

SERVICE

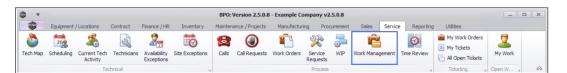
WORK MANAGEMENT - VIEW OPEN WORK ORDERS

The **Work Management** screen lists all Work Orders dependant on the employee **hierarchy**.

The Work Orders displayed are those that have <u>time records</u> linked to them.

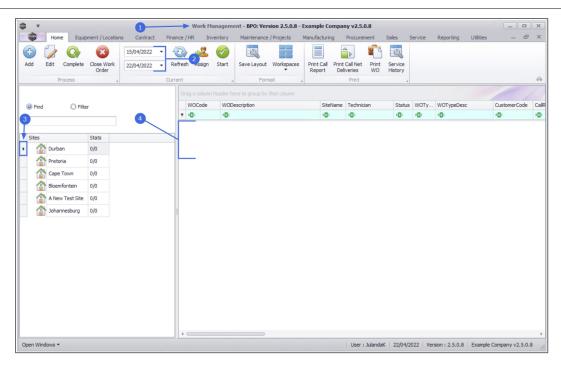
Each Work Order can be Viewed, <u>Assigned</u>, <u>Edited</u>, <u>Started</u>, <u>Completed</u> and <u>Closed</u> from here.

Ribbon Access: Service > Work Management



- 1. The *Work Management* screen will be displayed.
- 2. The *date range* fields will auto populate with an **8** day range up to and including the current date.
- 3. The *row indicator* in the *Site* frame will auto select the first site in the list.
- The Work Orders listed in the Work Orders data grid will only be the ones included in that <u>date range</u>, within the selected <u>site</u>, that have *labour / time records* logged against it.





ADJUST DATE RANGE

If the Work Order you wish to view is not listed, you can change the date range, or use the <u>find</u> or <u>filter</u> functions.

 Set the date range, by clicking and typing the required date in the date fields, or click on the down *arrow* to adjust each *date field* using the calendar function.





