

SERVICE

MY WORK – LOG A PART REQUEST

The **My Work** screen deals with work that is assigned to a specific employee, i.e. when an employee is logged in, that employee can only see work orders assigned to themselves.

This screen has similar functionality to the call screen in that the employee can **request parts**, services and loan units; book time, travel and expenses; view customer and machine details (including warranty information).

The employee can request from a [bill of material](#) or from the **full part list**.

Remember: The part request will either be [Auto Approved](#), or it will need to be [authorised manually](#)

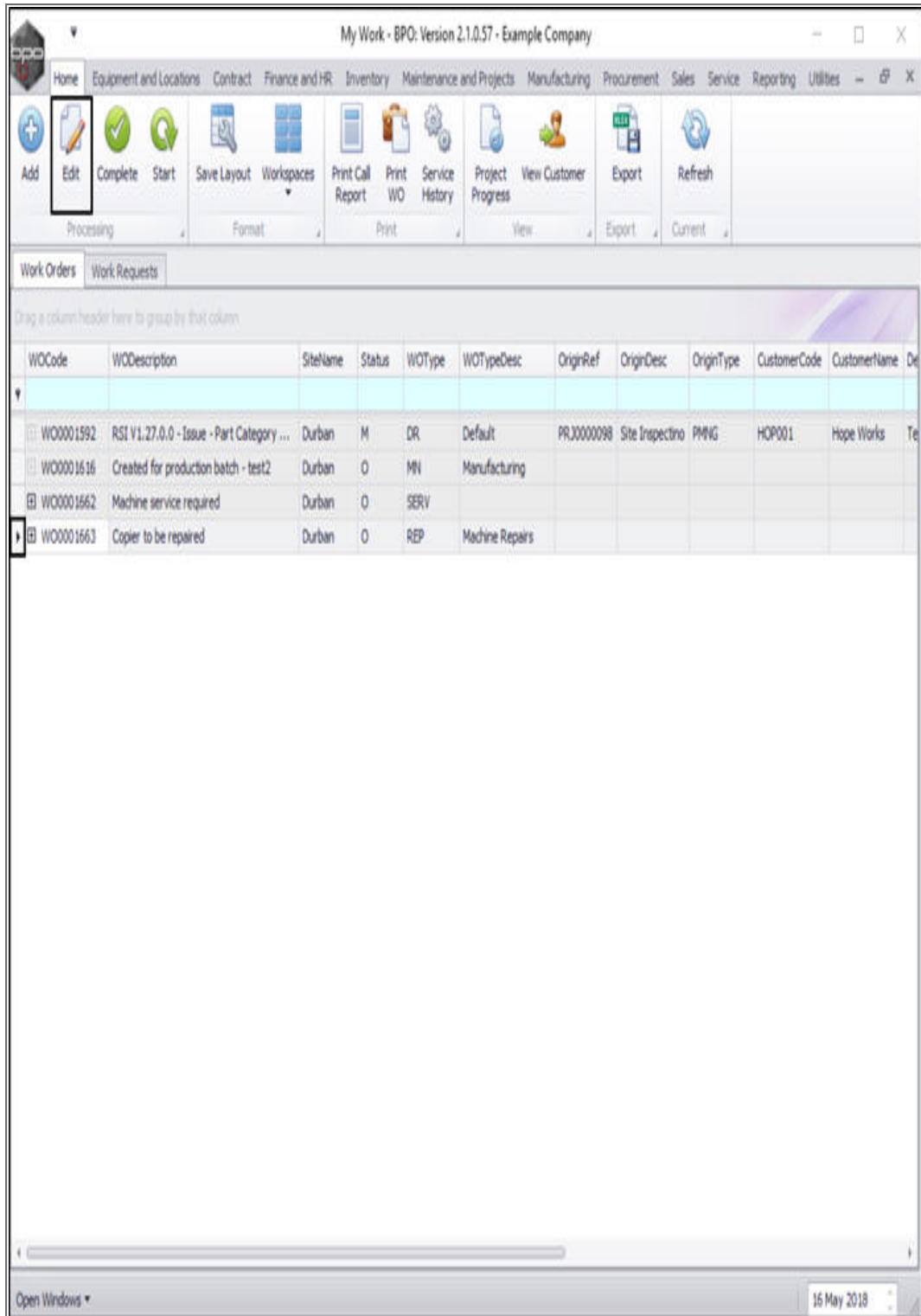
Ribbon Access: *Service > My Work*



The **My Work** listing screen will be displayed.

Either

- Click on the ***row selector*** in front of the ***work order*** that you wish to log a ***part request*** for.
- Click on ***Edit***.



