We are currently updating our site; thank you for your patience.

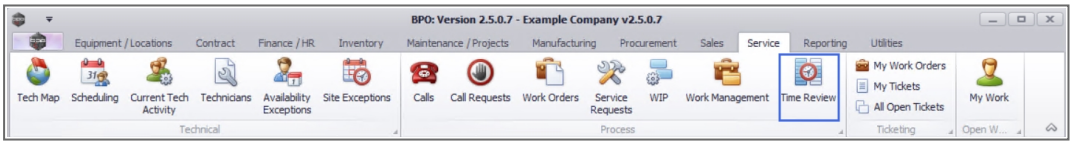
SERVICE

TIME REVIEW - FLAG REVIEWED

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 > Time Review



1. The **Time Review** listing screen will be displayed.
2. This screen is divided into 2 sections:
    - The **Work Orders** frame and the
    - **SLA** frame.
3. The **Work Order** frame displays all work orders with time records.
4. The **SLA** frame displays all contract inclusions linked to an item on the selected work order.

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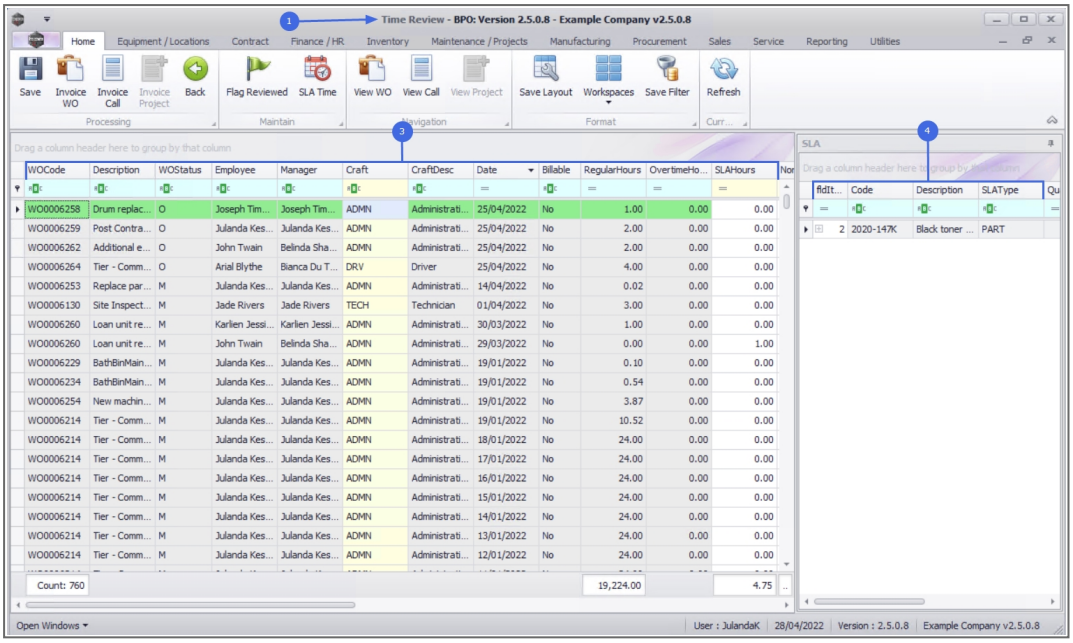

5. Click on the **row** of the Work Order you would like to review time for.

REVIEW TIME – NO LINKED CRAFT INCLUSIONS

6. The item linked to the selected Work Order has no linked contract inclusions and therefore will have no **SLA** information.

> Note that only craft inclusions (**CRFT**) are affected by Time Review.

- The **Billable** column indicates whether the labour time is billable or non-billable.
- **Regular Hours** displays the time logged by the employee against the work order. This field cannot be changed.
- Any overtime logged against the work order will display in the **Overtime Hours** column. This field cannot be changed.

> All Work Orders created after the Time Review flag has been set to 'Yes' in the Configurator will have the Billable flag set to 'No'

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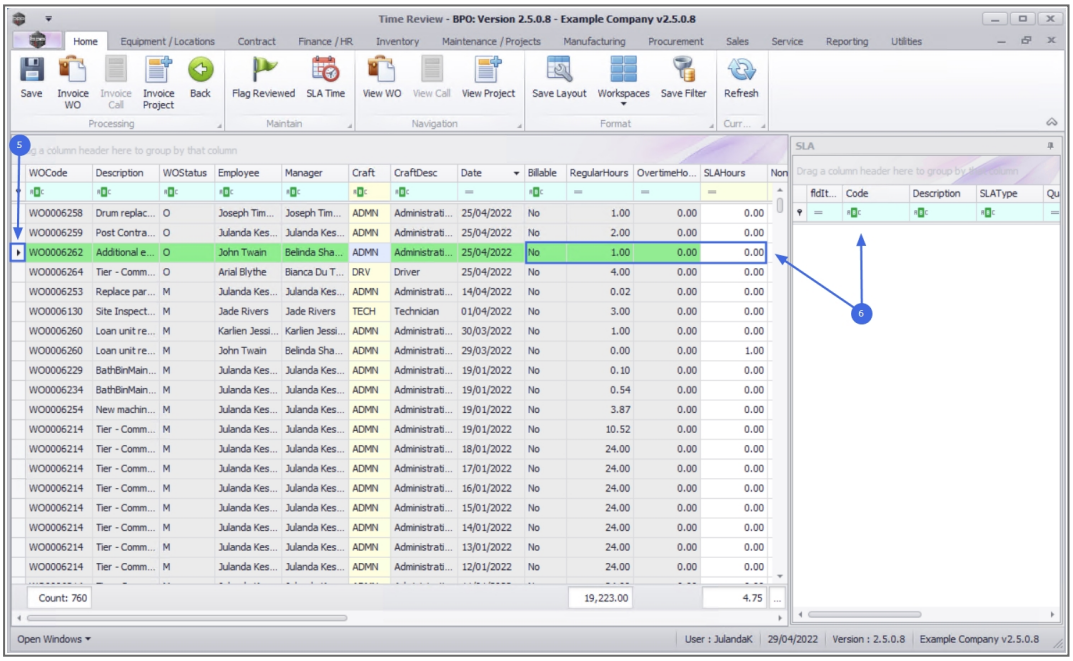
by default but all hours allocated as Regular Hours will be billable by default.

- Time allocated as **SLA Hours** on the work order, will be deducted from the client's contractual agreement as service or support time.

Note on SLA Hours

- Time allocated as ***SLA Hours*** will be deducted from ***Regular Hours***. The example has no time was allocated as ***SLA Hours*** and therefore the ***Regular Hours*** remained the same. If **1**hour had been allocated as ***SLA Hours***, then the **Regular Hours** would have changed to **1.25**.
- The **Overtime Hours** field is not affected by changes in the ***Regular Hours***, ***SLA Hours*** and ***Non Billable Hours*** fields.



7. Use the ***Scroll*** bar at the bottom of the frame to scroll until the ***Marked*** column is visible.

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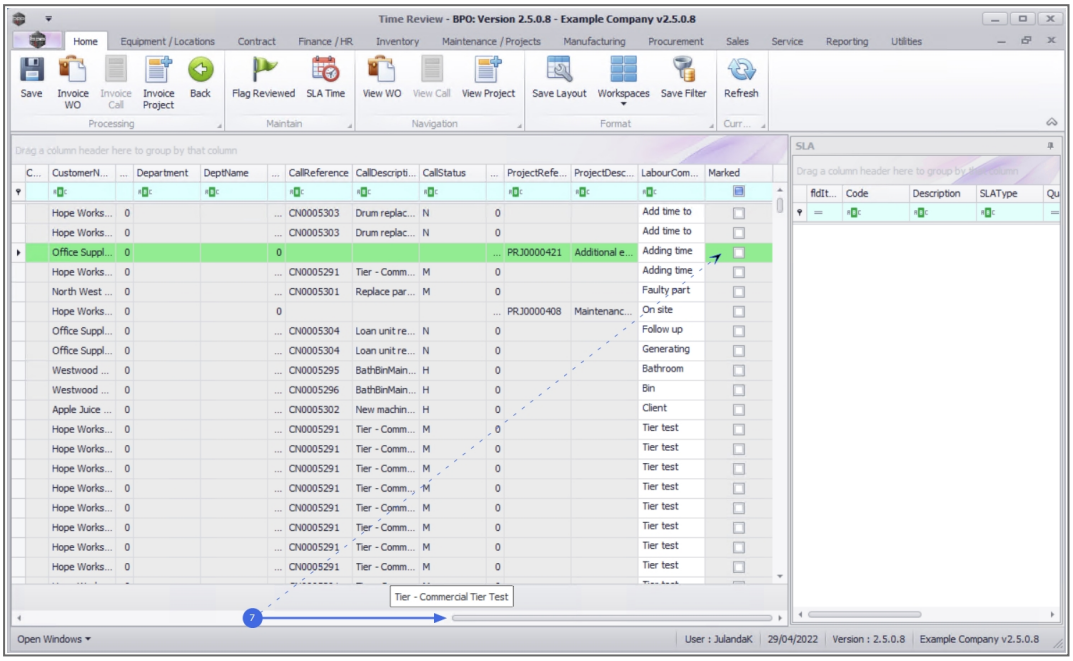
Note that the ***Marked*** field will remain unchecked as no time was allocated as ***SLA Hours***. If time had been allocated as ***SLA Hours***, then this field would have been checked.



