

SERVICE

INTRODUCTION TO WORK MANAGEMENT

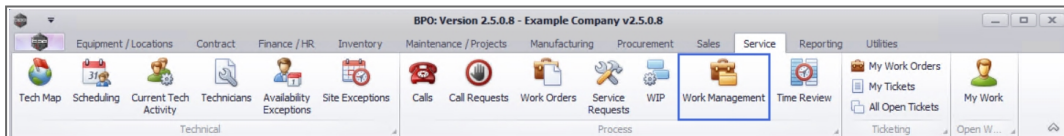
The Work Management screen is designed for Service and Technical Management to view, assign, complete and close work orders; and works much like the Call Centre screen.

Only Work Orders that have time records linked to them are listed. Of these, you can view the number of **Open** and **Completed** Work Orders per site, and by technician, for the date range selected.

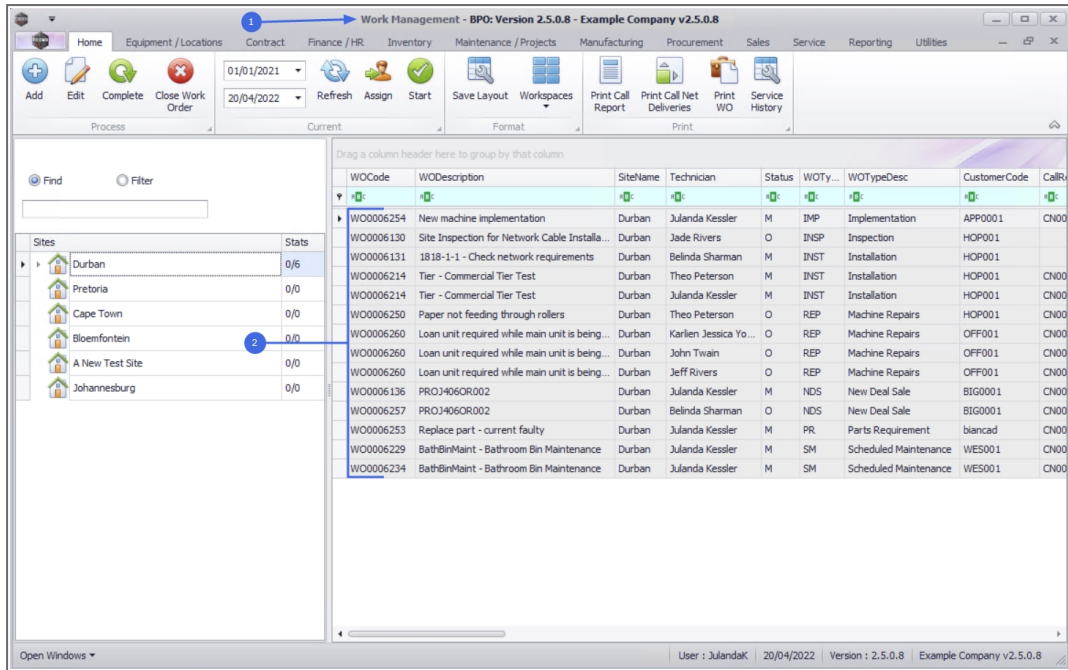


If you are using Tech Connect then the [Technician Activity](#) and [Last GPS Location](#) can be viewed, as with the Call Centre screen.

