

# SERVICE

## WORK MANAGEMENT – ASSIGN OR RE-ASSIGN A WORK ORDER

Unassigned, open Work Orders can be assigned to a <u>technician</u> from the **Work Management** screen.

The Work Orders listed are <u>only</u> for technicians that have **labour time** booked. A work order may be listed <u>more than once</u>. A separate line is allocated for <u>each</u> employee that has time recorded against that Work Order. The Technician column in the data grid is not the <u>Assigned to</u> person but the employee that has a <u>labour / time record</u> linked.

Ribbon Access: Service > Work Management



- 1. The *Work Management* screen will be displayed.
- Select the *date range* that will contain the *work order* you wish to assign.
- 3. Select the *Site* where the work order was issued.
  - The example has **Durban** selected.

Click on the **Refresh** button Refresh to update the screen.

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Help v2.5.1.4 - Pg 1 - Printed: 27/06/2024



		-	Work Manag	ement - BPO: Version 2.5.0.8 - Example	e Company	v2.5.0.8				>
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			WO0006254	New machine implementation	Durban	Julanda Kessler	м	IMP	Implementation	APP0001
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Sides	0/6		WO0006131	1818-1-1 - Check network requirements	Durban	Belinda Sharman	м	INST	Installation	HOP001
	0/0		WO0006214	Tier - Commercial Tier Test	Durban	Theo Peterson	м	INST	Installation	HOP001
Belinda Sharman	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	0	REP	Machine Repairs	OFF001
Theo Reterson	1/1		WO0006260	Loan unit required while main unit is being.	Durban	John Twain	0	REP	Machine Repairs	OFF001
	1/1		WO0006260	Loan unit required while main unit is being	Durban	Jeff Rivers	0	REP	Machine Repairs	OFF001
Jade Rivers	1/0		WO0006136	PROJ406OR002	Durban	Julanda Kessler	м	NDS	New Deal Sale	BIG0001
Jeff Rivers	1/0		WO0006257	PROJ406OR002	Durban	Belinda Sharman	0	NDS	New Deal Sale	BIG0001
Pretoria	0/0		WO0006253	Replace part - current faulty	Durban	Julanda Kessler	М	PR	Parts Requirement	biancad
Cape Town	0/0		WO0006229	BathBinMaint - Bathroom Bin Maintenance	Durban	Julanda Kessler	М	SM	Scheduled Maintenance	WES001
			WO0006234	BathBinMaint - Bathroom Bin Maintenance	Durban	Julanda Kessler	м	SM	Scheduled Maintenance	WES001
Bioemfontein	0/0									
A New Test Site	0/0									
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Open Windows 🔻					Us	er : JulandaK 25/0	04/2022	Version	2.5.0.8 Example Comp	any v2.5.0.8

4. The *Work Orders* frame will be populated with all the work orders in the specified date range.

### **ASSIGN WORK ORDER LINKED TO A PROJECT**

- 5. Click on the *row* of the *work order* you wish to *assign* to a Technician.
- 6. Click on Assign.

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



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	2	WO0006254	New machine implementation	Durban	Julanda Kessler	м	IMP	Implementation	APP0001	CN0005302
Sites	Stats	WO000613	Site Inspection for Network Cable Insta	alla Durban	Jade Rivers	0	INSP	Inspection	HOP001	
E a Durban	0/6	WO000613	1818-1-1 - Check network requirement	s Durban	Belinda Sharman	м	INST	Installation	HOP001	
	0,0	WO0006214	Tier - Commercial Tier Test	Durban	Theo Peterson	м	INST	Installation	HOP001	CN0005291
Beinda Sharman	1/1	WO0006214	Tier - Commercial Tier Test	Durban	Julanda Kessler	м	INST	Installation	HOP001	CN0005291
Karlien Jessica Young Dunnaway Svenson	1/0	WO0006250	Paper not feeding through rollers	Durban	Theo Peterson	0	REP	Machine Repairs	HOP001	CN0005298
🧏 John Twain	1/0	WO0006260	Loan unit required while main unit is bei	ing Durban	Karlien Jessica Yo	0	REP	Machine Repairs	OFF001	CN0005304
Theo Peterson	1/1	WO0006260	Loan unit required while main unit is beild	ing Durban	John Twain	0	REP	Machine Repairs	OFF001	CN0005304
		WO0006260	Loan unit required while main unit is beild	ing Durban	Jeff Rivers	0	REP	Machine Repairs	OFF001	CN0005304
Jade Rivers	1/0	WO000613	5 PRO3406OR002	Durban	Julanda Kessler	м	NDS	New Deal Sale	BIG0001	CN0005274
Jeff Rivers	1/0	WO000625	7 PRO3406OR002	Durban	Belinda Sharman	0	NDS	New Deal Sale	BIG0001	CN0005274
Pretoria	0/0	WO0006253	8 Replace part - current faulty	Durban	Julanda Kessler	м	PR	Parts Requirement	biancad	CN0005301
Cape Town	0/0	WO0006225	BathBinMaint - Bathroom Bin Maintenan	nce Durban	Julanda Kessler	м	SM	Scheduled Maintenance	WES001	CN0005295
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A New Test Site	0/0									
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		•								