The **Maintain WO - Ref []** screen will be displayed.

- Click on the **Parts** tile.

Maintain WO - Ref WO0001663 - BPO: Version 2.1.0.57 - Example Company

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

Save Back Save Layout Print

Maintain Format Print

Links

Enter text to search...

Functions

Time

Services

Third Party Services

Parts

Loans

Swap Outs

Meters

Expenses

Meters

Open Windows

16 May 2018

Description Copier to be repaired

Requestor Abigail Mine

WO Type Repair

Priority 2

Request Date 15 May 2018 10:40:28

Status Open

Billable

Capitalise

Work Order Item

Functional Location Equipment

Item 19-12345

Comment

Links

| RefType | ReferenceType | ReferenceNo |
|---------|-------------------|-------------|
| CALL | Call Reference | |
| PMNG | Project Reference | |

Schedule

Assigned To Abigail Mine

Assigned By Abigail Mine

Scheduled Start 15 May 2018 10:40:29

Scheduled End 14 Jun 2018 00:00:00

Actual Start 14 Jun 2018 00:00:00

Actual End 14 Jun 2018 00:00:00

Delay Comments Currently on Schedule

Rectification Code

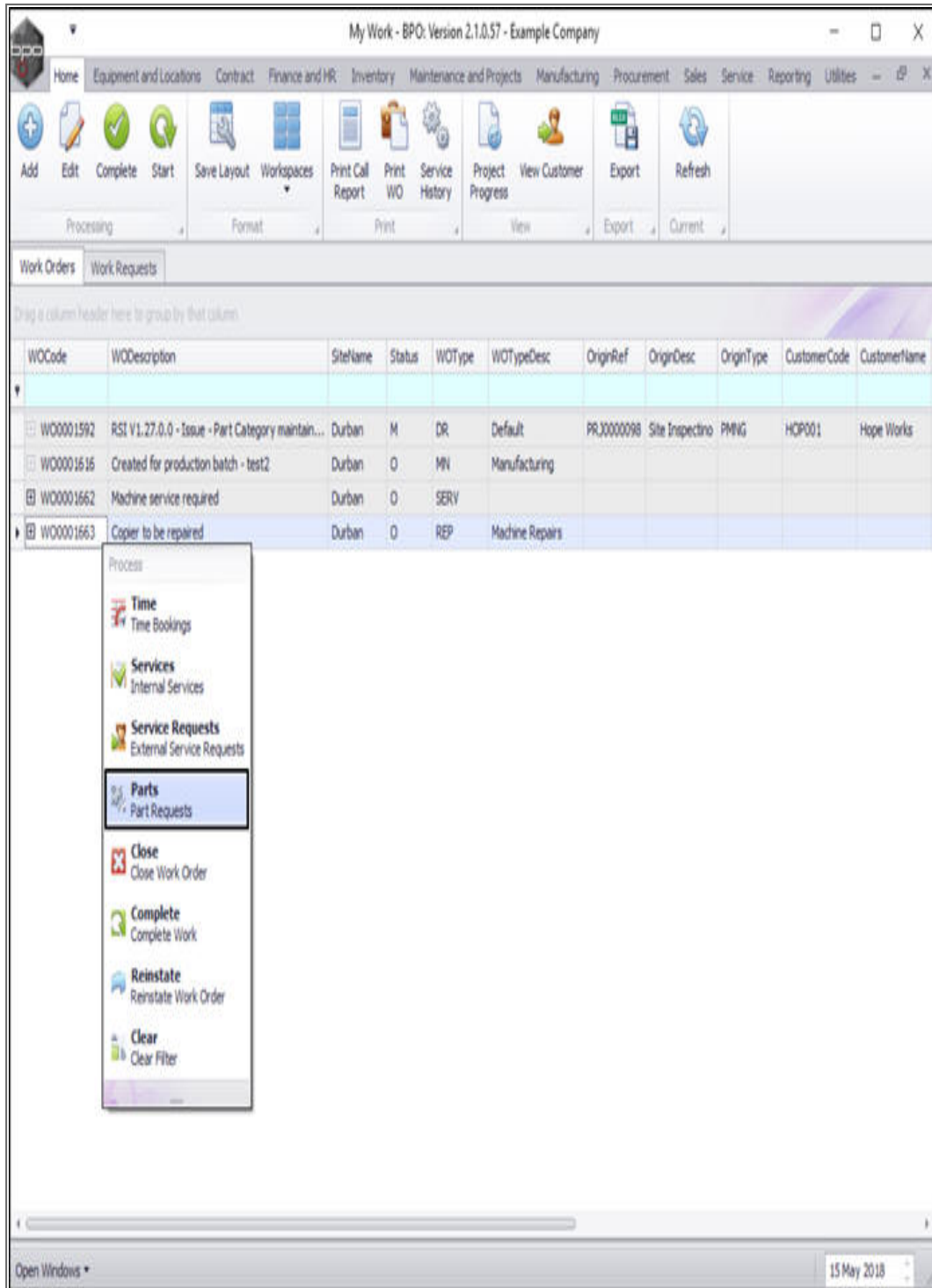
Rectification Comments

Completion Date 14 Jun 2018 00:00:00

Or

In the My Work listing screen,

- **Right click** anywhere in the **row** of the **work order** where you wish to log a **part** request.
- A **Process** menu will pop up.
- Click on **Parts** - Part Requests



| WOCode | WODescription | SiteName | Status | WOType | WOTypeDesc | OriginRef | OriginDesc | OriginType | CustomerCode | CustomerName |
|-----------|---|----------|--------|--------|-----------------|------------|-----------------|------------|--------------|--------------|
| WO0001592 | RSL V1.27.0.0 - Issue - Part Category maintain... | Durban | M | DR | Default | PRJ0000098 | Site Inspection | PMING | HOP001 | Hope Works |
| WO0001616 | Created for production batch - test2 | Durban | O | MAN | Manufacturing | | | | | |
| WO0001662 | Machine service required | Durban | O | SERV | | | | | | |
| WO0001663 | Copier to be repaired | Durban | O | REP | Machine Repairs | | | | | |

Either process will bring you to the **Part Requests for WO Code []** screen.

- Click on **Add**.

Part Requests for WO Code W00001663 - BPO: Version 2.1.0.57 - 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 Workspaces Save Filter Requisition Issue Transfer Note Change Whse Remap Part Create Part