Ribbon Access: *Service > Work Management*

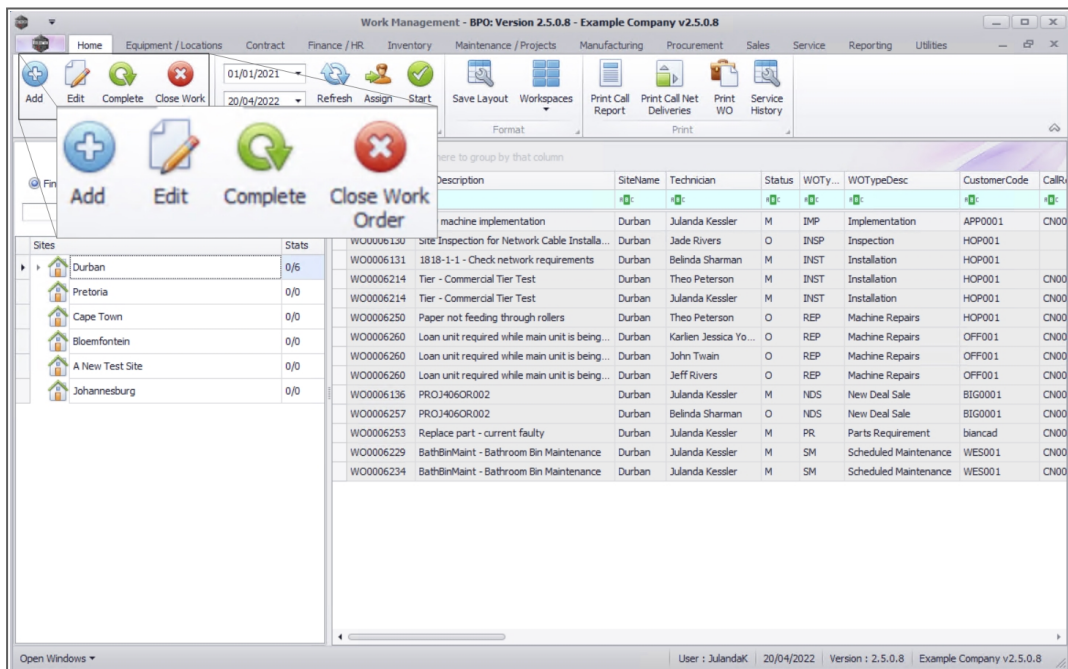


1. The **Work Management** screen will be displayed.
2. This screen lists all [time linked](#) Work Orders, dependant on the employee hierarchy.



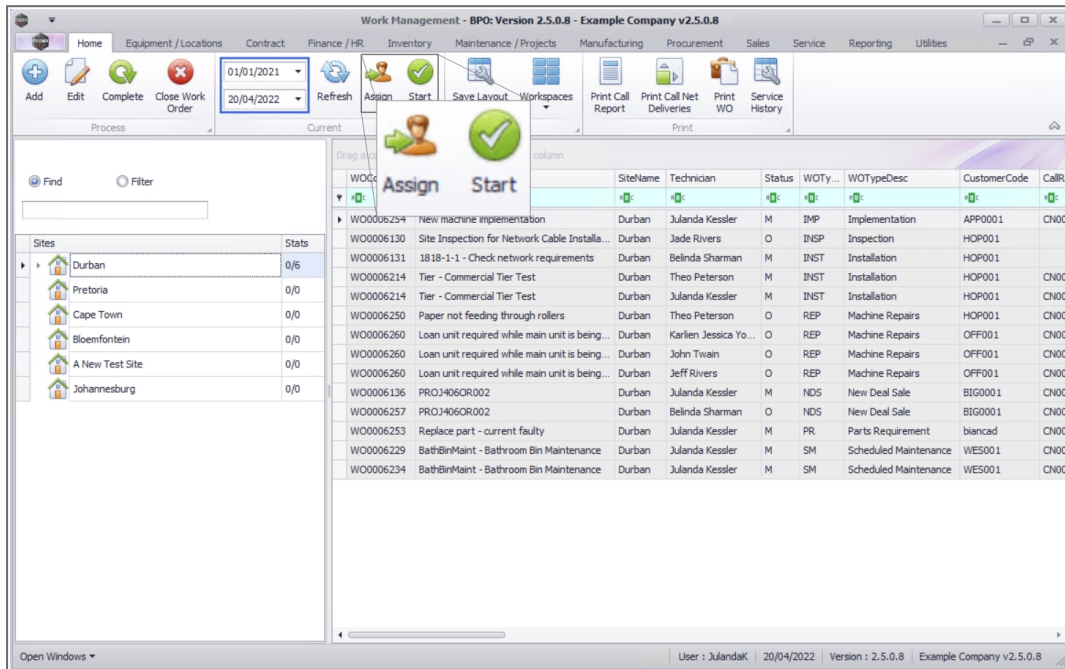
RIBBON ACTION BUTTONS

A work order can be Linked, Edited, Completed and Closed from the process buttons.