- 7. The *Work Assignment: Reference No [work order number]* screen will be displayed.
  - Work Order: The Work Order number you have selected will populate this field.
  - Assigned To: Click on the down *arrow* to select the name of the Technician you wish to assign the work order to from the drop-down list.
  - **Craft Name:** Click on the *search* button to select the required craft from the *Select the craft* screen.
  - Sched Date: This field will display the *current* date. Click to type in or click on the down *arrow* to select the scheduled date for the work order using the calendar function.
  - **Billable:** Click to select the check box if the Work Order assignment should be billed.
- 8. When you have finished editing the work assignment details, click on

#### Save.





- 9. When you receive the *Processing* message to confirm that;
  - Work Order: [work order number] has been successfully assigned.
- 10. Click on *OK*.

*		
₩ <b>▼</b>	Work Assignment : Reference No W00006130 - BPO: Version 2.5.0.8 - Example Company v2.5.0.8	
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Work Order W00008130		
Assigned To Belinda Sharman 👻	•	
Craft Name CON P	•	
Sched Date 09/05/2022 -		
Billable		
	Processing  Victor Vict	
Open Windows 🕶	User : JulandaK 25/04/2022 Version : 2.5.0.8 Example	Company v2.5.0.8



- 11. You will return to the *Work Management* screen.
- 12. Click on the *Refresh* button to update the screen.

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2 Belinda Sharman	1/1		WO0006214	Tier - (	Commercial Tier Test	Durb	an	Theo Peterson	M	INST	Installation	HOP001	CN0005291
			WO0006214	Tier - (	Commercial Tier Test	Durb	an	Julanda Kessler	M	INST	Installation	HOP001	CN0005291
Karlien Jessica Young Dunnaway Svenson	1/0		WO0006250	Paper	not feeding through rollers	Durb	an	Theo Peterson	0	REP	Machine Repairs	HOP001	CN0005298
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2 Theo Peterson	1/1		WO0006260	Loan u	unit required while main unit is b	eing Durb	an	John Twain	0	REP	Machine Repairs	OFF001	CN0005304
			WO0006260	Loan u	unit required while main unit is b	eing Durb	an	Jeff Rivers	0	REP	Machine Repairs	OFF001	CN0005304
a sade Rivers	1/0		WO0006136	PRO34	106OR002	Durb	an	Julanda Kessler	м	NDS	New Deal Sale	BIG0001	CN0005274
Jeff Rivers	1/0		WO0006257	PRO34	106OR002	Durb	an	Belinda Sharman	0	NDS	New Deal Sale	BIG0001	CN0005274
Pretoria	0/0		WO0006253	Replac	te part - current faulty	Durb	an	Julanda Kessler	м	PR.	Parts Requirement	biancad	CN0005301
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13. The work order will now appear twice on the screen, as a *separate line* has now been allocated for <u>each</u> employee that has a *time record* booked against a Work Order.

