SERVICE

INTRODUCTION TO MY WORK

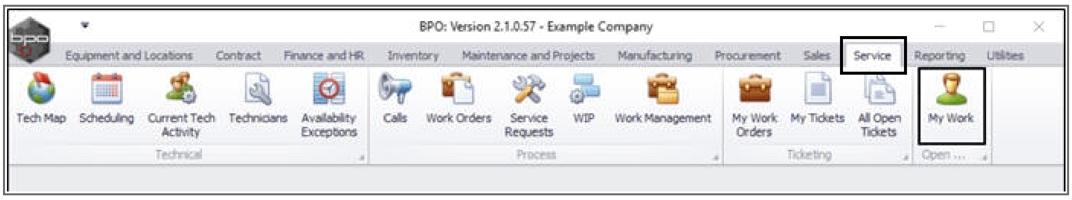
The **My Work** screen deals with work that is assigned to a ***specific*** employee, i.e. when I am logged in, I can only see work orders assigned to me.

This screen is very much like the call screen in that you can request parts, services and loan units; book time, travel and expenses; as well as view customer and machine detail (including warranty information).

This screen can be used by:

- a technician who does not use Tech Connect, but has access to BPO in order to log his own part requests and book his time, etc.
- anyone assigned to the work order, where a call does not exist, e.g. a work order was created to repair a machine in the workshop.

