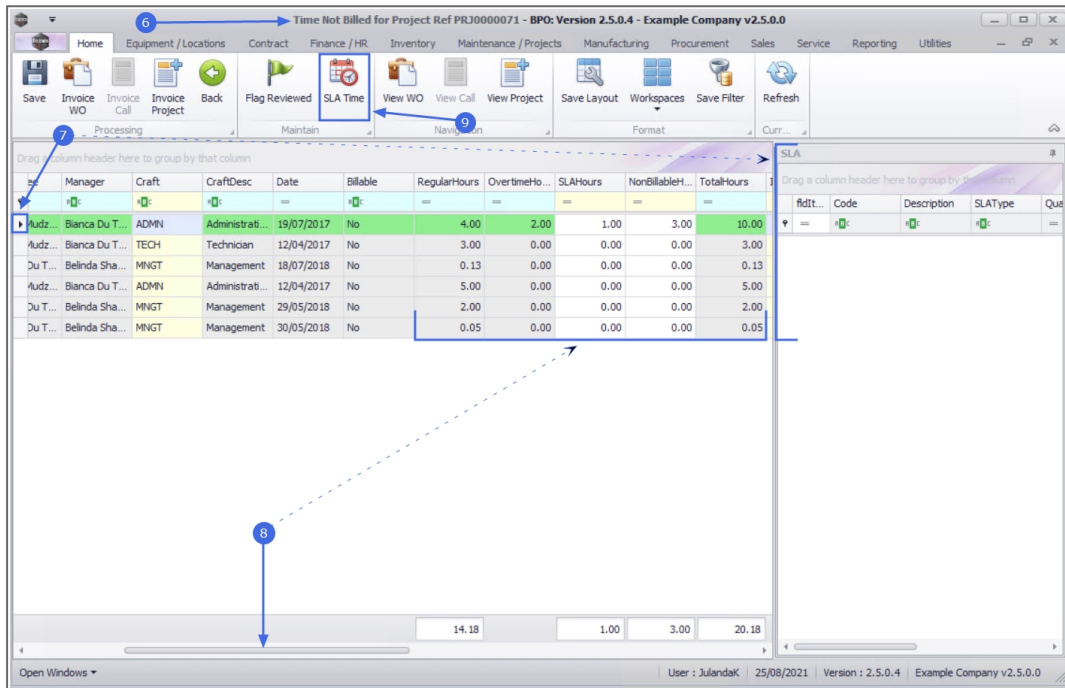
SLA TIME

SLA¹ 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. Failing which, the client can receive compensation of a pre-agreed type (usually also set up in the SLA).

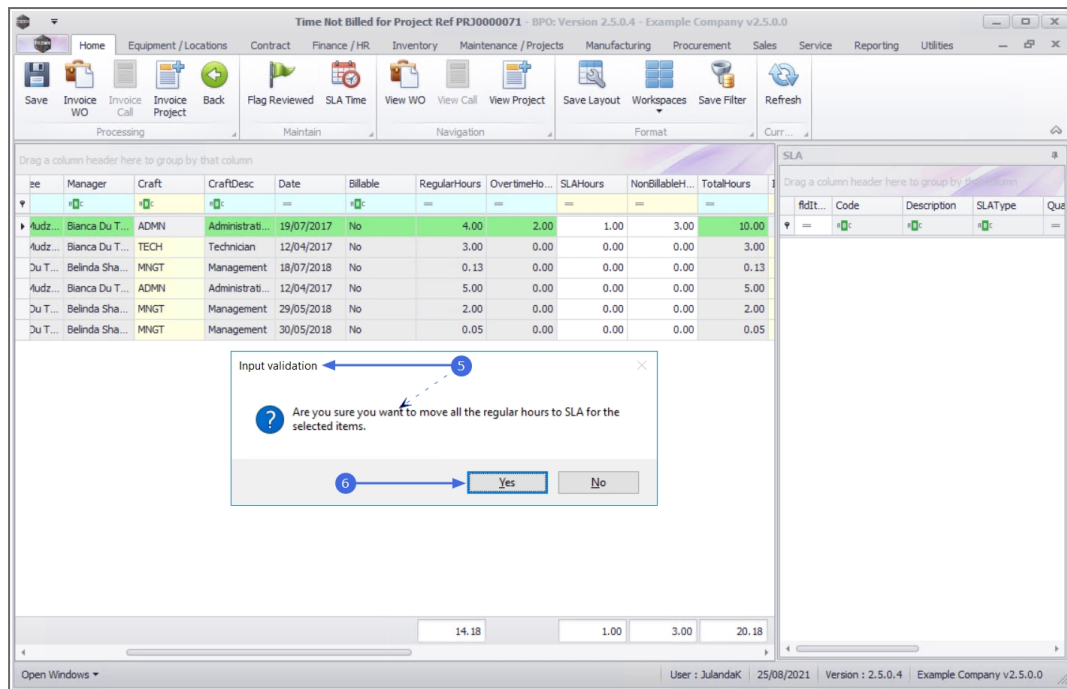
1. From the **Time Not Billed for Project Ref [project ref number]** screen will be displayed.