- Time allocated to ***Non Billable Hours*** will not be billed. Click in this field to type in or use the **arrow** indicators to allocate non billable hours for the work order, if required.
    - Time allocated as ***non billable hours*** will be deducted from ***Regular Hours***.

Overtime Hours will not be affected by changes in the ***Regular Hours***, ***SLA Hours*** or ***Non Billable Hours*** fields.

Total Hours = *Regular Hours* + *Overtime Hours* + *SLA Hours* + *Non Billable Hours*.

- ***Total Hours*** is greyed out and cannot be adjusted.

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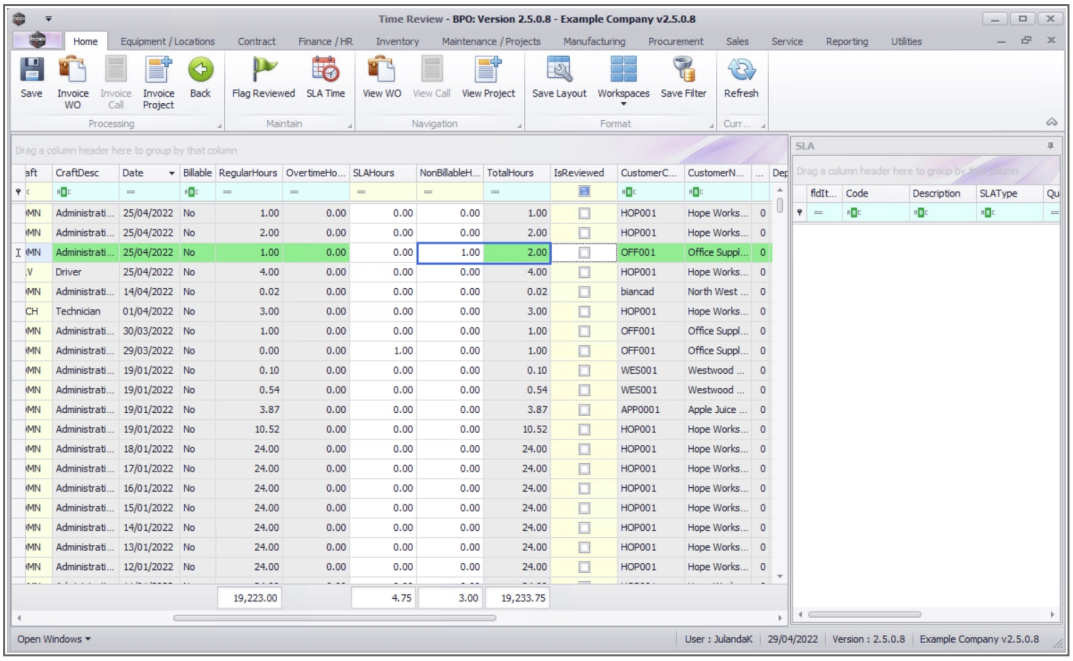

8. When you are done reviewing the time click on the **Is Reviewed** check box or click on **Flag Reviewed** to mark the check box.
9. Click on **Save**.
10. When you receive the ***Time Review Processing*** message to confirm that;
    - ***Time Review processing successfully updated.***
11. Click on ***OK***.

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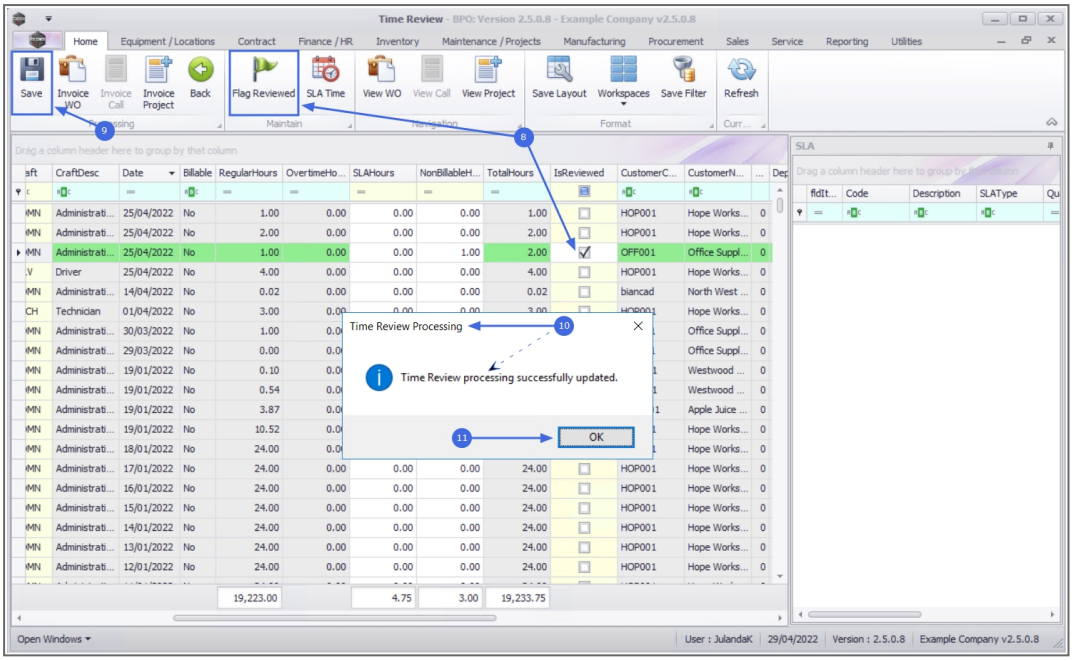

TIME REVIEW WITH LINKED CRAFT INCLUSIONS

- In this image, the item on the selected work order has linked contract inclusions and they are displayed in the ***SLA*** section.
    - ***Note 1:*** Although all contract inclusions linked to an item on a selected work order will be displayed in the ***SLA*** section, only craft inclusions (***CRFT***) are affected by time review.
    - ***Note 2:*** The information displayed in the ***SLA*** section can also be viewed in the ***Call*** screen - ***SLAs*** tab and the Contract Balances screen. In the Contract Balances screen, only ***SLA*** information for craft inclusions is displayed.

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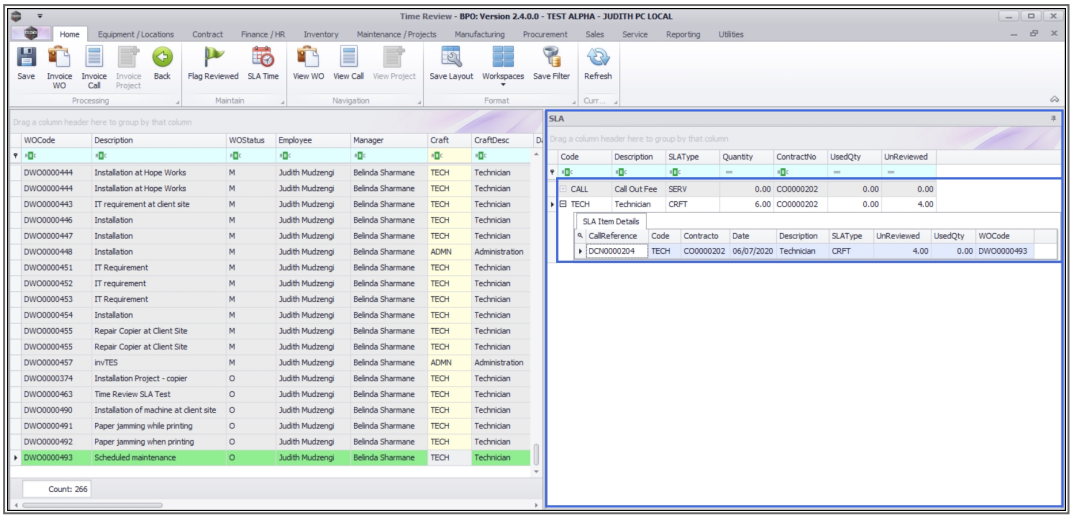
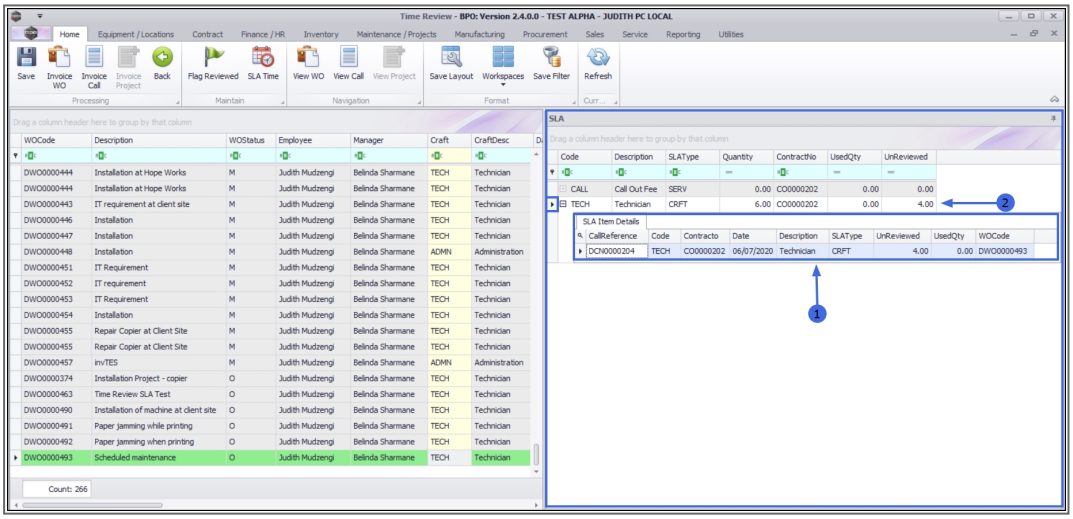


In the ***SLA*** panel,

1. the ***SLA Item Details*** for the
2. the craft inclusion linked to the item on the selected work order will auto display.