| v | | | | | | | W | ork Ma | anager | ment - BPO: Version 2.5 | 0.8 - Exa | mple Compa | ny v2.5.0.8 | | | | | |
|----------|-------------------|------------------|---------|--------|--------|---------|----------|--------|--------------|------------------------------|-------------|------------|--------------------|---------|---------|-----------------------|--------------|-----|
| | Home Equip | ment / Locations | Cor | ntract | Fi | nance | /HR | Inv | entory | Maintenance / Project | s Mar | ufacturing | Procurement 5 | ales S | Service | Reporting Utilities | - 6 | 7 |
| | | × | 11/01/2 | 2021 | - | 42 | | 9 | \checkmark | 2 | | | 1 III | 2 | | | | |
| Add I | Edit Complete | Close Work | 22/04/2 | | | ~ | | ssian | Start | Save Layout Worksp | | | Call Net Print | Service | | | | |
| Aug | curr complete | Order | 22/04/2 | 2022 | • | 1 Va | <u> </u> | soigin | Juli | | | | | History | | | | |
| | Process | 4 | | F | riday, | 22 Apr | il 202 | 2 | | 4 Format | 4 | | Print | 4 | | | | - |
| | | | ۲ | | 20 |)22 Ap | ril | | ۲ | here to group by that colu | | | | | | | | |
| Find | O Filter | | SU | MO | τυ | WE | TH | FR | SA | Description | | SiteName | Technician | Status | WOTY | WOTypeDesc | CustomerCode | e C |
| Find | U Filter | | | | | | | 1 | 2 | | | HEC. | | 100 | 101 J | 100 | RDC | |
| | | | 3 | 4 | 5 | 6 | 7 | 8 | 9 | machine implementation | | Durban | Julanda Kessler | M | IMP | Implementation | APP0001 | c |
| - | | | 10 | 11 | 12 | 13 | 14 | 15 | 16 | Inspection for Network Ca | hle Install | | Jade Rivers | 0 | INSP | Inspection | HOP001 | |
| Sites | | | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 3-1-1 - Check network reg | | Durban | Belinda Sharman | м | INST | Installation | HOP001 | |
| • • 👔 | Durban | | 24 | 25 | 26 | 27 | 28 | 29 | 30 | - Commercial Tier Test | | Durban | Theo Peterson | M | INST | Installation | HOP001 | C |
| | 🙎 Belinda Sharm | an | | | | 4 | | | | - Commercial Tier Test | | Durban | Julanda Kessler | M | INST | Installation | HOP001 | 0 |
| | 🕱 Karlien Jessica | Young Dunnawa | | | | Clear | | | | er not feeding through roll | ers | Durban | Theo Peterson | 0 | REP | Machine Repairs | HOP001 | 0 |
| | | | · | | | cicui | | 00020 | | unit required while main u | | | Karlien Jessica Yo | - | REP | Machine Repairs | OFF001 | 0 |
| | John Twain | | | | 1/0 | | | 00626 | | n unit required while main u | | | John Twain | 0 | REP | Machine Repairs | OFF001 | 0 |
| | Theo Peterson | 1 | | | L/1 | | | 00626 | | n unit required while main u | | - | Jeff Rivers | 0 | REP | Machine Repairs | OFF001 | 0 |
| | 2 Jade Rivers | | | | L/O | 1 | | 00613 | | 01406OR002 | | Durban | Julanda Kessler | M | NDS | New Deal Sale | BIG0001 | 0 |
| | 2 Jeff Rivers | | | | L/O | -1- | woo | 00625 | 7 PR(| 01406OR002 | | Durban | Belinda Sharman | 0 | NDS | New Deal Sale | BIG0001 | c |
| | | | | | | | woo | 00625 | 3 Rec | ace part - current faulty | | Durban | Julanda Kessler | м | PR | Parts Requirement | biancad | C |
| _ 👔 | Pretoria | | | 0 | 0/0 | | | 00622 | | hBinMaint - Bathroom Bin M | aintenanc | e Durban | Julanda Kessler | м | SM | Scheduled Maintenance | WES001 | C |
| 1 | Cape Town | | | 0 | 0/0 | | woo | 00623 | 4 Bat | hBinMaint - Bathroom Bin M | aintenanc | e Durban | Julanda Kessler | м | SM | Scheduled Maintenance | WES001 | C |
| | Bloemfontein | | | 0 | 0/0 | | | | | | | | | | | | | |
| | A New Test Site | | | 0 | 0/0 | | | | | | | | | | | | | |
| | | | | | 0/0 | -11- | | | | | | | | | | | | |
| | Johannesburg | | | | 0/0 | _ | | | | | | | | | | | | |
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| | | | | | | 4 | _ | | | | | | | | | | | |
| | lows 🕶 | | | | | | - | | | the brook on chick | | | User : JulandaK | | | | | - |

SITES FRAME

If the Work Order that you wish to view does not display, you may need to select an alternative site and expand it.

- 7. The *Sites* frame contains a list of the sites currently on the system.
- 8. The *row selector* indicates which *site* you are currently working in.
 - The example has *Durban* selected.
- The *Stats* column in this frame indicated the number of *Open* and *Completed* assignments for the site.
- 10. Click on the *tree view chevron node* of the required site to *expanded* to display the *employees* within the site, with their *individual* work assignment stats.
- A Work Order that has been assigned to <u>more than one</u> employee, that has a <u>time record</u> against that work order, will be listed for each employee.



