

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

SERVICE

TIME REVIEW - REVIEW TIME

Time review enables managers to allocate **regular** time logged by employees as **SLA** 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 require **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.

The Time Review flag must be set to Yes in Configurator.

Ribbon Access: Service > Time Review

- 1. The **Time Review** listing screen will be displayed.
- 2. This screen is divided into 2 sections:
 - The Work Orders frame and the
 - SLA frame.
- 3. The **Work Order** frame displays all work orders with time records.
- 4. The **SLA** section displays all <u>contract inclusions</u> linked to an item on the selected work order.
 - Click on the row of the Work Order you would like to review time for.



TIME REVIEW - NO LINKED CRAFT INCLUSIONS

In this image, the item linked to the selected Work Order has no linked <u>contract inclusions</u> therefore the **SLA** section is blank.

- Note: Only <u>craft inclusions</u> (CRFT) are affected by Time Review.
- The **Billable** field shows whether the labour time is billable or non-billable. In this example, the billable field is **Yes**.
- The Regular Hours field shows the employee time logged against the work order. This field cannot be changed. In this example, Regulars Hours = 2.5.
- If an employee logs overtime against a work order, it will be displayed in the Overtime Hours field. This field cannot be changed.
 In this example, no Overtime Hours were booked.
 - Note: All Work Orders created after the Time Review flag has been set to 'Yes' in the Configurator will have the Billable flag set to 'No' by default but all hours allocated as Regular Hours will be billable by default.

SLA Hours: Time allocated to this field will be deducted from the service / support time from a client's contractual agreement.

Note 1: Time allocated as SLA Hours will be deducted from Regular Hours, in this example, no time was allocated as SLA Hours therefore Regular Hours remained the same. If 1hr had been allocated as SLA Hours, then the Regular Hours would have changed to 1.25hrs.



- Note 2: The Overtime Hours field is not affected by changes in the Regular Hours, SLA Hours and Non Billable Hours fields.
- Scroll right until you see the Marked field.
 - Note: Since no time was allocated as SLA Hours, the Marked field will remain unchecked. If time had been allocated as SLA Hours, then this field would have been checked.
- Non Billable Hours: Time allocated to this field will not be billed.

 In this image, 1hr has been allocated as non billable hours.
- The time allocated as *non billable hours* has now been deducted from *Regular Hours*. Click away from this field to see the changes.
 In this image, *Regular Hours* now display as 1.25 hrs.
- If 0.25 had been allocated as SLA hours and 1 as Non Billable
 Hours, then Regular Hours would have been displaying as 1.
 - Note: The Overtime Hours field is not affected by changes in the Regular Hours, SLA Hours or Non Billable Hours fields.
- Scroll right until you can view the Marked field.
- Since time was allocated as Non Billable Hours, this field is now checked.
- *Scroll* left to go back.



- Total Hours = Regular Hours + Overtime Hours + SLA Hours+ Non Billable Hours.
- The *Total Hours* field is greyed out and cannot be changed.

SELECT 'FLAG REVIEWED'

When you are done, you can now mark time as reviewed by either clicking on the **Is Reviewed** field or the **Flag Reviewed** button.

REVIEW TIME WITH THE 'IS REVIEWED' CHECK BOX

- Click on the *Is Reviewed* check box.
- The *Is Reviewed* check box will be marked.

SAVE REVIEWED TIME

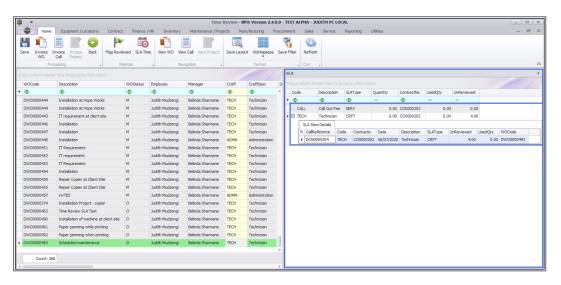
- Click on Save.
- A *Time Review Processing* message will pop up telling you;
 - Time Review processing successfully updated.
- Click on Ok.
- You will return to the *Time Review* listing screen.
- *Scroll* right to view more fields.



• The *Is Reviewed* check box will now be checked.