- ***Code:*** This shows the code of the contract inclusion.
- ***Description:*** This shows the description of the contract inclusion.
- ***SLA Type:*** This shows the type of the contract inclusion.
- ***Quantity:*** This shows the quantity of the contract inclusion.

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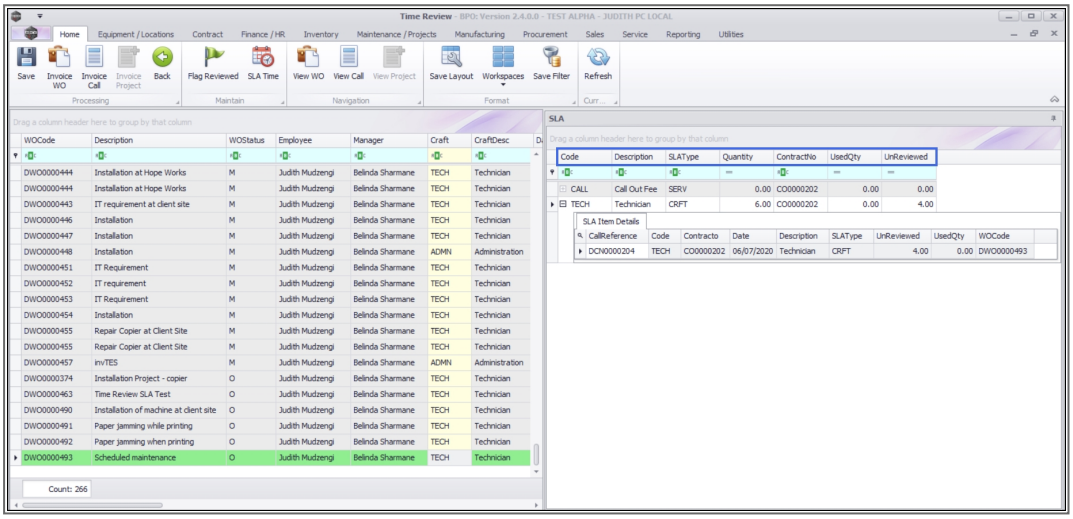
- ***Contract No:*** This shows the contract number where the item on the selected work order is linked to.
- ***Used Qty:*** This shows the quantity of the contract inclusion that has been used up.
- ***UnReviewed:*** This shows time logged against the item on the selected work order that has not been reviewed.



In the **SLA Item Details** panel:

- ***Call Reference:*** This shows the call number where the selected work order is linked to.
- ***Code:*** This shows the code of the contract inclusion.
- ***Contract No:*** This shows the contract number where the item on the selected work order is linked to.
- ***Date:*** This shows the date when time was logged.
- ***SLA Type:*** This shows the type of the contract inclusion.
- ***UnReviewed:*** This shows time logged against the work order that has not been reviewed.
- ***Used Qty:*** This shows the SLA hours that have been allocated to this craft inclusion.

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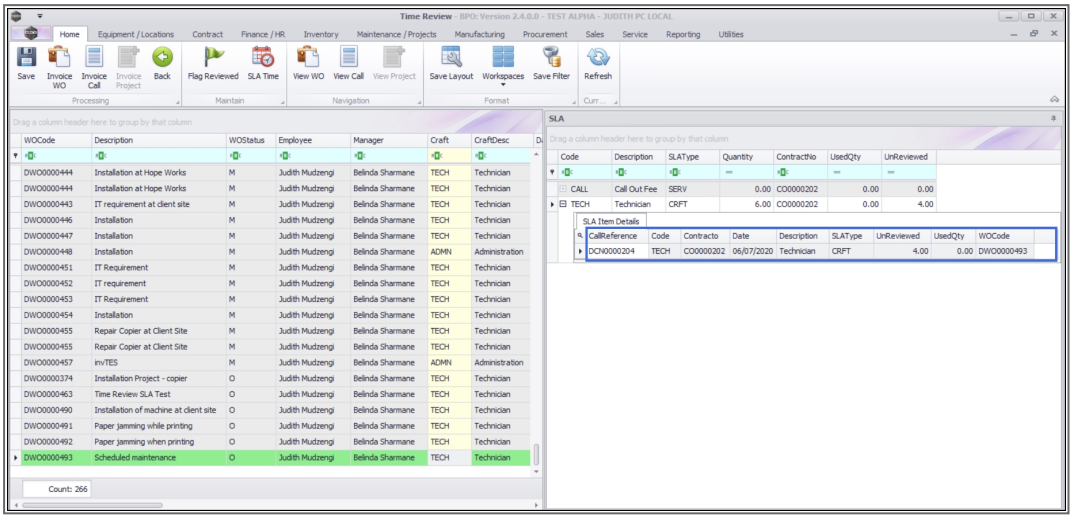
- ***WO Code:*** This shows the work order number of the selected work order.



In the work orders panel, scroll to the right until you see the fields described below;

- The ***Billable*** field shows whether the labour time is billable or non-billable. In this example, the billable field is ***No***.
- The ***Regular Hours*** field shows the employee time logged against the work order. This field cannot be changed. In this example, the ***Regulars Hours*** = ***4***.
- If an employee logs overtime against a work order, it will be displayed in the ***Overtime Hours*** field. This field cannot be changed. In this example, no ***Overtime Hours*** have been logged.
    - ***Note:*** All work orders that are created after the Time Review flag has been set to ***Yes*** in the ***Configurator*** will have the ***Billable*** flag set to ***No*** by default but all hours allocated as ***Regular Hours*** will be billable by default.

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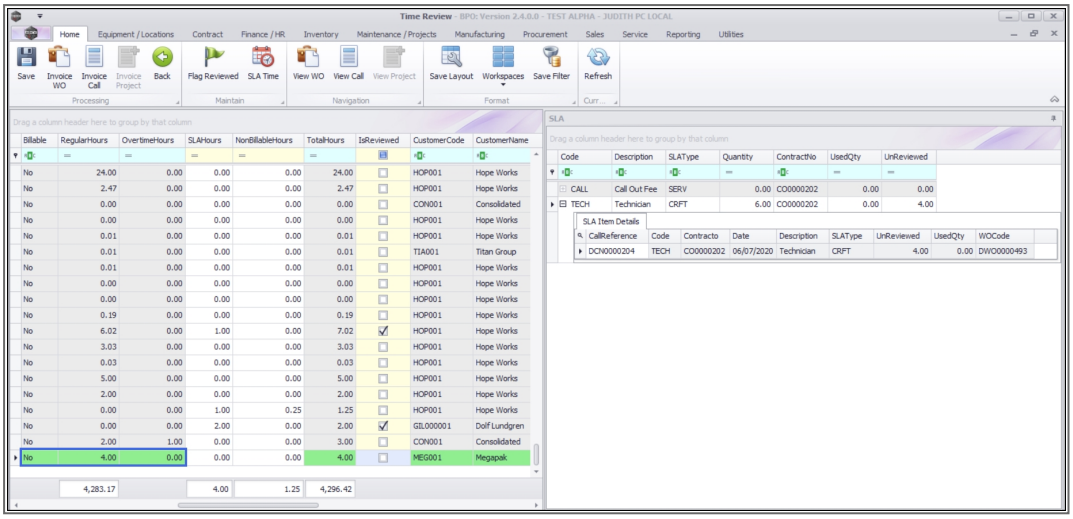
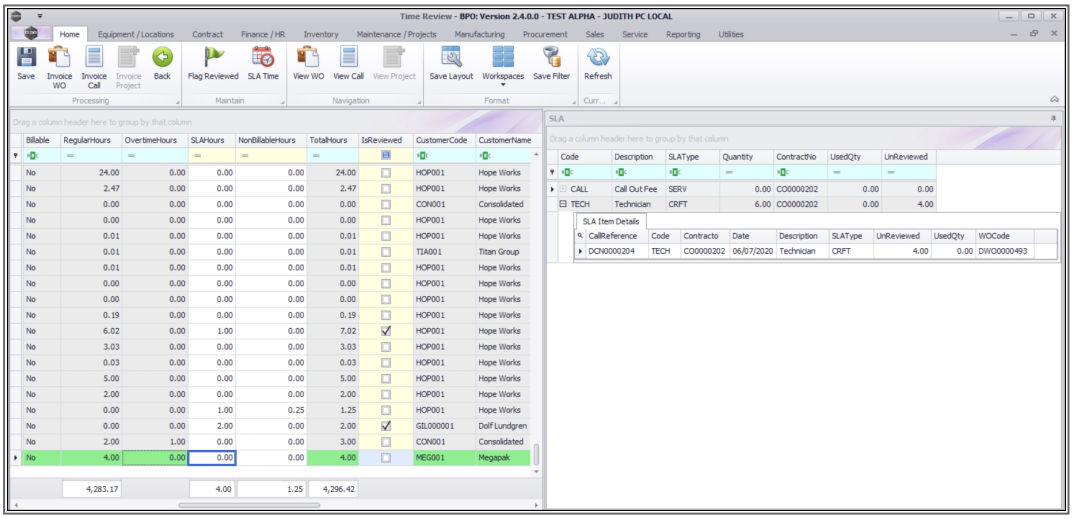