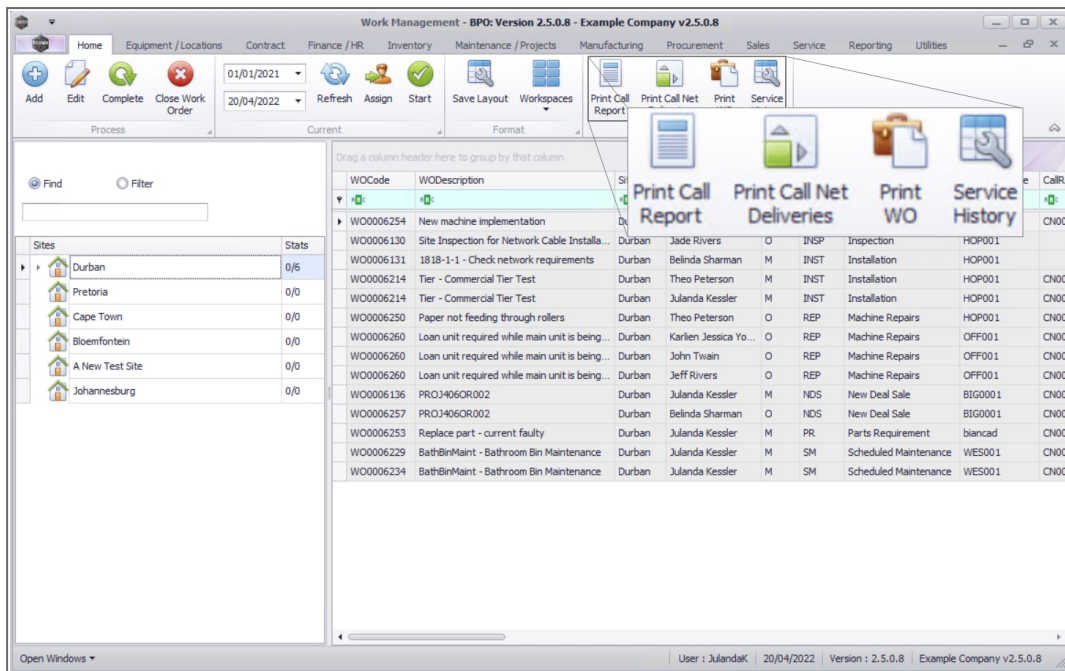


The ***date range*** fields will auto populate with an **8** day range up to and including, the current date. The date range can be changed.

From here a work order can also be Assigned. Use Started to End Work on a work order.