			Wo	rk Man	agement - BPO:	Version 2.5	5.0.8 - Exa	nple C	ompany v2.5.0.	3				_ <b>– x</b>
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t - A Durban	0/6	W	00006130	Site In	nspection for Netw	ork Cable Ins	stalla Du	ban	Jade Rivers	0	INSP	Inspection	HOP001	
		W	00006131	1818-	1-1 - Check netwo	ork requiremen	nts Du	ban	Belinda Sharman	м	INST	Installation	HOP001	
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Karlien Jessica Young Dunnaway Svenson	1/0	W	00006214	Tier -	Commercial Tier Te	est	Du	ban	Julanda Kessler	м	INST	Installation	HOP001	CN0005291
🤦 John Twain	1/0	W	00006250	Paper	not feeding throu	igh rollers	Du	ban	Theo Peterson	0	REP	Machine Repairs	HOP001	CN0005298
Theo Peterson	1/1	W	00006260	Loanu	unit required while	main unit is b	eing Du	ban	Karlien Jessica Yo	0	REP	Machine Repairs	OFF001	CN0005304
	-/ -	W	00006260	Loanu	unit required while	main unit is b	eing Du	ban	John Twain	0	REP	Machine Repairs	OFF001	CN0005304
Jade Rivers	1/0	W	00006260	Loanu	unit required while	main unit is b	eing Du	ban	Jeff Rivers	0	REP	Machine Repairs	OFF001	CN0005304
Jeff Rivers	1/0	W	00006136	PRO34	406OR002		Du	ban	Julanda Kessler	м	NDS	New Deal Sale	BIG0001	CN0005274
Pretoria	0/0	W	00006257	PROJ4	406OR002		Du	ban	Belinda Sharman	0	NDS	New Deal Sale	BIG0001	CN0005274
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Cape Town	0/0	W	00006229	BathB	inMaint - Bathroon	n Bin Maintena	ance Du	ban	Julanda Kessler	м	SM	Scheduled Maintenance	WES001	CN0005295
Bloemfontein	0/0	W	00006234	BathB	inMaint - Bathroon	n Bin Maintena	ance Du	ban	Julanda Kessler	м	SM	Scheduled Maintenance	WES001	CN0005296
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### ASSIGN A WORK ORDER LINKED TO A CALL

- 1. From the *Work Management* screen;
- 2. Click on the *row* of the *Work Order* you wish to assign.
- 3. Click on *Assign*.

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Home Equipment / Locations Contra	ct Fina	ince /	HR Inven	tory Maintenance / Projects Manuf	acturing	Procurement S	Sales S	Service	Reporting Utilities		- 8
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Sites	Stats		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	
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🙎 Karlien Jessica Young Dunnaway Svenson	1/0	Н	WO0006214	Tier - Commercial Tier Test	Durban	Julanda Kessler	м	INST	Installation	HOP001	CN0005291
2 John Twain	1/0		WO0006250	Paper not feeding through rollers	Durban	Theo Peterson	0	REP	Machine Repairs	HOP001	CN0005298
	10		WO0006260	Loan unit required while main unit is being	Durban	Karlien Jessica Yo.	0	REP	Machine Repairs	OFF001	CN0005304
Theo Peterson	1/1		WO0006260	Loan unit required while main unit is being	Durban	John Twain	0	REP	Machine Repairs	OFF001	CN0005304
🏭 Jade Rivers	1/0	1111	WO0006260	Loan unit required while main unit is being	Durban	Jeff Rivers	0	REP	Machine Repairs	OFF001	CN0005304
🙎 Jeff Rivers	1/0		WO0006136	PROJ406OR002	Durban	Julanda Kessler	м	NDS	New Deal Sale	BIG0001	CN0005274
Pretoria	0/0		WO0006257	PROJ406OR002	Durban	Belinda Sharman	0	NDS	New Deal Sale	BIG0001	CN0005274
	0,0		WO0006253	Replace part - current faulty	Durban	Julanda Kessler	м	PR	Parts Requirement	biancad	CN0005301
Cape Town	0/0		WO0006229	BathBinMaint - Bathroom Bin Maintenance	Durban	Julanda Kessler	м	SM	Scheduled Maintenance	WES001	CN0005295
Bloemfontein	0/0		WO0006234	BathBinMaint - Bathroom Bin Maintenance	Durban	Julanda Kessler	м	SM	Scheduled Maintenance	WES001	CN0005296
A New Test Site	0/0										
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uzu; -		4.0									

- 4. "The Call Assignment: Reference No: [call ref number] screen will be displayed. " on page 4
  - **Assigned To:** Click on the down **arrow** to select the name of the Technician you wish to assign the work order to from the drop-down list.
  - **Detail:** The *call reference description* for the call will populate the field.
  - Assignment Date: The <u>current</u> date and time will display.
  - Assigned By: The person currently assigning to the call will display in the field. Click on the down arrow to select the select a different employee from the drop-down list, if required.