Ribbon Access: *Service > My Work*

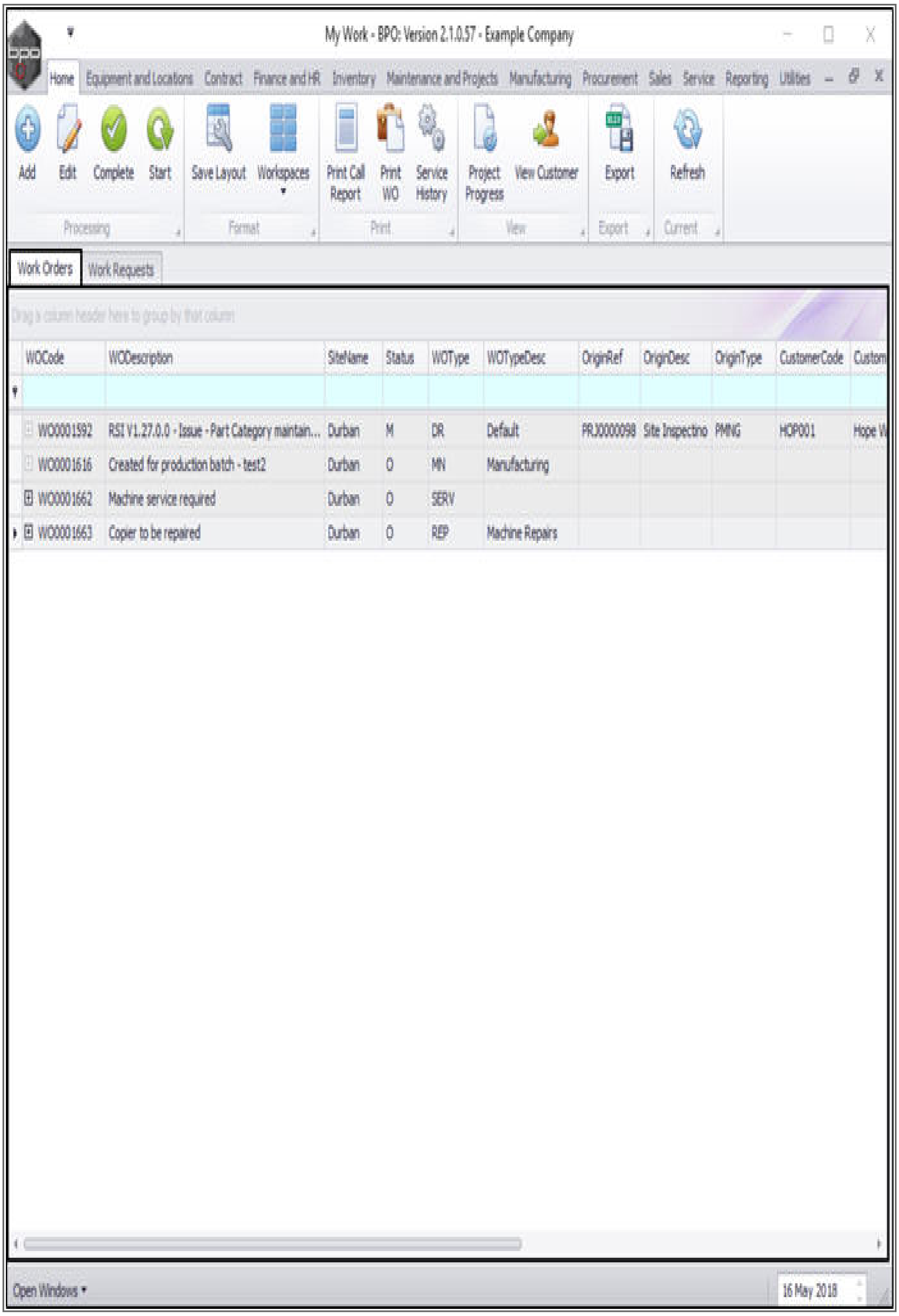


THE MY WORK LISTING SCREEN

- The ***My Work*** Listing screen will be displayed.
- This screen lists all ***open*** and completed work orders assigned to the current user logged in to the system.

