

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

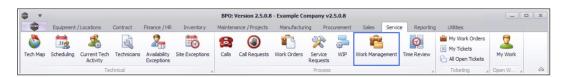
SERVICE

WORK MANAGEMENT – ASSIGN OR RE-ASSIGN A WORK ORDER

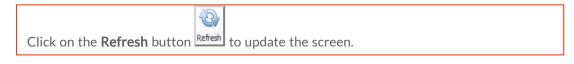
Unassigned, open Work Orders can be assigned to a <u>technician</u> from the **Work Management** screen.

The Work Orders listed are <u>only</u> for technicians that have **labour time** booked. A work order may be listed <u>more than once</u>. A separate line is allocated for <u>each</u> employee that has time recorded against that Work Order. The Technician column in the data grid is not the <u>Assigned to</u> person but the employee that has a **labour / time record** linked.

Ribbon Access: Service > Work Management



- 1. The Work Management screen will be displayed.
- 2. Select the **date range** that will contain the **work order** you wish to assign.
- 3. Select the **Site** where the work order was issued.
 - The example has **Durban** selected.





·			ement - BPO: Version 2.5.0.8 - Example	Company	v2.5.0.8				
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A Durban	0/6	WO0006131	1818-1-1 - Check network requirements	Durban	Belinda Sharman	м	INST	Installation	HOP001
		WO0006214	Tier - Commercial Tier Test	Durban	Theo Peterson	м	INST	Installation	HOP001
🕌 Belinda Sharman	1/1	WO0006214	Tier - Commercial Tier Test	Durban	Julanda Kessler	м	INST	Installation	HOP001
🔽 Karlien Jessica Young Dunnaway Svenson	1/0	WO0006250	Paper not feeding through rollers	Durban	Theo Peterson	0	REP	Machine Repairs	HOP001
👤 John Twain	1/0	WO0006260	Loan unit required while main unit is being	Durban	Karlien Jessica Yo	0	REP	Machine Repairs	OFF001
Theo Peterson	1/1	WO0006260	Loan unit required while main unit is being	Durban	John Twain	0	REP	Machine Repairs	OFF001
		WO0006260	Loan unit required while main unit is being	Durban	Jeff Rivers	0	REP	Machine Repairs	OFF001
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Pretoria	0/0	WO0006253	Replace part - current faulty	Durban	Julanda Kessler	М	PR	Parts Requirement	biancad
Cape Town	0/0	WO0006229	BathBinMaint - Bathroom Bin Maintenance	Durban	Julanda Kessler	М	SM	Scheduled Maintenance	
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4. The **Work Orders** frame will be populated with all the work orders in the specified date range.

ASSIGN WORK ORDER LINKED TO A PROJECT

- 5. Click on the **row** of the **work order** you wish to **assign** to a Technician.
- 6. Click on Assign.

Short cut key:Right click to display the Process menu list. Click on Assign.



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- 7. The **Work Assignment: Reference No [work order number]** screen will be displayed.
 - Work Order: The Work Order number you have selected will populate this field.
 - Assigned To: Click on the down arrow to select the name of the Technician you wish to assign the work order to from the drop-down list.
 - Craft Name: Click on the search button to select the required craft from the Select the craft screen.
 - Sched Date: This field will display the current date. Click to type in or click on the down **arrow** to select the scheduled date for the work order using the calendar function.
 - **Billable:** Click to select the check box if the Work Order assignment should be billed.
- When you have finished editing the work assignment details, click on Save.



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Assigned To	Belinda Sharman	•										
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- 9. When you receive the **Processing** message to confirm that;
 - Work Order: [work order number] has been successfully assigned.
- 10. Click on OK.

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- 11. You will return to the Work Management screen.
- 12. Click on the **Refresh** button to update the screen.

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13. The work order will now appear twice on the screen, as a separate line has now been allocated for <u>each</u> employee that has a time record booked against a Work Order.

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ASSIGN A WORK ORDER LINKED TO A CALL

- 1. From the Work Management screen;
- 2. Click on the **row** of the **Work Order** you wish to assign.
- 3. Click on **Assign**.

