

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

SERVICE

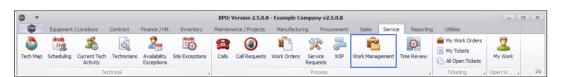
INTRODUCTION TO WORK MANAGEMENT

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 <u>Technician Activity</u> and <u>Last GPS</u> <u>Location</u> can be viewed, as with the Call Centre screen.

Ribbon Access: Service > Work Management



- 1. The Work Management screen will be displayed.
- This screen lists all <u>time linked</u> Work Orders, dependant on the employee hierarchy.



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				WO0006253	Replace part - current faulty		Durban	Julanda Kessler	М	PR	Parts Requirement	biancad	CN
				WO0006229	BathBinMaint - Bathroom Bin M		Durban	Julanda Kessler	М	SM	Scheduled Maintenance	WES001	CN
				WO0006234	BathBinMaint - Bathroom Bin M	laintenance	Durban	Julanda Kessler	M	SM	Scheduled Maintenance	WES001	CN

RIBBON ACTION BUTTONS

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

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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 <u>Assigned</u>. Use <u>Started</u> to End Work on a work order.

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From the print buttons the <u>Call Report</u>, <u>Call Net Deliveries</u>, <u>Work Order</u> <u>Report</u> and <u>Service History Repor</u>t can be printed.



Introduction to Work Management

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SITES FRAME

- 1. 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.
- 2. The **Stats** column indicates the number of **Open** and **Completed** assignments for the site.
- 3. The Work Orders listed in the data grid will be filtered using the specified <u>date range</u> for the selected <u>site</u>.



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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.
- A Work Order that has been assigned to <u>more than one</u> employee, that has <u>time recorded</u> 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.



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EMPLOYEE ASSIGNMENTS

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



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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 <u>full Work Order number</u> in the text box and press **Enter**.

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

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



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An 1			WO0006131	1818	-1-1 - Check network requirements	Durban	Belinda Sharman	м	INST	Installation	HOP001	
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3		• •	WO0006253	Repla	ce part - current faulty	Durban	Julanda Kessler	м	PR.	Parts Requirement	biancad	CN
-			WO0006229	Bath	BinMaint - Bathroom Bin Maintenance	Durban	Julanda Kessler	м	SM	Scheduled Maintenance	WES001	CN
			WO0006234	Bath	BinMaint - Bathroom Bin Maintenance	Durban	Julanda Kessler	м	SM	Scheduled Maintenance	WES001	CN

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**.
- 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 <u>remove</u> 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.



Introduction to Work Management

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