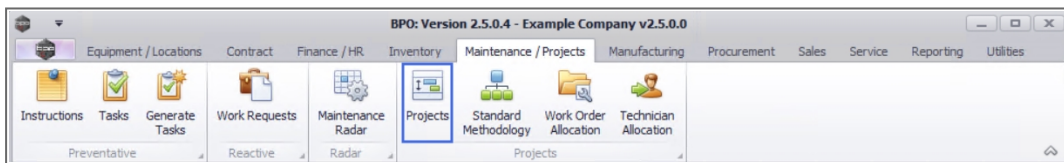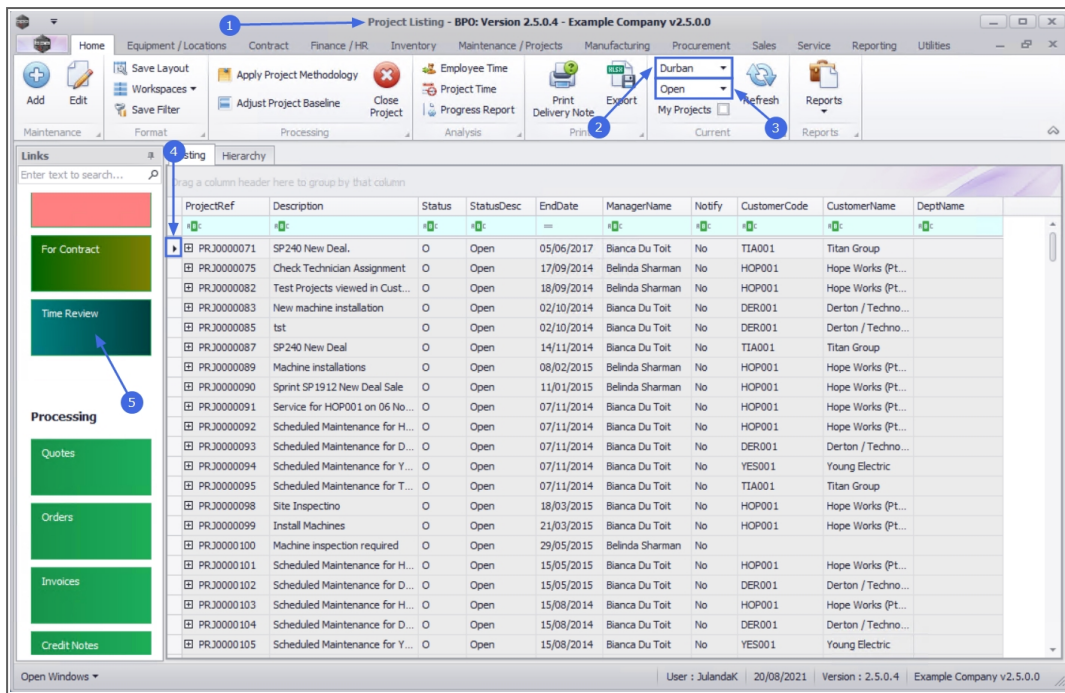# PROJECTS

## PROJECTS – TIME REVIEW

Time review enables the Project Managers to allocate *regular* time logged by employees as **SLA** and / 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 required **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.

For this to work, the Time Review flag must be set to *Yes* in the *Configurator*.

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**Ribbon Access:** *Maintenance / Projects > Projects*



1. The **Project Listing** screen will be displayed.
2. Select the **Site** where the project can be located.
   - The example has **Durban** selected.
3. Ensure that the **Status** has been set to **Open**.
4. Select the **row** of the project you wish to review time for.
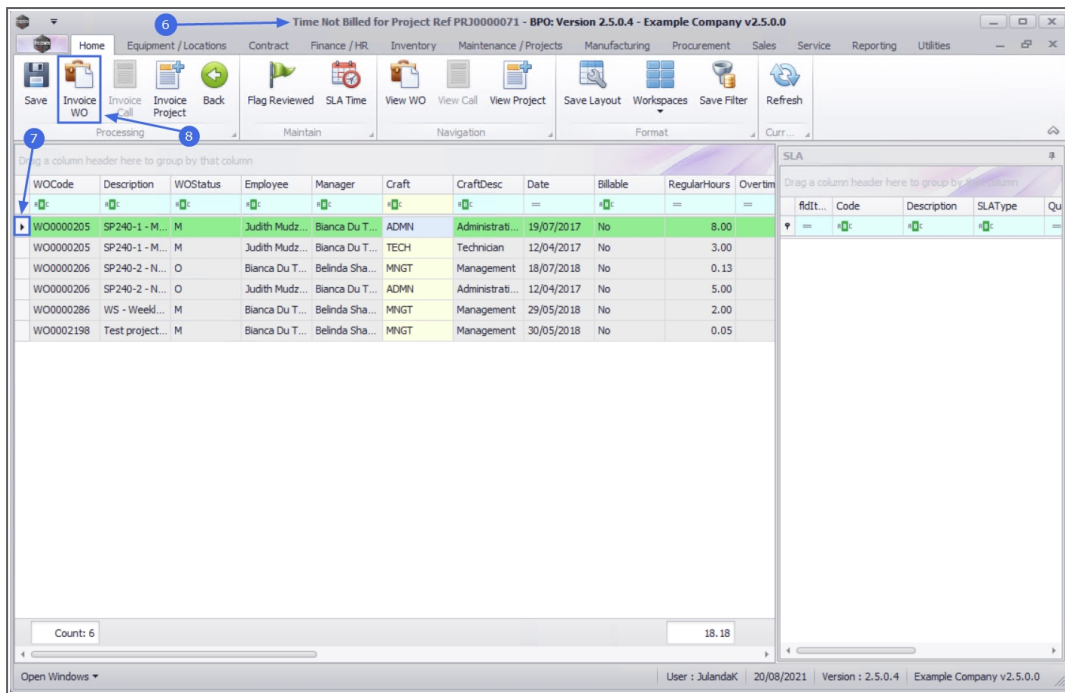5. Click on the **Time Review** tile.