Note that the Technician column in the data grid is not the Assigned to person but the employee that has a labour / time record linked to the Work Order.

| Home Equipment / Locations Contrac | t Fin | ance | /HR Inven | | acturing | Procurement Sa | ales S | Service | Reporting Utilities | - 8 | |
|---|-------|-------|------------------------|--|------------|------------------------------------|-------------------|--------------|--|-------------------|---|
| Image: Complete Close Work 11/01/2021 Vidd Edit Complete Close Work 22/04/2022 Process Process Complete Close Work Close Work | • | Refre | | tart Save Layout Workspaces Print Rep | Call Print | Call Net Print S | ervice fistory | | | | |
| | | |)rag a column hei | ader here to group by that column | | | - | | | | |
| Find Filter | 9 | | WOCode | WODescription | SiteName | Technician | Status | WOTy | WOTypeDesc | CustomerCode | |
| 3 | T | 9 | a 🛛 c | A C | R C | s C | # C | 8 0 0 | 8 0 0 | REC | |
| | | , | WO0006254 | New machine implementation | Durban | Julanda Kessler | м | IMP | Implementation | APP0001 | |
| Sites | Stats | 1 | WO0006130 | Site Inspection for Network Cable Installa | Durban | Jade Rivers | 0 | INSP | Inspection | HOP001 | |
| - 🟠 Durban | 0/6 | | WO0006131 | 1818-1-1 - Check network requirements | Durban | Belinda Sharman | м | INST | Installation | HOP001 | 0 |
| Belinda Sharman | | | WO0006214 | Tier - Commercial Tier Test | Durban | Theo Peterson | м | INST | Installation | HOP001 | |
| | 1/1 | | WO0006214 | Tier - Commercial Tier Test | Durban | Julanda Kessler | м | INST | Installation | HOP001 | |
| Karlien Jessica Young Dunnaway Svenson | 1/0 | | WO0006250 | Paper not feeding through rollers | Durban | Theo Peterson | 0 | REP | Machine Repairs | HOP001 | |
| John Twain | 1/0 | | WO0006260 | Loan unit required while main unit is being | Durban | Karlien Jessica Yo | | REP | Machine Repairs | OFF001 | |
| 👤 Theo Peterson | 1/1 | | WO0006260 | Loan unit required while main unit is being | | John Twain | 0 | REP | Machine Repairs | OFF001 | |
| Jade Rivers | 1/0 | | WO0006260 | Loan unit required while main unit is being | | Jeff Rivers | 0 | REP | Machine Repairs | OFF001 | |
| | | | WO0006136 | PRO3406OR002 | Durban | Julanda Kessler | M | NDS | New Deal Sale | BIG0001 | |
| Jeff Rivers | 1/0 | | WO0006257 | PRO3406OR002 | Durban | Belinda Sharman Julanda Kessler | 0 | NDS | New Deal Sale | BIG0001 | |
| Pretoria | 0/0 | H | WO0006253 WO0006229 | Replace part - current faulty BathBinMaint - Bathroom Bin Maintenance | Durban | Julanda Kessler Julanda Kessler | M | PR SM | Parts Requirement Scheduled Maintenance | biancad WES001 | |
| Cape Town | 0/0 | 1 | WO0006229 WO0006234 | BathBinMaint - Bathroom Bin Maintenance | Durban | Julanda Kessler | M | SM | Scheduled Maintenance | | |
| Bloemfontein | 0/0 | F | W0000234 | bau ibinimaint - bau i oom bin maintenance | Durban | Juidi lud Kessiel | 10 | 2141 | Scheduled Maintenance | WE3001 | |
| A New Test Site | 0/0 | | | | | | | | | | |
| Johannesburg | 0/0 | 1 | | | | | | | | | |
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- 12. Click on the *row* of the work order you wish to view.
- 13. Click on *Edit*.