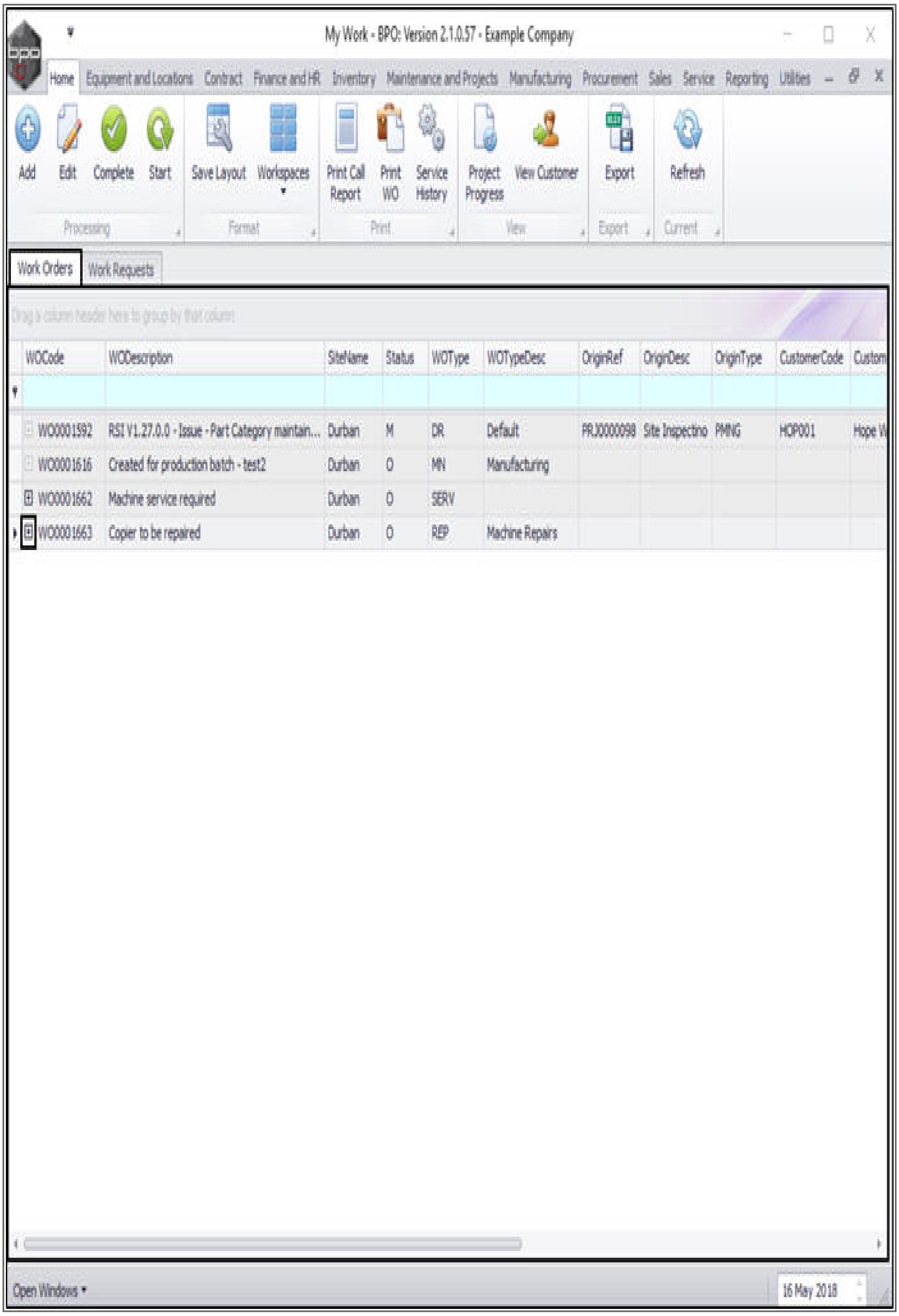
THE WORK ORDERS FRAME

- Click on this tab to view a list of all ***work orders*** assigned to the user logged in.



Prior Work Orders and Work Order Technicians Frames

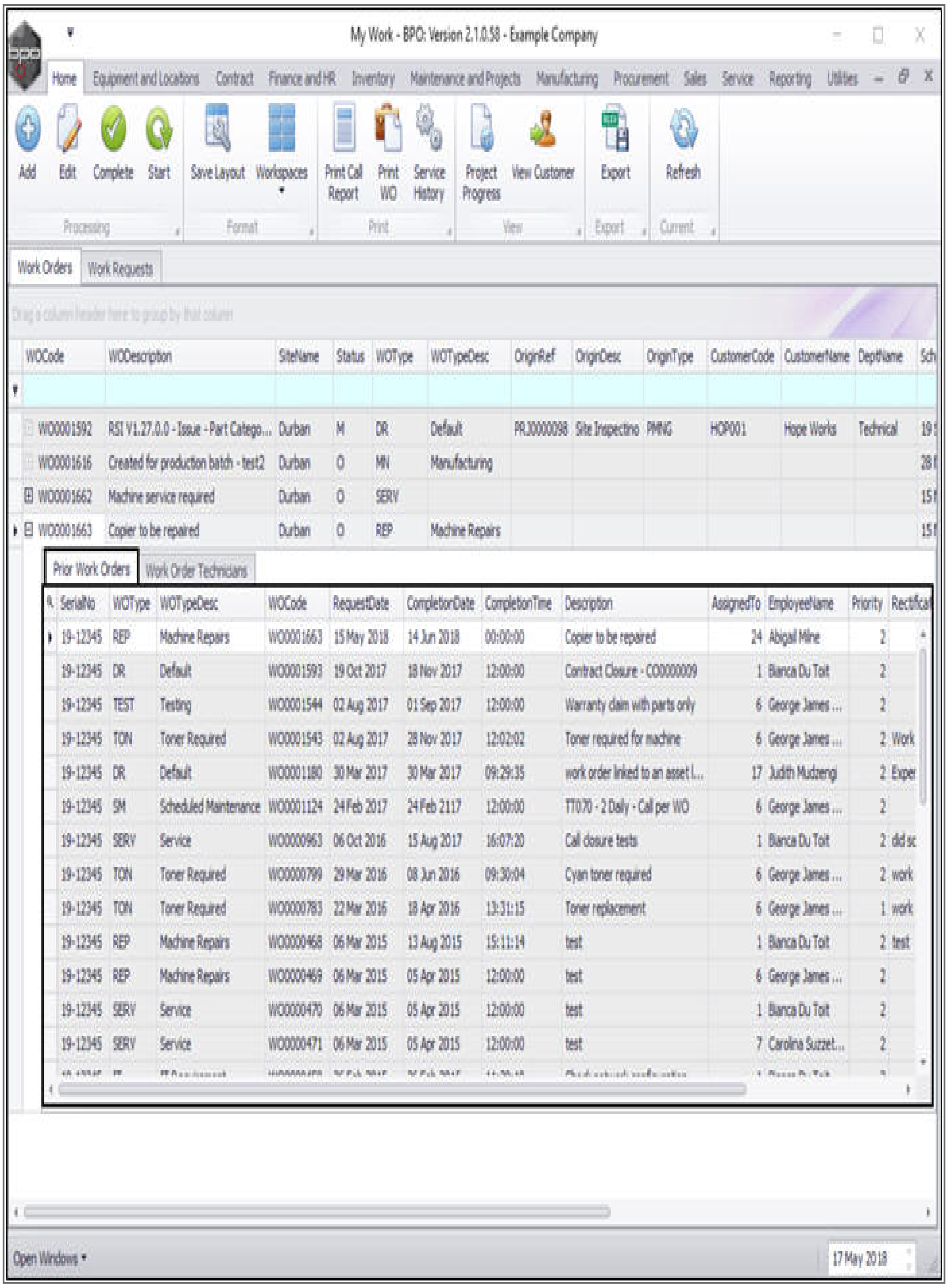
- In the Work Orders frame, click on a work order that has a ***bold*** (active) expand button in front of its row.
    - **Note:** If the expand button is ***bold*** as opposed to ***feint*** then this indicates that there is hidden content.


