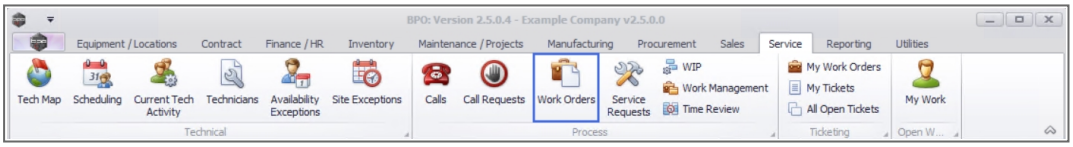
SERVICE

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 Time Review flag 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.

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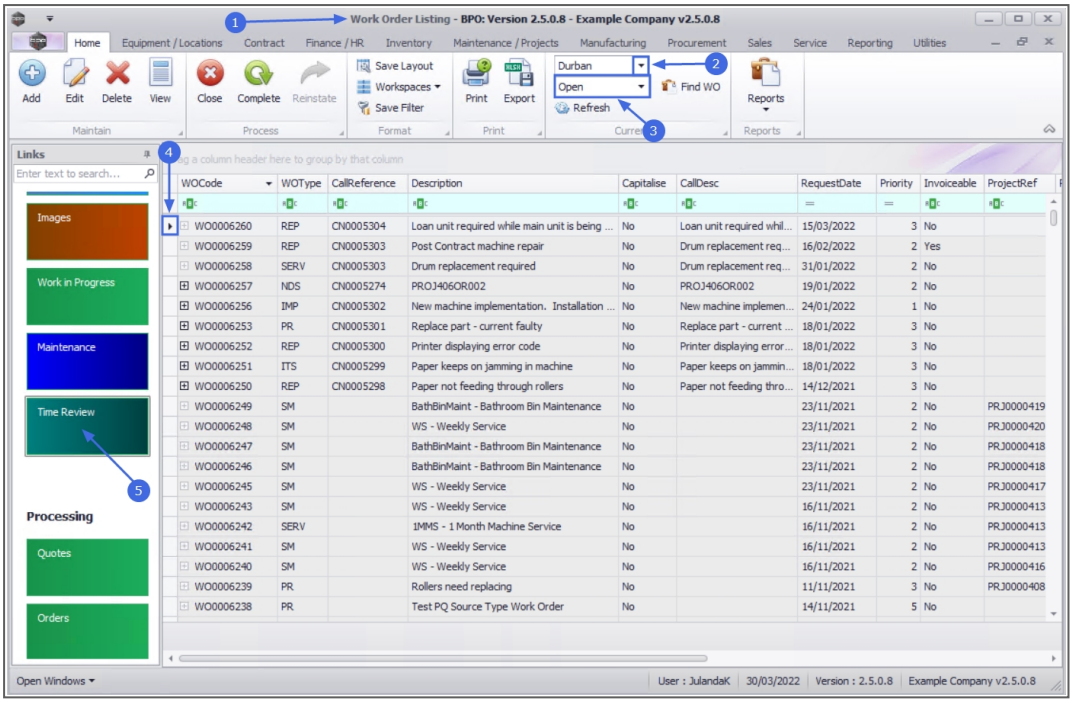

INVOICE WORK ORDER

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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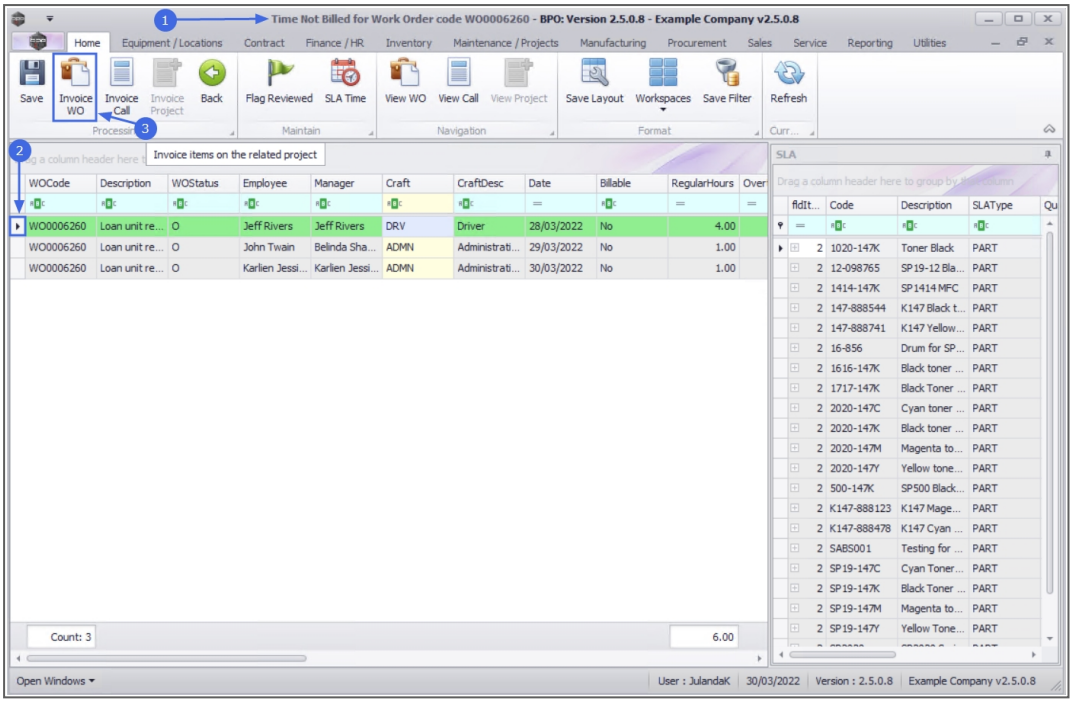

4. The ***Add New Customer Invoice*** screen will be displayed.
5. Complete the Customer Invoice then click on ***Save***.

