

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

SERVICE

MY WORK – LOG A PART REQUEST

The **My Work** screen deals with work that is assigned to a specific employee, i.e. when an employee is logged in, that employee can only see work orders assigned to themselves.

This screen has similar functionality to the call screen in that the employee can **request parts**, services and loan units; book time, travel and expenses; view customer and machine details (including warranty information).

The employee can request from a [bill of material](#) or from the **full part list**.

Remember: The part request will either be [Auto Approved](#), or it will need to be [authorised manually](#)

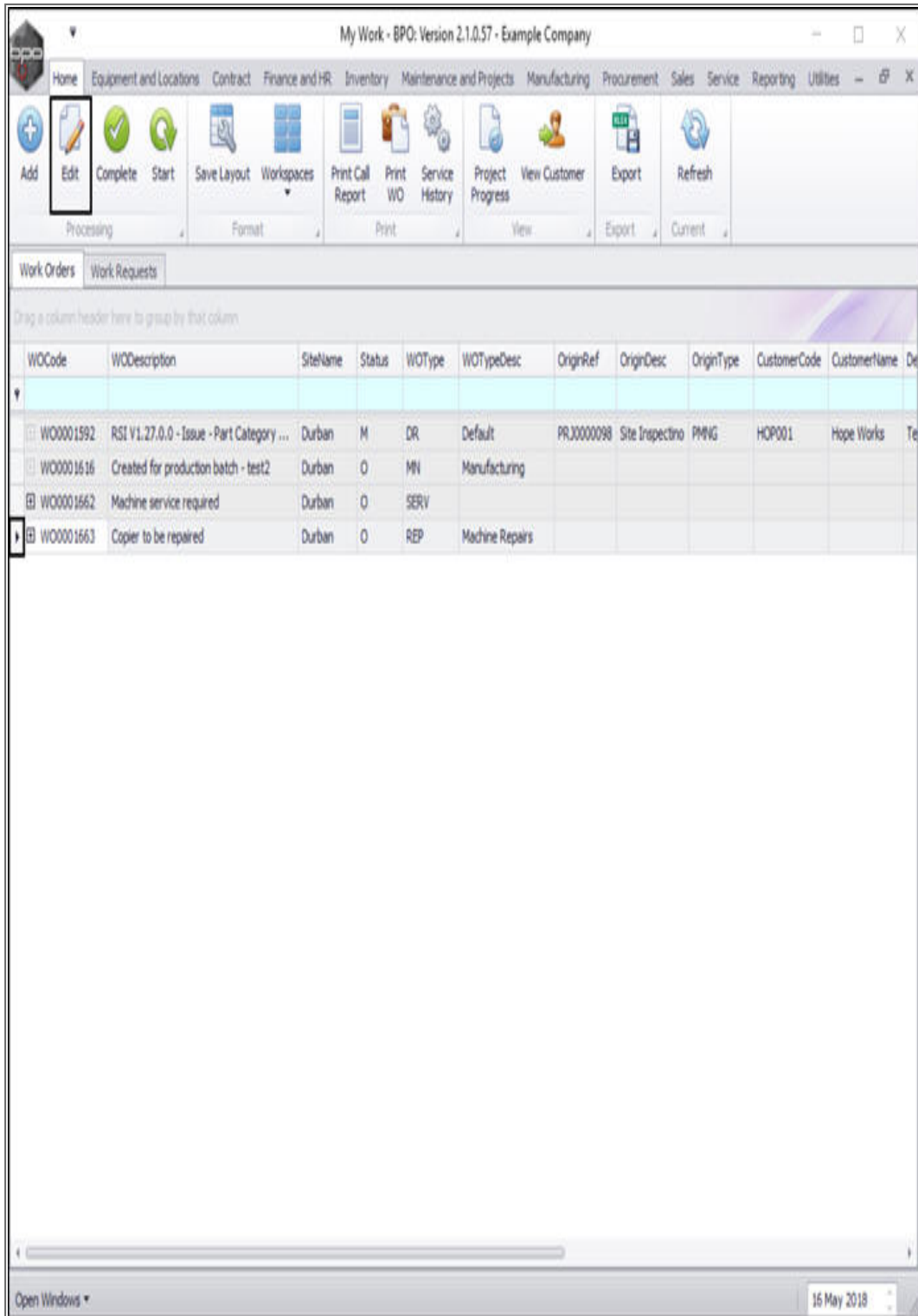
Ribbon Access: Service > My Work



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

Either

- Click on the **row selector** in front of the **work order** that you wish to log a **part request** for.
- Click on **Edit**.



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

- Click on the **Parts** tile.