My Work - 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
Complete
Start
Save Layout
Workspaces
Print Call Report
Print WO
Service History
Project Progress
View Customer
Export
Refresh
Processing
Format
Print
View
Export
Current
Work Orders
Work Requests
Drag a column header here to group by that column
WOCode
WODescription
SiteName
Status
WOType
WOTypeDesc
OriginRef
OriginDesc
OriginType
CustomerCode
WO0001592
RSI V1.27.0.0 - Issue - Part Category maintain...
Durban
M
DR
Default
PRJ0000098
Site Inspectino
PMNG
HOP001
WO0001616
Created for production batch - test2
Durban
O
MN
Manufacturing
WO0001662
Machine service required
Durban
O
SERV
WO0001663
Copier to be repaired
Durban
O
REP
Machine Repairs
Open Windows
16 May 2018

The ***Prior Work Orders*** and ***Work Order Technicians*** frames will be expanded.

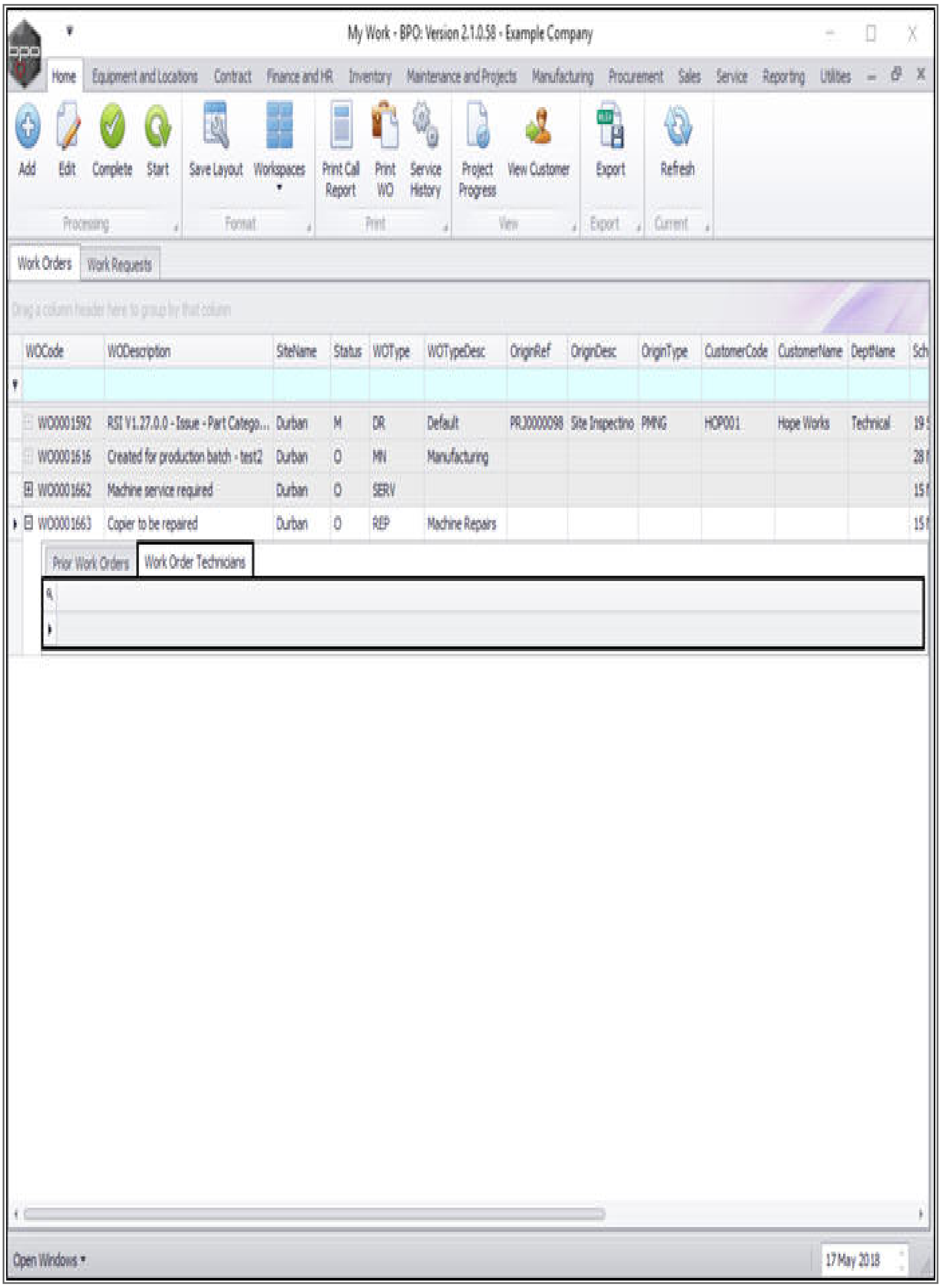
PRIOR WORK ORDERS

- Click on the ***Prior Work Orders*** tab to display a list of ***prior work orders*** for this serial number.


My Work - BPO: Version 2.1.0.58 - Example Company
Home
Equipment and Locations
Contract
Finance and HR
Inventory
Maintenance and Projects
Manufacturing
Procurement
Sales
Service
Reporting
Utilities
Add
Edit
Complete
Start
Save Layout
Workspaces
Print Call Report
Print WO
Service History
Project Progress
View Customer
Export
Refresh
Processing
Format
Print
View
Export
Current
Work Orders
Work Requests
Prior Work Orders
Work Order Technicians
Open Windows
17 May 2018