Durban - All States - Refresh Print Export

Maintenance Format Process Current Print

Drag a column header here to group by that column

| DodNo | PartCode | PartDesc | PartType | WarehouseName | BinLocationName | Quantity | IssuedStock | Source |
|------------|-----------|--------------------|----------|----------------|-----------------|----------|-------------|--------|
| PQ0000194B | 2020-147K | Black toner SP2020 | C | Main Warehouse | DBN-A1 | 1.00 | 1.00 | WKC |

Notes

Drag a column header here to group by that column

| StateDesc | FullName | NoteDate | NoteTime | Note |
|--------------|---------------|-------------|----------|--------------|
| Order Raised | Abigail Milne | 15 May 2018 | 13:59:38 | Purchase Ord |

Purchase Orders

Drag a column header here to group by that column

| POCode | Status | SupplierCode | SupplierName | RequestorName |
|-----------|--------|--------------|---------------------|----------------|
| PQ0000244 | P | SPR001 | Sprint Distribut... | Blanca Du Toit |
| PQ0000244 | P | SPR001 | Sprint Distribut... | Blanca Du Toit |
| PQ0000332 | P | SPR001 | Sprint Distribut... | Blanca Du Toit |
| PQ0000340 | P | SPR001 | Sprint Distribut... | Blanca Du Toit |
| PQ0000430 | P | YES001 | Young Electric | Abigail Milne |
| PQ0000431 | P | YES001 | Young Electric | Abigail Milne |
| PQ0000446 | N | SPR002 | Sprint Internat... | Abigail Milne |

Open Windows 15 May 2018

The **Part Requests** screen will be displayed.

REQUEST FROM BILL OF MATERIAL

With this selection:

When you search for the **part number**, the system will only bring up a list of parts that belong to this machine. For this process, a 'part list **BOM**' must already be set up. View **Bill of Materials** for more details.

- Click on the **BOM** radio button.

Part Requests - BPO: Version 2.1.0.57 - Example Company

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

Save Back

Process

BOM

Parts

Work Order

WO0001663

Part

Description

Quantity

1

Warehouse

Required Date

15 May 2018

Assigned To

Abigail Mine

Requested By

Abigail Mine

Comment

Billable

Is Loan

Under Warranty

Open Windows

15 May 2018

REQUEST FROM FULL PART LIST

With this selection:

When you search for the ***part number***, the system will bring up all part numbers.

- Click on the ***Parts*** radio button.