The screenshot displays the 'Maintain WO - Ref WO0001663 - BPO: Version 2.1.0.57 - Example Company' window. The interface includes a top navigation bar with tabs like Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below this is a toolbar with Save, Back, Save Layout, and Print buttons. A left sidebar contains 'Functions' with tiles for Time, Services, Third Party Services, **Parts** (highlighted), Loans, Swap Outs, Meters, and Expenses. The main 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 (radio), Equipment (radio), Item: 19-12345
- Comment:** (empty text area)
- Links:**

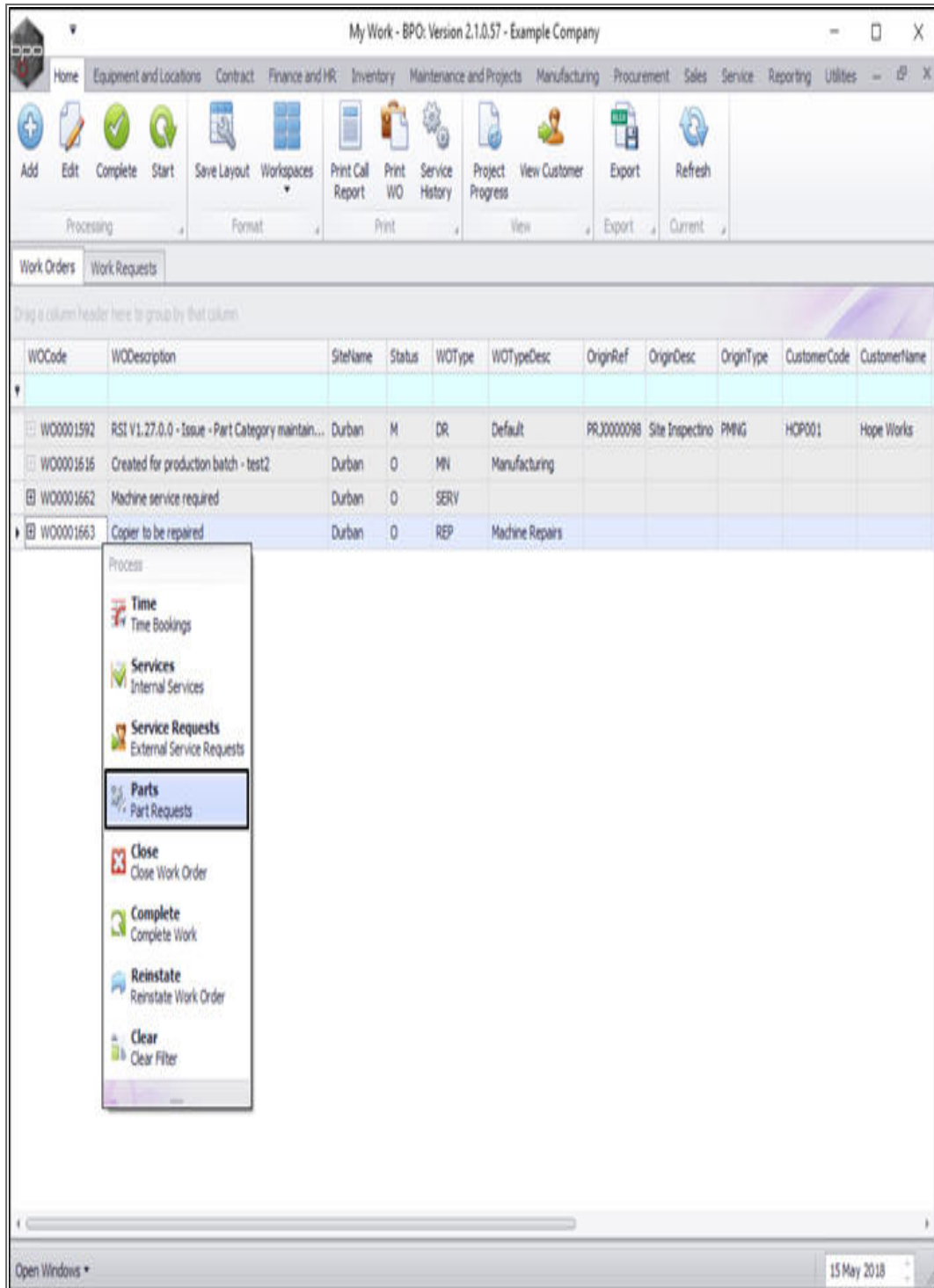
RefType	ReferenceType	ReferenceNo
CALL	Call Reference	
PMNG	Project Reference	
- Schedule:**
 - Assigned To:** Abigail Mine
 - Assigned By:** Abigail Mine
 - Scheduled Start:** 15 May 2018 10:40:29
 - Scheduled End:** 14 Jun 2018 00:00:00
 - Actual Start:** 14 Jun 2018 00:00:00
 - Actual End:** 14 Jun 2018 00:00:00
 - Delay Comments:** Currently on Schedule
 - Rectification Code:** (empty dropdown)
 - Rectification Comments:** (empty text area)
 - Completion Date:** 14 Jun 2018 00:00:00

