

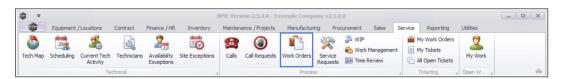
SERVICE

WORK ORDERS - TIME REVIEW

Time review enables managers to allocate *regular* time logged by employees as *SLA* 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 require **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.

The <u>Time Review flag</u> must be set to **Yes** in **Configurator**.

Ribbon Access: Service > Work Orders



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



Work Orders - Time Review

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	WO0006259	REP	CN0005303	Post Contract machine repair	No	Drum replacement req	16/02/2022	2 Yes	
	· WO0006258	SERV	CN0005303	Drum replacement required	No	Drum replacement req	31/01/2022	2 No	
Work in Progress	⊞ WO0006257	NDS	CN0005274	PROJ406OR002	No	PROJ406OR002	19/01/2022	2 No	
		IMP	CN0005302	New machine implementation. Installation	. No	New machine implemen	24/01/2022	1 No	
		PR	CN0005301	Replace part - current faulty	No	Replace part - current	18/01/2022	3 No	
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		ITS	CN0005299	Paper keeps on jamming in machine	No	Paper keeps on jammin	18/01/2022	3 No	
		REP	CN0005298	Paper not feeding through rollers	No	Paper not feeding thro	14/12/2021	3 No	
Time Review	· WO0006249	SM		BathBinMaint - Bathroom Bin Maintenance	No		23/11/2021	2 No	PRJ00004
		SM		WS - Weekly Service	No		23/11/2021	2 No	PR.300004
	· WO0006247	SM		BathBinMaint - Bathroom Bin Maintenance	No		23/11/2021	2 No	PR.300004
	· WO0006246	SM		BathBinMaint - Bathroom Bin Maintenance	No		23/11/2021	2 No	PR300004
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-	· WO0006243	SM		WS - Weekly Service	No		16/11/2021	2 No	PR300004
rocessing	· WO0006242	SERV		1MMS - 1 Month Machine Service	No		16/11/2021	2 No	PR300004
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Quotes	· WO0006240	SM		WS - Weekly Service	No		16/11/2021	2 No	PR300004
	··· WO0006239	PR		Rollers need replacing	No		11/11/2021	3 No	PR300004
	· WO0006238	PR		Test PQ Source Type Work Order	No		14/11/2021	5 No	

INVOICE WORK ORDER

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

- 1. From the *Time Note Billed for Work Order code [work order coder]* screen,
- 2. Click on the *row* of the work order you wish to invoice.
- 3. Click on *Invoice WO*.

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



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WO0006260	Loan unit re	0	Karlien Jessi	Karlien Jessi	ADMN	Administrati	30/03/2022	No	1.00			2	12-098765	SP19-12 Bla	PART	
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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 Work Order



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

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



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INVOICE CALL

- 1. From the *Time Note Billed for Work Order code [work order coder]*screen,
- 2. Click on the *row* of the work order you wish to invoice.
- 3. Click on Invoice Call.

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



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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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		Expenses	TOLL	Marian	hill Ridge,	Marianhill Ridg	e, Toll to				1.000	27.000	15.000	0.000	31.050	31.0	50
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- 6. You will return to the *Time Not Billed for Work Order code* screen.
- 7. Click on *Back* to return to the Work Order Listing screen.

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

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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 Work Order code [work order code]* 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 Hours:**² Time allocated to this field will be deducted from the service / support time from a customer's contractual agreement.
 - Non Billable Hours:³ 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)

³Adding Non Billable hours will deduct from Regular hours

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.



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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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- 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*.



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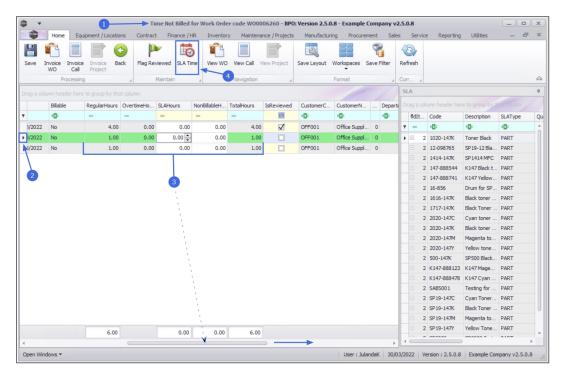
SLA¹ is the <u>Service Level Agreement</u> that you have signed with your customer. It is a contract of performance that you have agreed to. For example, if your customer calls with a requirement for a part or service request and your agreed response time to this customer (SLA) is 5 hours then you are 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 Work Order code [work order 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).