- **SLA Hours**: Time allocated to this field will be deducted from the **service / support time** from a client's contractual agreement.
- You can choose to allocate a portion of or all **Regular Hours** logged by an employee as **SLA Hours**.



ALLOCATE 'ALL' REGULAR HOURS

- To allocate all *Regular Hours* as *SLA Hours*, click on *SLA Time*.

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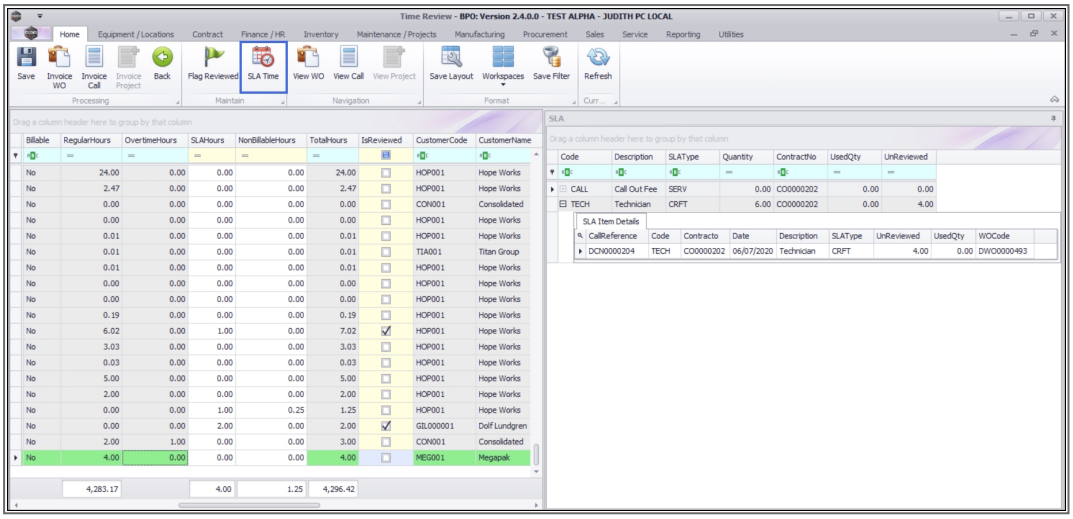
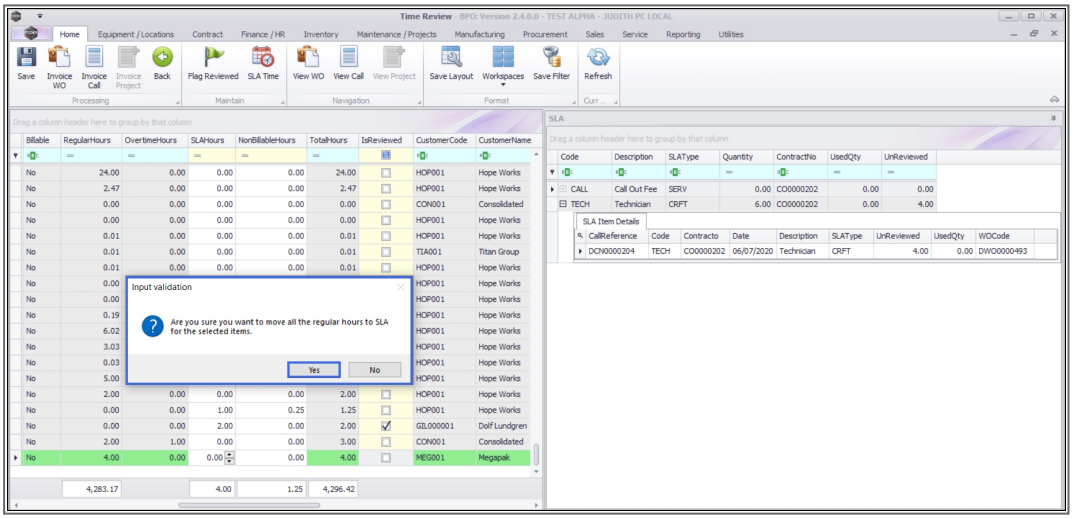


- An ***Input Validation*** message will pop up asking you;
  - ***Are you sure you want to move all the regular hours to SLA for the selected items.***
- Click on ***Yes***.



- All ***Regular Hours*** will now be allocated as ***SLA Hours***.

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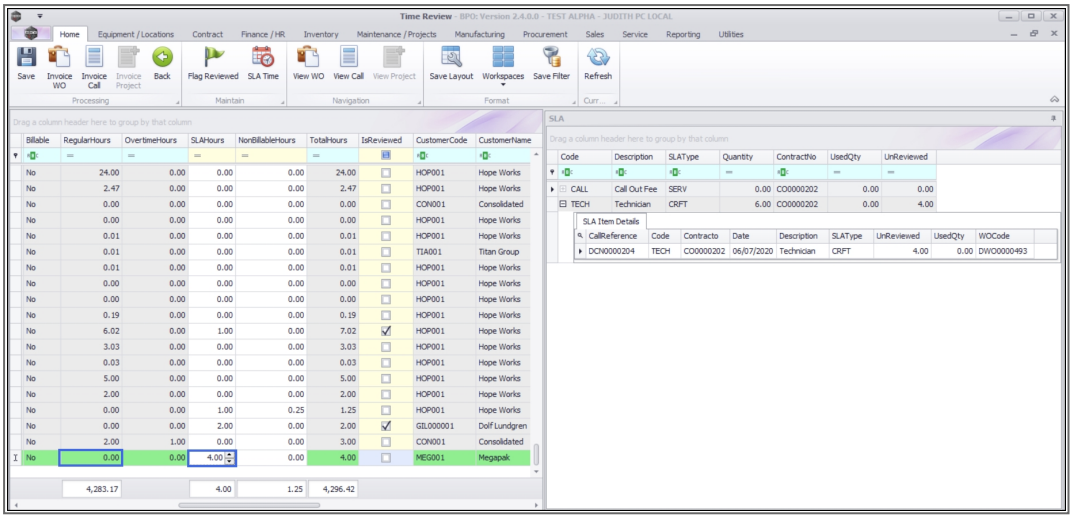
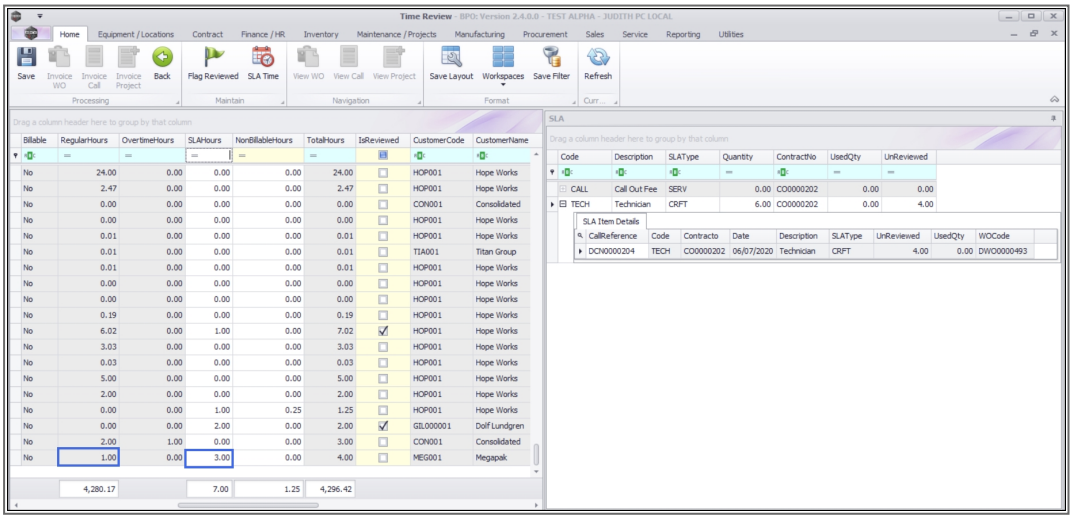


ALLOCATE A 'PORTION' OF REGULAR HOURS

- To allocate a portion of the ***Regular Hours*** as ***SLA Hours***, type in the number of hours you wish to apportion as ***SLA Hours***.
- In this example, ***3 hrs*** have been allocated as ***SLA Hours***.
- The time allocated as ***SLA Hours*** has now been deducted from ***Regular Hours***. Click away from this field to see the changes. In this case, ***Regular Hours*** now display as 1.
- ***Note:*** The ***Overtime Hours*** field is no affected by changes in the ***Regular Hours***, ***SLA Hours*** and ***Non Billable Hours*** fields.