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

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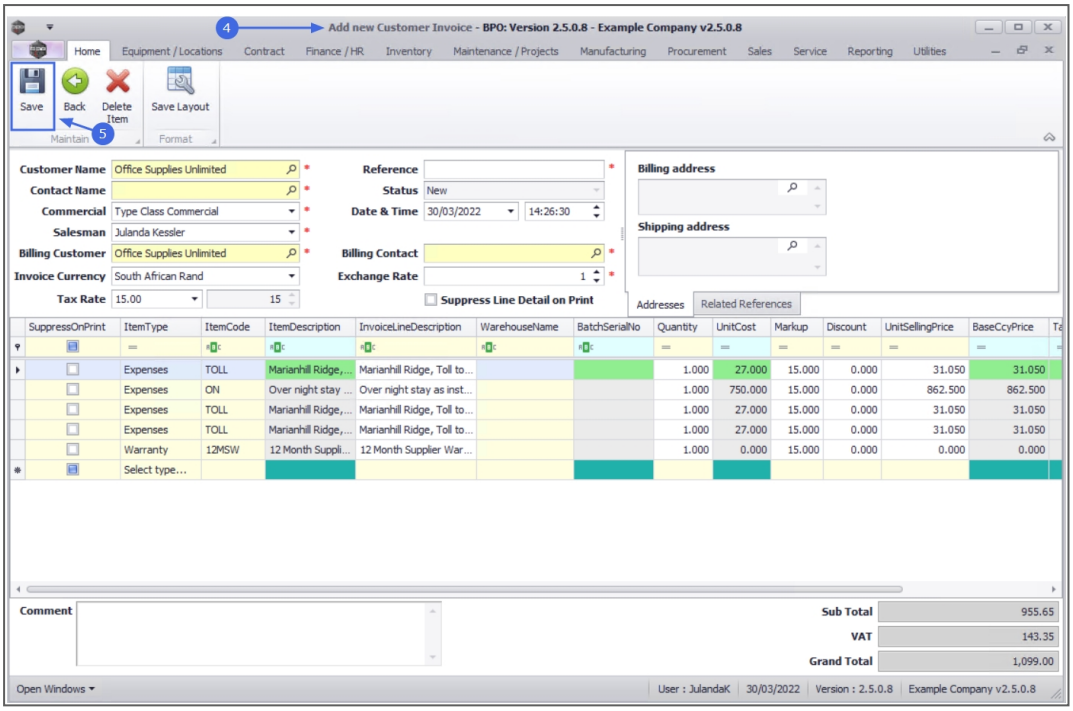

6. You will return to the ***Time Not Billed for Work Order*** screen.
7. Click on ***Back*** to return to the ***Work Order Listing*** screen.

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

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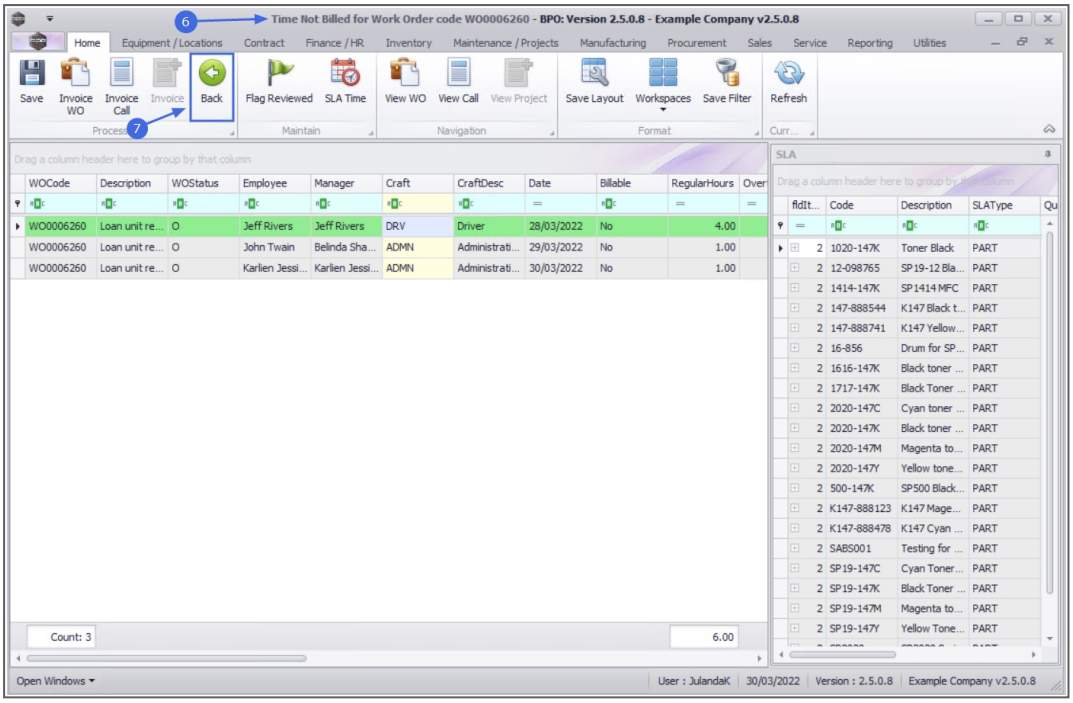