# INVOICE WORK ORDER

A work order can be invoiced from the *Time Review* screen.

6. From the *Time Note Billed for Project Ref [project ref number]*screen,
7. Click on the *row* of the work order you wish to invoice.
8. Click on *Invoice WO*.

> Short cut key: *Right click* to display the *All groups* menu list. Click on *Invoice WO*.

9. The *Add New Customer Invoice* screen will be displayed.

10. Complete the Customer Invoice then click on *Save*.

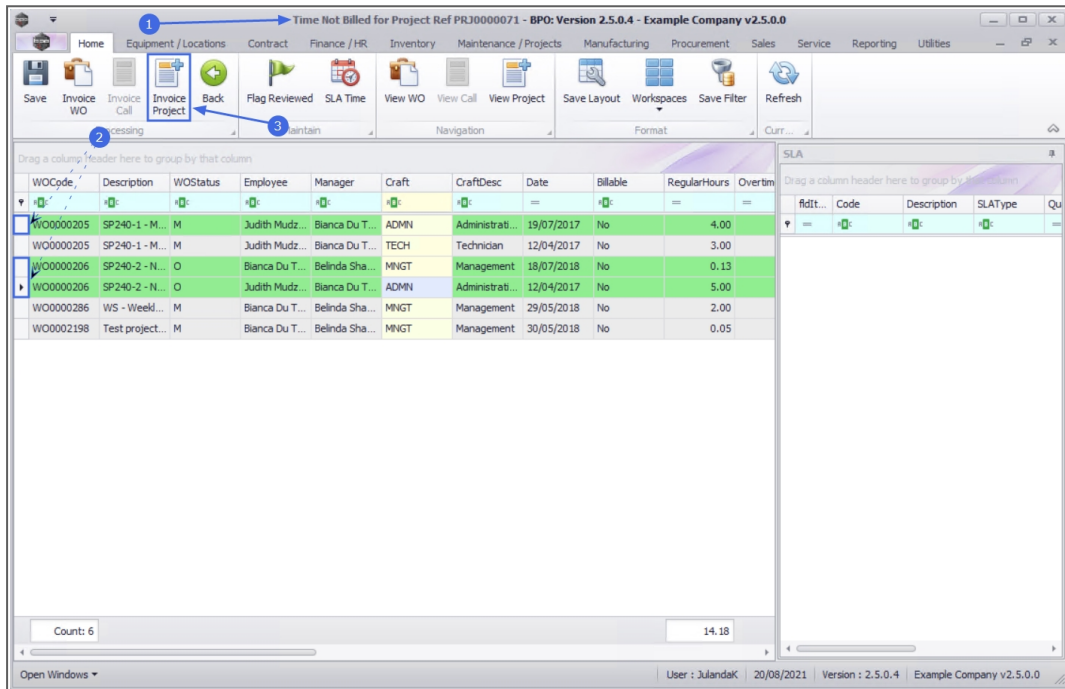For a detailed handling of this topic refer to Time Review - Invoice Work Order

11. You will return to the *Time Not Billed for Project* screen.

12. Click on *Back* to return to the *Project Listing* screen.

For a detailed handling of this topic refer to Introduction to Invoices

# INVOICE PROJECT

1. From the *Time Note Billed for Project Ref [project ref number]*screen,
2. Click on the *row(s)* of the work order(s) you wish to invoice.
3. Click on *Invoice Project*.

> Short cut key: *Right click* to display the *All groups* menu list. Click on *Invoice Project*.



4. The *Add New Customer Invoice* screen will be displayed.
5. Complete the Customer Invoice then click on *Save*.

For a detailed handling of this topic refer to Time Review - Invoice Project

6. You will return to the *Time Not Billed for Project* screen.

7. Click on *Back* to return to the Project Listing screen.

For a detailed handling of this topic refer to Introduction to Invoices

# FLAG REVIEWED

Note on the Time Review flag: Work orders created <u>after</u> the Time Review flag has been set to 'Yes' in the Configurator, will by default display as 'No' in the Billable column, yet all *Regular Hours* will be billed.