TIME REVIEW WITH LINKED CRAFT INCLUSIONS

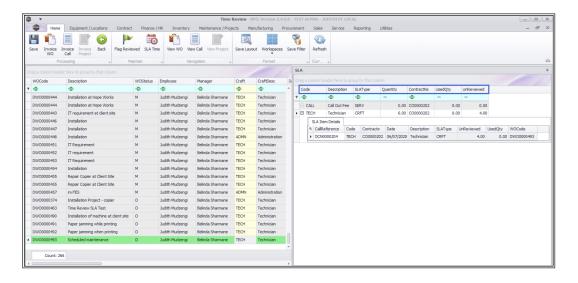
- In this image, the item on the selected work order has linked contract inclusions and they are displayed in the SLA section.
 - Note 1: Although all contract inclusions linked to an item on a selected work order will be displayed in the SLA section, only craft inclusions (CRFT) are affected by time review.
 - Note 2: The information displayed in the SLA section can also be viewed in the Call screen - SLAs tab and the Contract Balances screen. In the Contract Balances screen, only SLA information for craft inclusions is displayed.



In the **SLA** panel,



- 1. the SLA Item Details for the
- 2. the craft inclusion linked to the item on the selected work order will auto display.
 - Code: This shows the code of the contract inclusion.
 - *Description:* This shows the description of the contract inclusion.
 - *SLA Type:* This shows the type of the contract inclusion.
 - Quantity: This shows the quantity of the contract inclusion.
 - *Contract No:* This shows the contract number where the item on the selected work order is linked to.
 - *Used Qty:* This shows the quantity of the contract inclusion that has been used up.
 - UnReviewed: This shows time logged against the item on the selected work order that has not been reviewed.

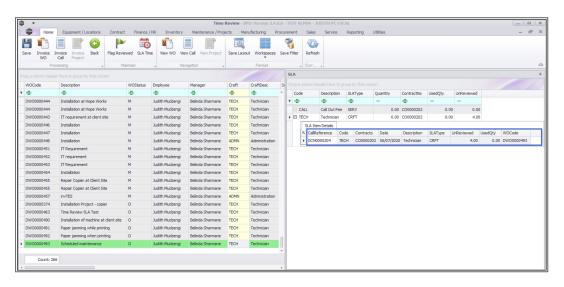


In the **SLA Item Details** panel:

- *Call Reference:* This shows the call number where the selected work order is linked to.
- Code: This shows the code of the contract inclusion.



- *Contract No:* This shows the contract number where the item on the selected work order is linked to.
- Date: This shows the date when time was logged.
- *SLA Type:* This shows the type of the contract inclusion.
- *UnReviewed:* This shows time logged against the work order that has not been reviewed.
- *Used Qty:* This shows the SLA hours that have been allocated to this craft inclusion.
- *WO Code:* This shows the work order number of the selected work order.

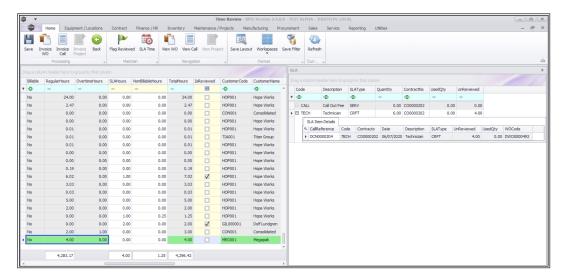


In the work orders panel, scroll to the right until you see the fields described below;

- The *Billable* field shows whether the labour time is billable or non-billable. In this example, the billable field is *No*.
- The Regular Hours field shows the employee time logged against the work order. This field cannot be changed. In this example, the Regulars Hours = 4.

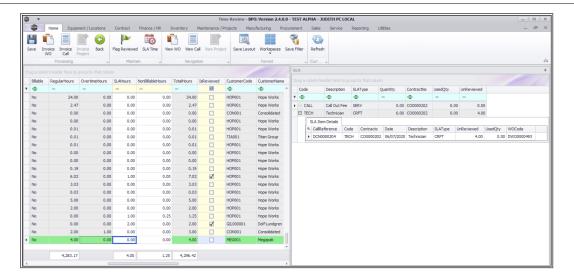


- If an employee logs overtime against a work order, it will be displayed in the *Overtime Hours* field. This field cannot be changed.
 In this example, no *Overtime Hours* have been logged.
 - Note: All work orders that are created after the Time Review flag has been set to Yes in the Configurator will have the Billable flag set to No by default but all hours allocated as Regular Hours will be billable by default.