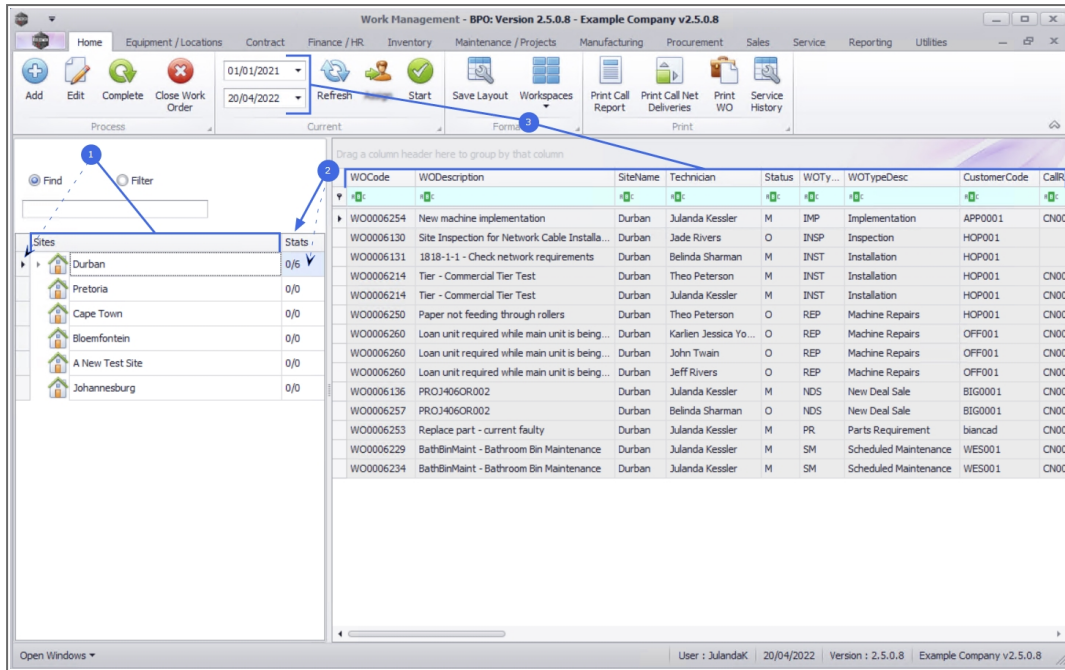


From the print buttons the Call Report , Call Net Deliveries, Work Order Report and Service History Report can be printed.



SITES FRAME

- The **Sites** frame contains a list of all the sites currently on the system.
 - Upon opening this screen, the first site in the list will be selected, thereafter, you can select the site that you wish to work in.
- The **Stats** column indicates the number of **Open** and **Completed** assignments for the site.
- The Work Orders listed in the data grid will be filtered using the specified date range for the selected site.

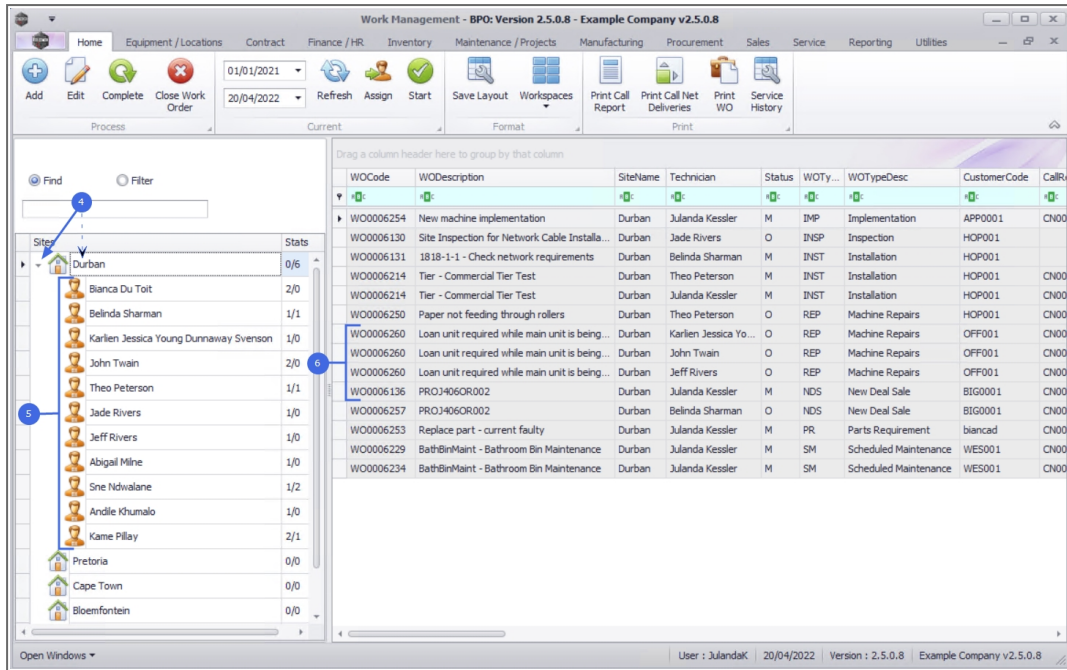


EMPLOYEE HIERARCHY

4. Click on the **tree view chevron node** of a site to expand the hierarchy view.
 - In this example **Durban** has been selected.
5. The employees listed will be those **linked** to that site and who have **recorded time** against their Work Orders.
6. A Work Order that has been assigned to more than one employee, that has **time recorded** against that work order, will be listed for each employee.

