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

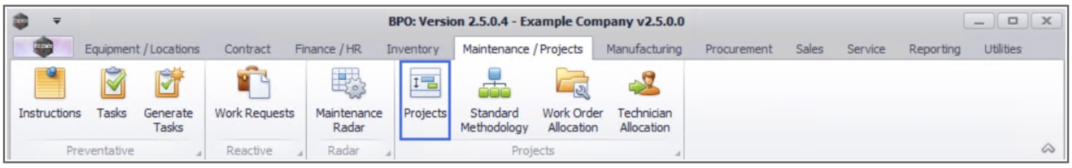
PROJECTS

PROJECTS – TIME REVIEW

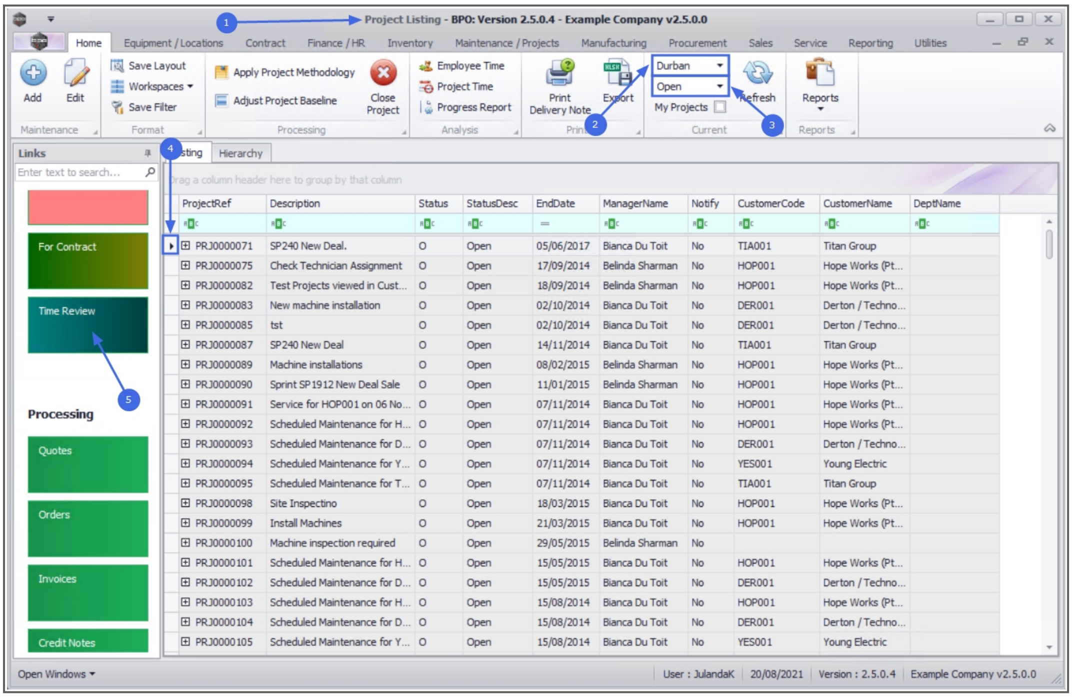
Time review enables the Project Managers to allocate **regular** time logged by employees as **SLA** and / or **non billable** time. For example, if an employee books **4** hours against a work order and the manager knows that the task should only required **2** hours to complete, then the manager can 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***.

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.