INVOICE CALL

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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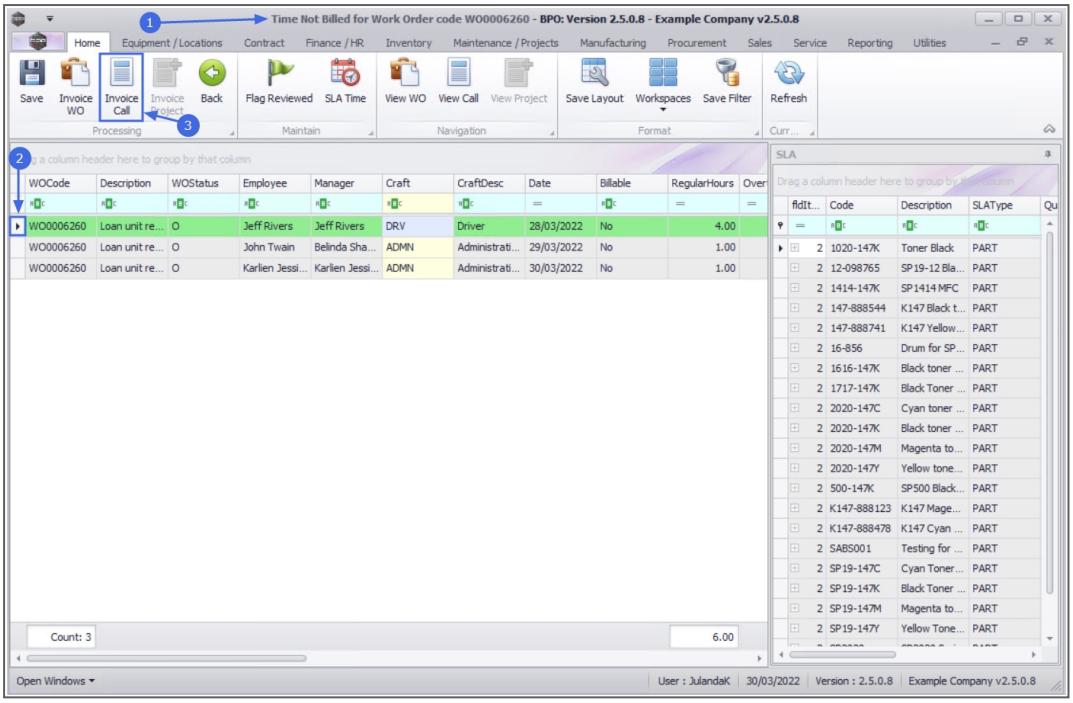
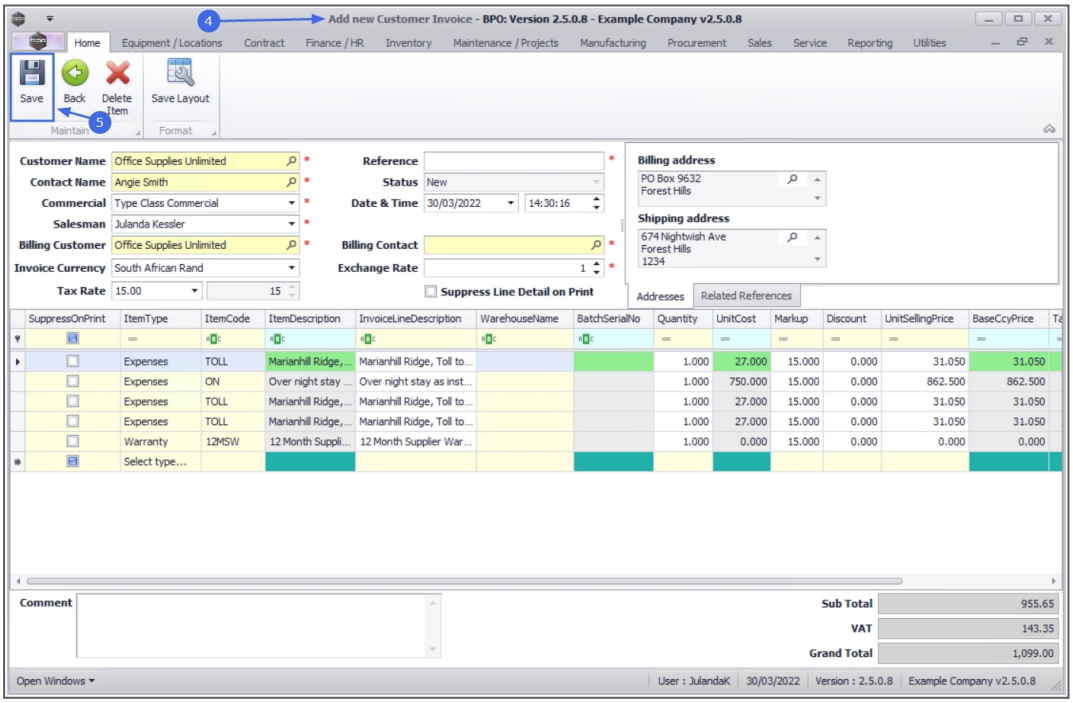


4. The ***Add New Customer Invoice*** screen will be displayed.
5. Complete the Customer Invoice then click on ***Save***.

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



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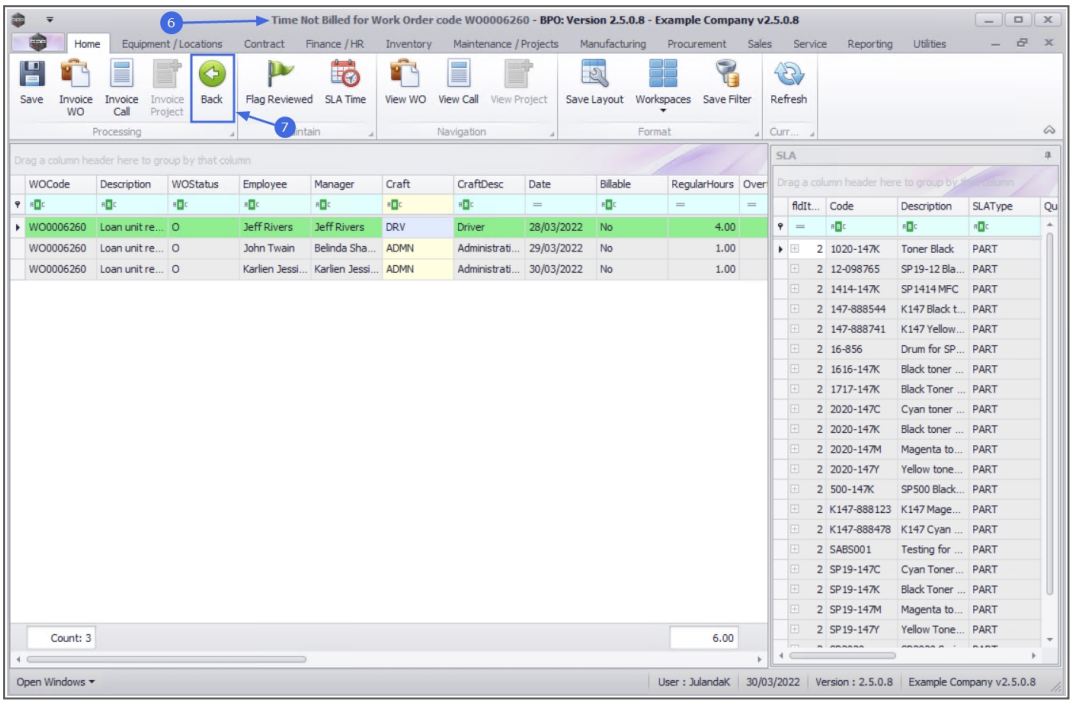
6. You will return to the ***Time Not Billed for Work Order code*** screen.
7. Click on ***Back*** to return to the Work Order Listing screen.

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



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 Work Order code*** *[work order code]* screen,
2. Click on the ***row*** of the Work Order you wish to review the time for.

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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*[1] *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 not be billed.
    - **Total Hours:** = ***Regular Hours*** + ***Overtime Hours*** + ***SLA Hours+ Non Billable Hours***. *(This field cannot be changed)*

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[1]Overtime hours will not be adjusted when changes are made to the Regular, SLA and/or Non-billable hours.
[2]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.
[3]Adding Non Billable hours will deduct from Regular hours