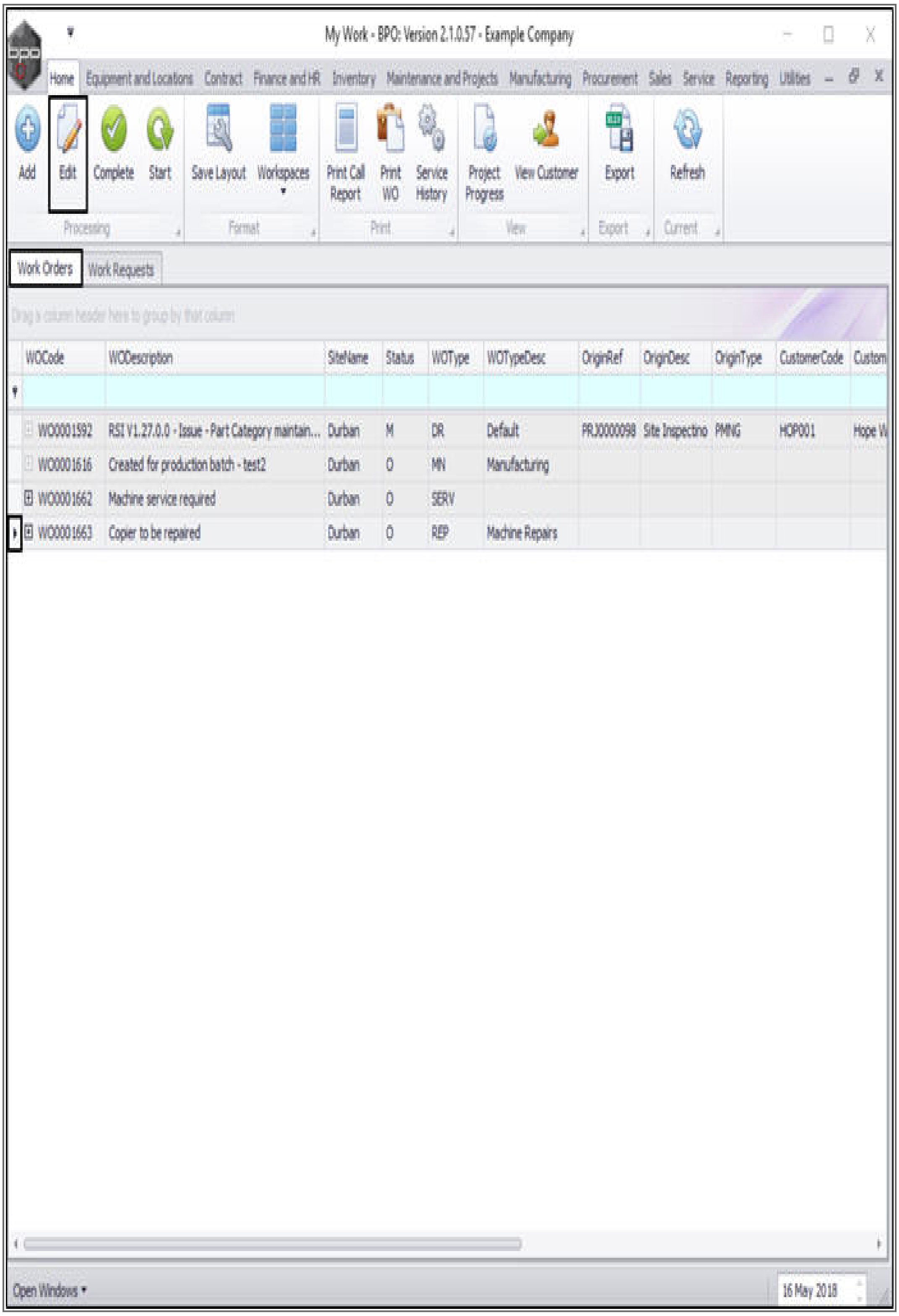
WORK ORDER TECHNICIANS

- Click on the ***Work Order Technicians*** tab to display a list of ***technicians*** linked to this work order.