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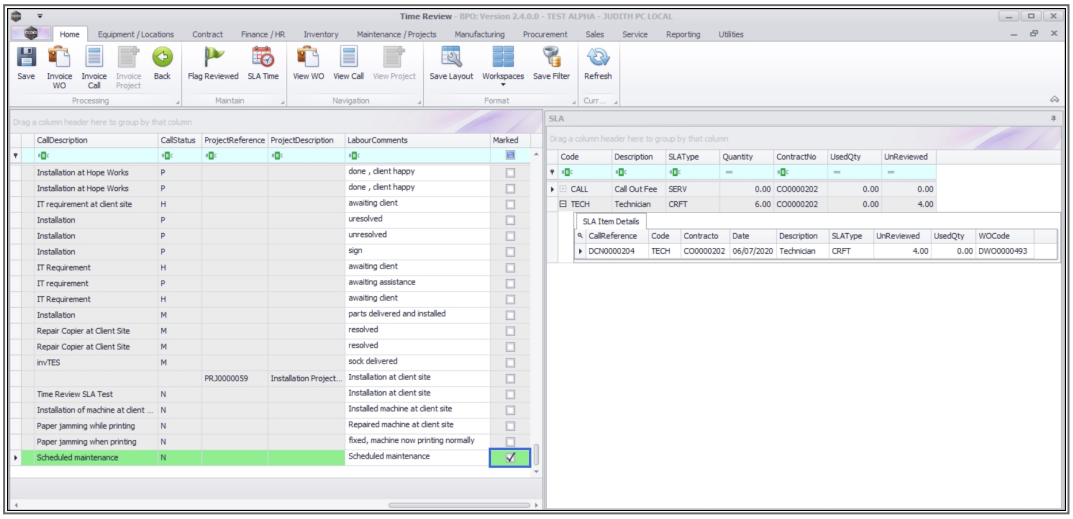
- *Scroll* right until you see the *Marked* field.
- Since time was allocated as *SLA Hours*, this field is now be checked.
- *Scroll* left to go back.



- *Non Billable Hours:* Time allocated to this field will not be billed. In this example, *1 hr* was allocated as non billable hours.
- The time allocated as *Non Billable Hours* has now been deducted from *Regular Hours*. Click away from this field to see the changes. In this case, *Regular Hours* field now has *0* hrs.
    - **Note**: The *Overtime Hours* field is not affected by changes in the *SLA Hours* or *Non Billable Hours* fields.

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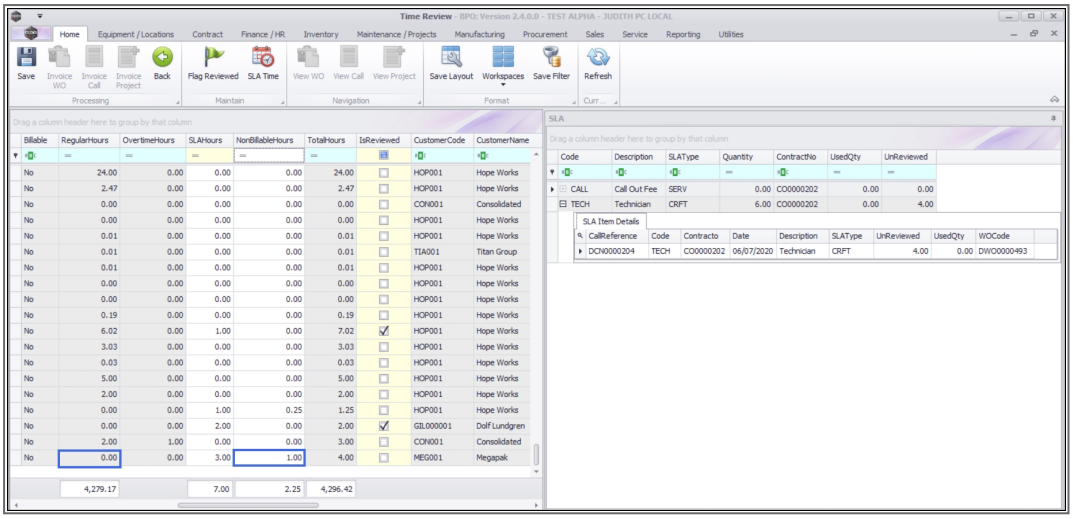
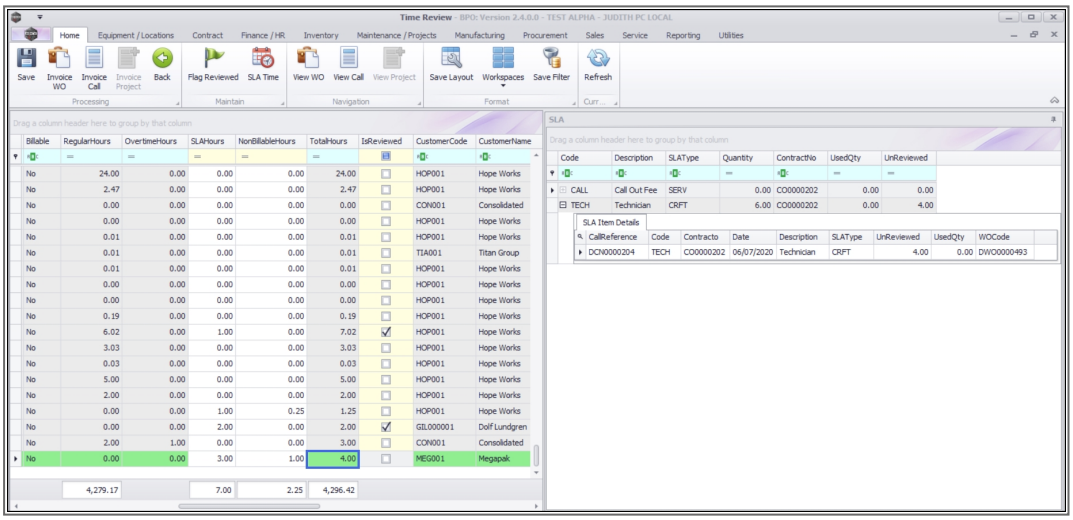


- *Total Hours = Regular Hours + Overtime Hours + SLA Hours + Non Billable Hours.*
- This field is greyed out and cannot be changed.



You can now mark the time as reviewed by either clicking on the **Is Reviewed** check box or the **Flag Reviewed** button.