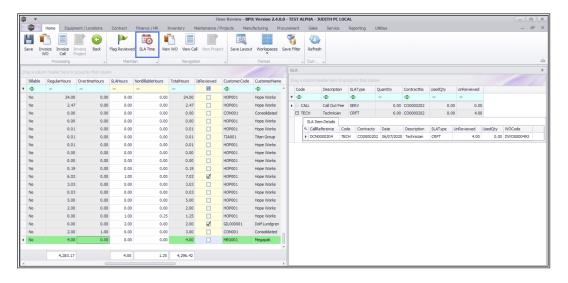
- **SLA Hours**: Time allocated to this field will be deducted from the **service / support time** from a client's contractual agreement.
- You can choose to allocate <u>a portion of</u> or <u>all</u> Regular Hours logged by an employee as SLA Hours.





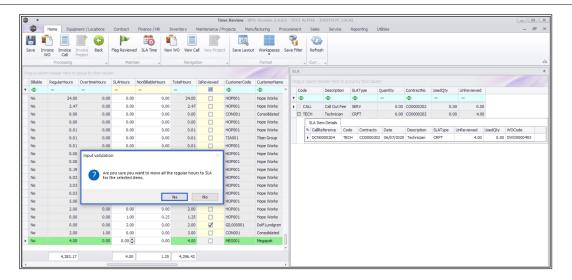
ALLOCATE 'ALL' REGULAR HOURS

• To allocate all *Regular Hours* as *SLA Hours*, click on *SLA Time*.

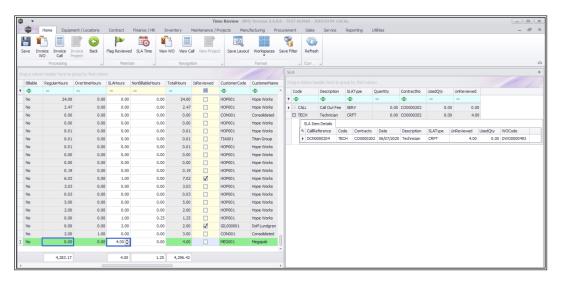


- An Input Validation message will pop up asking you;
 - Are you sure you want to move all the regular hours to SLA for the selected items.
- Click on Yes.





• All Regular Hours will now be allocated as SLA Hours.

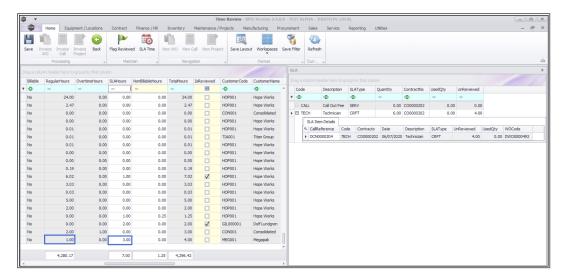


ALLOCATE A 'PORTION' OF REGULAR HOURS

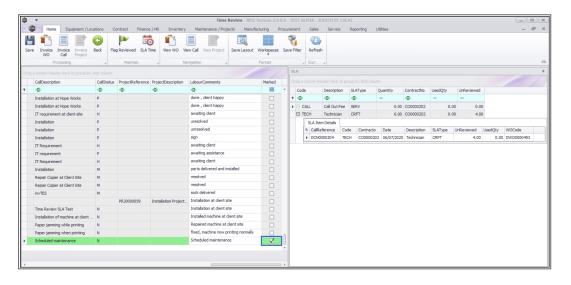
- To allocate a portion of the *Regular Hours* as *SLA Hours*, type in the number of hours you wish to apportion as *SLA Hours*.
- In this example, *3 hrs* have been allocated as *SLA Hours*.
- The time allocated as *SLA Hours* has now been deducted from
 Regular Hours. Click away from this field to see the changes. In
 this case, *Regular Hours* now display as 1.



 Note: The Overtime Hours field is no affected by changes in the Regular Hours, SLA Hours and Non Billable Hours fields.