Short cut key: *Right click* to display the *Process* menu list. Click on *Edit*.



| Þ - | | | | | | Work Man | ageme | ent - BPO: Vers | ion 2.5.0.8 - | Examp | le Compa | ny v2.5.0.8 | | | | | | |
|-------|----------|----------------------------------|------------|-------------------------|---------|--------------|--------------|-------------------|-------------------|--------------|----------|------------------------------|--------------------|--------------|-----------------|-----------|-------------|------|
| | Hor | me Equipment / Locations | Contract | Finan | ice / H | HR Inven | itory | Maintenance / | / Projects | Manufa | cturing | Procurement | Sales | Service | Reporting L | Itilities | - | 8 |
| Ð | | Q 😮 🔟 | /01/2021 | • | 3 | 2 (| | 2 | | | | i | 2 | | | | | |
| Add | Edit | Complete Close Work 22 | /04/2022 | Ref | fresh | Assign S | Start | Save Layout | Workspaces | Print Rep | | Call Net Print iveries WO | Service History | | | | | |
| | | Process | | Curre | nt | | 4 | Forma | at , | | | Print | 4 | | | | | |
| | | | | | | | | | | | | | | | | | | |
| Find | ł | O Filter | | | 1 | NOCode | WODe | scription | | | SiteName | Technician | Status | WOTy | WOTypeDesc | | CustomerCo | de (|
| | | | | 1 | 2 | • • • | R O C | | | | R C | a 🗖 c | # C | • D ¢ | # C | | R C | , |
| | | | | | 1 | NO0006254 | New m | nachine implemer | ntation | | Durban | Julanda Kessler | м | IMP | Implementation | | APP0001 | (|
| Sites | | | St | ats | 1 | NO0006130 | Site In | spection for Net | twork Cable In | stalla | Durban | Jade Rivers | 0 | INSP | Inspection | | HOP001 | |
| / | Durb | 380 | 0/ | 6 | • | WO0006131 | 1818- | 1-1 - Check netv | vork requireme | nts | Durban | Belinda Sharman | м | INST | Installation | | HOP001 | |
| | - | | | _ | 1 | NO0006214 | Tier - (| Commercial Tier | Test | | Durban | Theo Peterson | м | INST | Installation | | HOP001 | 0 |
| | <u> </u> | Belinda Sharman | 1/ | 1 | 1 | NO0006214 | Tier - (| Commercial Tier | Test | | Durban | Julanda Kessler | м | INST | Installation | | HOP001 | 0 |
| | | Karlien Jessica Young Dunnaway S | ovenson 1/ | 0 | 1 | NO0006250 | Paper | not feeding thro | ough rollers | | Durban | Theo Peterson | 0 | REP | Machine Repairs | | HOP001 | 0 |
| | 2 | John Twain | 1/ | 0 | ١ | NO0006260 | Loan u | unit required whi | le main unit is l | being | Durban | Karlien Jessica Yo | 0 | REP | Machine Repairs | | OFF001 | 0 |
| | 7 | Theo Peterson | 1/ | 4 | 1 | NO0006260 | Loan u | unit required whi | le main unit is l | being | Durban | John Twain | 0 | REP | Machine Repairs | | OFF001 | 0 |
| | - | | | | ١ | NO0006260 | Loan u | unit required whi | le main unit is l | being | Durban | Jeff Rivers | 0 | REP | Machine Repairs | | OFF001 | 0 |
| | <u> </u> | Jade Rivers | 1/ | 0 | 1 | WO0006136 | PROJ4 | 406OR002 | | | Durban | Julanda Kessler | м | NDS | New Deal Sale | | BIG0001 | 0 |
| | 2 | Jeff Rivers | 1/ | 0 | ١ | NO0006257 | PROJ4 | 106OR002 | | | Durban | Belinda Sharman | 0 | NDS | New Deal Sale | | BIG0001 | 0 |
| 1 | Pret | oria | 0/ | 0 | ١ | NO0006253 | Replac | ce part - current | faulty | | Durban | Julanda Kessler | м | PR | Parts Requireme | nt | biancad | 0 |
| | Con | e Town | 0/ | | 1 | WO0006229 | BathBi | inMaint - Bathroo | om Bin Mainten | ance | Durban | Julanda Kessler | м | SM | Scheduled Maint | enance | WES001 | 0 |
| | Cap | e rown | | | ١ | NO0006234 | BathBi | inMaint - Bathroo | om Bin Mainten | ance | Durban | Julanda Kessler | M | SM | Scheduled Maint | enance | WES001 | 0 |
| | Bloe | mfontein | 0/ | 0 | | | | | | | | | | | | | | |
| | A Ne | ew Test Site | 0/ | 0 | | | | | | | | | | | | | | |
| 1 | Joha | annesburg | 0/ | 0 | | | | | | | | | | | | | | |
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| | ndows • | | | | _ | | | | | | | User : JulandaK | 22/04/2 | 022 No | reien + 2 E 0 9 | | ompany v2.5 | 0.0 |