¹This 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).

2. Click on the **row(s)** to select the Work Order(s) you would like to adjust Regular Hours booked, to SLA Time.
 - Any contract inclusions 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.



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**.



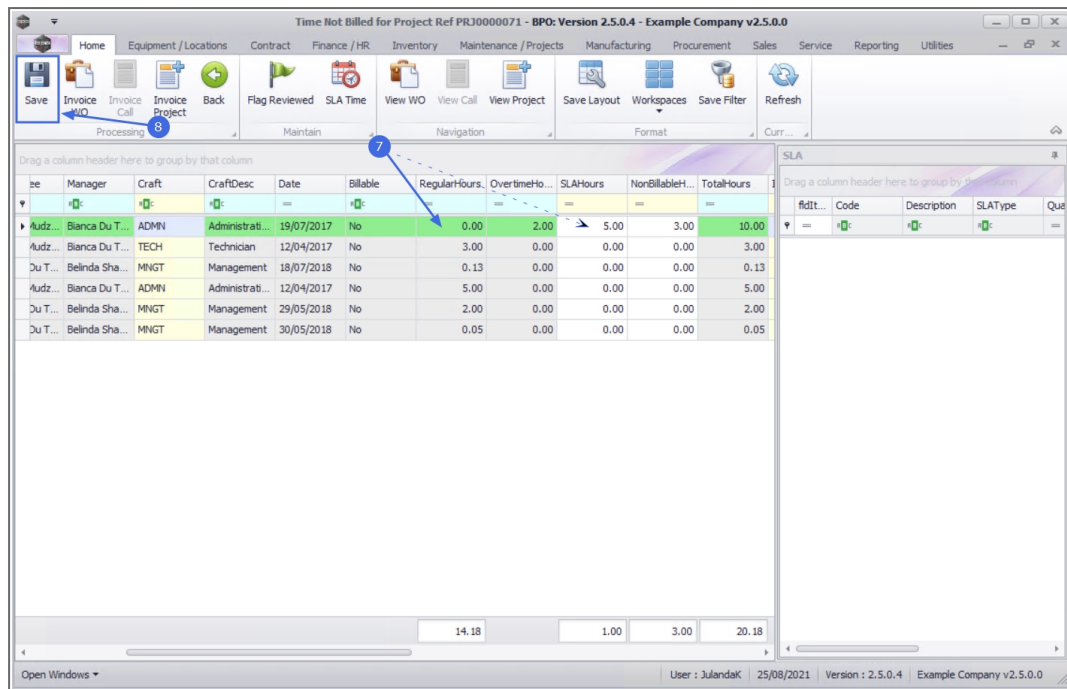
Manager	Craft	CraftDesc	Date	Billable	RegularHours	OvertimeHours	SLAHours	NonBillableHours	TotalHours
Audz... Bianca Du T...	ADMIN	Administrati...	19/07/2017	No	4.00	2.00	1.00	3.00	10.00
Audz... Bianca Du T...	TECH	Technician	12/04/2017	No	3.00	0.00	0.00	0.00	3.00
Du T... Belinda Sha...	MNGT	Management	18/07/2018	No	0.13	0.00	0.00	0.00	0.13
Audz... Bianca Du T...	ADMIN	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	30/05/2018	No	0.05	0.00	0.00	0.00	0.05

- 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.