1. From the *Time Not Billed for Project Ref [project ref number]* screen,
2. Click on the *row* of the Work Order you wish to review the time for.
3. *Scroll* until you can view all the Time columns.
   - **Billable:** Labour time is displayed as billable or non-billable.
   - **Regular Hours:** The time logged against the work order. *(This field cannot be changed)*
   - **Overtime[1] Hours:** Overtime hours logged against the work order. *(This field cannot be changed)*
   - **SLA Hours:[2]** Time allocated to this field will be deducted from the service / support time from a customer's contractual agreement.
   - **Non Billable Hours:[3]** Time allocated to this field will <u>not</u> be billed.
   - **Total Hours:** = *Regular Hours + Overtime Hours + SLA Hours+ Non Billable Hours. (This field cannot be changed)*

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[1]Overtime hours will not be adjusted when changes are made to the Regular, SLA and/or Non-billable hours.

[2]Time allocated to SLA hours will be deducted from Regular Hours. For example 8 Regular Hours booked, will be updated to 7 Regular Hours when you add 1 to the SLA Hours field.
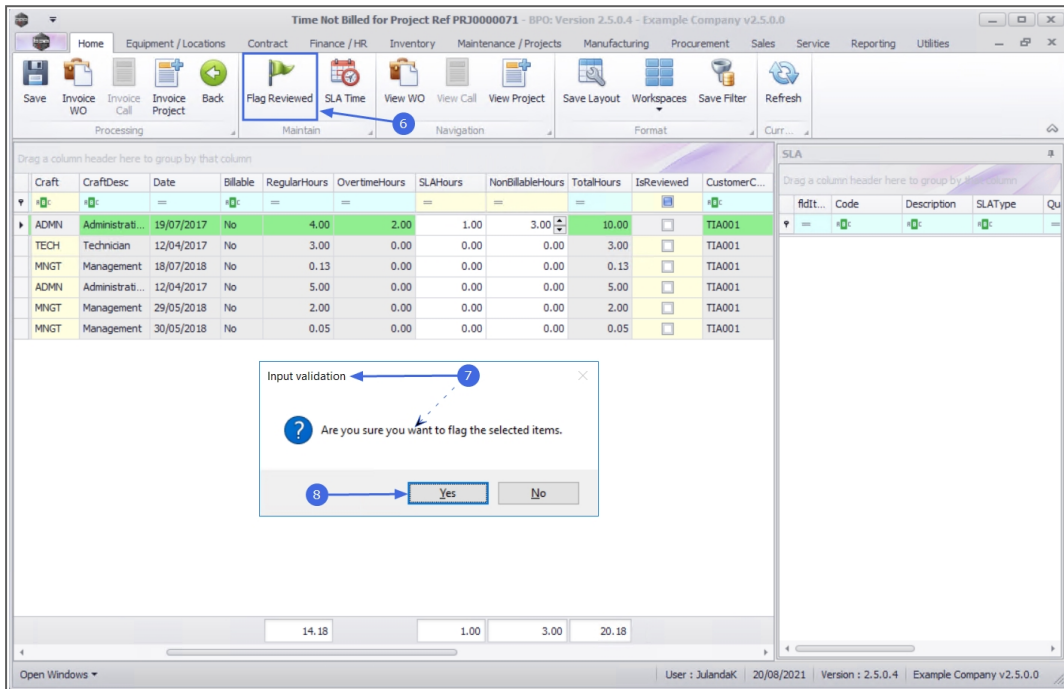
[3]Adding Non Billable hours will deduct from Regular hours
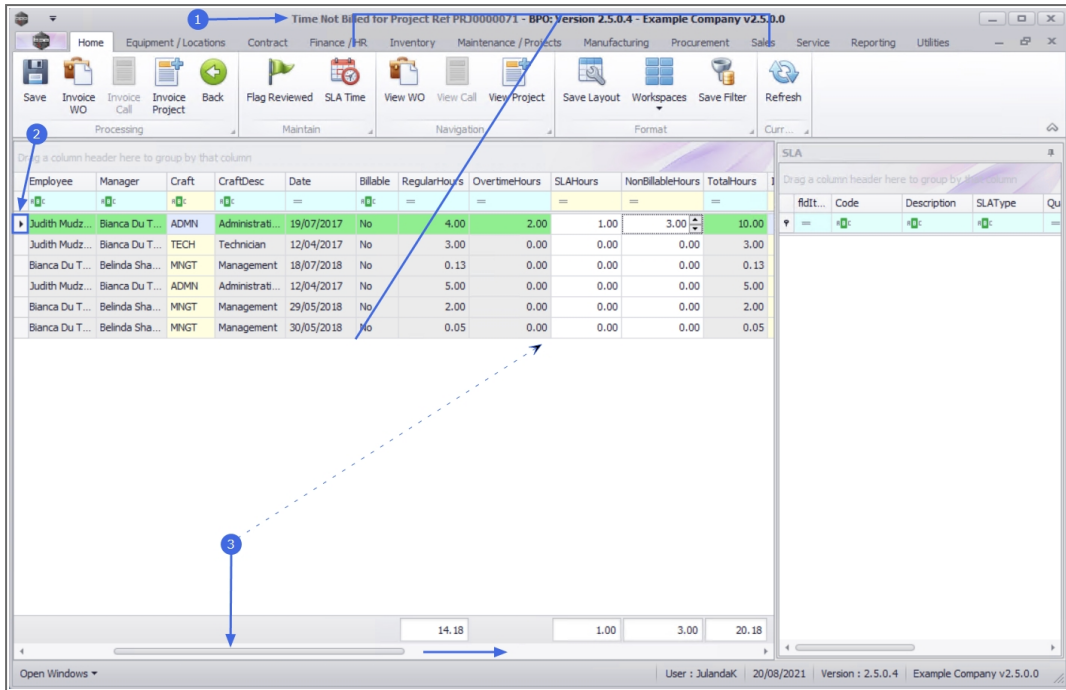
4. *Scroll* right until you can view the *Marked* column.