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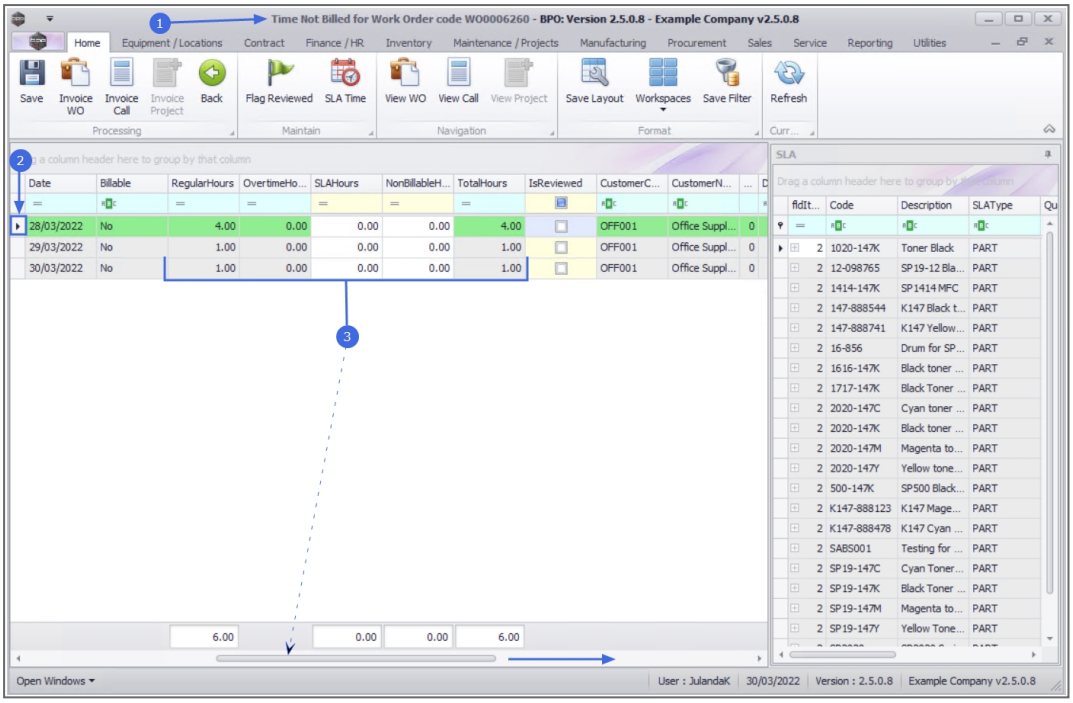
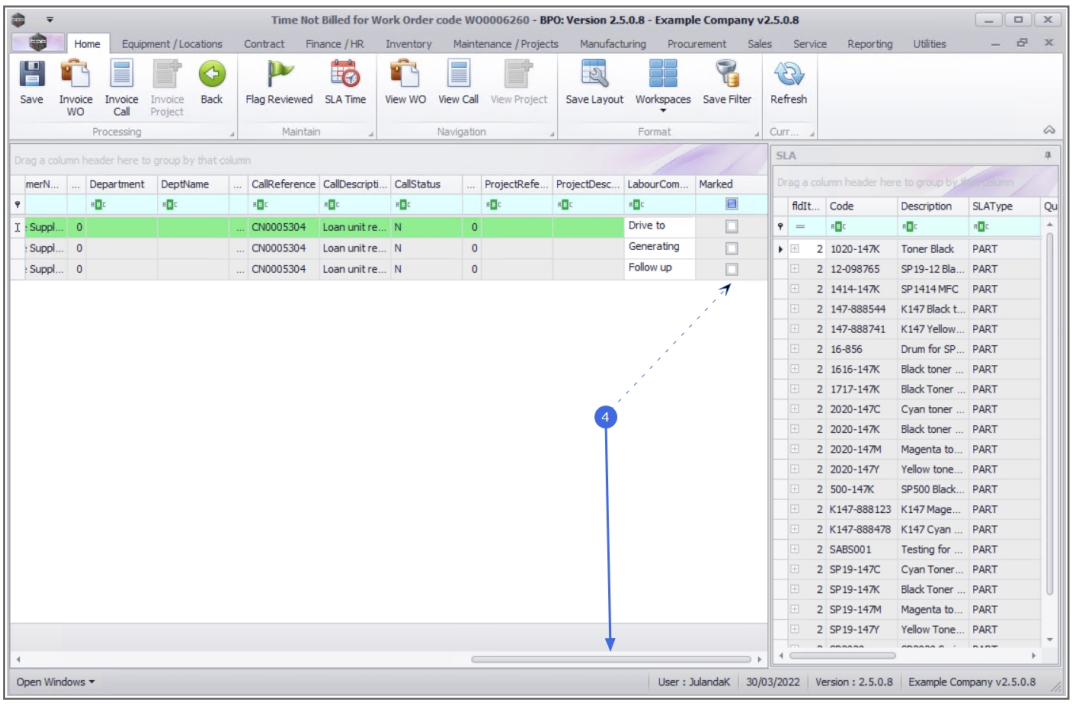


4. *Scroll* right until you can view the *Marked* column.
5. The Marked field for the work order will be checked when time is allocated to *SLA and/or Non Billable Hours*.



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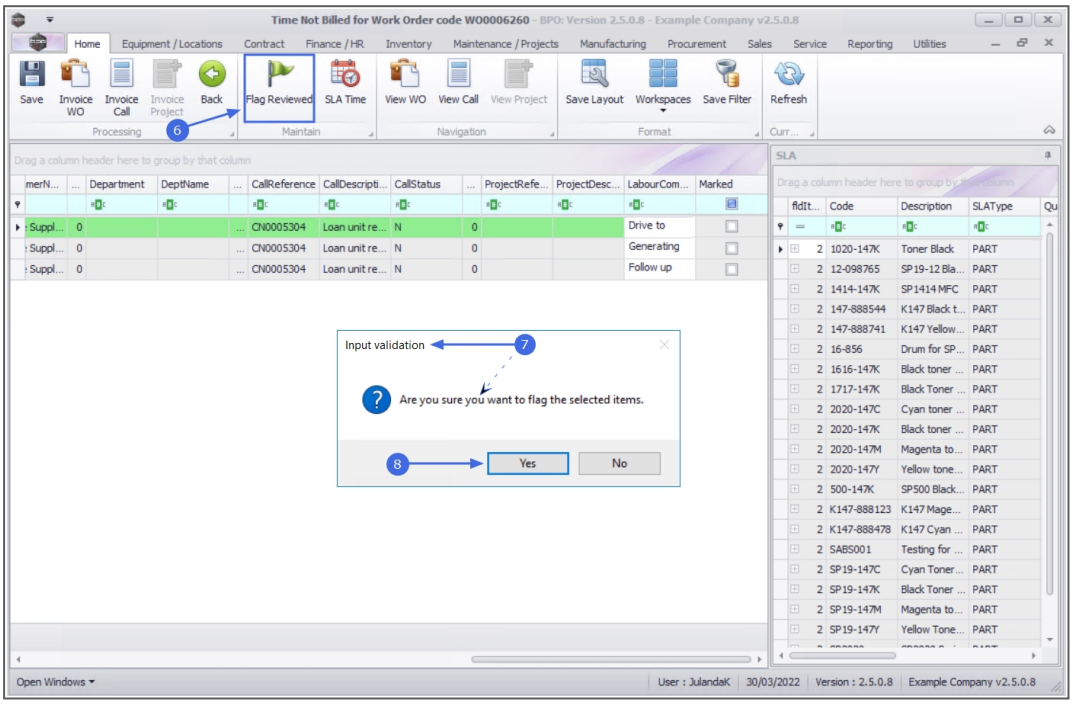
6. Click on ***Flag Reviewed***, when you have completed reviewing the time for the work order.
7. When you receive the ***Input Validation*** message to confirm;
    - ***Are you sure you want to flag the following items.***
8. Click on *Yes*.