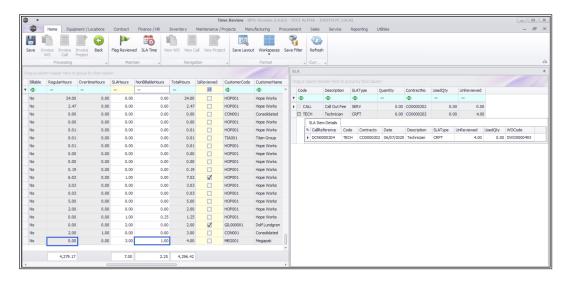
- Scroll right until you see the Marked field.
- Since time was allocated as SLA Hours, this field is now be checked.
- Scroll left to go back.



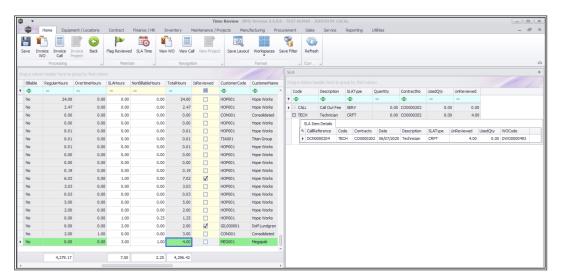
Non Billable Hours: Time allocated to this field will not be billed.
 In this example, 1 hr was allocated as non billable hours.



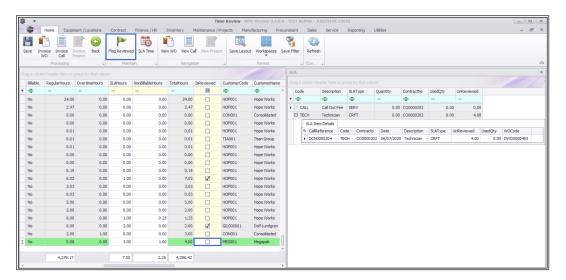
- The time allocated as *Non Billable Hours* has now been deducted from *Regular Hours*. Click away from this field to see the changes.
 In this case, *Regular Hours* field now has *O* hrs.
 - Note: The Overtime Hours field is not affected by changes in the SLA Hours or Non Billable Hours fields.



- Total Hours = Regular Hours + Overtime Hours + SLA Hours + Non Billable Hours.
- This field is greyed out and cannot be changed.

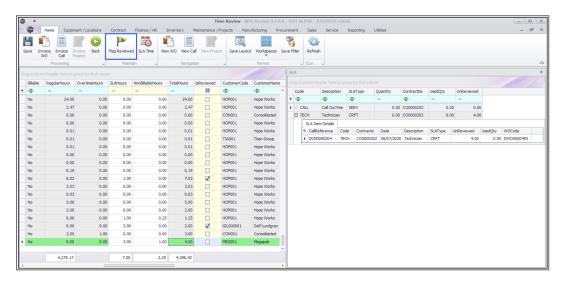


You can now mark the time as reviewed by either clicking on the **Is Reviewed** check box or the **Flag Reviewed** button.



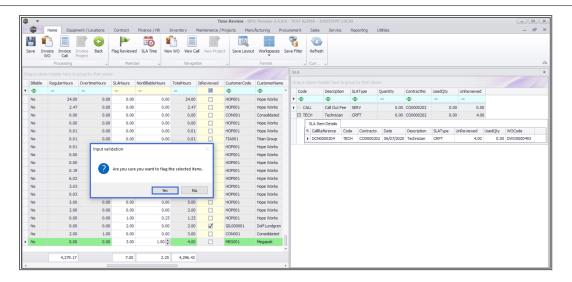
REVIEW TIME USING THE 'FLAG REVIEWED' BUTTON

• Click on Flag Reviewed.

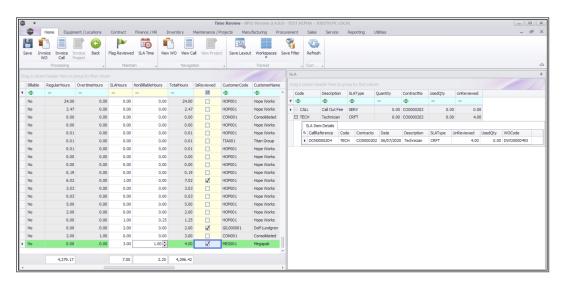


- An *Input Validation* message will pop up asking you;
 - Are you sure you want to flag the following items.
- · Click on Yes.