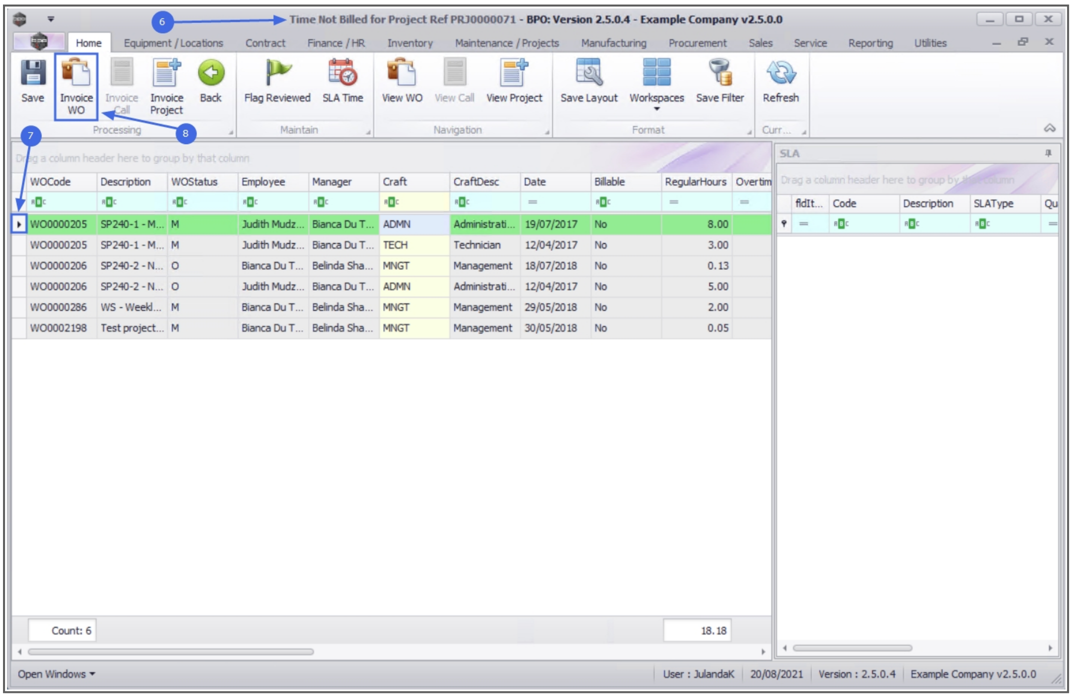


INVOICE WORK ORDER

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

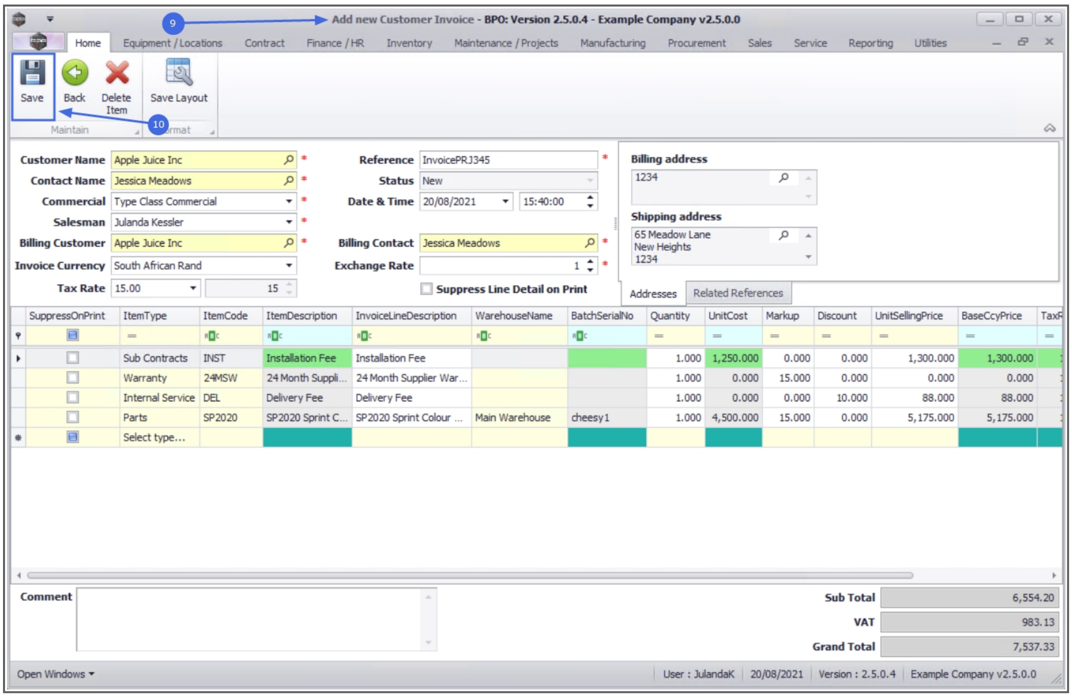
6. From the **Time Note Billed for Project Ref [**project ref number**]**screen,
7. Click on the **row** of the work order you wish to invoice.
8. Click on **Invoice WO**.

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



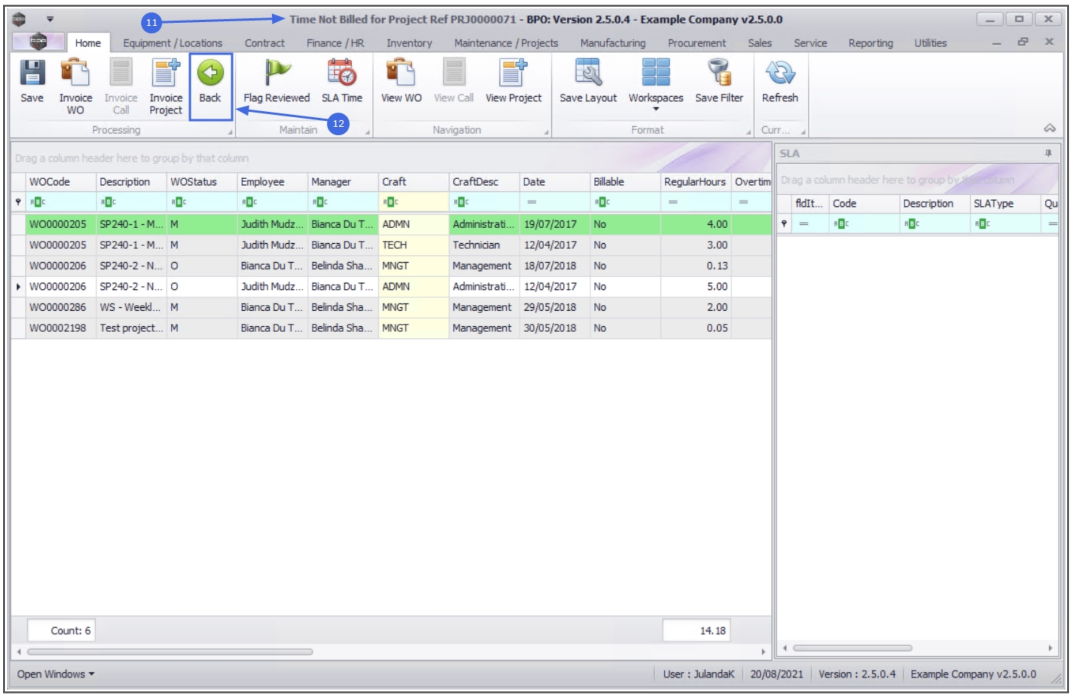
9. The **Add New Customer Invoice** screen will be displayed.
10. Complete the Customer Invoice then click on **Save**.

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.

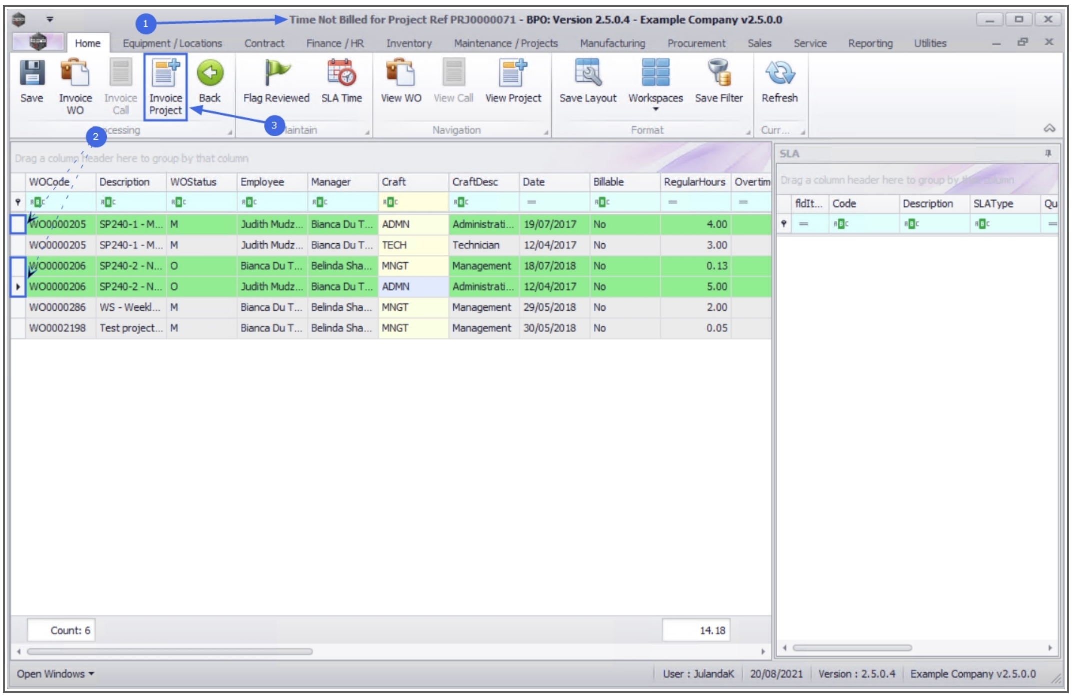
For a detailed handling of this topic refer to Introduction to Invoices