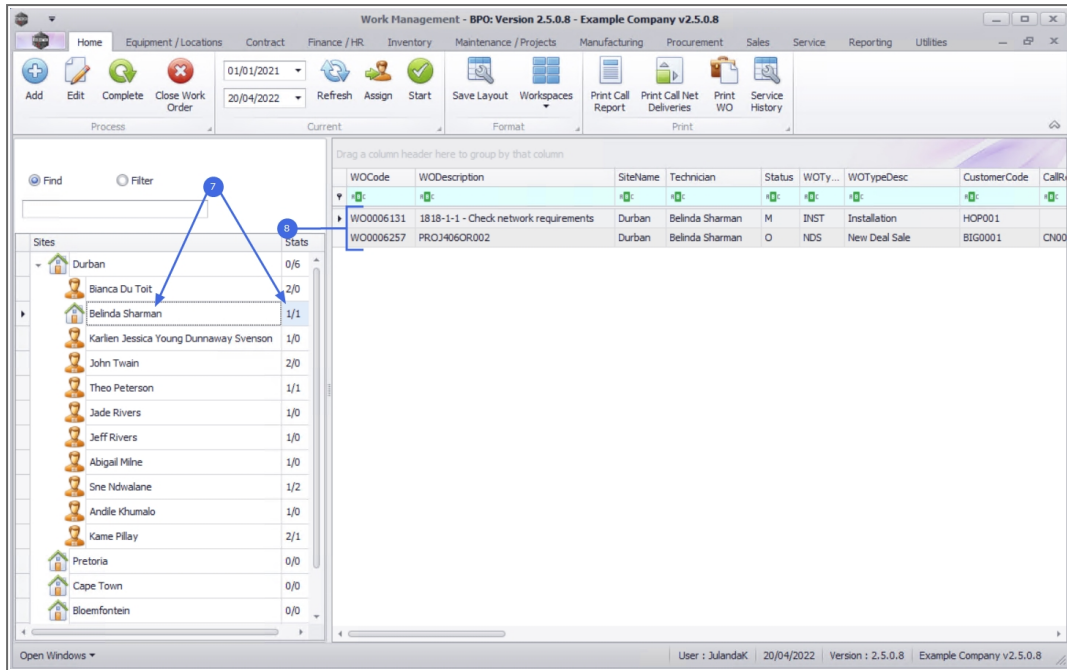


Note that the Technician column in the data grid is not the **Assigned to** person but the employee that has a **labour / time record** linked to the Work Order.



EMPLOYEE ASSIGNMENTS

- Click on the employee to view each employee's individual assignment stats.
- The **Open** and **Completed** Work Order assignments for the employee will be listed.



FIND A WORK ORDER

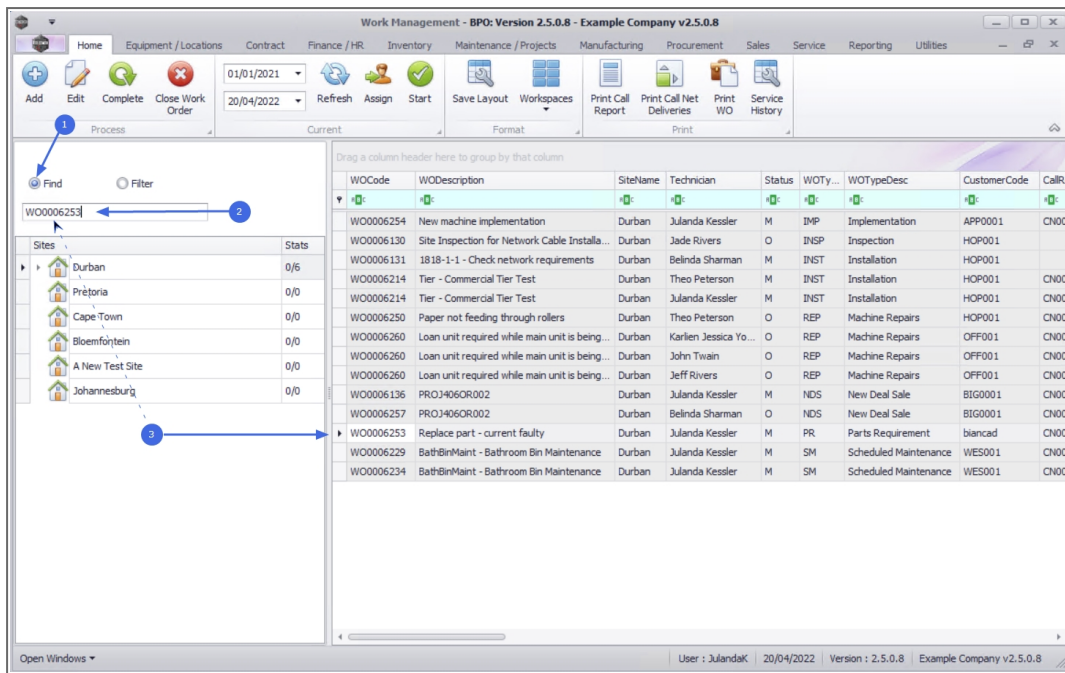
You can find an Open or Completed Work Order, regardless of the site or date range by using the Find radio button.