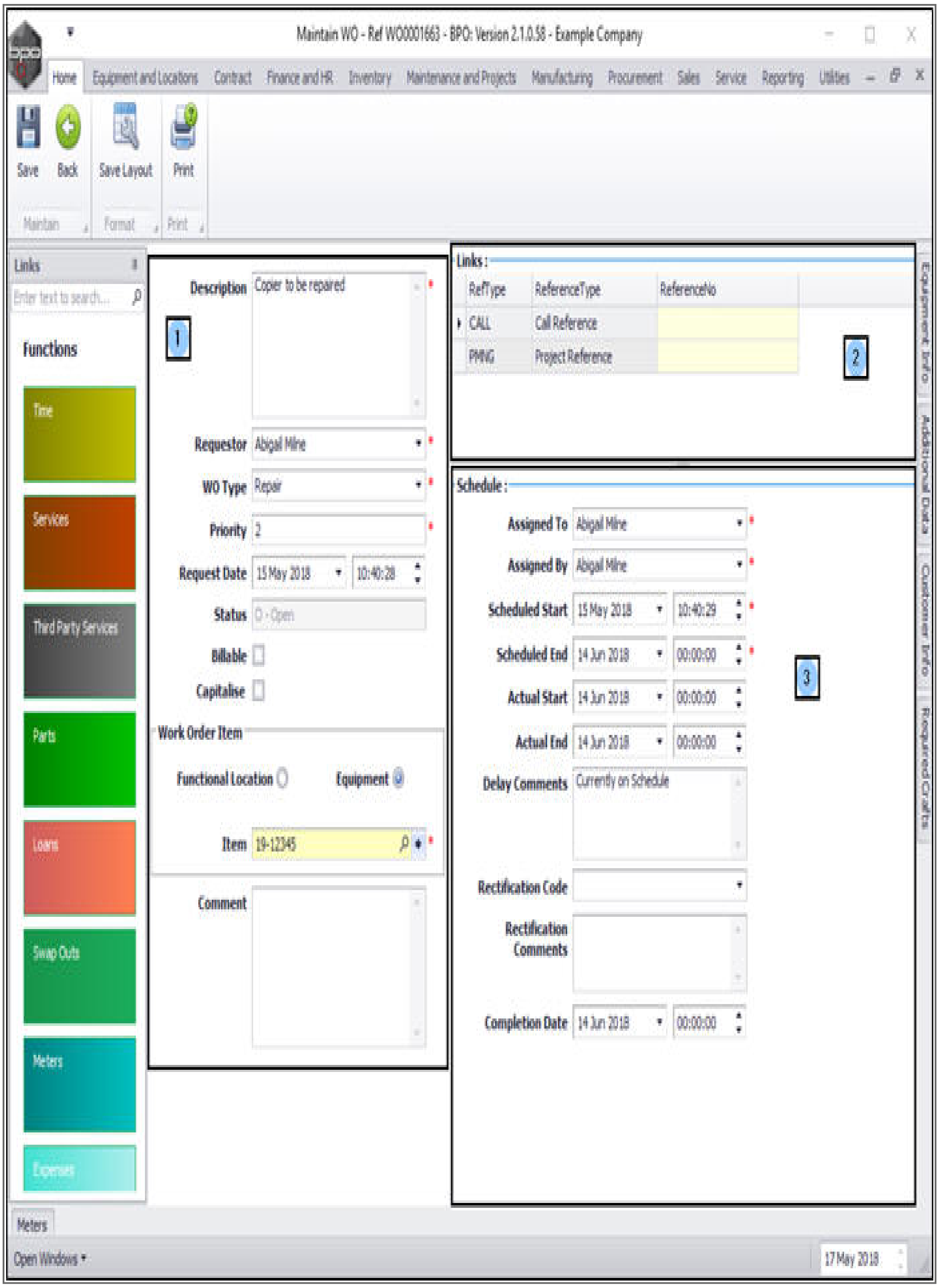
VIEW WORK ORDER DETAILS

- Making sure that you are in the ***Work Orders*** frame, click on the ***row selector*** in front of the ***work order*** that you wish to view the ***details*** of.
- Click on ***Edit***.