5. The Marked field for the work order will be checked when time is allocated to *SLA and/or Non Billable Hours*.



The Marked field is checked when time has been allocated to SLA Hours and/or Non Billable Hours
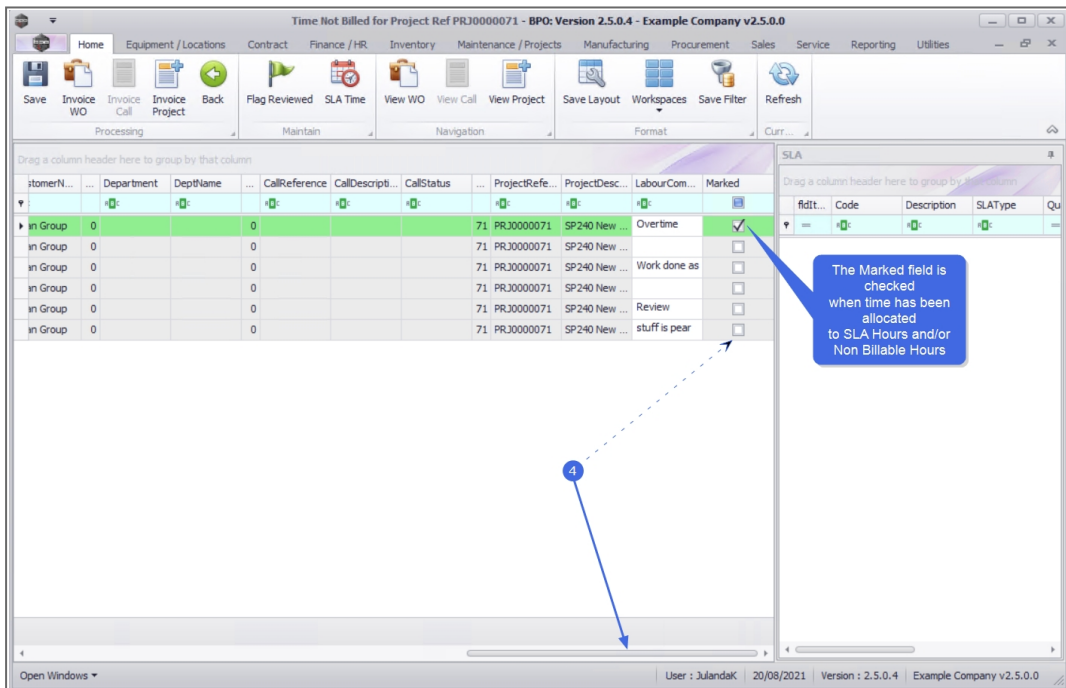
6. Click on *Flag Reviewed*, when you have completed reviewing the time for the work order.
7. When you receive the *Input Validation* message to confirm;
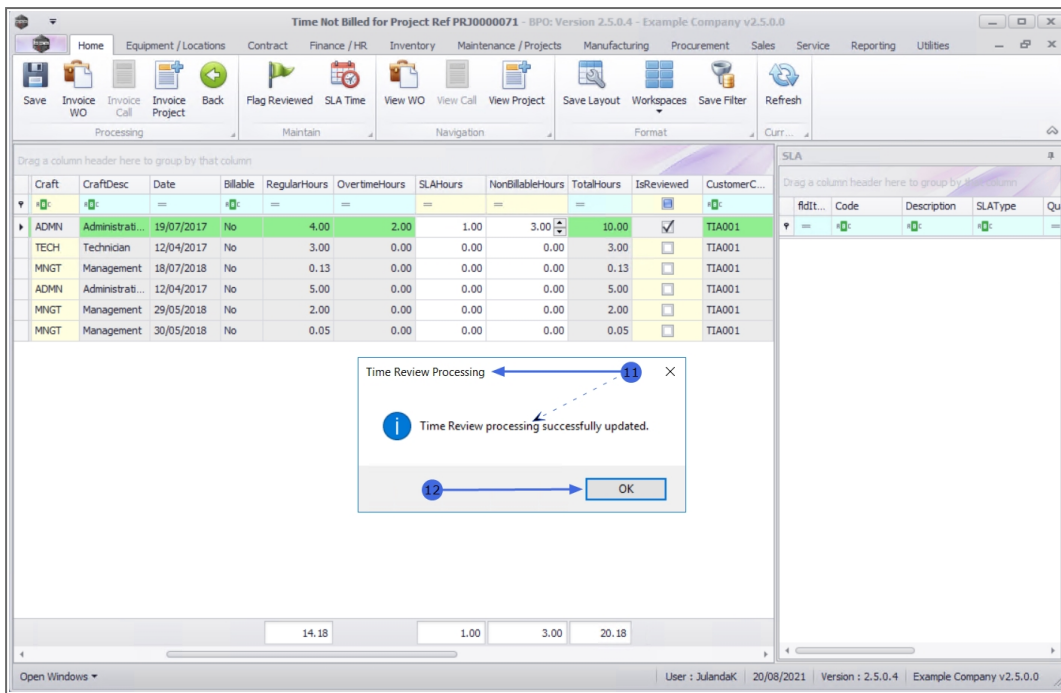   - *Are you sure you want to flag the following items.*
8. Click on *Yes*.