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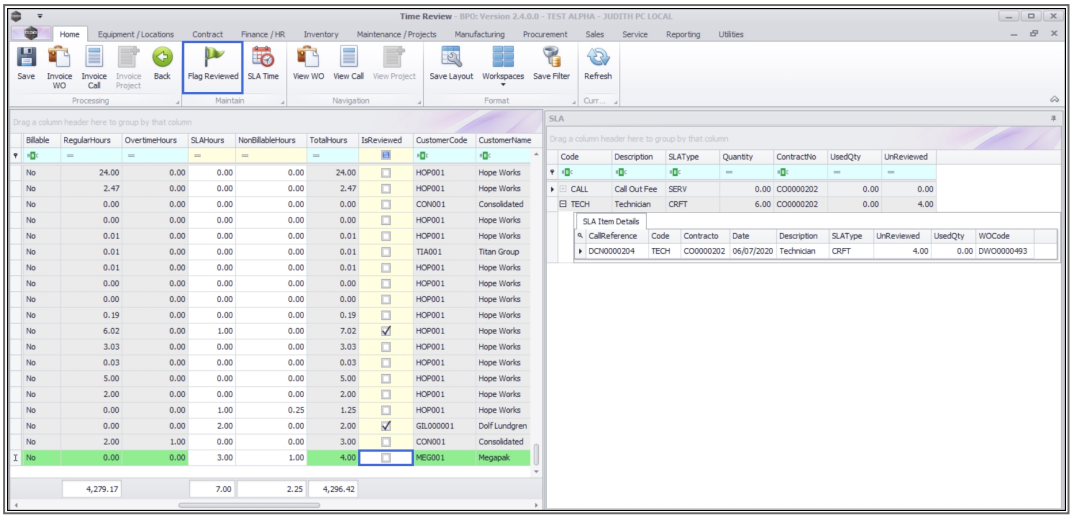
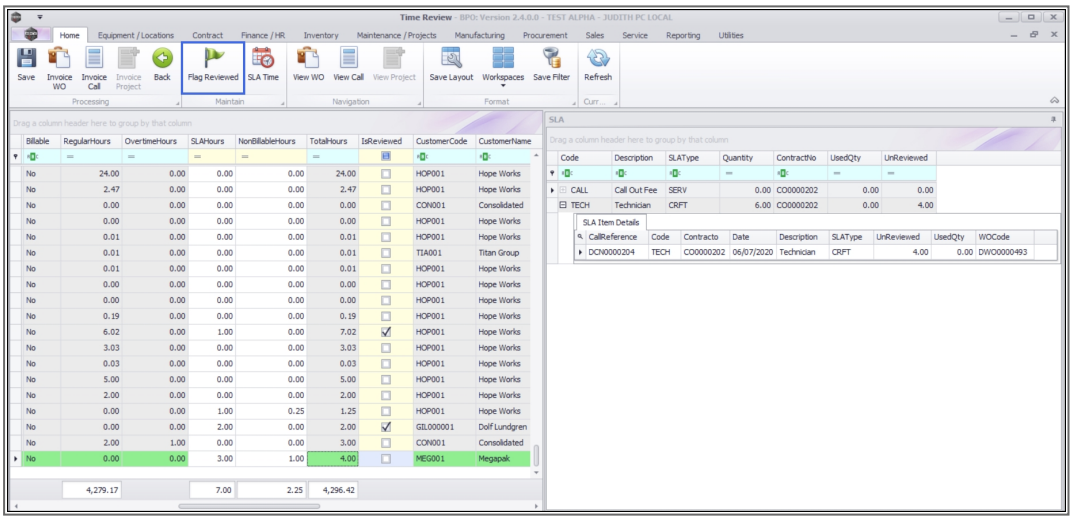


REVIEW TIME USING THE 'FLAG REVIEWED' BUTTON

- Click on *Flag Reviewed*.



- An *Input Validation* message will pop up asking you;
  - *Are you sure you want to flag the following items.*
- Click on *Yes*.

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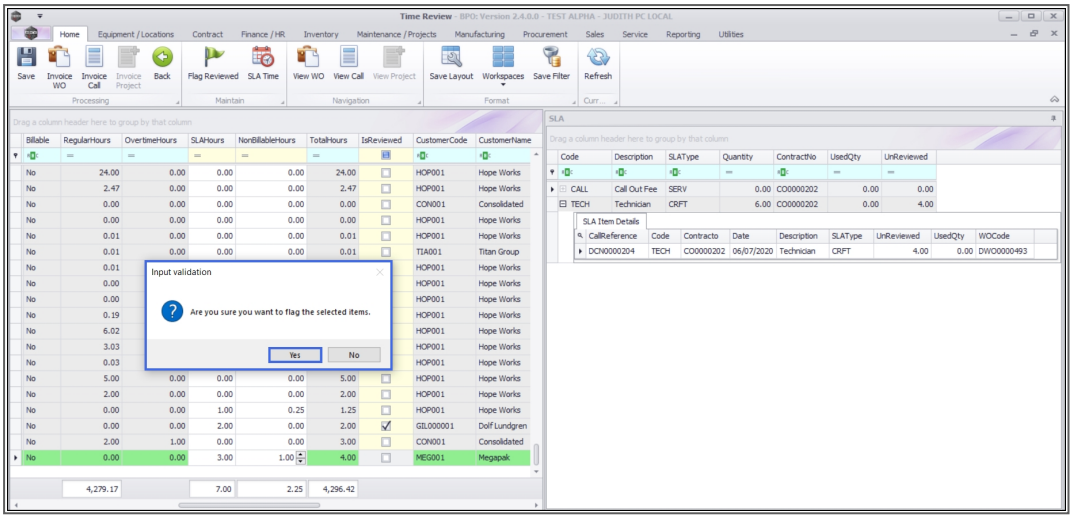
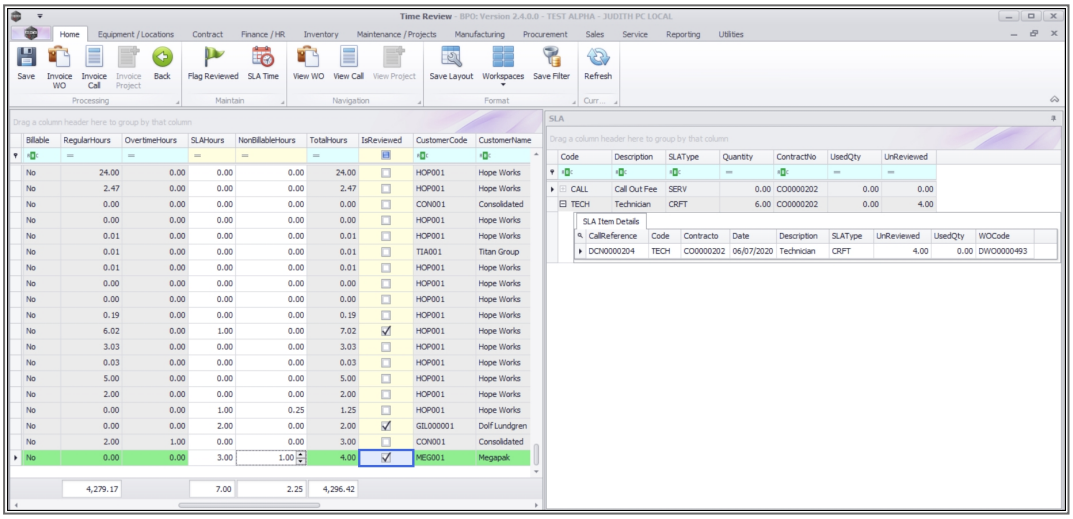


- The *Is Reviewed* field will now be checked.



SAVE REVIEWED TIME

- Click on *Save*.

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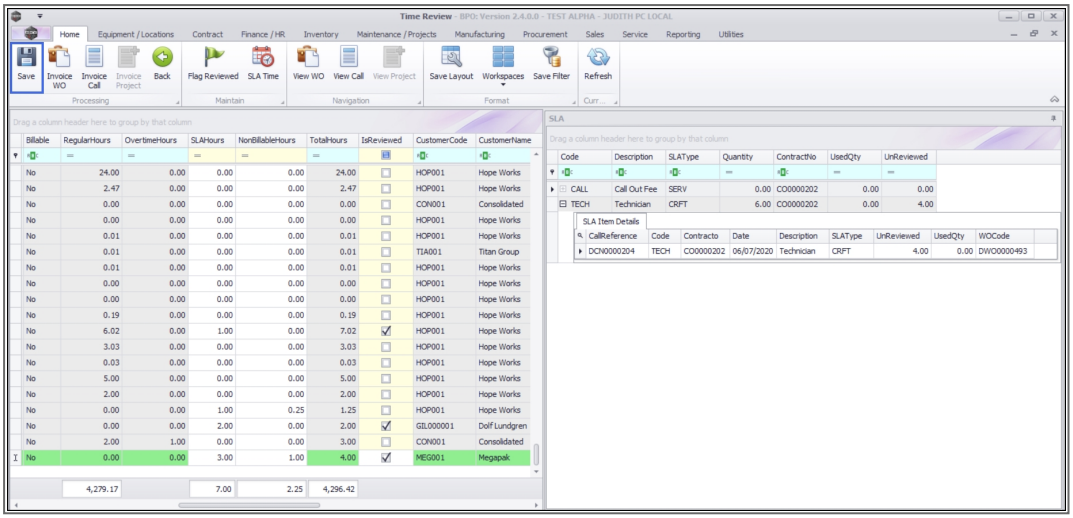
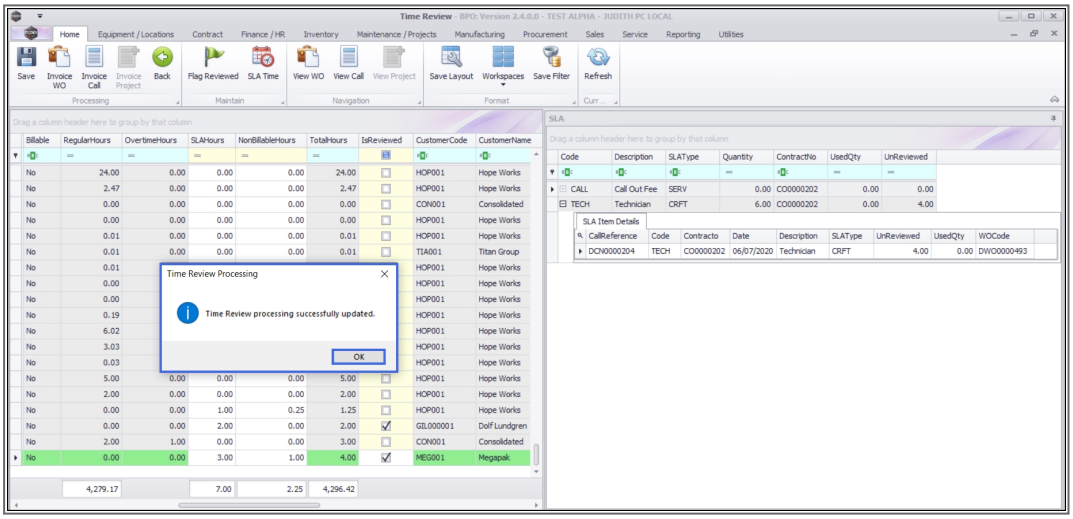


- A ***Time Review Processing*** message will pop up telling you;
    - ***Time Review processing successfully updated.***
- Click on ***Ok***.