- 14. The Maintain WO Ref [work order number] screen will be displayed to view the work order information.
- 15. You can <u>Add</u> to or <u>Edit</u> the work order details here.
- 16. Click on *Back* to return to the Work management listing screen.

| \$ <u>*</u> | 14 | Maintain WO - Ref WO00 | | | | | | | | | | | | |
|------------------------|-------------------|------------------------------------|-------------------|---------------------------|-------------------------------------|-----------|----------|--------|---------|------------------|------------|--------------|---|--|
| Home Equipment | | ract Finance / HR Inventory I | Maintenance / Pro | ijects Mani | ufacturing P | rocuren | nent Sa | ales | Service | Reporting | Utilities | - 6 | X | |
| | P | | | | | | | | | | | | | |
| Save Back Save Layout | Print | | | | 5 | | | | | | | | | |
| Maintain Former | Print _ | | | | | | | | | | | | \diamond | |
| Links 4 | Description | 1818-1-1 - Check network | | | | | | inks | | | | | Ę | |
| Enter text to search P | Description | requirements | RefType | Referen | | | | | | | | | | |
| Functions | | | I CALL PMNG | | Call Reference Project Reference | | 30000411 | | | | | | Equipment Info | |
| Time | | * | PPING | riojecti | (ererence | r b | 50000411 | | | | | | 0 | |
| Time | Requestor | Julanda Kessler 🔹 🔹 | | | | | | | | | | | Additional Data Customer Info Required Crafts | |
| | W0 Type | Installation 🔹 * | Schedule : | | | | | | | | | | tional | |
| Services | Priority | 2 🛊 * | | Assigned To | David Rowe | | | • • | | | | | Data | |
| | Request Date | | | Assigned By | Julanda Kessler | | | - • | | | | | 2 | |
| | | M - Completed | Sch | eduled Start | 19/08/2021 | · 12:00:0 | | \$ | | | | | Istom | |
| Third Party Services | Billable | | Sc | heduled End | 24/08/2021 | - | 12:00:00 | \$ | | | | | er Inf | |
| | Capitalise | | | Actual Start | 21/09/2021 | • | 12:00:00 | \$ | | | | | • | |
| Parts | Vork Order Item : | | | Actual End | 21/09/2021 | - | 12:00:00 | \$ | | | | | Requi | |
| | Functional Loca | ation O Equipment (a) | Dela | Comments | Currently on Schedule | | | * | | | | | red C | |
| | | | | | | | | | | | | | rafts | |
| Loans | Item | 0109501101530003 P + | | | | | | Ŧ | | | | | | |
| | Comment | Generated by Project Methodology - | | ication Code | | | | • | | | | | | |
| Swap Outs | | 1818-1-1 | 1 | Rectification Comments | | | | ^ | | | | | | |
| | | | | | | | | - | | | | | | |
| | | - | Com | pletion Date | 21/09/2021 | • | 00:00:00 | \$ | | | | | | |
| Meters | | | | | | | | | | | | | | |
| Meters | | | | | | | | | | | | | | |
| Open Windows 🕶 | | | | | | User : | JulandaK | 22/04/ | 2022 V | ersion : 2.5.0.8 | Example Co | mpany v2.5.0 | .8 // | |



MNU.074.001

Help v2.5.1.4 - Pg 6 - Printed: 27/06/2024

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