- 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.



- 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.



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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.



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- 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 Work Order Listing screen.



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VIEW WORK ORDER

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



	Equipmor	1 nt / Locations		lot Billed for V Finance / HR		ode W0000626 Maintenance / I		ion 2.5.0.8 - E	Procurement	Sales		service Reporting	Utilities	_ 6	
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g a column he											SLA				
WOCode	Description	WOStatus	Employee	Manager	Craft	CraftDesc	Date	Billable	RegularHours	Over					
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WO0006260	Loan unit re	0	Jeff Rivers	Jeff Rivers	DRV	Driver	28/03/2022	No	4.00		٩	- #80	REC	R D C	
WO0006260	Loan unit re	0	John Twain	Belinda Sha	ADMN	Administrati	29/03/2022	No	0.00		• 8	2 1020-147K	Toner Black	PART	
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												2 16-856	Drum for SP	PART	
												2 1616-147K	Black toner	PART	
												2 1717-147K	Black Toner	PART	
												2 2020-147C	Cyan toner	PART	
												2 2020-147K	Black toner	PART	
												2 2020-147M	Magenta to	PART	
												2 2020-147Y	Yellow tone	PART	
												2 500-147K	SP500 Black	PART	
												2 K147-888123	K147 Mage	PART	
												2 K147-888478	K147 Cyan	PART	
												2 SABS001	Testing for	PART	
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												2 SP19-147K	Black Toner	PART	
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	1								5.00			2 SP19-147Y	Yellow Tone	PART	
Count: 3															

- 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*.



· · · · · · · · · · · · · · · · · · ·	Maintain WO - Ref W00006260	- BPO: Version 2.5.0.8 - Exam	ple Company v2.5.	0.8			
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Third Party Services Status	O - Open	Scheduled Start 15	j/03/2022 🔻	00:00:00 🗘 *			stome
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Capitalise		Actual Start 14	H/04/2022 -	12:00:00 🛟			•
Parts Work Order Item :		Actual End 14	+/04/2022 -	12:00:00			Equipment Info Additional Data Customer Info Required Crafts
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Open Windows 🔻			User : JulandaK	30/03/2022	Version : 2.5.0.8	Example Company v2.5.	.0.8

VIEW CALL

- 1. From the *Time Not Billed for Work Order code [work order number]* screen,
- 2. Click on View Call.



	-	_]	Time N	lot Billed for V	Vork Order o	ode W0000626	0 - BPO: Vers	sion 2.5.0.8 - I	Example Comp	any v2.	5.0.	.8				
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	REC	Description	NUCStatus	Employee	Manager REC	erant .	REC	Date	REC	=	=					/	
4	WO0006260	-		Jeff Rivers	Jeff Rivers	DRV	-					ę		Code	Description	SLAType	1
	WO0006260	Loan unit re		John Twain	Belinda Sha		Driver Administrati	28/03/2022	No	4.00		-		-	Toner Black	-	
		Loan unit re			Karlien Jessi			29/03/2022		1.00		۲		1020-147K 12-098765	SP19-12 Bla	PART	
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													2	K147-888478	K147 Cyan	PART	
													- 2	SABS001	Testing for	PART	
													2	SP19-147C	Cyan Toner	PART	
													- 2	SP19-147K	Black Toner	PART	
													2	SP19-147M	Magenta to	PART	
ſ	Count: 3									5.00			2	SP19-147Y	Yellow Tone	PART	
										5.00			-			DIDT	
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3. "The Call maintenance screen will be displayed." on page 4

4. Make the required changes to the call information and click on *Save*.

-	•							Company v						
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	Address	Forest Hills	-		Location]				
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work in Progress		Repair			Order Refer									
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Notes	Description	Loan unit required being repaired	while main unit is	*										
Anderson	Call Date Time	15/03/2022	▼ 10:30:03	\$										
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