INVOICE PROJECT

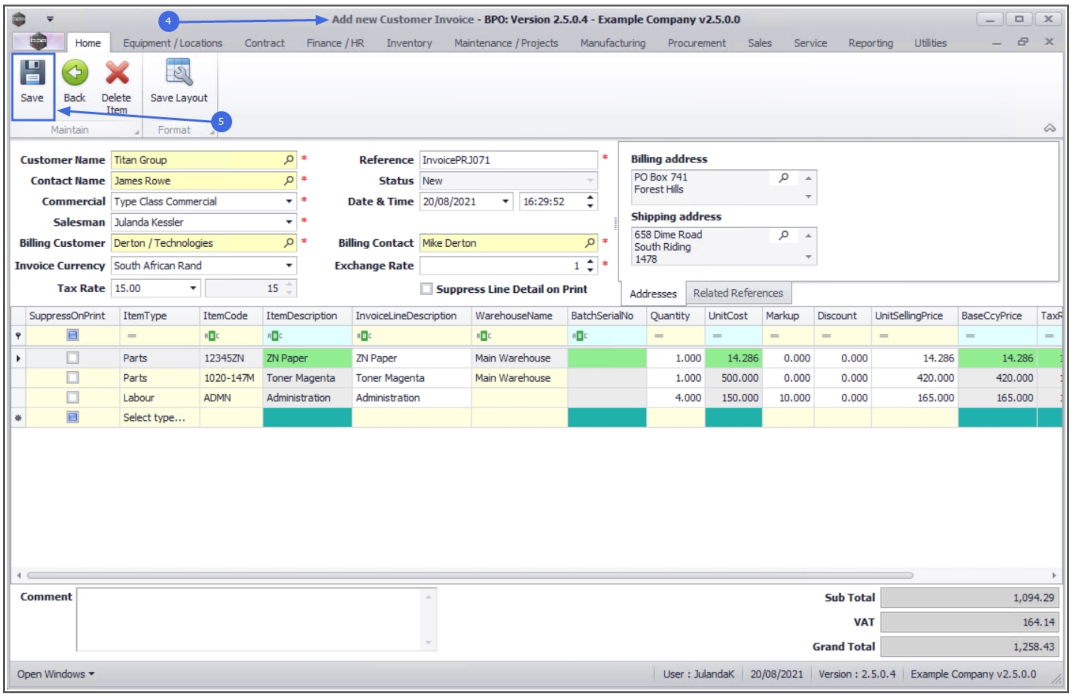
1. From the **Time Note Billed for Project Ref [**project ref number**]**screen,
2. Click on the **row(s)** of the work order(s) you wish to invoice.
3. Click on **Invoice Project**.

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



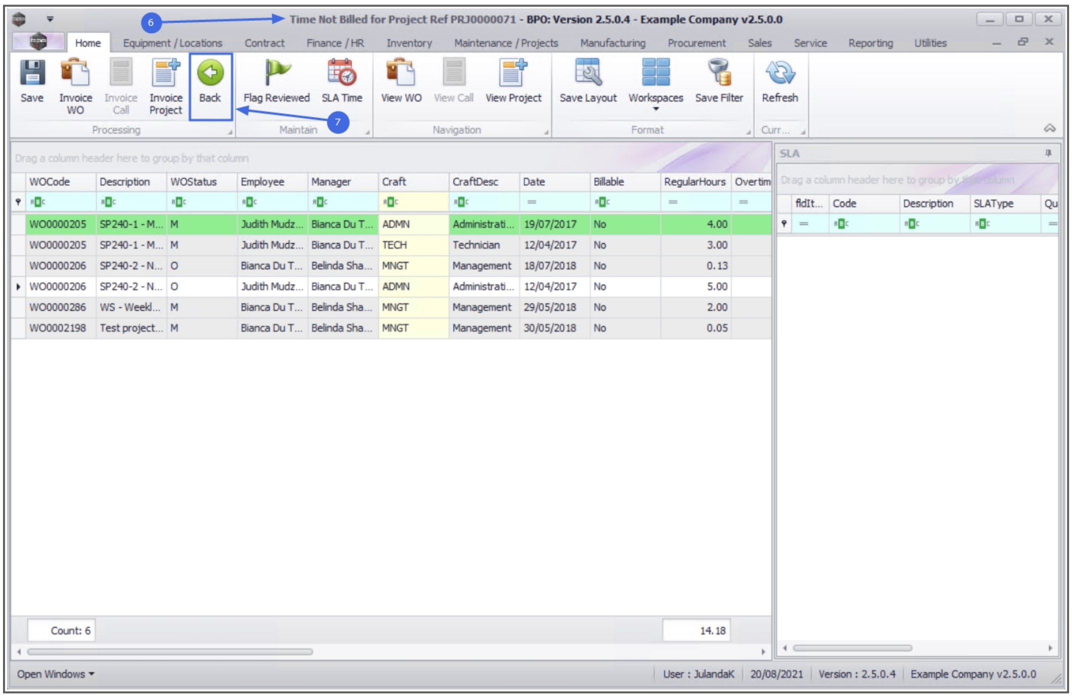
4. The **Add New Customer Invoice** screen will be displayed.
5. Complete the Customer Invoice then click on **Save**.