9. The *Is Reviewed* field will now be checked.
10. Click on *Save*.

11. When you receive the *Time Review Processing* message to confirm;

   • *Time Review processing successfully updated.*

12. Click on *OK*.

🖉 **Note** that for a record to be __removed__ from this screen, the Work Order has to be *closed*.

# SLA TIME

SLA[1] is the Service Level Agreement that you have signed with your customer. It is a contract of performance that you have agreed to. For example, if your customer calls with a requirement for a part or service request and your agreed response time to this customer (SLA) is 5 hours then you are required to have the part or technician on site within that time frame. Failing which, the client can receive compensation of a pre-agreed type (usually also set up in the SLA).

1. From the *Time Not Billed for Project Ref [project ref number]* screen will be displayed.

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[1]This is the Service Level Agreement that you have signed with your customer. It is a contract of performance that you have agreed to. For example, if your customer calls with a requirement for a part or service request and your agreed response time to this customer (SLA) is 5 hours then you are required to have the part or technician on site within that time frame. receive compensation of a pre-agreed type (usually also set up in the SLA).

2. Click on the *row(s)* to select the Work Order(s) you would like to adjust Regular Hours booked, to SLA Time.
   - Any <u>contract inclusions</u> linked to an item on the selected work order will be displayed in the SLA section.
3. Use the *scroll bar* to scroll until you are able to see the hours booked for the Work Order(s).
4. Click on *SLA Time* to convert the Regular Hours to SLA Hours.
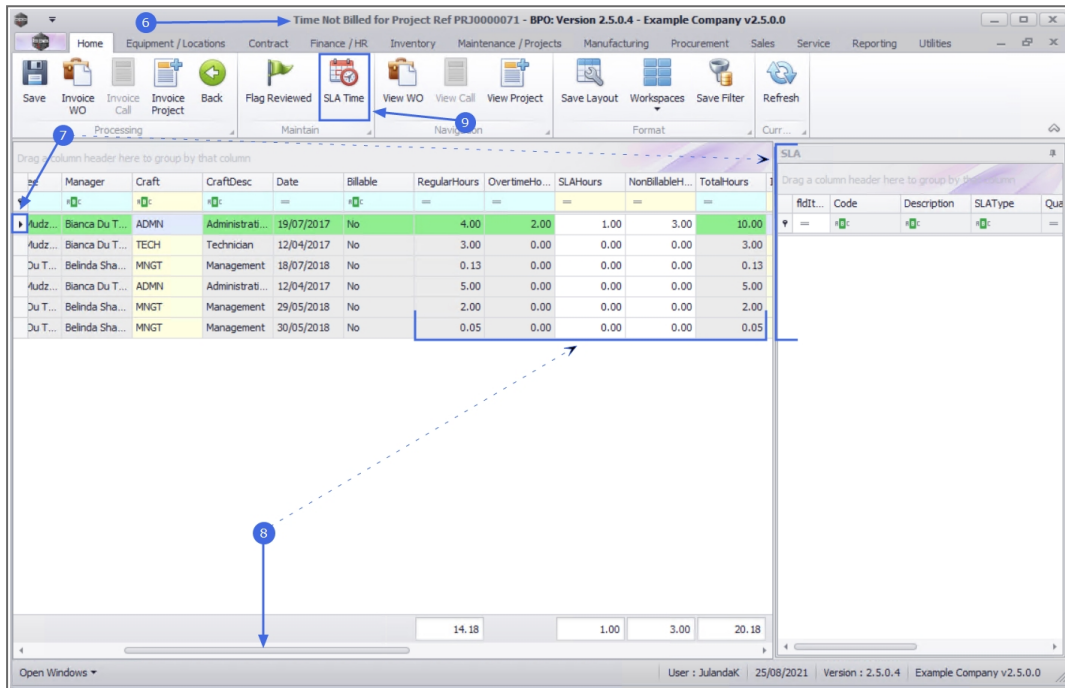