At the bottom, there is a 'Meters' section and an 'Open Windows' dropdown. The system date is shown as 16 May 2018.

Or

In the My Work listing screen,

- **Right click** anywhere in the **row** of the **work order** where you wish to log a **part** request.
- A **Process** menu will pop up.
- Click on **Parts** - Part Requests



Either process will bring you to the **Part Requests for WO Code []** screen.

- Click on **Add**.

The **Part Requests** screen will be displayed.

REQUEST FROM BILL OF MATERIAL

With this selection:

When you search for the **part number**, the system will only bring up a list of parts that belong to this machine. For this process, a 'part list **BOM**' must already be set up. View [Bill of Materials](#) for more details.

- Click on the **BOM** radio button.

Part Requests - BPO: Version 2.1.0.57 - Example Company

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

Save Back Process

BOM Parts

Work Order W0001663

Part

Description

Quantity 1

Warehouse

Required Date 15 May 2018

Assigned To Abigal Mine

Requested By Abigal Mine

Comment

Billable Is Loan

Under Warranty

Open Windows 15 May 2018

REQUEST FROM FULL PART LIST

With this selection:

When you search for the **part number**, the system will bring up all part numbers.

- Click on the **Parts** radio button.

Part Requests - BPO: Version 2.1.0.57 - Example Company

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

Save | Back

Process

BOM | Parts

Work Order: W00001663

Part: 9855632

Description: Air Freshner

Quantity: 1

Warehouse: Main Warehouse

Required Date: 16 May 2018

Assigned To: Abigail Mine

Requested By: Abigail Mine

Comment:

Billable | Is Loan

Under Warranty

Open Windows | 16 May 2018

- **Work Order:** This field will be auto populated with the initially selected work order number.
- **Part:** Click on the search button and select the part required.
 - If you clicked on the **BOM** radio button - you will only be able to select from a list of parts that belong to this machine as per BOMs already set up on the system.
 - If you clicked on the **Parts** radio button - you will be able to select from a list of all parts numbers on the system.
- **Description:** This will auto populate once you have selected the part in the previous step.
- **Quantity:** Click in this text box and type in the quantity required.
- **Warehouse:** Click on the search button and select the warehouse that you wish to request the part from.
- **Required Date:** Click on the drop-down arrow and either type in or use the calendar function to select the date required.
- **Assigned To:** Click on the drop-down arrow and select from the list the person responsible for the part request.
- **Requested By:** Click on the drop-down arrow and select from the list the person who requested this part.

- **Comments:** Type in any comments pertaining to this part request if required.
- **Is Billable:** Click on this check box if the part is billable.

- **Note 1:** This will be set to **billable** by default, unless the part is linked to the contract as an inclusion.
- **Note 2:** Only stock items can be marked as billable, asset and loan requests will not be billable
- **Under Warranty:** Click in this check box in order to note whether the item replaced is under warranty. This does not process the item as a warranty claim part. View [Warranty Claims](#) introduction for more details.

Part Requests - BPO: Version 2.1.0.57 - Example Company

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

Save | Back

Process

BOM | Parts

Work Order: W00001663

Part:

Description:

Quantity:

Warehouse:

Required Date: 16 May 2018

Assigned To: Abigail Mine

Requested By: Abigail Mine

Comment:

Billable Is Loan

Under Warranty

Open Windows | 16 May 2018

- When you have finished adding the **partorBOM** request details, click on **Save**.
 - In this image, a parts request has been created for a drum which is not billable and noted not to be under warranty.

Part Requests - BPD: Version 2.1.0.57 - Example Company

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

Save Back

Process

BOM Parts

Work Order WO0001663

Part DR111111

Description Drum

Quantity 1

Warehouse Main Warehouse

Required Date 16 May 2018

Assigned To Abigal Mine

Requested By Abigal Mine

Comment New drum needed to complete repair service.

Billable Is Loan

Under Warranty

Open Windows 16 May 2018

You will return to the **Parts Requests for WO Code []** screen.

- Here you can now view the new part request.
- A **Part Request Processing** message box will pop up informing you that;
 - **The part request for part [] has been saved successfully to WO: [].**
- Click on **OK**.

Part Requests for WO Code W00001663 - BPO: Version 2.1.0.57 - 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 Workspaces Save Filter Requisition Issue Transfer Note Change Wise Remap Part Create Part

Maintenance Format Process Current Print

DocNo	PartCode	PartDesc	PartType	WarehouseName	BinLocationName	Quantity	IssuedStock
PQ00001948	2020-147K	Black toner SP2020	C	Main Warehouse	DBV-A1	1.00	1.00
PQ00001949	DR1111111	Drum	B	Main Warehouse	DBV-A1	1.00	0.00

Notes

StateDesc	FullName	NoteDate	NoteTime	Note
Order Raised	Abigal Mine	15 May 2018	13:59:38	Purchase Ord

Purchase Orders

POCode	Status	SupplierCode	SupplierName	RequestorName
PO0000244	P	SPR001	Sprint Distribut...	Bianca Du Toit
PO0000244	P	SPR001	Sprint Distribut...	Bianca Du Toit
PO0000332	P	SPR001	Sprint Distribut...	Bianca Du Toit
PO0000340	P	SPR001	Sprint Distribut...	Bianca Du Toit
PO0000430	P	YES001	Young Electric	Abigal Mine
PO0000431	P	YES001	Young Electric	Abigal Mine
PO0000446	N	SPR002	Sprint Internat...	Abigal Mine

Part Request Processing

i The part request for part DR1111111 has been saved successfully to WO : W00001663.

OK

Open Windows 16 May 2018

- Follow the steps in [Part Requests - Issuing Stock Items](#) to complete the part request issuing process.

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