1. Click on the **Find** radio button.
2. Type in the full **Work Order number** in the text box and press **Enter**.



Note that the Find function will only search for a Work Order that has been allocated and is either **Open** or **Completed**.

3. The system will **find** and **select** the Work Order.



FILTER BY WORK ORDER

Use the filter function to list a range of Open or Completed Work Orders, containing the prefix you have typed in.

1. Click on the **Filter** radio button.
2. Type in the **prefix** that you wish to filter by and press **Enter**.
3. The system will search for and display the Open and Completed Work Orders that **match** the prefix.
4. The **Edit Filter** row will list the text or number you typed in for filtering.
5. To remove the filter, click on the [X] in the Edit Filter row and the screen will refresh to display information in the data grid that was available before the filter.

Work Management - BPO: Version 2.5.0.8 - Example Company v2.5.0.8

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

Process: 1 | Current: 20/04/2022 | Refresh | Assign | Start | Save Layout | Workspaces | Print Call Report | Print Call Net Deliveries | Print WO | Service History

Applied Filter: [WOCCode] Like 'WO0006%'

Find: WO0006 | Filter: 2

WOCCode	WODescription	SiteName	Technician	Status	WOTy...	WOTypeDesc	CustomerCode	CallR
WO0006254	New machine implementation	Durban	Julanda Kessler	M	IMP	Implementation	APP0001	CH00
WO0006130	Site Inspection for Network Cable Installa...	Durban	Jade Rivers	O	INSP	Inspection	HOP001	
WO0006131	1818-1-1 - Check network requirements	Durban	Belinda Sharman	M	INST	Installation	HOP001	
WO0006214	Tier - Commercial Tier Test	Durban	Theo Peterson	M	INST	Installation	HOP001	CH00
WO0006214	Tier - Commercial Tier Test	Durban	Julanda Kessler	M	INST	Installation	HOP001	CH00
WO0006250	Paper not feeding through rollers	Durban	Theo Peterson	O	REP	Machine Repairs	HOP001	CH00
WO0006260	Loan unit required while main unit is being...	Durban	Karlien Jessica Yo...	O	REP	Machine Repairs	OFF001	CH00
WO0006260	Loan unit required while main unit is being...	Durban	John Twain	O	REP	Machine Repairs	OFF001	CH00
WO0006260	Loan unit required while main unit is being...	Durban	Jeff Rivers	O	REP	Machine Repairs	OFF001	CH00
WO0006136	PROJ406OR002	Durban	Julanda Kessler	M	NDS	New Deal Sale	BIG0001	CH00
WO0006257	PROJ406OR002	Durban	Belinda Sharman	O	NDS	New Deal Sale	BIG0001	CH00
WO0006253	Replace part - current faulty	Durban	Julanda Kessler	M	PR	Parts Requirement	biancad	CH00
WO0006229	BathBinMaint - Bathroom Bin Maintenance	Durban	Julanda Kessler	M	SM	Scheduled Maintenance	WES001	CH00
WO0006234	BathBinMaint - Bathroom Bin Maintenance	Durban	Julanda Kessler	M	SM	Scheduled Maintenance	WES001	CH00

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Open Windows | User: JulandaK | 20/04/2022 | Version: 2.5.0.8 | Example Company v2.5.0.8

BPO.MNU.074