### **CREATE NEW WORK ORDER**

• Create new Work Order: Click to select the check box to create a new Work Order if the technician needs to follow up on the same call, but for a different task. Make sure you also change the assignment detail accordingly.

Refer to Create new Work Order or select Open Work Orders for more ation.	inform-
Call Assignment : Reference No. : CN0005291 - 8PO: Version 2.5.0.8 - Example Company v2.5.0.8     Fore Equipment / Locations Contract Pinance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities	- B X
Save Back Save Layout View Call Process , Format , View , Assigned To Anial Blythe   Detail The - Commercial The Test	~
Assignment Date 25/04/2022 • 13:55:32 •	

### **OPEN WORK ORDERS**

gned By Julanda Kessle

Create new Work Order 🗹

Create new Work Order

• You may with to create a <u>new</u> Work Order by selecting an <u>exist-</u> ing **Open Work Order**.

User : JulandaK 25/04/2022 Version : 2.5.0.8 Example Company v2.5.0.8

Note that you <u>cannot</u> choose a Work Order that was previously assigned to someone.



Save.

Refer to Create new Work Order or select Open Work Orders for more information.

5. When you have finished editing the call assignment details, click on

			Call Assignment :	Reference No. : CN0005291	- BPO: Version 2.5.0	).8 - Example Co	ompany v2.	5.0.8			_ <b>– x</b>
Home Ed	quipment / Locations	Contract Fina	nce / HR Invent	ory Maintenance / Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities	- 8 ×
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Assignment Date	25/04/2022 • 13	:55:32 🗘 *									
Assigned By	Julanda Kessler	•									
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- 6. You will return to the *Work Management* screen.
- 7. When you receive the *Call Processing* message to confirm that;
  - Call No: [call ref number] has been assigned.
- 8. Click on OK.



	6-		Wo	rk Mana	agement - BPO: Version 2.5	5.0.8 - Exa	mple C	Company v2.5.0.	8				_ <b>D</b> X
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Sites	Stats		WO0006130	Site In	spection for Network Cable Ins	talla Du	ban	Belinda Sharman	0	INSP	Inspection	HOP001	
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	2/1	•	WO0006214	Tier - O	Commercial Tier Test	Du	ban	Theo Peterson	м	INST	Installation	HOP001	CN0005291
Karlien Jessica Young Dunnaway Svenson	1/0		WO0006214	Tier - O	Commercial Tier Test	Du	ban	Julanda Kessler	М	INST	Installation	HOP001	CN0005291
🧏 John Twain	1/0	_	WO0006250	Paper	not feeding through Call Pro	cessing <	-	7		×	Machine Repairs	HOP001	CN0005298
2 Theo Peterson	1/1		WO0006260	Loan u	unit required while ma	-					Machine Repairs	OFF001	CN0005304
	-/-	-	WO0006260	Loan u	unit required while ma			L'			Machine Repairs	OFF001	CN0005304
Jade Rivers	1/0		WO0006260	Loan u	unit required while ma	Call No	: CN0	005291 has been	assigned.		Machine Repairs	OFF001	CN0005304
Jeff Rivers	1/0		WO0006136	PRO34	106OR002						New Deal Sale	BIG0001	CN0005274
Pretoria	0/0	_	WO0006257	PRO34	106OR002						New Deal Sale	BIG0001	CN0005274
Cape Town	0/0		WO0006253	Replac	ce part - current fault			►	OK		Parts Requirement	biancad	CN0005301
	0/0		WO0006229	BathBi	inMaint - Bathroom Bi					-	Scheduled Maintenance	WES001	CN0005295
Bioemfontein	0/0		w00006234	BathBi	nMaint - Bathroom Bin Maintena	ance Du	ban	Julanda Kessler	М	SM	Scheduled Maintenance	WES001	CN0005296
A New Test Site	0/0												
3 Johannesburg	0/0												
		4											
Open Windows 🕶									User : Julan	daK 25/	04/2022 Version : 2.5.0	).8 Example Co	mpany v2.5.0.8

#### **Related References**

• "View Work Order Details" on page 25

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