

## SERVICE

### MY WORK – ADD A TRAVEL CLAIM

Travel time can be logged against the work order via the **My Work** screen.

Confirm with your supervisor as to whether you will log your travel, or whether call centre administration will do this.

A technician who does not use [Tech Connect](#), but does have access to BPO will use this method in order to log his travel time.

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**Ribbon Access:** *Service > My Work*

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The **My Work** listing screen will be displayed.

- Click on the **row selector** in front of the **work order** where you wish to **add a travel claim**.
- Click on **Edit**.

My Work - BPO: Version 2.1.0.62 - Example Company

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

Processing | Format | Print | View | Export | Current

Work Orders | Work Requests

Drag a column header here to group by that column

WCode	WDescription	SiteName	Status	WOType	WOTypeDesc	OriginRef	OriginDesc	OriginType	CustomerCode	CustomerName	DeptName	ScheduledStartDa
WO0001592	RSE V1.27.0.0 - Issue - Part...	Durban	M	DR	Default	PRJ0000098	Site Inspectio	PMNG	HQP001	Hope Works	Technical	19 Sep 2017
WO0001668	SP240 New Deal.	Durban	O	DR	Default	PRJ0000071	SP240 New Deal.	PMNG	TJA001	Titan Group		24 May 2018
WO0001616	Created for production batc...	Durban	O	MV	Manufacturing							28 Nov 2017
WO0001663	Copier to be repaired	Durban	O	REP	Machine Repairs							15 May 2018

Open Windows • 06 Jul 2018

The **Maintain WO - Ref [ ]** screen will be displayed.

- Click on the **Travel** tile.

The screenshot shows the 'Maintain WO - Ref WO0001663' screen. The left sidebar contains several tiles: 'Parts', 'Loans', 'Swap Outs', 'Meters', 'Expenses', 'Travel' (highlighted with a red border), 'Documents', and 'Warranties Issued'. The main content area is divided into several sections:

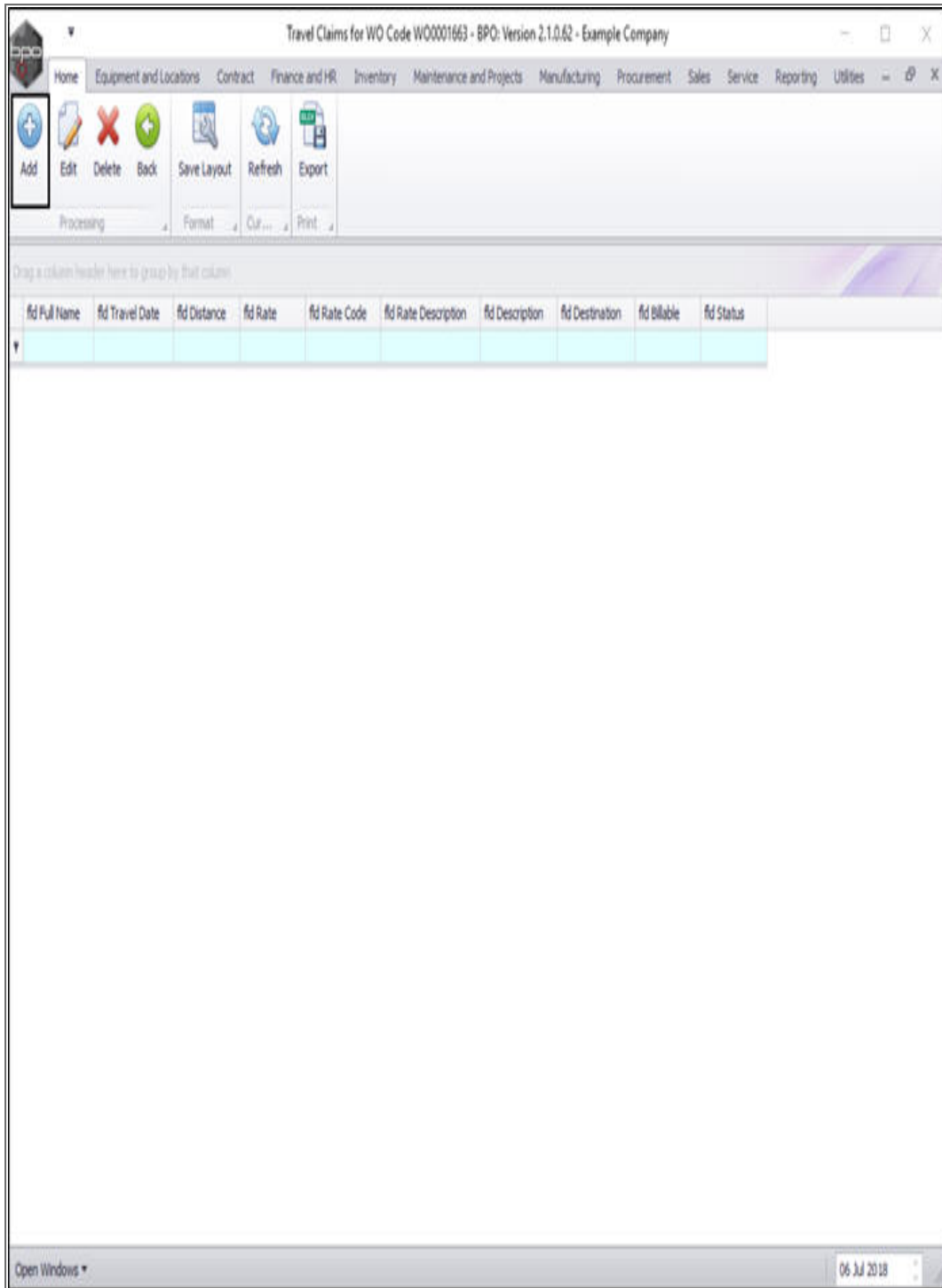
- Description:** Copier to be repaired
- Requestor:** Abigail Mine
- WO Type:** Repair
- Priority:** 2
- Request Date:** 15 May 2018 10:40:28
- Status:** Open
- Billable:**
- Capitalise:**
- Work Order Item:**
  - Functional Location:
  - Equipment:
  - Item: 19-12345
  - Comment:
- Links:**