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

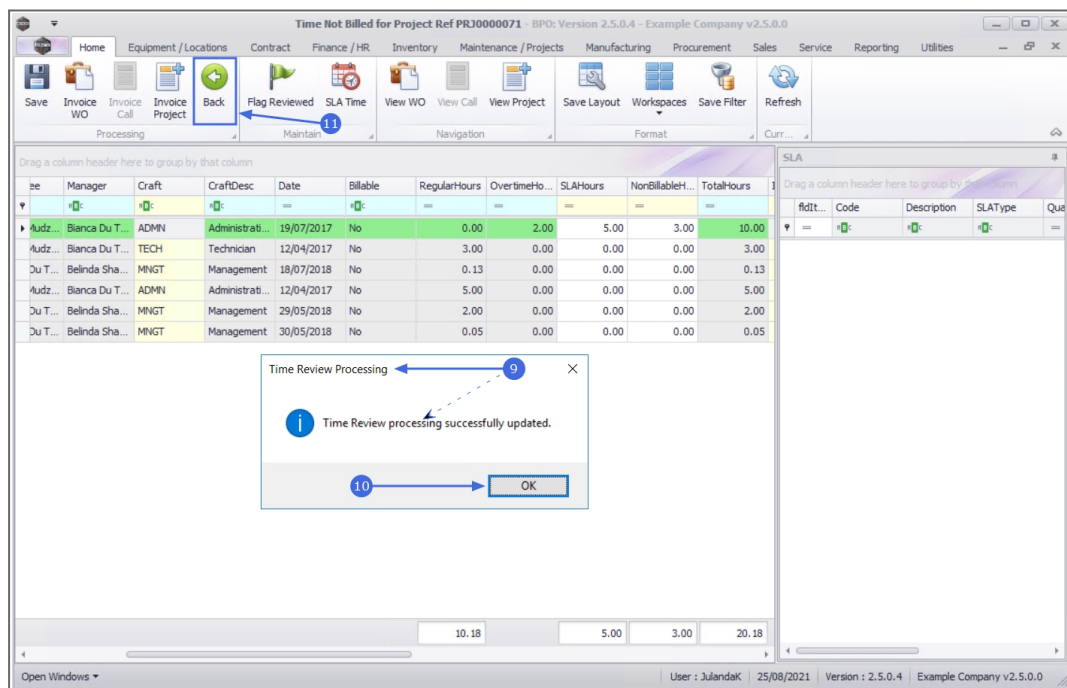


9. When you receive the **Time Review Processing** message to confirm;

- **Time Review processing successfully updated.**

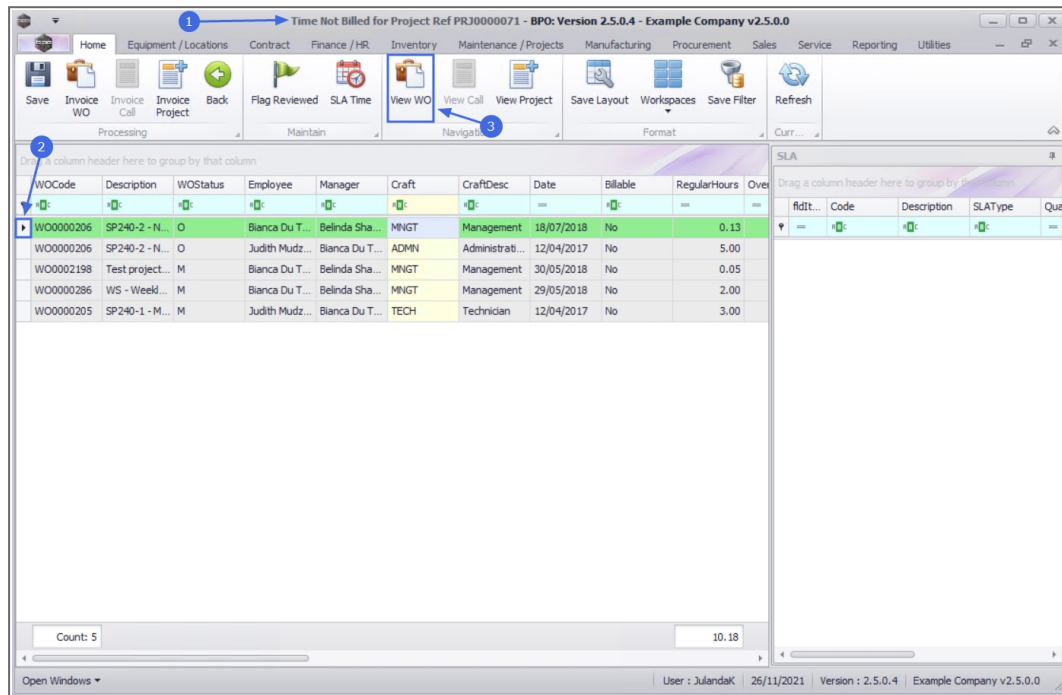
10. Click on **OK** to confirm.

11. Click on **Back** to return to the Project Listing screen.



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**.



4. " The Work Order Maintenance screen will be displayed. " on page 2
5. 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**.

4 → Maintain WO - Ref WO0000206 - BPO: Version 2.5.0.4 - Example Company v2.5.0.0

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

Save Back Save Layout Print

6 mat Print

Links
Enter text to search...