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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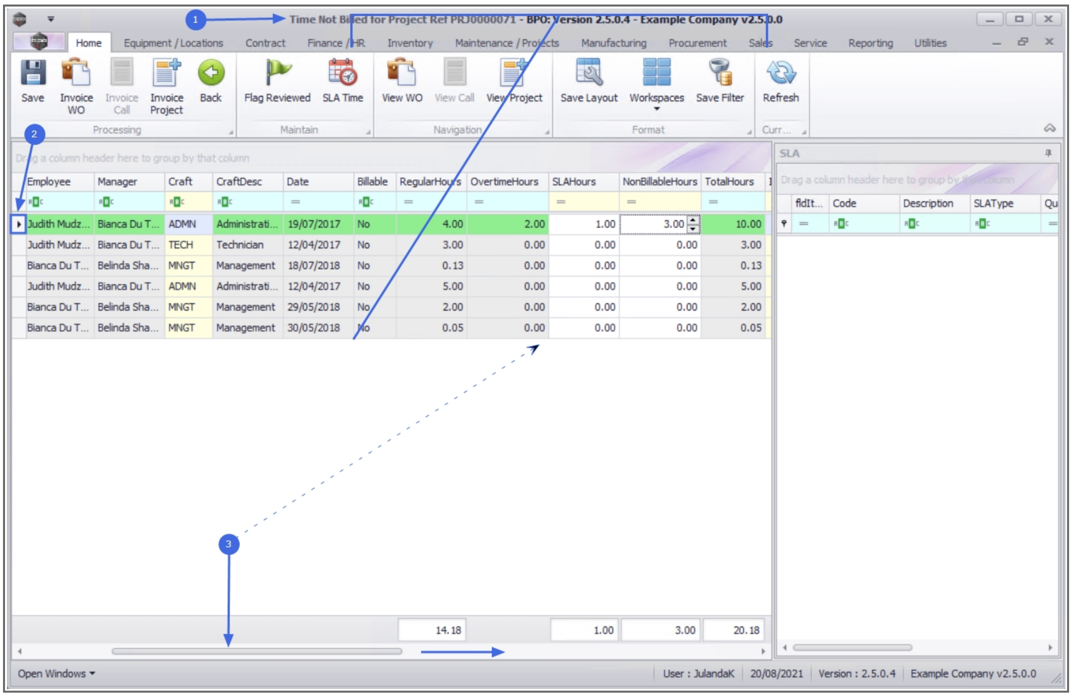
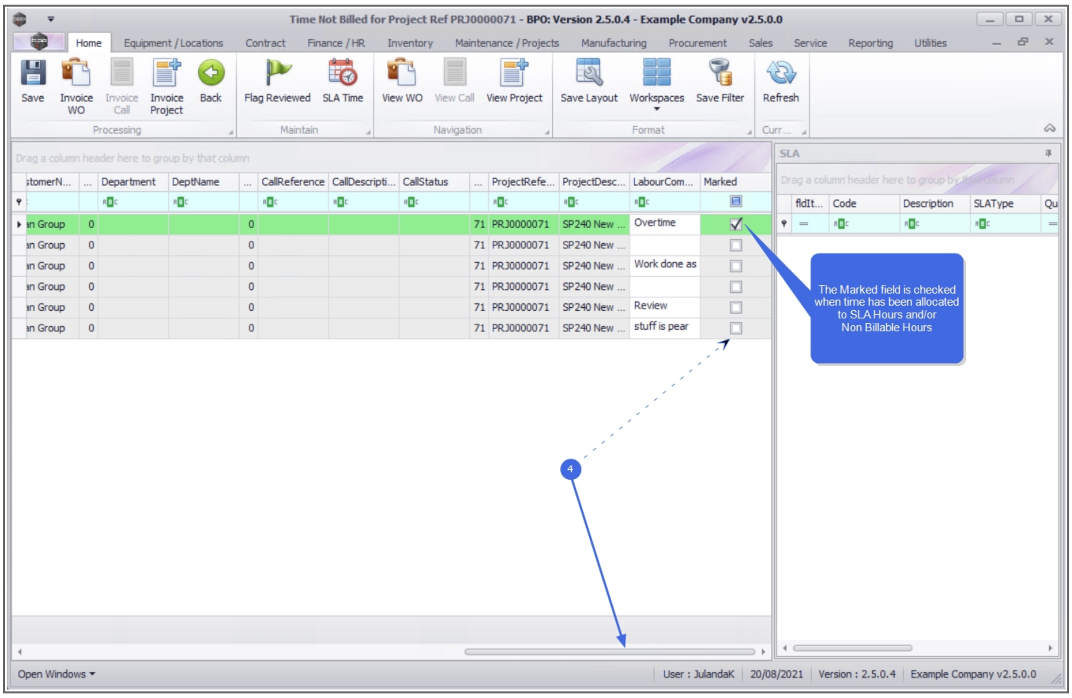
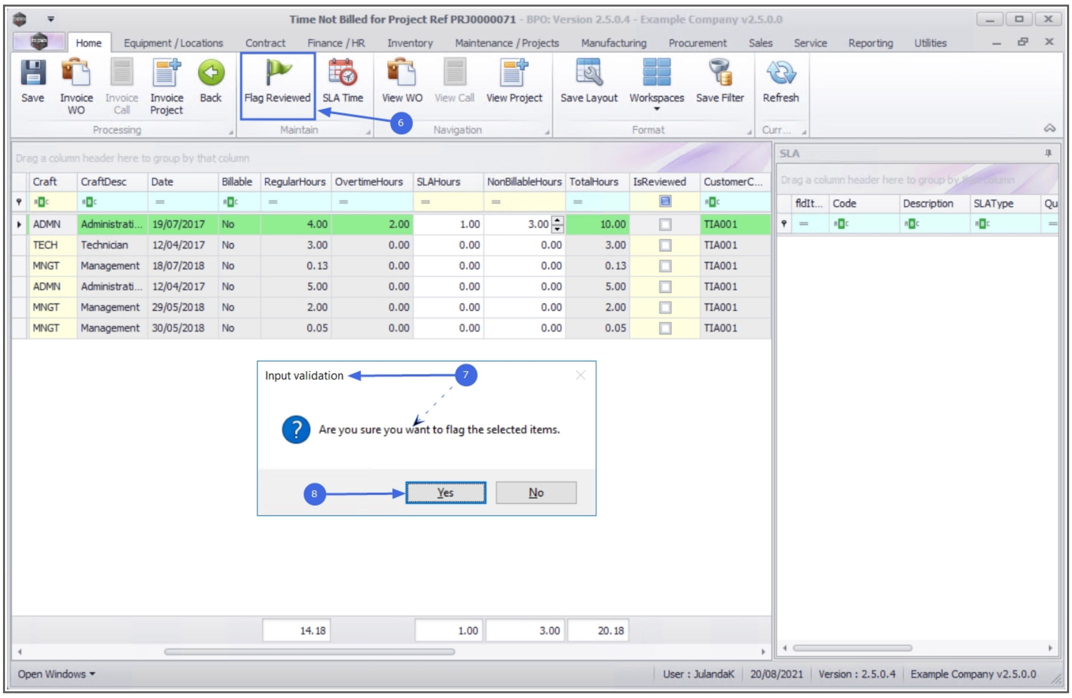
[1]Overtime hours will not be adjusted when changes are made to the Regular, SLA and/or Non-billable hours.
[2]Time allocated to SLA hours will be deducted from Regular Hours. For example 8 Regular Hours booked, will be updated to 7 Regular Hours when you add 1 to the SLA Hours field.
[3]Adding Non Billable hours will deduct from Regular hours