5. When you receive the *Input validation* message to confirm;
   - *Are you sure you want to move all the regular hours to SLA for the selected items.*
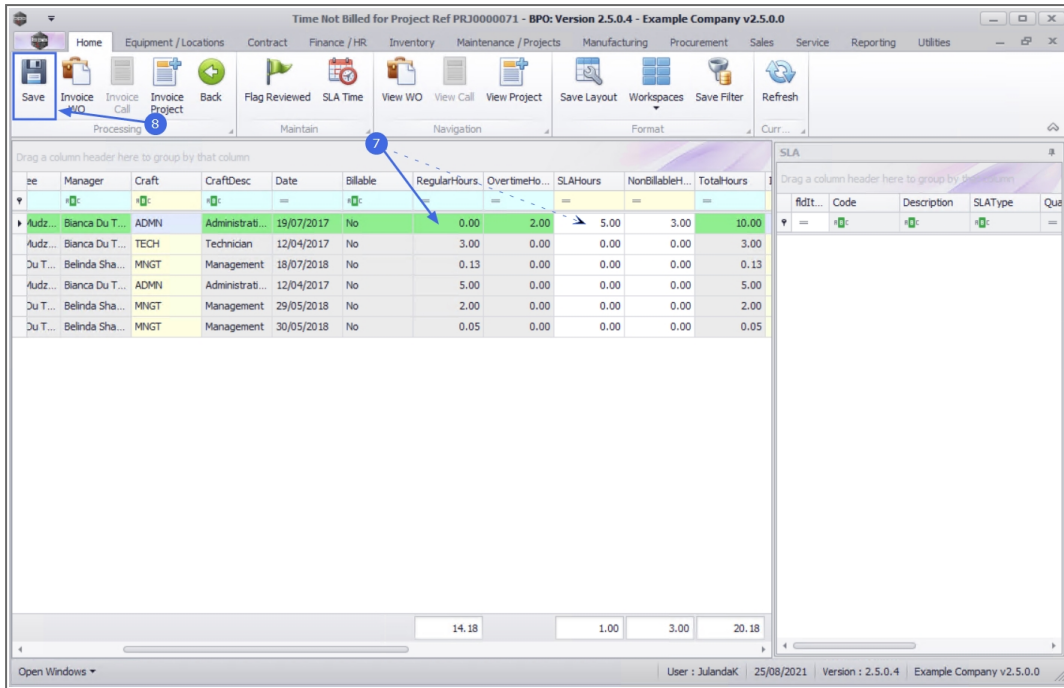6. Click on *Yes*.

7. The selected *work order(s)* have been updated and the Regular Hours have been moved or added to the SLA Hours.

> ✏ **Note** that only Regular Hours have been moved. Overtime and Non-Billable Hours were not affected.
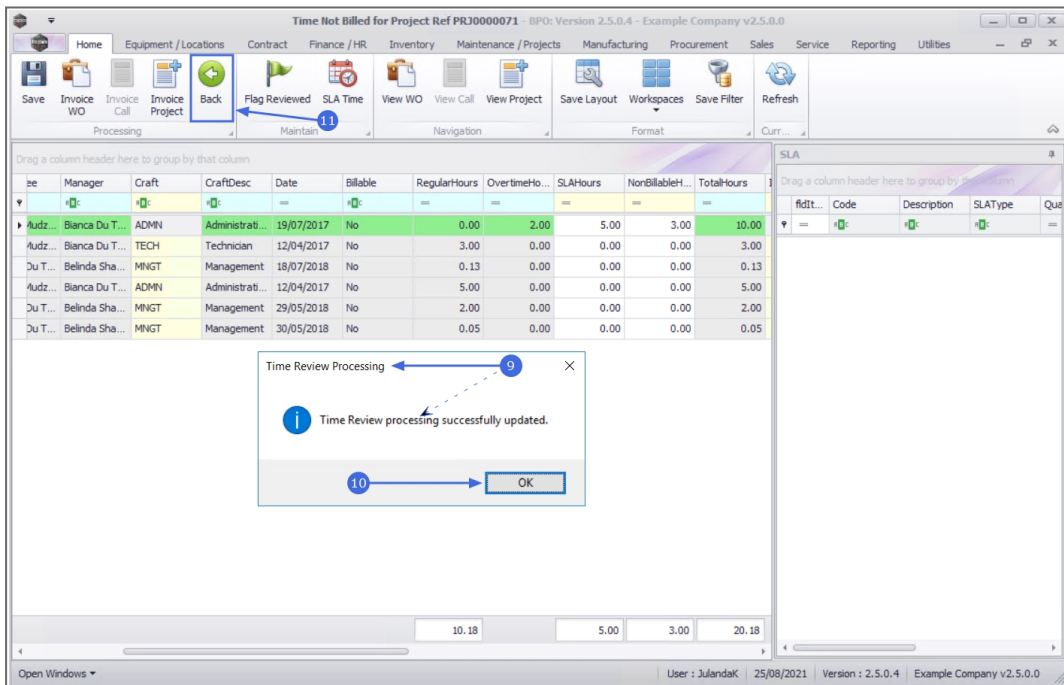
8. Click on *Save* to save the changes.