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

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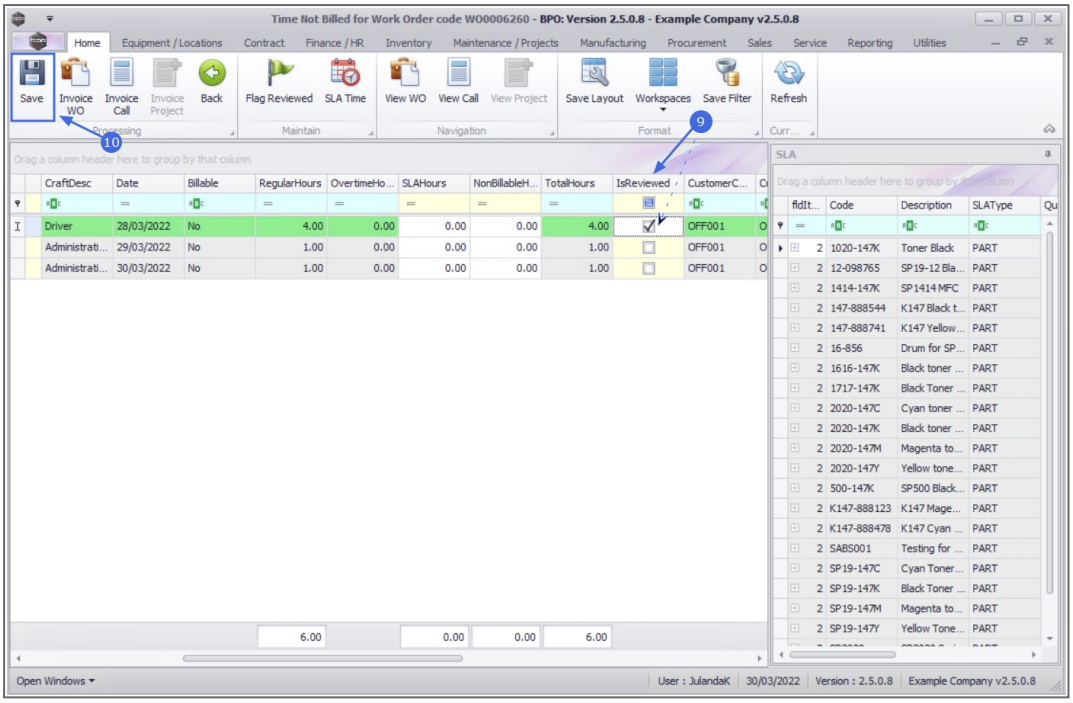

11. When you receive the ***Time Review Processing*** message to confirm;
    - ***Time Review processing successfully updated.***
12. Click on ***OK***.

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

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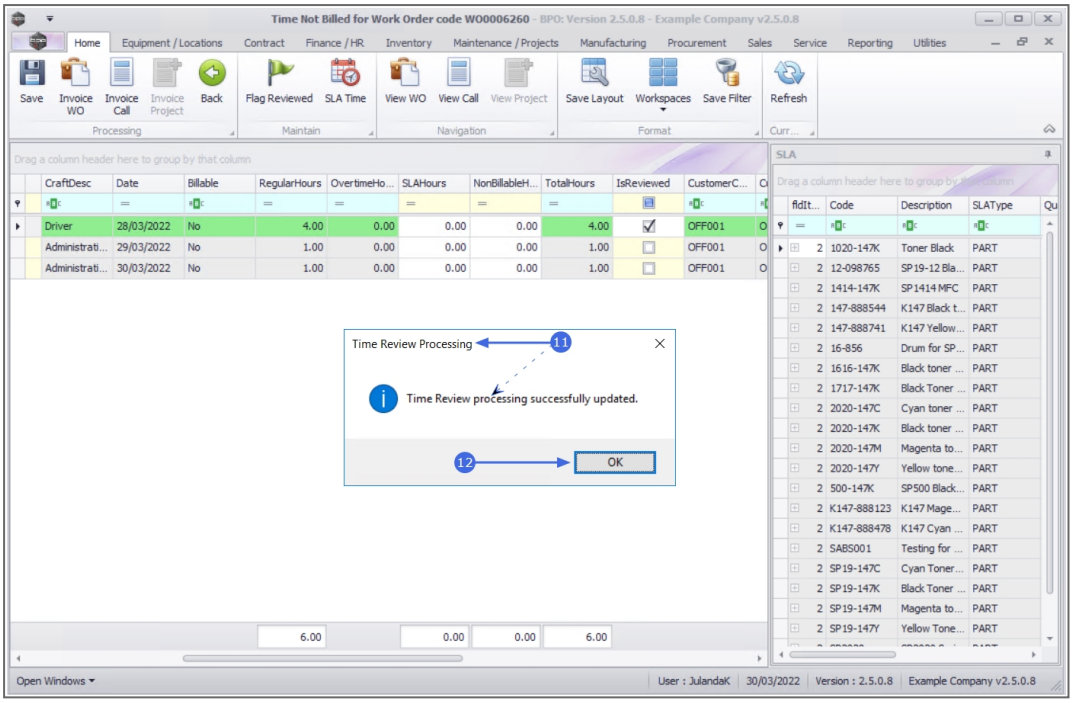

SLA TIME

SLA[1] 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 Work Order code*** *[work order number]* screen will be displayed.

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[1]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).