Part Requests - BPO: Version 2.1.0.57 - Example Company

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

Save Back

Process

BOM ☐ Parts ☒

Work Order WO0001663

Part 9855632

Description Air Freshner

Quantity 1

Warehouse Main Warehouse

Required Date 16 May 2018

Assigned To Abigail Mine

Requested By Abigail Mine

Comment

Billable ☒ Is Loan ☐

Under Warranty ☐

Open Windows 16 May 2018

- **Work Order:** This field will be auto populated with the initially selected work order number.
- **Part:** Click on the search button and select the part required.
 - If you clicked on the **BOM** radio button - you will only be able to select from a list of parts that belong to this machine as per BOMs already set up on the system.
 - If you clicked on the **Parts** radio button - you will be able to select from a list of all parts numbers on the system.
- **Description:** This will auto populate once you have selected the part in the previous step.
- **Quantity:** Click in this text box and type in the quantity required.
- **Warehouse:** Click on the search button and select the warehouse that you wish to request the part from.
- **Required Date:** Click on the drop-down arrow and either type in or use the calendar function to select the date required.
- **Assigned To:** Click on the drop-down arrow and select from the list the person responsible for the part request.
- **Requested By:** Click on the drop-down arrow and select from the list the person who requested this part.
- **Comments:** Type in any comments pertaining to this part request if required.
- **Is Billable:** Click on this check box if the part is billable.

- **Note 1:** This will be set to **billable** by default, unless the part is linked to the contract as an inclusion.
- **Note 2:** Only stock items can be marked as billable, asset and loan requests will not be billable
- **Under Warranty:** Click in this check box in order to note whether the item replaced is under warranty. This does not process the item as a warranty claim part. View [Warranty Claims](#) introduction for more details.

Part Requests - BPO: Version 2.1.0.57 - Example Company

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

Save Back

Process

BOM Parts

Work Order

WO0001663

Part

Description

Quantity

1

Warehouse

Required Date

16 May 2018

Assigned To

Abigail Mine

Requested By

Abigail Mine

Comment

Billable

☐

Is Loan

☐


Under Warranty

☐

Open Windows

16 May 2018

- When you have finished adding the ***part*orBOM** request details, click on **Save**.
 - In this image, a parts request has been created for a drum which is not billable and noted not to be under warranty.



Part Requests - BPO: Version 2.1.0.57 - Example Company

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

Save

Back

Process

BOM

Parts

Work Order

WO0001663

Part

DR111111

Description

Drum

Quantity

1

Warehouse

Main Warehouse

Required Date

16 May 2018

Assigned To

Abigail Mine

Requested By

Abigail Mine

Comment

New drum needed to complete repair service.

Billable

Is Loan

Under Warranty

Open Windows

16 May 2018

You will return to the **Parts Requests for WO Code []** screen.

- Here you can now view the new part request.
- A **Part Request Processing** message box will pop up informing you that;
 - *The part request for part [] has been saved successfully to WO: [].*
- Click on **OK**.

Part Requests for WO Code WO0001663 - BPO: Version 2.1.0.57 - 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 Workspaces Save Filter Requisition Issue Transfer Note Change Whse Remap Part Create Part

Maintenance Format Process Current Print

Drag a column header here to group by that column

| DodNo | PartCode | PartDesc | PartType | WarehouseName | BinLocationName | Quantity | IssuedStock |
|------------|-----------|--------------------|----------|----------------|-----------------|----------|-------------|
| PQ00001948 | 2020-147K | Black toner SP2020 | C | Main Warehouse | DBN-A1 | 1.00 | 1.00 |
| PQ00001949 | DR111111 | Drum | B | Main Warehouse | DBN-A1 | 1.00 | 0.00 |

Notes

Drag a column header here to group by that column

| StateDesc | FullName | NoteDate | NoteTime | Note |
|--------------|---------------|-------------|----------|--------------|
| Order Raised | Abigail Milne | 15 May 2018 | 13:59:38 | Purchase Ord |

Purchase Orders

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| PO0000244 | P | SPR001 | Sprint Distribut... | Blanca Du Toit |
| PO0000244 | P | SPR001 | Sprint Distribut... | Blanca Du Toit |
| PO0000332 | P | SPR001 | Sprint Distribut... | Blanca Du Toit |
| PO0000340 | P | SPR001 | Sprint Distribut... | Blanca Du Toit |
| PO0000430 | P | YES001 | Young Electric | Abigail Milne |
| PO0000431 | P | YES001 | Young Electric | Abigail Milne |
| PO0000446 | N | SPR002 | Sprint Internat... | Abigail Milne |

Part Request Processing

The part request for part DR111111 has been saved successfully to WO : WO0001663.

OK

Open Windows

16 May 2018

- Follow the steps in [Part Requests - Issuing Stock Items](#) to complete the part request issuing process.

MNU.073.002