RefType	ReferenceType	ReferenceNo
CALL	Call Reference	
PMNG	Project Reference	
- Schedule:**
  - Assigned To: Abigail Mine
  - Assigned By: Belinda Sharman
  - Scheduled Start: 15 May 2018 10:40:29
  - Scheduled End: 14 Jun 2018 00:00:00
  - Actual Start: 18 Jun 2018 08:30:00
  - Actual End: 18 Jun 2018 10:30:00
  - Delay Comments: Client not available until the actual start date.
  - Rectification Code: Replaced components
  - Rectification Comments: Parts replaced, machine cleaned and tested. Job complete
  - Completion Date: 18 Jun 2018 00:00:00

The bottom right corner shows the date '06 Jul 2018'.

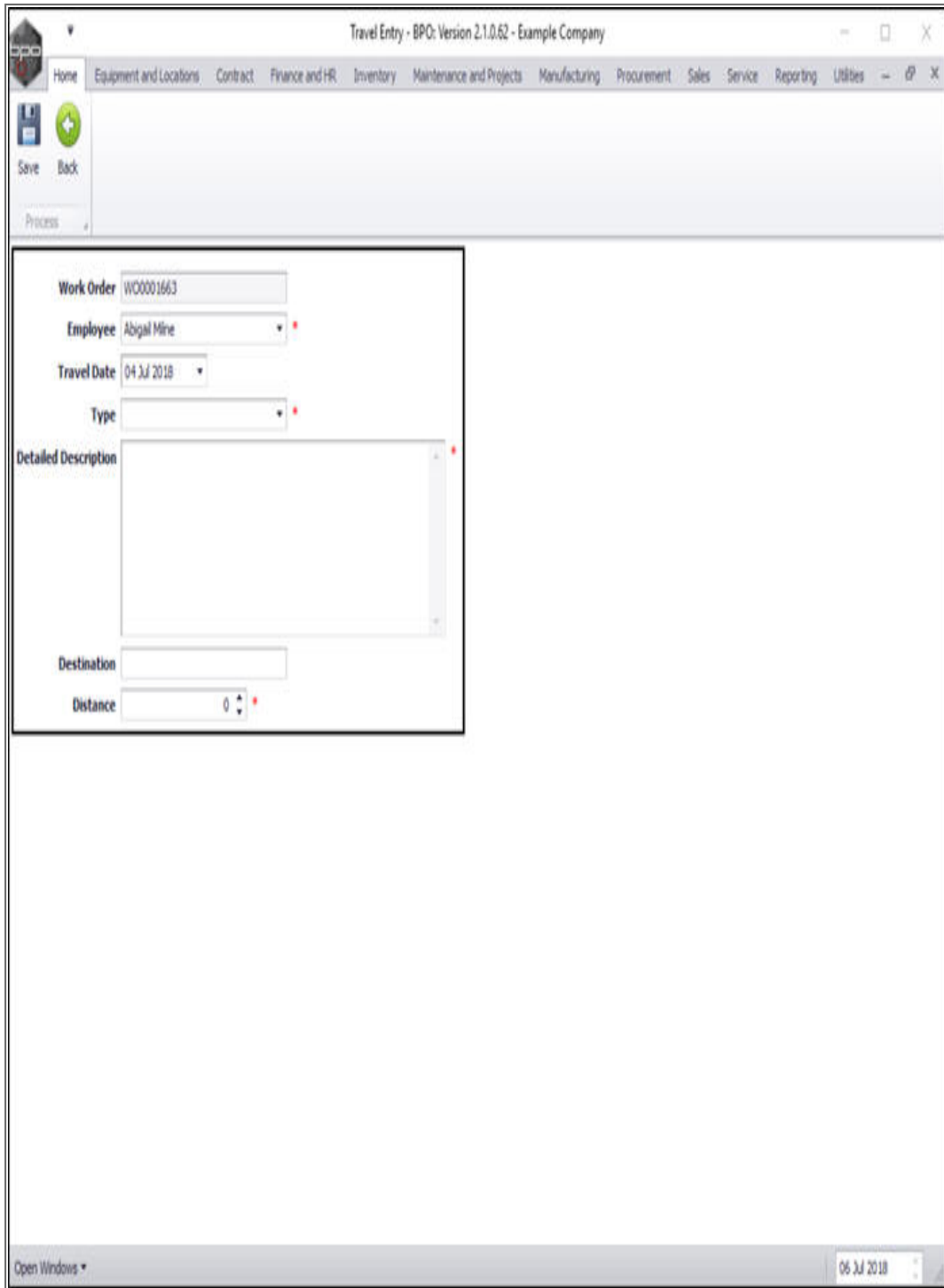
The **Travel Claims for WO Code [ ]** screen will be displayed.