9. When you receive the *Time Review Processing* message to confirm;
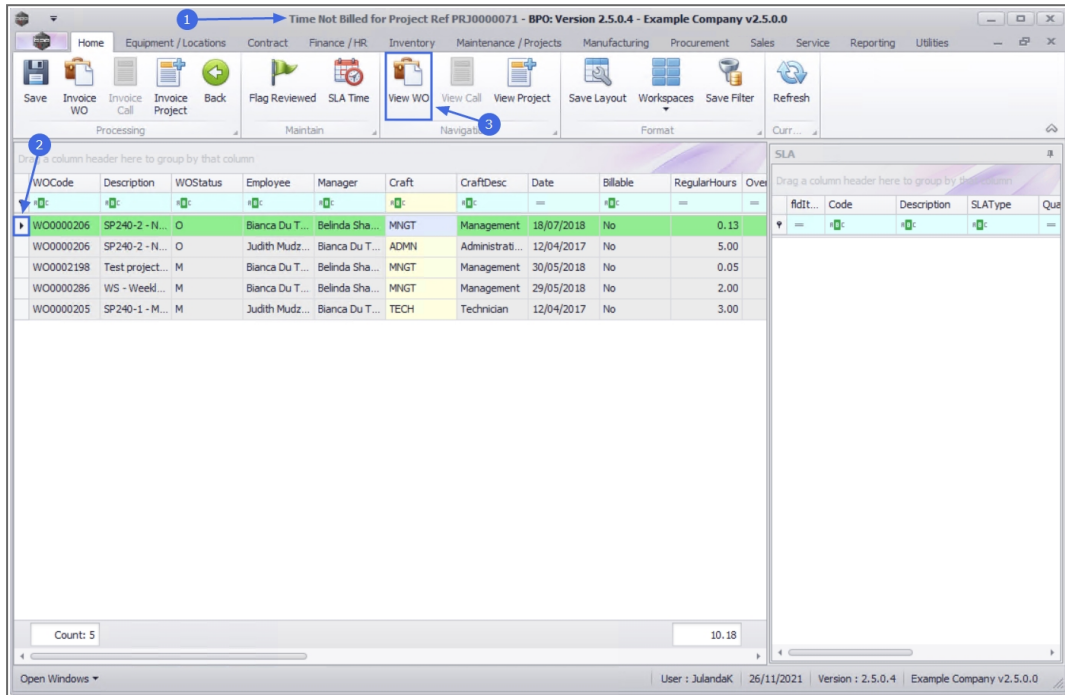   - *Time Review processing successfully updated.*

10. Click on *OK* to confirm.

11. Click on *Back* to return to the Project Listing screen.

# VIEW WORK ORDER

1. From the *Time Not Billed for Project Ref [project ref number]* screen,

2. Click on the *row* of the Work Order you wish to view.

3. Click on *View WO*.



4. " The Work Order Maintenance screen will be displayed. " on page 2

5. From here you can add to or edit the *Work Order* details, *Customer Info*, the *Required Crafts*, *Additional Data* or the *Equipment Info* for the work order, or update the work order using the *Function* and *Processing* tiles.