- ***Scroll*** to the right to view more fields.

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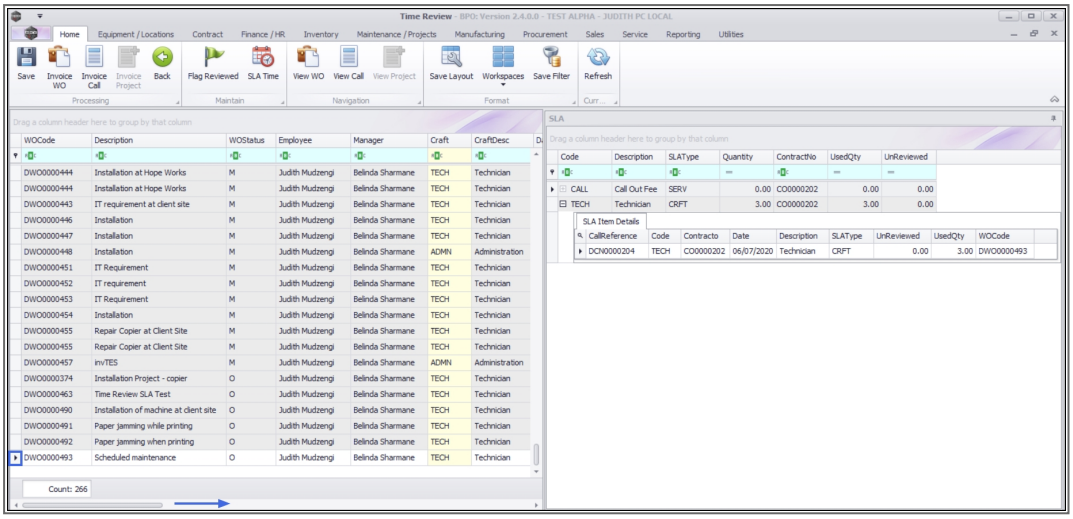
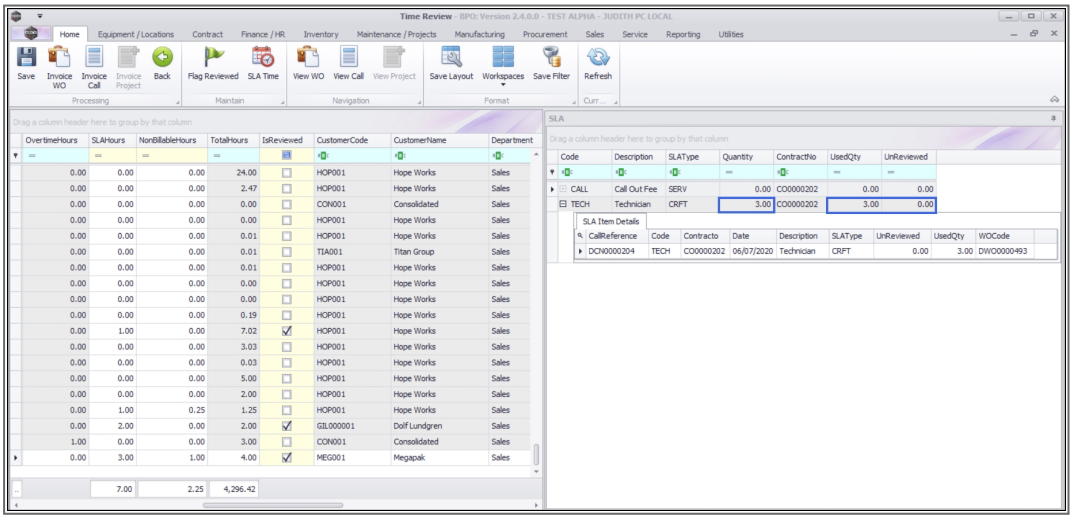


In the ***SLA*** panel,

- the ***Quantity*** will now be auto adjusted to reflect the balance of unused service or support hours left after time has been reviewed for the selected craft inclusion.
- The ***Used Qty*** will now show the total number of service or support hours that have been consumed for the selected craft inclusion.
- The ***UnReviewed*** field will now show the total number of hours that have not been reviewed for the selected craft inclusion.



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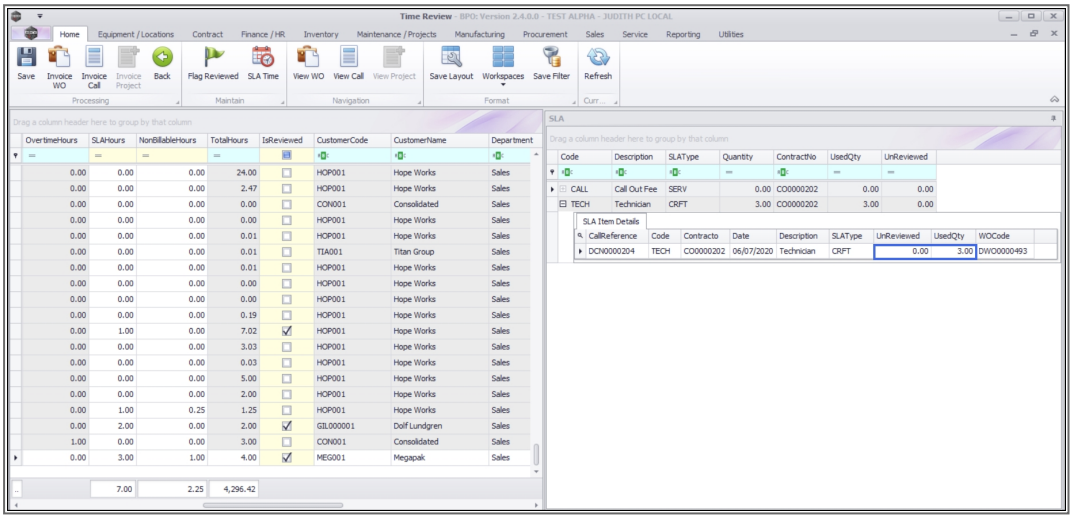
In the ***SLA Items Details*** panel,

- The ***UnReviewed*** field will now show the total number of hours that have not been reviewed on the selected call.
- The ***Used Qty*** will now show the total number of service or support hours that have been consumed on the selected call.



- If multiple time records were logged against a craft inclusion, all the individual time records will be displayed in the ***SLA Item Details*** panel.

1. In this image, three time records relating to the ***ADMN*** craft were logged and
2. each individual transaction for ***ADMN*** can be seen in the ***SLA Item Details***.