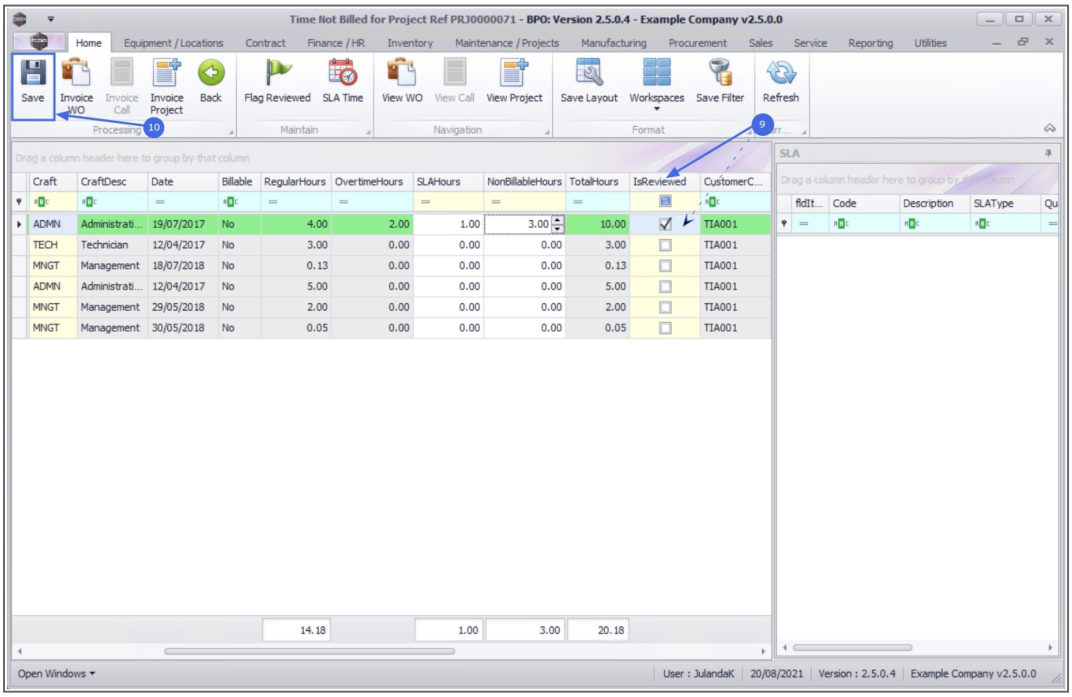
4. *Scroll* right until you can view the ***Marked*** column.
5. The Marked field for the work order will be checked when time is allocated to ***SLA and/or Non Billable Hours***.



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***.

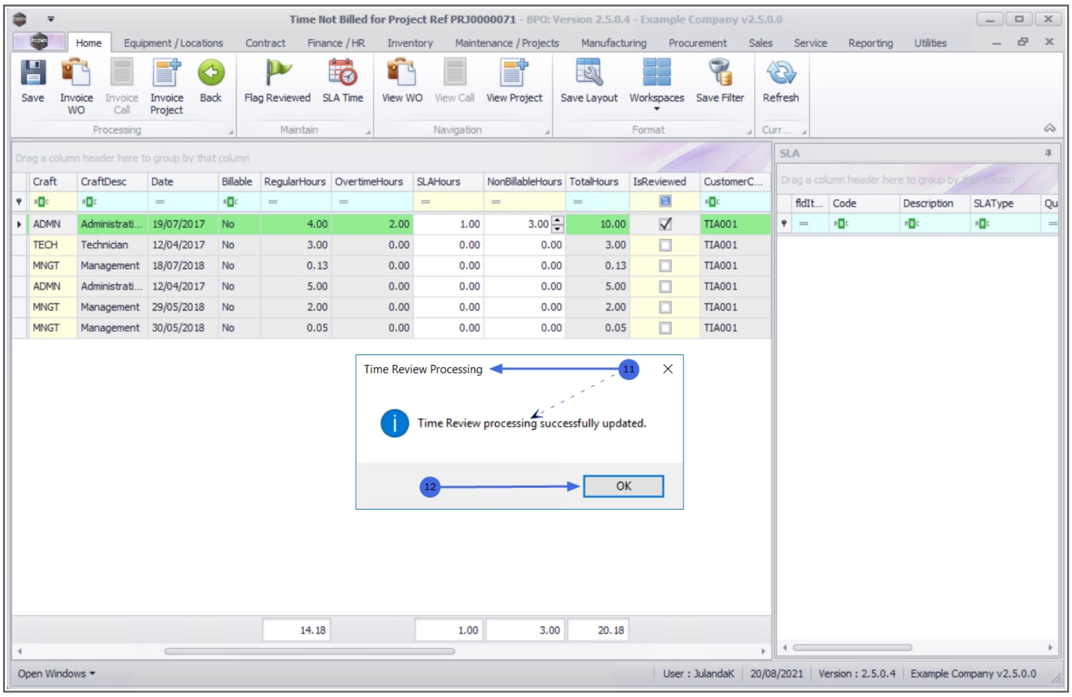


9. The ***Is Reviewed*** field will now be checked.
10. Click on ***Save***.



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.