- Click on **Add**.



The **Travel Entry** screen will be displayed.

- **Work Order:** This will be auto populated with the number of the work order selected in the previous step.
- **Employee Name:** This will be auto populated with the employee linked to the work order selected in the previous step. You can click on the drop-down arrow and select from the list an alternative employee who incurred the travel expense if required.
- **Travel Date:** This will auto populate with the current date. Either type in or click on the drop-down arrow and use the calendar function to select an alternative date if required.
- **Type:** Click on the drop-down arrow and select from the list, the type of travel expense.
- **Detailed Description:** Type the in description / reason for the travel expense.
- **Destination:** Type in the travel destination.
- **Distance:** Either type in or use the arrow indicators to select the distance travelled, (in kilometres).



Travel Entry - BPO: Version 2.1.0.62 - Example Company

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

Save Back

Process

Work Order: W00001663

Employee: Abigail Mine

Travel Date: 04 Jul 2018

Type:

Detailed Description:

Destination:

Distance: 0

Open Windows 06 Jul 2018

- When you have finished adding the details to the Travel Entry screen, click on **Save**.

The screenshot shows a web-based application window titled "Travel Entry - BPO: Version 2.1.0.62 - Example Company". The interface includes a top navigation bar with menu items: Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. On the left side, there are "Save" and "Back" buttons. The main content area contains a form with the following fields:

- Work Order:** W00001663
- Employee:** Abigail Mine
- Travel Date:** 04 Jul 2018
- Type:** Normal Travel Rate
- Detailed Description:** Travelled to client and back for machine repair.
- Destination:** New Town
- Distance:** 12.5

At the bottom of the window, there is an "Open Windows" button on the left and a date/time indicator "06 Jul 2018" on the right.

You will return to the **Travel Claims for Work Order Code [ ]** screen.



- An ***Travel Processing*** message box will pop up informing you that;
  - **Travel Claim on WO: [ ] complete.**
- Click on **OK**.

fd Full Name	fd Travel Date	fd Distance	fd Rate	fd Rate Code	fd Rate Description	fd Description	fd Destination	fd Billable	fd Status
Abigail Mine	04 Jul 2018	12.50	3.5000	STD	Normal Travel Rate	Traveled to d...	New Town	No	A

- You can now view the new travel claim in this screen.

Travel Claims for WO Code WO0001663 - BPO: Version 2.1.0.62 - Example Company

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

Add | Edit | Delete | Back | Save Layout | Refresh | Export

Processing | Format | Cur... | Print

Drag a column header here to group by that column

fd Full Name	fd Travel Date	fd Distance	fd Rate	fd Rate Code	fd Rate Description	fd Description	fd Destination	fd Billable	fd Status
Abigail Mine	04 Jul 2018	12.50	3.5000	STD	Normal Travel Rate	Travelled to client and back for machine repair.	New Town	No	A

Open Windows | 06 Jul 2018

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