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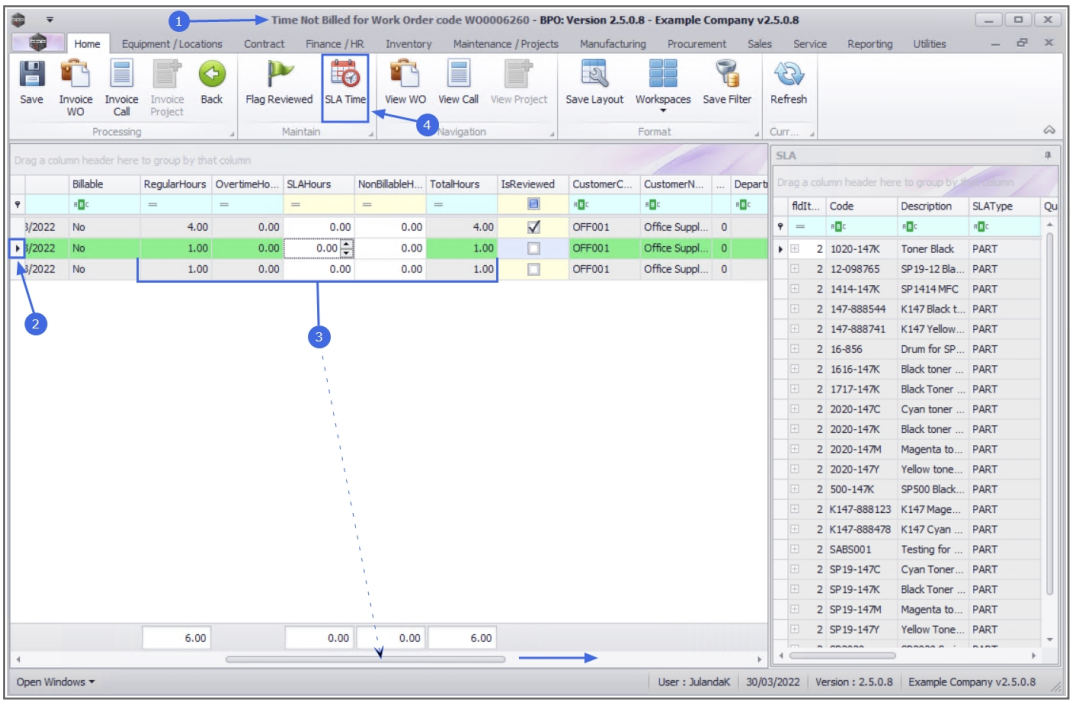
2. Click on the ***row(s)*** to select the Work Order(s) you would like to adjust Regular Hours booked, to SLA Time.
    - Any contract inclusions linked to an item on the selected work order will be displayed in the SLA section.
3. Use the ***scroll bar*** to scroll until you are able to see the hours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

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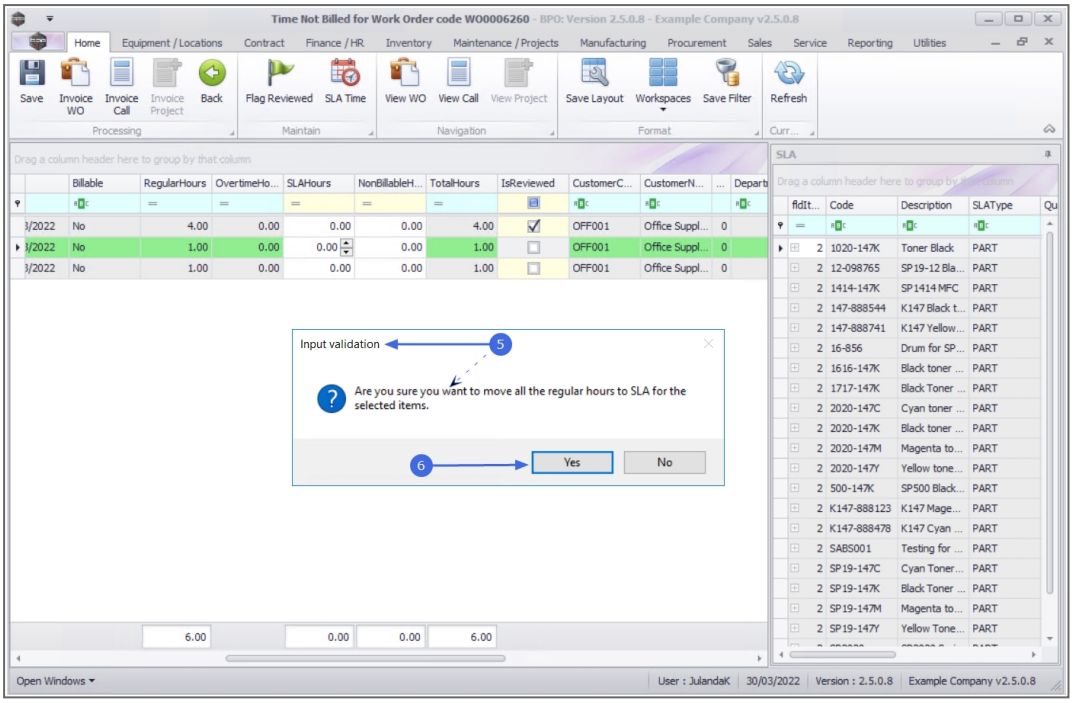

7. The selected ***work order(s)*** have been updated and the Regular Hours have been moved or added to the SLA Hours.

> 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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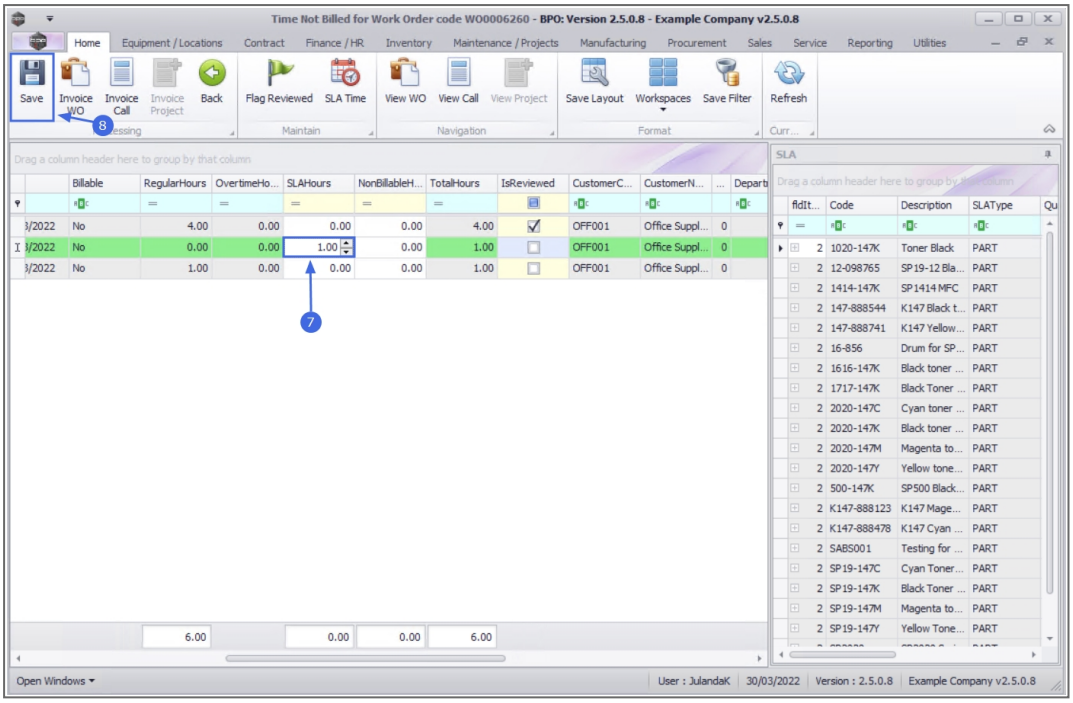

9. When you receive the ***Time Review Processing*** message to confirm;
    - ***Time Review processing successfully updated.***
10. Click on ***OK*** to confirm.
11. Click on ***Back*** to return to the Work Order Listing screen.