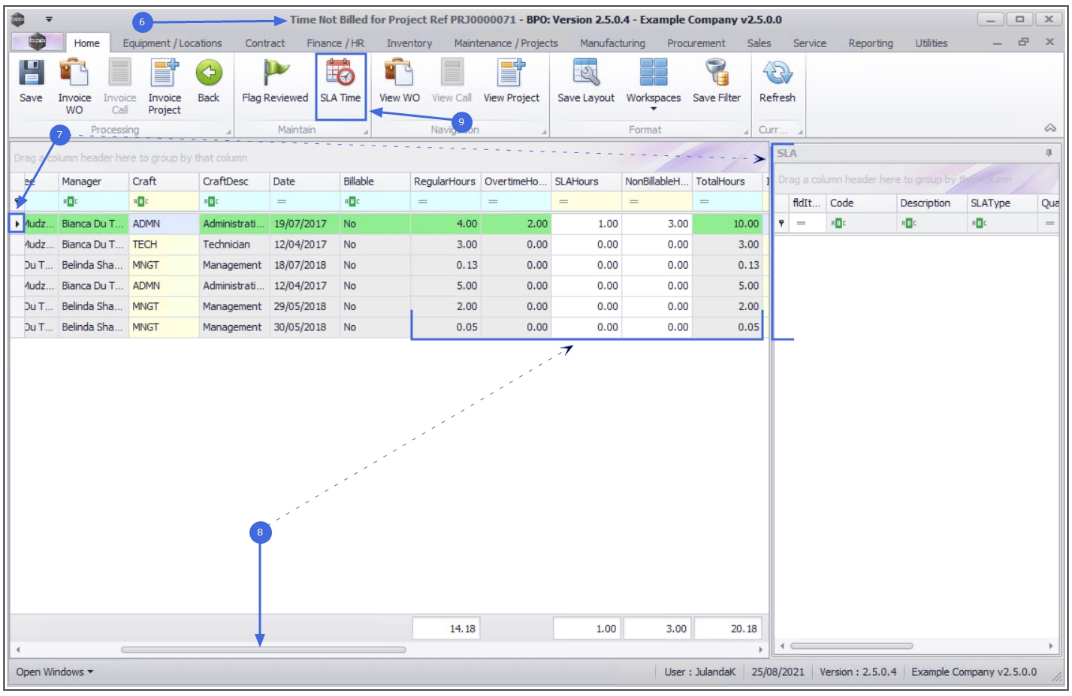
SLA TIME

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).

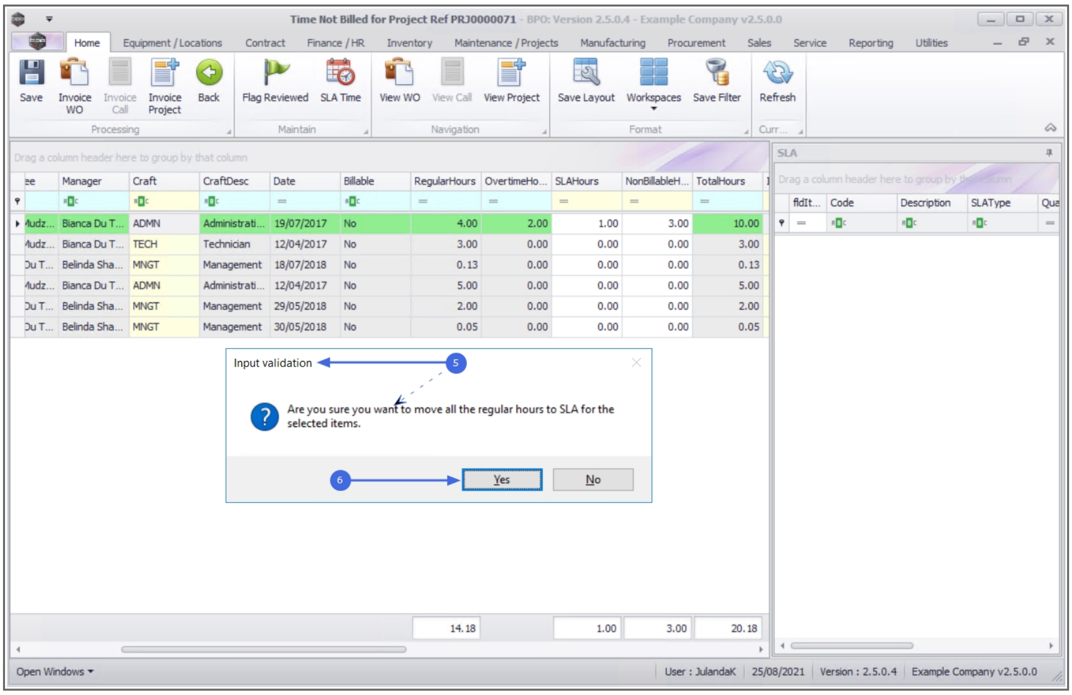
1. From the **Time Not Billed for Project Ref [**project ref number**]** screen will be displayed.

[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 contract inclusions 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.



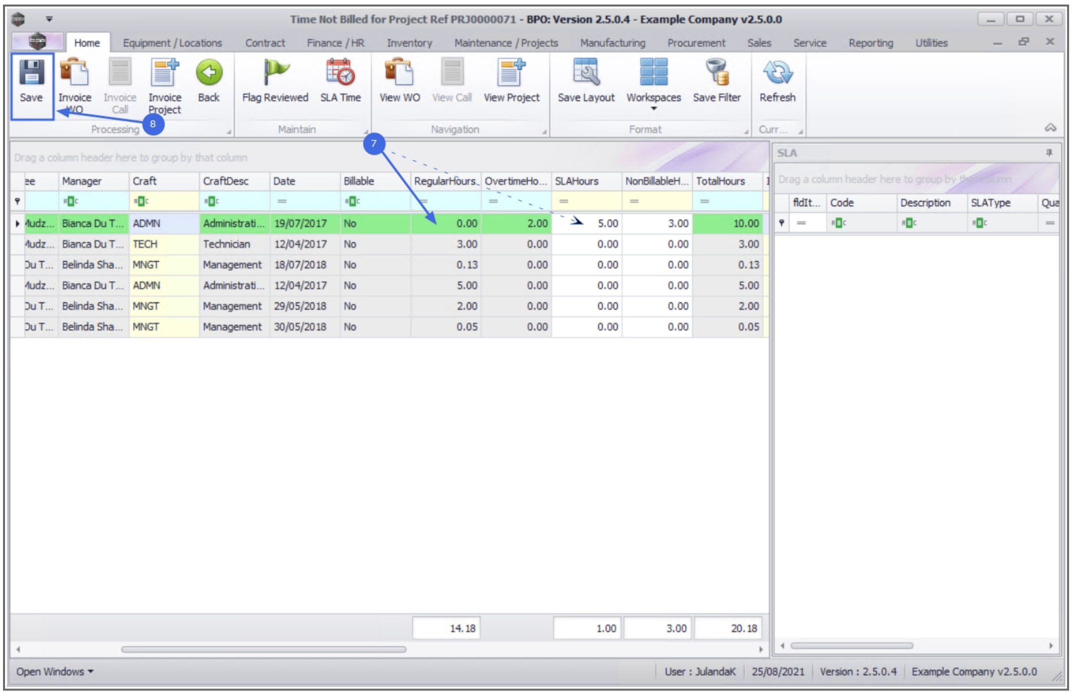
5. When you receive the **Input validation** message to confirm;
    - **Are you sure you want to move all the regular hours to SLA for the selected items.**
6. Click on **Yes**.