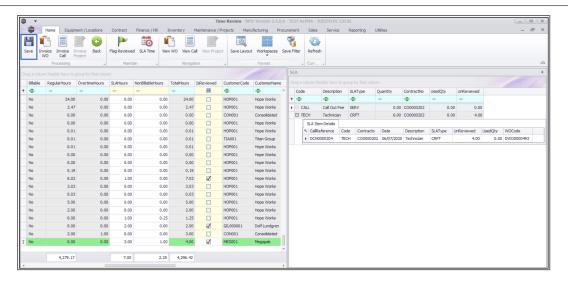
• The *Is Reviewed* field will now be checked.



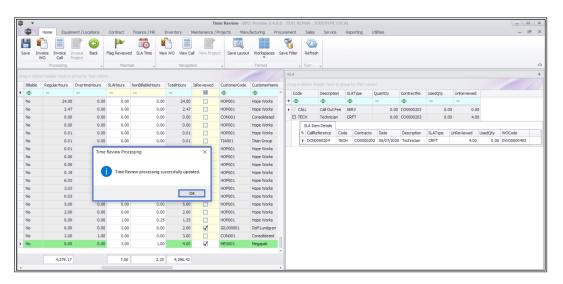
SAVE REVIEWED TIME

• Click on Save.



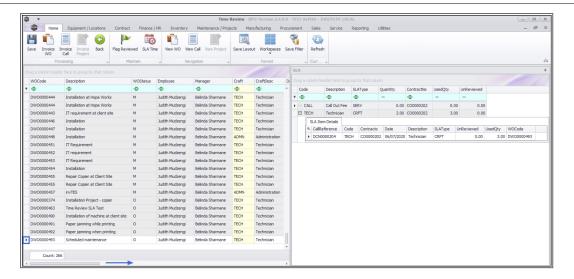


- A *Time Review Processing* message will pop up telling you;
 - · Time Review processing successfully updated.
- Click on Ok.



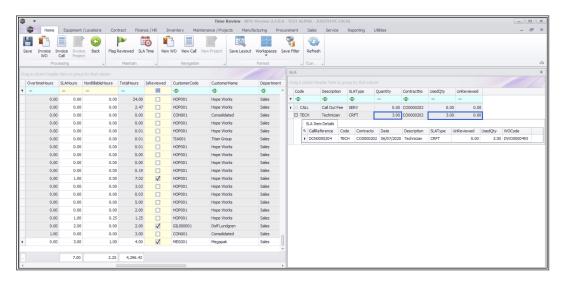
• *Scroll* to the right to view more fields.





In the SLA panel,

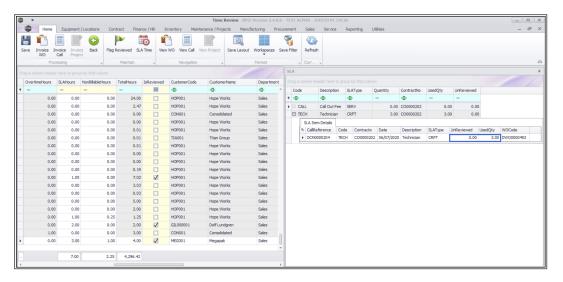
- the *Quantity* will now be auto adjusted to reflect the balance of unused service or support hours left after time has been reviewed for the selected craft inclusion.
- The *Used Qty* will now show the total number of service or support hours that have been consumed for the selected craft inclusion.
- The *UnReviewed* field will now show the total number of hours that have not been reviewed for the selected craft inclusion.





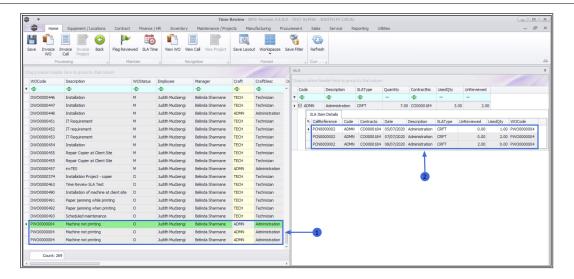
In the SLA Items Details panel,

- The *UnReviewed* field will now show the total number of hours that have not been reviewed on the selected call.
- The *Used Qty* will now show the total number of service or support hours that have been consumed on the selected call.