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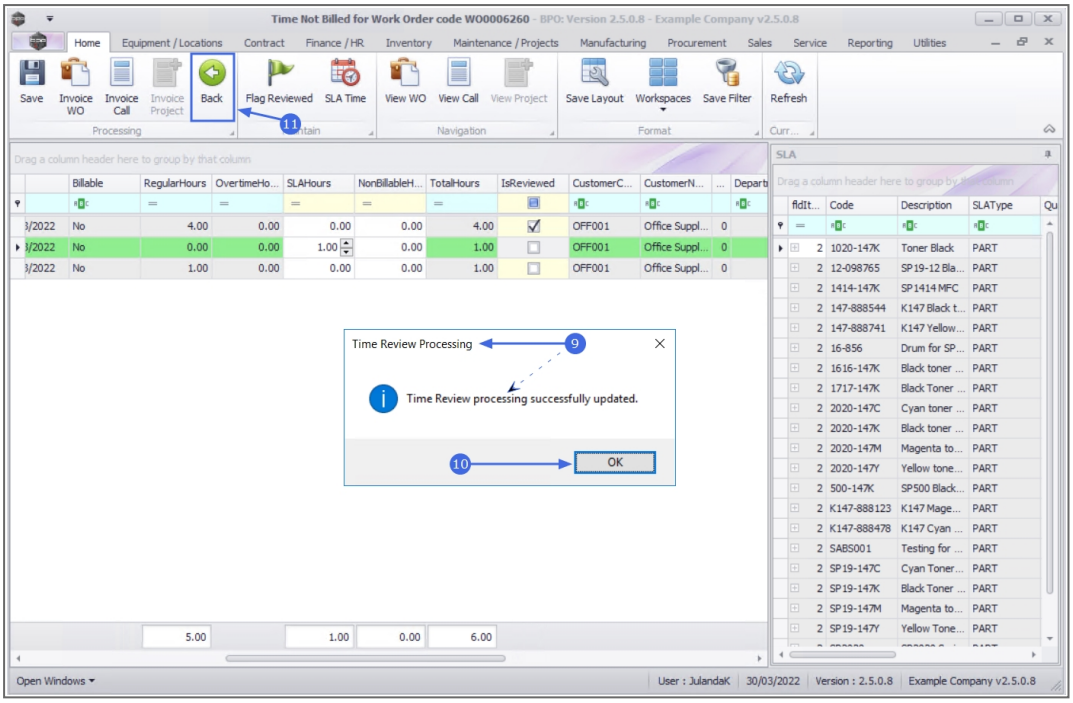

VIEW WORK ORDER

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***.

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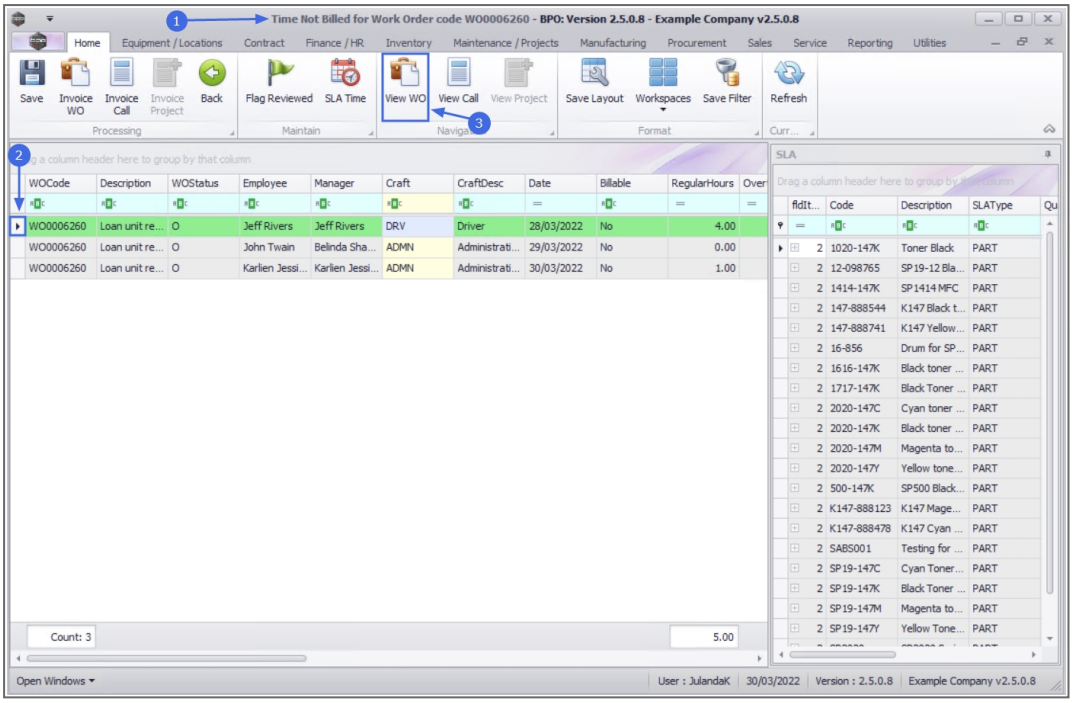

4. " The Work Order Maintenance screen will be displayed. " on page 2
5. From here you can add to or edit the ***Work Order*** details, ***Customer Info***, the ***Required Crafts***, ***Additional Data*** or the ***Equipment Info*** for the work order, or update the work order using the ***Function***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