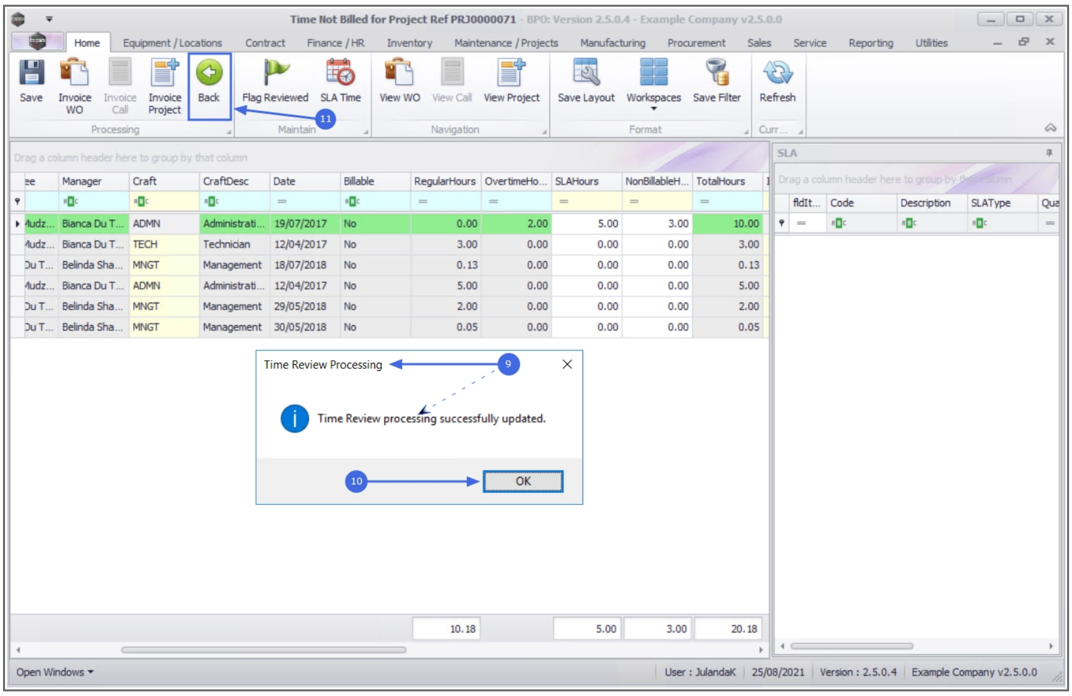
7. The selected **work order(s)** have been updated and the Regular Hours have been moved or added to the SLA Hours.

> Note that only Regular Hours have been moved. Overtime and Non-Billable Hours were not affected.

8. Click on **Save** to save the changes.

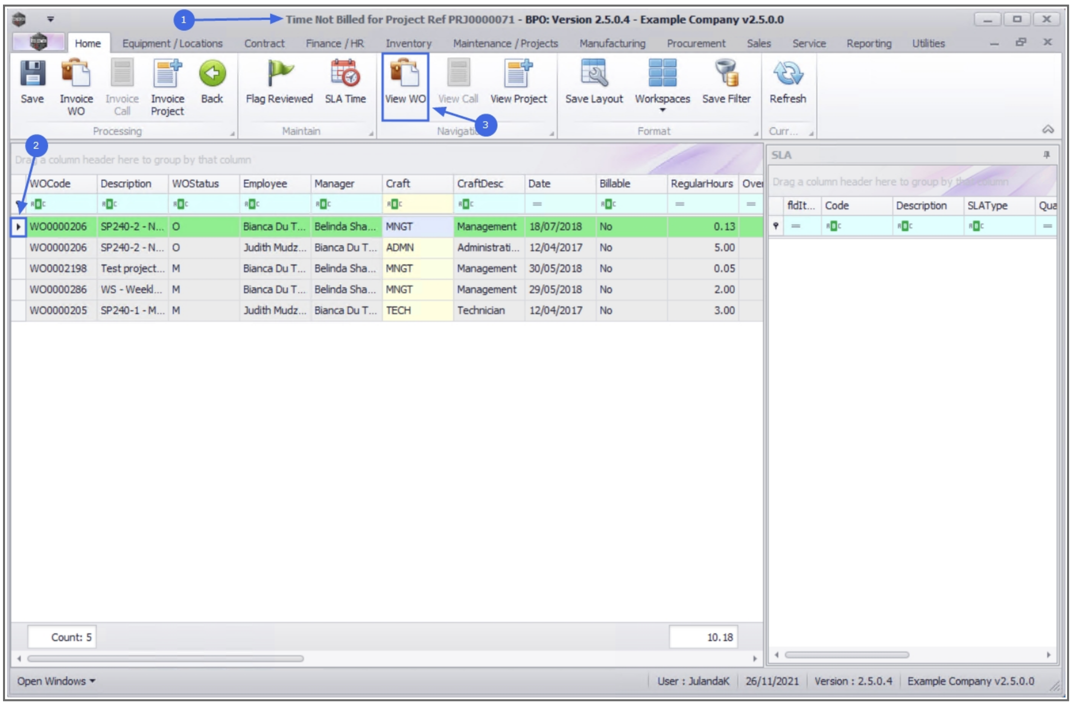


9. When you receive the **Time Review Processing** message to confirm;
   - **Time Review processing successfully updated.**
10. Click on **OK** to confirm.
11. Click on **Back** to return to the Project Listing screen.