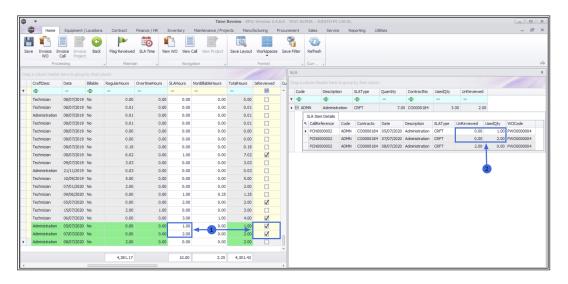


- If multiple time records were logged against a craft inclusion, all the individual time records will be displayed in the SLA Item Details panel.
- In this image, three time records relating to the ADMN craft were logged and
- 2. each individual transaction for *ADMN* can be seen in the *SLA Item Details*.





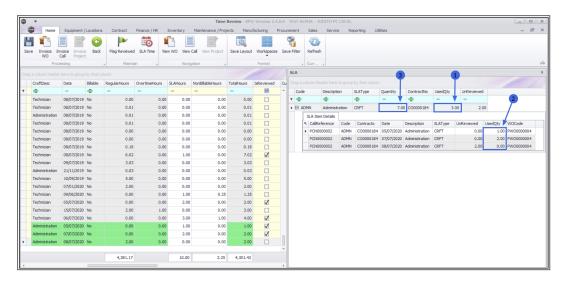
- Scroll to the right in the work orders section to view more columns.
- In this image, the first two time records were reviewed and *1hr* and *2hrs* were allocated as *SLA Hours* respectively.
- 2. These individual transactions can be viewed in the *SLA Items Details* panel, where *1 hr* and *2 hrs* are displayed in the *Used Quantity* field and *0* is displayed in the *UnReviewed* field for both transactions.



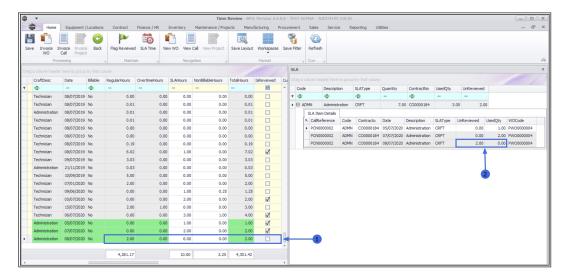
In the **SLA** panel:



- 1. the *Used Quantity* is the summation of all the
- 2. individual *Used Quantity* transactions displayed in the *SLA Item Details* frame. In this case *Used Quantity* = 1 + 2 + 0 = 3.
- 3. the *Quantity* = *Initial Quantity* (you can view this in the Balances screen) *Used Quantity*. In this case it is 7.



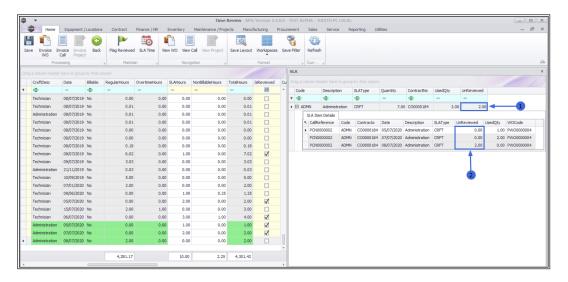
- 1. In the work orders panel, the last record is not reviewed and all hours are still allocated as *Regular Hours*.
- 2. This transaction can also be viewed in the *SLA Item Details* panel, where *UnReviewed* = *2* and *Used Quantity* = *0*.





In the **SLA** panel:

- 1. the *UnReviewed* (hours) are the summation of all the
- individual *UnReviewed* transactions displayed in the *SLA Item Details* frame. In this case, *Unreviewed* = 0 + 0 + 2 = 2 since there is only 1 transaction that has not been reviewed yet.



Note: For a record to be removed from this screen, the Work Order has to be closed.

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