6. When you have completed making the changes to the maintenance screen, click on *Save*.
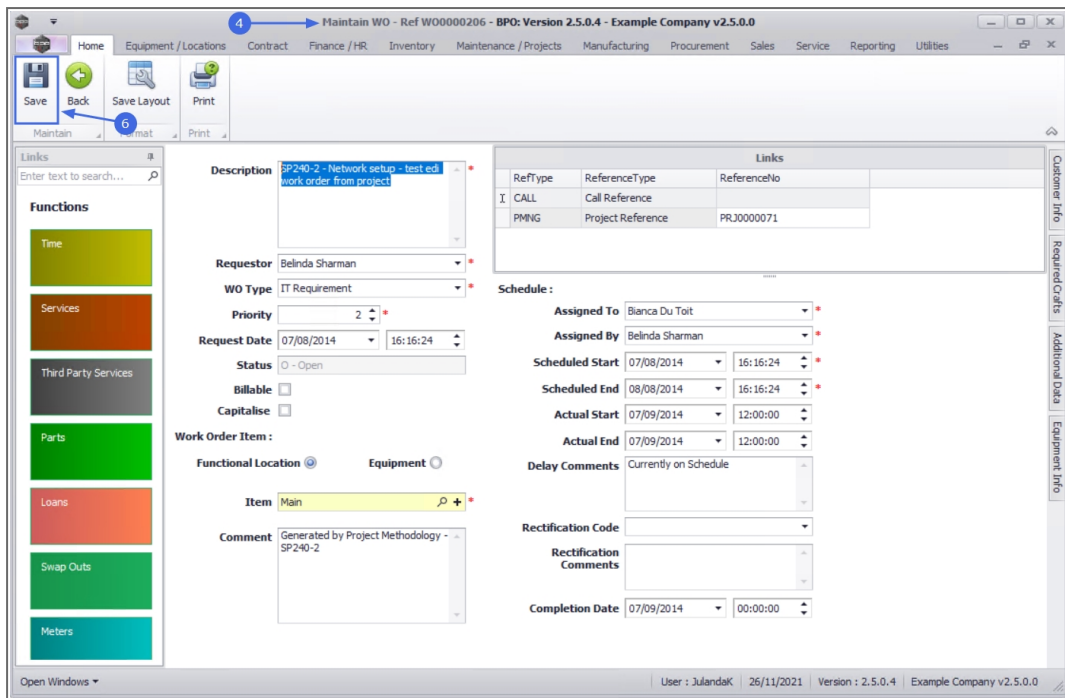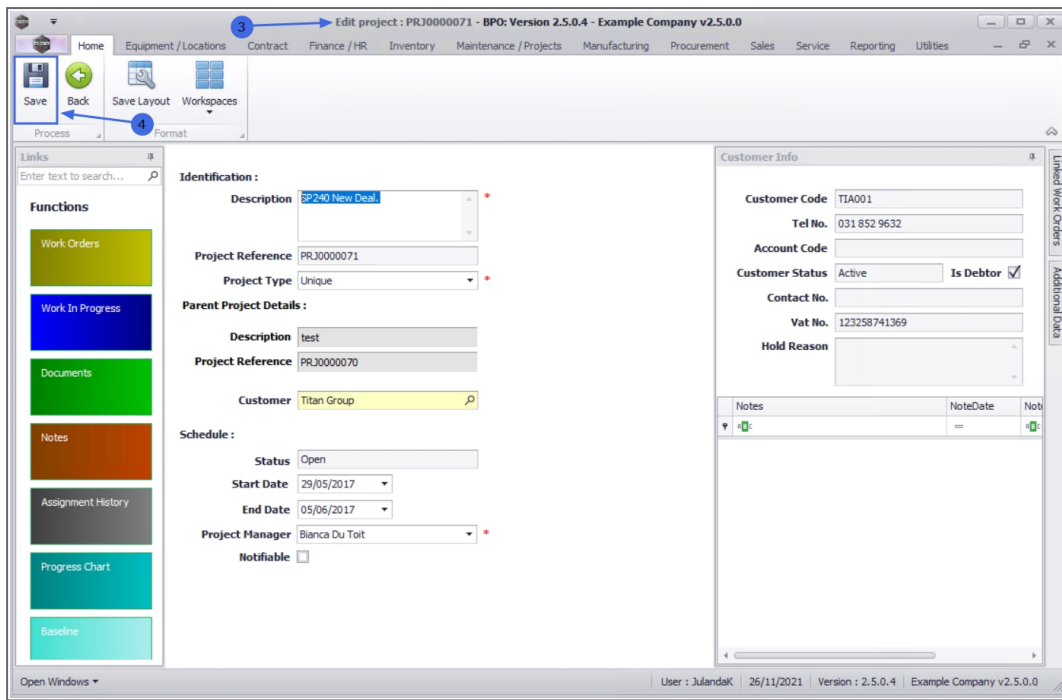
# VIEW PROJECT

1. From the *Time Not Billed for Project Ref [project ref number]* screen,
2. Click on *View Project*.
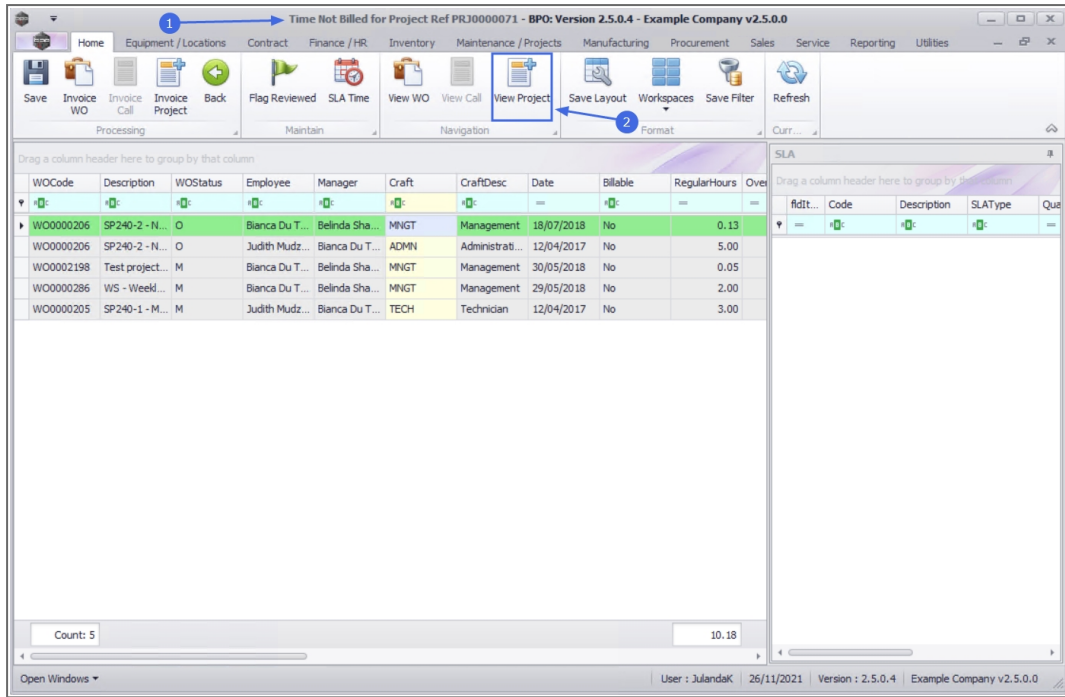
3. "The Edit project : [project ref number] screen will be displayed." on page 2

4. Make the required changes to the project information and click on *Save*.

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