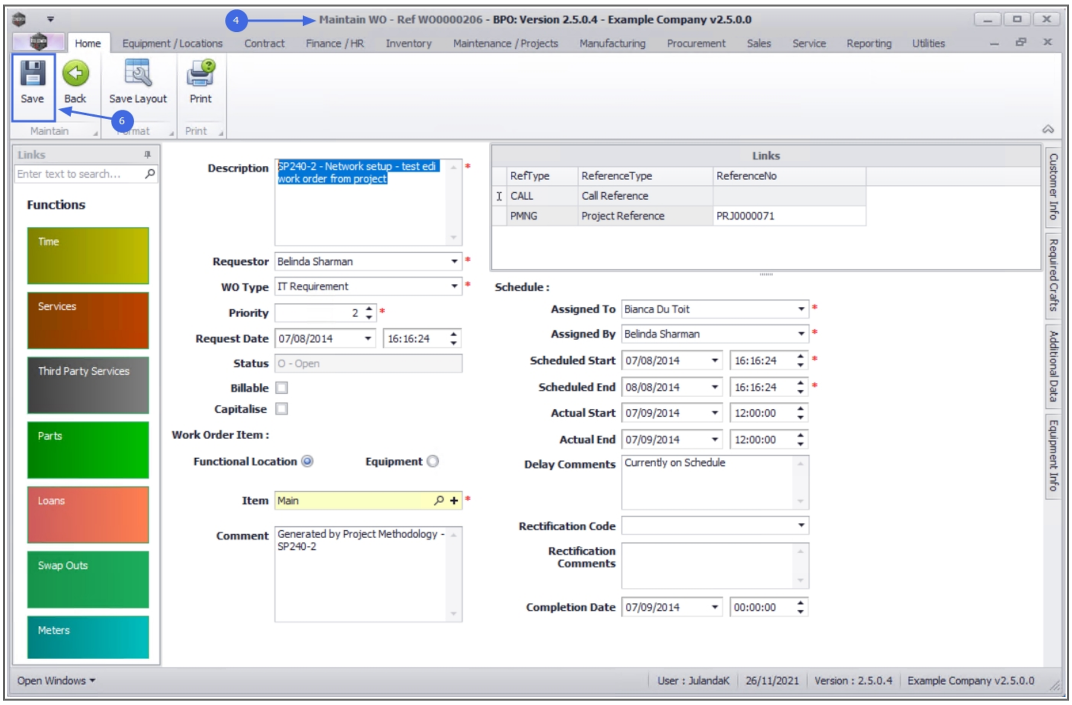


VIEW WORK ORDER

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**.

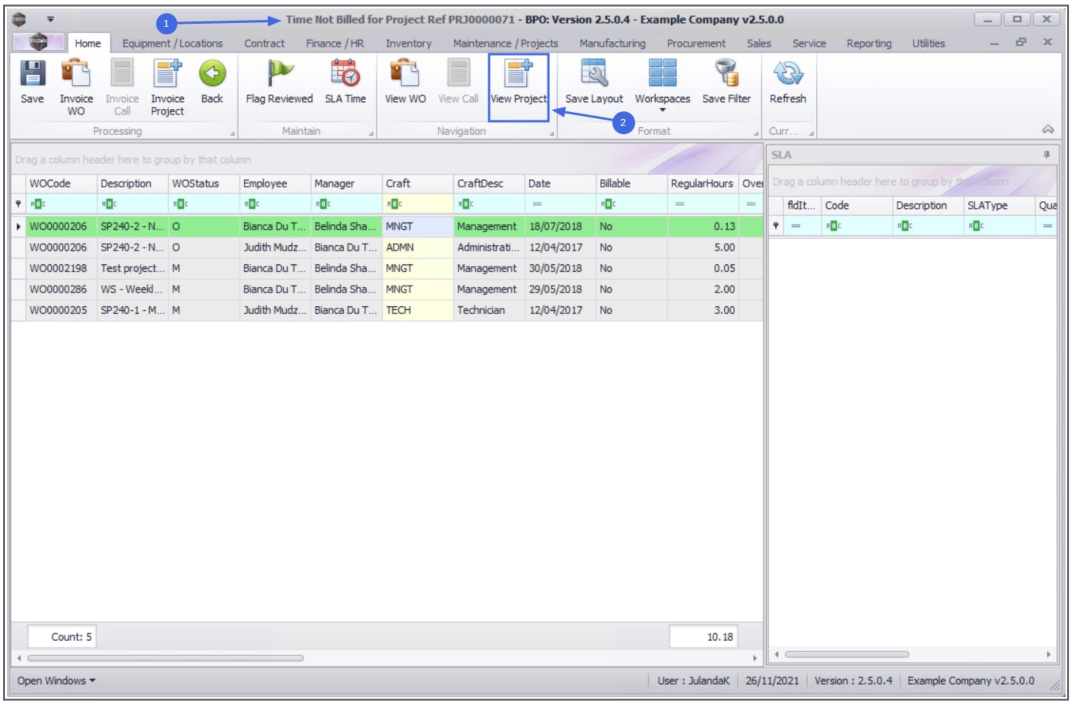


4. " The Work Order Maintenance screen will be displayed. " on page 2
5. From here you can add to or edit the **Work Order** details, **Customer Info**, the **Required Crafts**, **Additional Data** or the **Equipment Info** for the work order, or update the work order using the **Function** and **Processing** tiles.
6. When you have completed making the changes to the maintenance screen, click on **Save**.

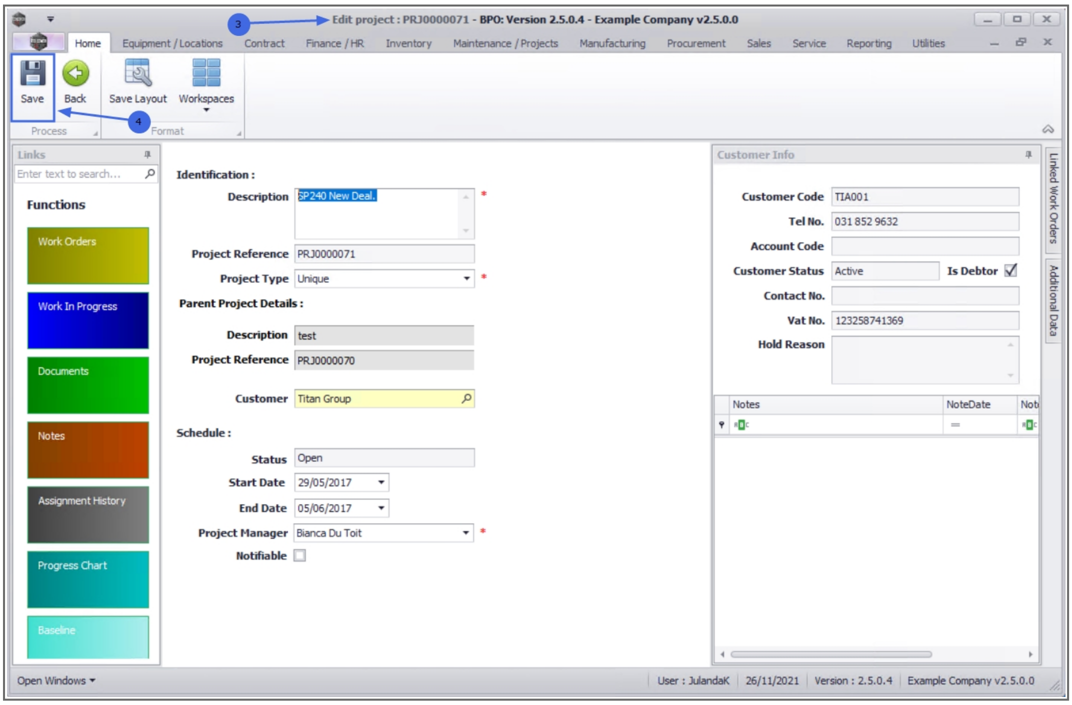


VIEW PROJECT

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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