Home Equipment / Locations Contra	ct Finar	nce / HF	R Inve	entory	Maintenance / Projects Ma	anufacturing	Procurement Sa	ales :	Service	Reporting Utilities		- 8	
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Sites	Stats		00006130		spection for Network Cable Insta		Jade Rivers	0	INSP	Inspection	HOP001		
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🧏 Belinda Sharman	2/1	<u> </u>	00006214		Commercial Tier Test	Durban	Theo Peterson	M	INST	Installation	HOP001	CN0005291	
Karlien Jessica Young Dunnaway Svenson	1/0		00006214		Commercial Tier Test	Durban	Julanda Kessler	M	INST	Installation	HOP001	CN0005291	
2 John Twain	1/0	W	00006250	Paper	not feeding through rollers	Durban	Theo Peterson	0	REP	Machine Repairs	HOP001	CN0005298	
	-4-	W	00006260	Loan u	init required while main unit is bei	ng Durban	Karlien Jessica Yo	0	REP	Machine Repairs	OFF001	CN0005304	
X Theo Peterson	1/1	W	00006260	Loan u	init required while main unit is bei	ng Durban	John Twain	0	REP	Machine Repairs	OFF001	CN0005304	
🔀 Jade Rivers	1/0	w	00006260	Loan u	init required while main unit is bei	ng Durban	Jeff Rivers	0	REP	Machine Repairs	OFF001	CN0005304	
👤 Jeff Rivers	1/0	W	00006136	PROJ4	106OR002	Durban	Julanda Kessler	М	NDS	New Deal Sale	BIG0001	CN0005274	
Pretoria	0/0	W	00006257	PROJ4	06OR002	Durban	Belinda Sharman	0	NDS	New Deal Sale	BIG0001	CN0005274	
A.		W	00006253	Replac	e part - current faulty	Durban	Julanda Kessler	М	PR	Parts Requirement	biancad	CN0005301	
Cape Town	0/0	W	00006229	BathBir	nMaint - Bathroom Bin Maintenan	ce Durban	Julanda Kessler	М	SM	Scheduled Maintenance	WES001	CN0005295	
Bloemfontein	0/0	W	00006234	BathBir	nMaint - Bathroom Bin Maintenan	ce Durban	Julanda Kessler	М	SM	Scheduled Maintenance	WES001	CN0005296	
A New Test Site	0/0												
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I Son all including	0/0												
		4 (

- 4. "The Call Assignment: Reference No: [call ref number] screen will be displayed. " on page 4
 - Assigned To: Click on the down **arrow** to select the name of the Technician you wish to assign the work order to from the drop-down list.
 - **Detail:** The **call reference description** for the call will populate the field.
 - Assignment Date: The <u>current</u> date and time will display.
 - Assigned By: The person currently assigning to the call will display in the field. Click on the down arrow to select the select a different employee from the drop-down list, if required.



CREATE NEW WORK ORDER

• Create new Work Order: Click to select the check box to create a new Work Order if the technician needs to follow up on the same call, but for a different task. Make sure you also change the assignment detail accordingly.

Refer	r to Create	new Work	Order or s	elect <mark>O</mark>	pen W	ork O	rders f	or more	e inform-
ation.									
-									
ф т	4	Call Assignment : Re	ference No. : CN0005291 -	BPO: Version 2.5.	0.8 - Example Co	mpany v2.5.0	.8		_ – x
Home Equipm	nent / Locations Contract	Finance / HR Inventory	Maintenance / Projects	Manufacturing	Procurement	Sales Ser	vice Reporting	Utilities	_ & ×
💾 😋 🛛									
Save Back Save Layo	ut View Call								
Process a Format	, View ,								\$
Assigned To Aria	al Blythe	•							
Detail Tie	r - Commercial Tier Test		* *						

OPEN WORK ORDERS

Date 25/04/2022

ned By Julanda Kess

▼ 13:55:32 ⁺

Create new Work Order 🗹

Create new Work Order 🗹

WOCode Description
WO0006214 Tier - Commercial Tier Test

• You may with to create a <u>new</u> Work Order by selecting an <u>exist-</u> ing **Open Work Order**.

User : JulandaK 25/04/2022 Version : 2.5.0.8 Example Company v2.5.0.8

Note that you <u>cannot</u> choose a Work Order that was previously assigned to someone.



Refer to Create new Work Order or select Open Work Orders for more information.

5. When you have finished editing the call assignment details, click on **Save**.

			Call Assig	nment : Refe	rence No. : CN0005291 -	BPO: Version 2.5.).8 - Example C	ompany v2.	5.0.8				x
Home E	quipment / Locations	Contract	Finance / HR	Inventory	Maintenance / Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities	- 8	×
Save Back Save	Layout View Call												
Process A P	at , View ,												\diamond
Assigned To	Arial Blythe		• •										
	Tier - Commercial Tie	r Test			* *								
					-								
Assignment Date	25/04/2022 -	13:55:32	‡ *										
Assigned By	Julanda Kessler		•										
	Create new Work	Order 🗌											
Open Work Orders	Drag a column head			/	1								
	WOCo		scription										
	• WOOD		- Commercial Tier		Tier - Com	nersial Tier	Test						
		\checkmark	100000	0214	Tier - Com	nercial Hel	Test						
Open Windows 🕶								User : Jular	ndaK 25	5/04/2022	Version : 2.5.0.8	Example Company v2.5.0.8	14

- 6. You will return to the Work Management screen.
- 7. When you receive the **Call Processing** message to confirm that;
 - Call No: [call ref number] has been assigned .
- 8. Click on OK.



Order Proces Current Format Print Proces Current Format Print Print Proces Current Format Print Print Proces Current Format Print Print Proces Current Print Print Print Proces Organ Galance header here to group by that calue UCCode UCC	Order Order Process Report Deliveries WO History Process Current Format Print Print Process Current Print Print Print Process Daga column header here to group by flat column Stelsum Stel		Image: Complete Close Work 01/02/ Edit Complete Close Work 25/04/		Refre	sh Assign	Start			Call Net Print	Service					
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Related References

• "View Work Order Details" on page 27

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