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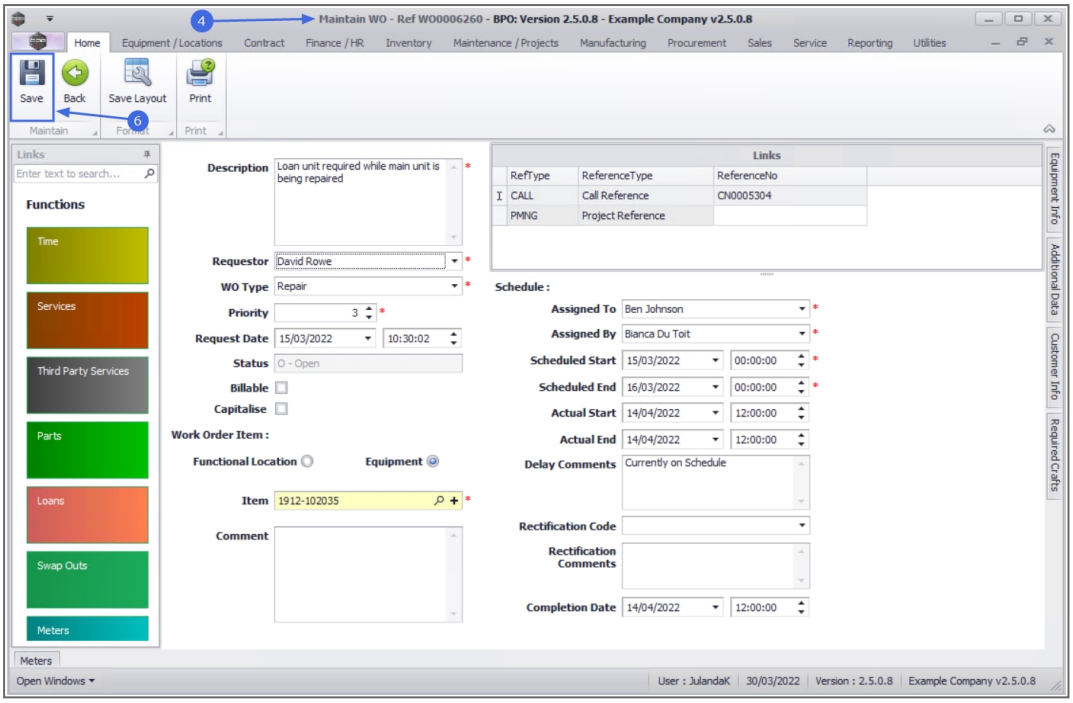

VIEW CALL

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

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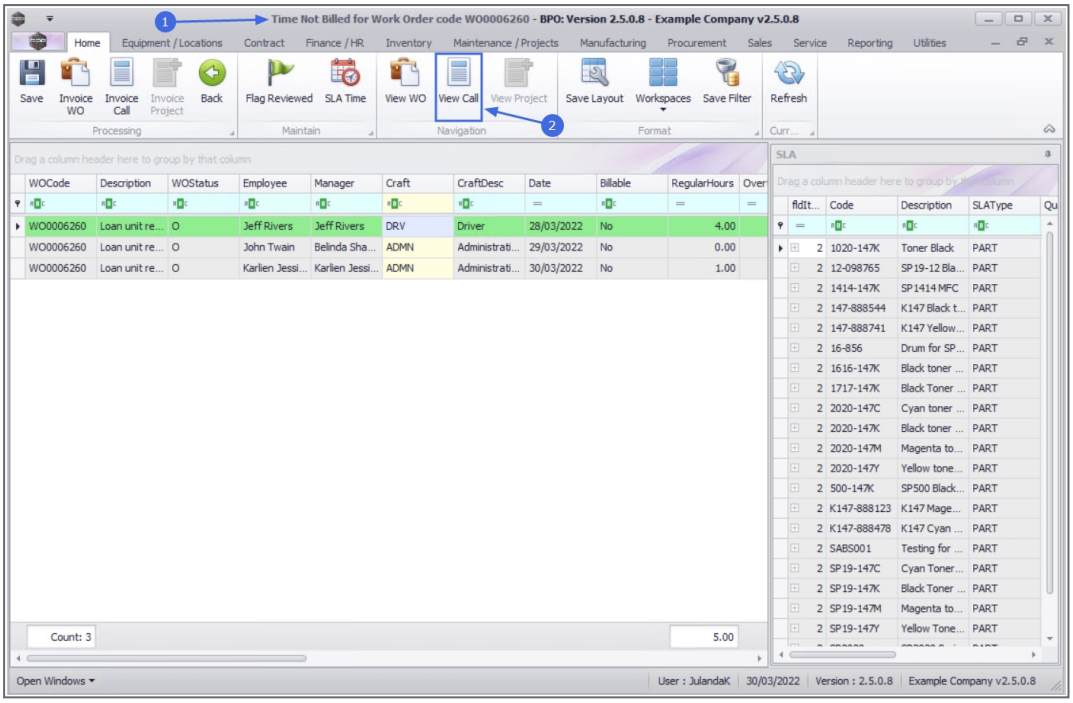
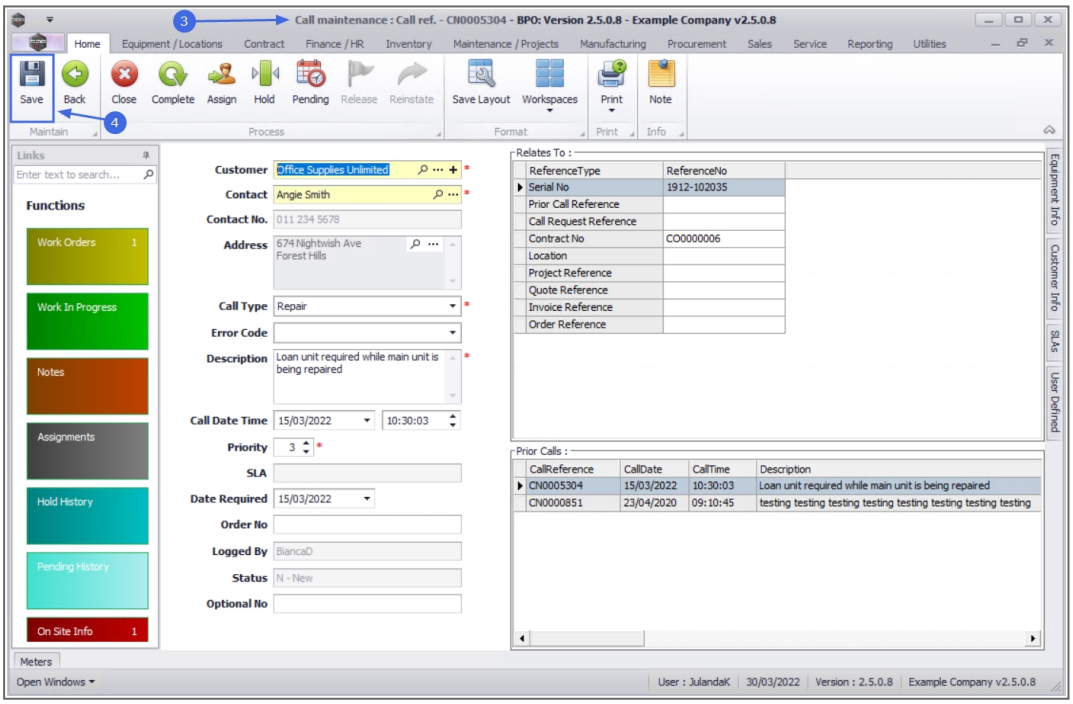


3. "The Call maintenance screen will be displayed." on page 4
4. Make the required changes to the call information and click on ***Save***.



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