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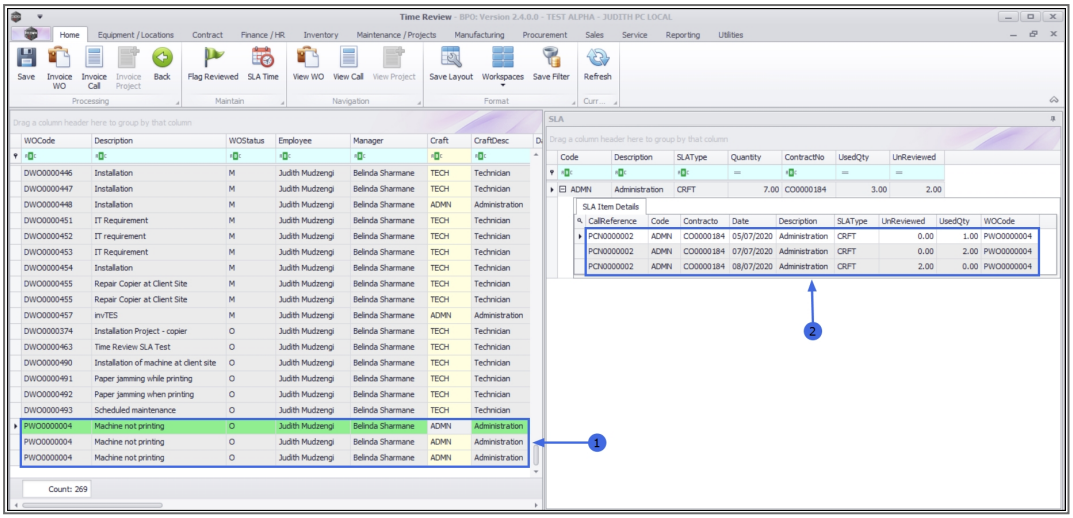
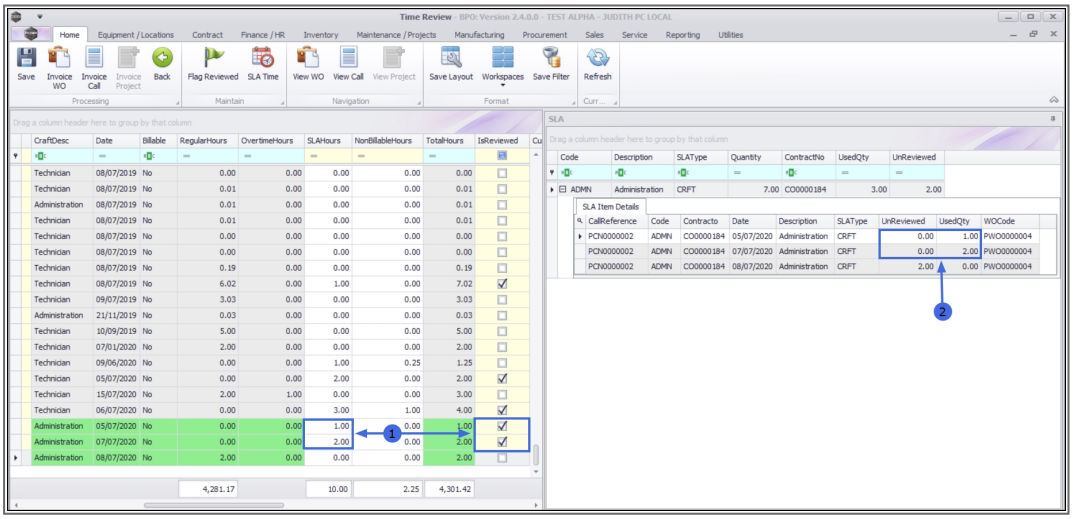


- Scroll to the right in the work orders section to view more columns.

1. In this image, the first two time records were reviewed and ***1hr*** and ***2hrs*** were allocated as ***SLA Hours*** respectively.
2. These individual transactions can be viewed in the ***SLA Items Details*** panel, where ***1 hr*** and ***2 hrs*** are displayed in the ***Used Quantity*** field and ***0*** is displayed in the ***UnReviewed*** field for both transactions.



In the ***SLA*** panel:

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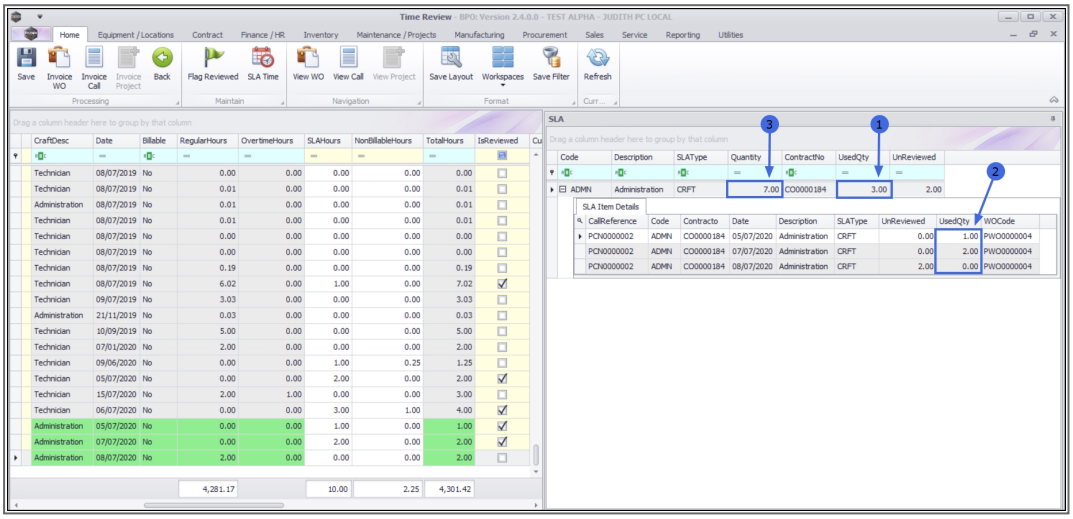
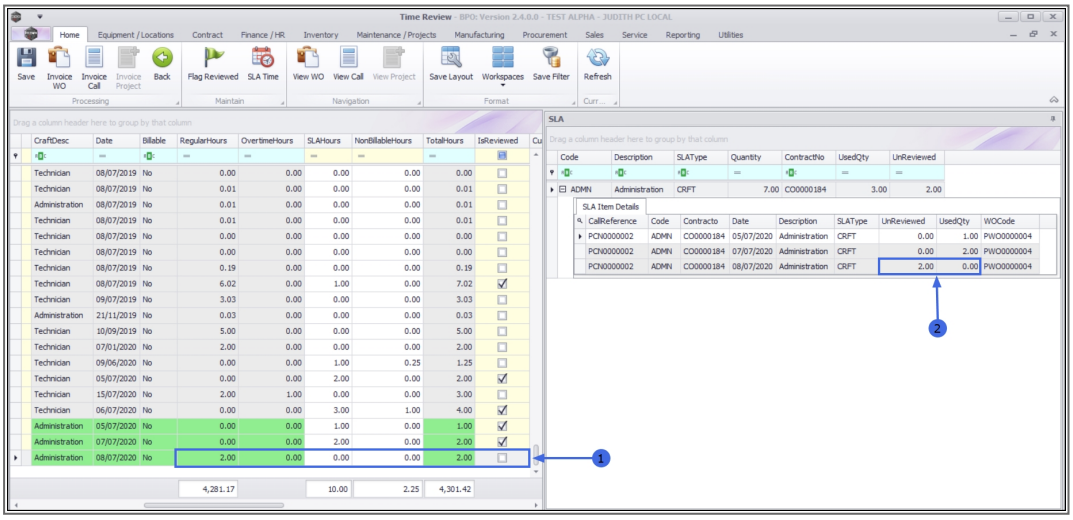
1. the ***Used Quantity*** is the summation of all the
2. individual ***Used Quantity*** transactions displayed in the ***SLA Item Details*** frame. In this case ***Used Quantity*** = ***1*** + ***2*** + ***0*** = ***3***.
3. the ***Quantity*** = ***Initial Quantity*** (you can view this in the Balances screen) - ***Used Quantity***. In this case it is ***7***.



1. In the work orders panel, the last record is not reviewed and all hours are still allocated as ***Regular Hours***.
2. This transaction can also be viewed in the ***SLA Item Details*** panel, where ***UnReviewed*** = ***2*** and ***Used Quantity*** = ***0***.



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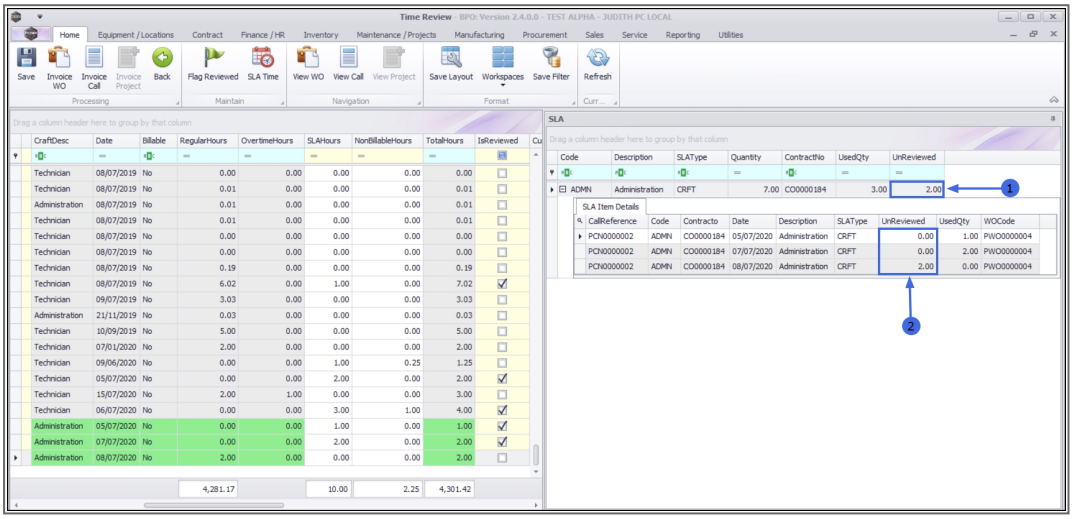
In the ***SLA*** panel:

1. the ***UnReviewed*** (hours) are the summation of all the
2. individual ***UnReviewed*** transactions displayed in the ***SLA Item Details*** frame. In this case, ***Unreviewed*** = ***0*** + ***0*** + ***2*** = ***2*** since there is only ***1*** transaction that has not been reviewed yet.



- **Note**: For a record to be removed from this screen, the Work Order has to be closed.

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