Functions

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

Description: SP240-2 - Network setup - test ed work order from project

Requestor: Belinda Sharman

WO Type: IT Requirement

Priority: 2

Request Date: 07/08/2014 16:16:24

Status: Open

Billable: ☐

Capitalise: ☐

Work Order Item:

Functional Location: Equipment

Item: Main

Comment: Generated by Project Methodology - SP240-2

Links

RefType	ReferenceType	ReferenceNo
CALL	Call Reference	
PMNG	Project Reference	PRJ0000071

Schedule:

Assigned To: Bianca Du Toit

Assigned By: Belinda Sharman

Scheduled Start: 07/08/2014 16:16:24

Scheduled End: 08/08/2014 16:16:24

Actual Start: 07/09/2014 12:00:00

Actual End: 07/09/2014 12:00:00

Delay Comments: Currently on Schedule

Rectification Code:

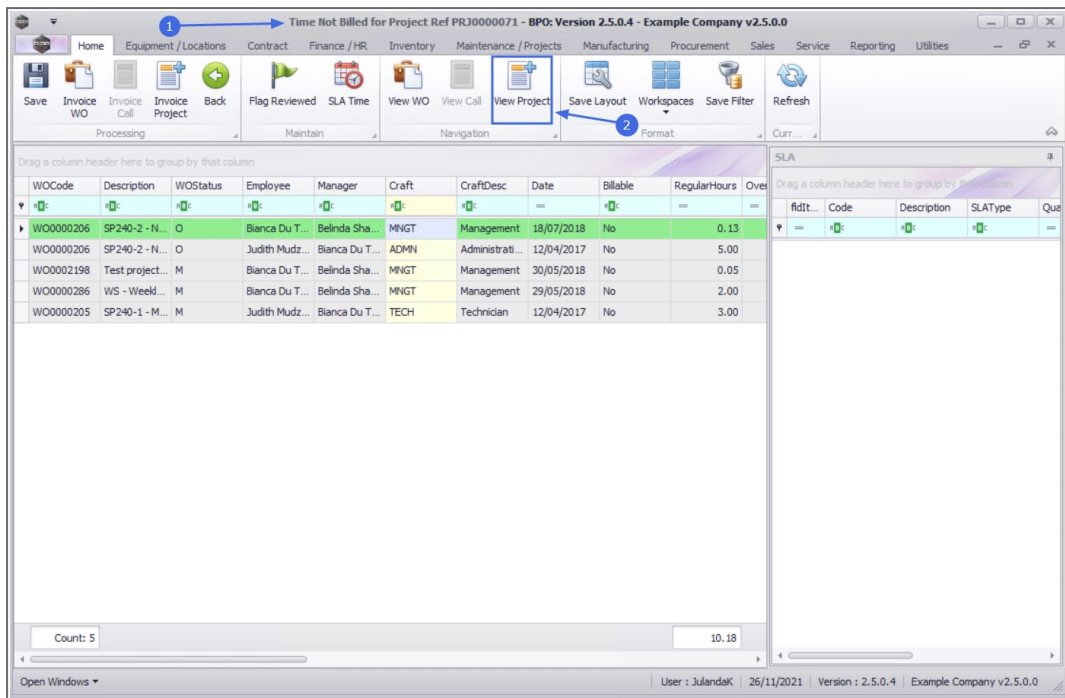
Rectification Comments:

Completion Date: 07/09/2014 00:00:00

User: JulandaK 26/11/2021 Version: 2.5.0.4 Example 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**.



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**.

3 Edit project: PRJ0000071 - BPO: Version 2.5.0.4 - Example Company v2.5.0.0

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

Save Back Save Layout Workspaces

Process 4 Format

Links
Enter text to search...

Functions

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

Identification :

Description: SP240 New Deal *

Project Reference: PRJ0000071

Project Type: Unique *

Parent Project Details :

Description: test

Project Reference: PRJ0000070

Customer: Titan Group

Schedule :

Status: Open

Start Date: 29/05/2017

End Date: 05/06/2017

Project Manager: Bianca Du Toit *

Notifiable: ☐

Customer Info

Customer Code: TIA001

Tel No.: 031 852 9632

Account Code:

Customer Status: Active ☒ Is Debtor ☒

Contact No.:

Vat No.: 123258741369

Hold Reason:

Notes

NoteDate

Note

Open Windows

User : JulandaK 26/11/2021 Version : 2.5.0.4 Example Company v2.5.0.0

MNU.058.030