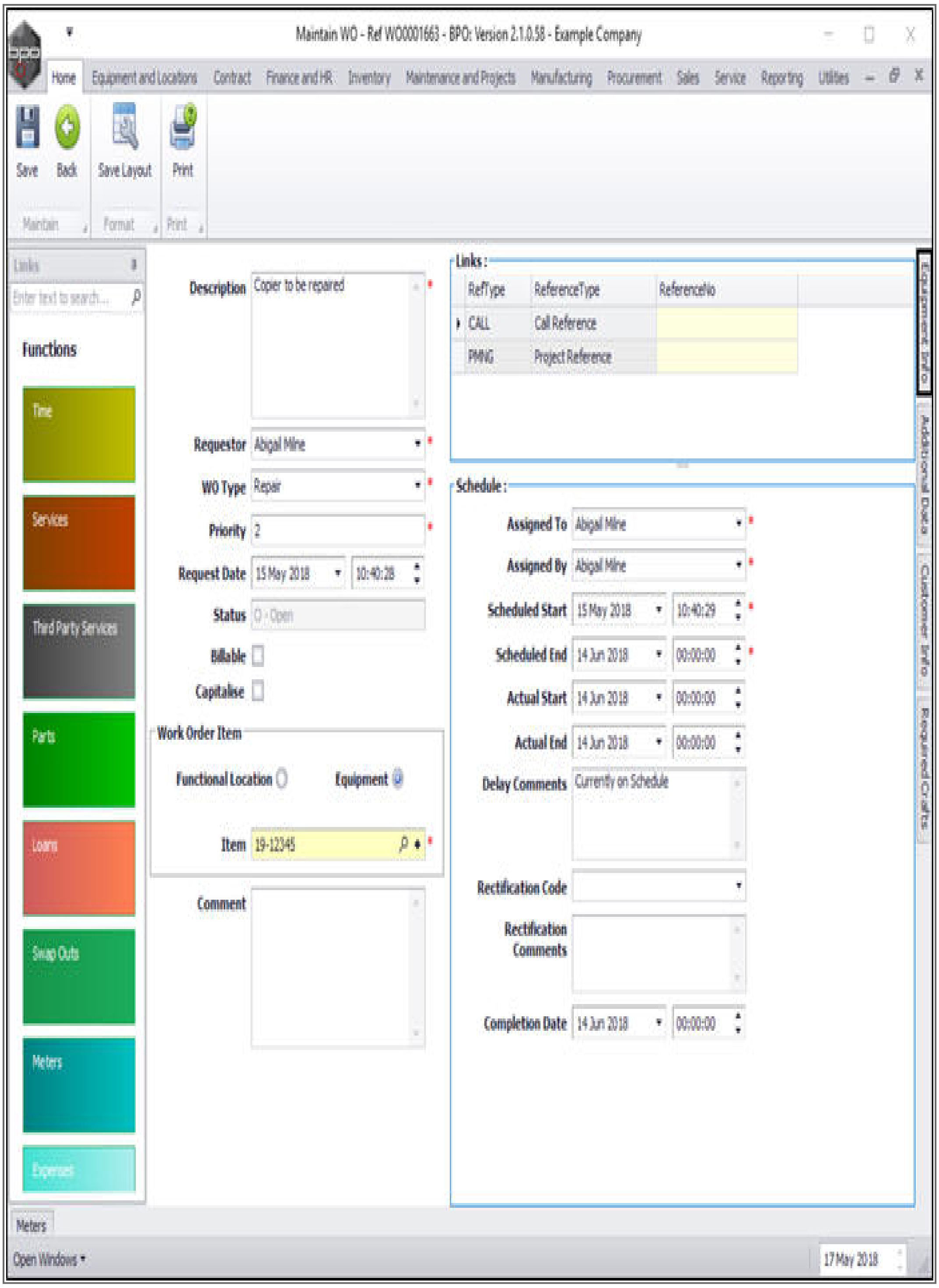
The ***Maintain WO - Ref [ ]*** screen will be displayed. Here you can view:

1. The main work order details.
2. The call or project reference - if this work order is linked to a call or project.
3. Scheduling details.


Maintain WO - Ref WO0001663 - BPO: Version 2.1.0.58 - Example Company
Home
Equipment and Locations
Contract
Finance and HR
Inventory
Maintenance and Projects
Manufacturing
Procurement
Sales
Service
Reporting
Utilities
Save
Back
Save Layout
Print
Maintain
Format
Print
Links
Enter text to search...
Functions
Time
Services
Third Party Services
Parts
Loans
Swap Outs
Meters
Expenses
Description
Copier to be repaired
1
Requestor
Abigail Mine
WO Type
Repair
Priority
2
Request Date
15 May 2018
10:40:28
Status
O - Open
Billable
Capitalise
Work Order Item
Functional Location
Equipment
Item
19-12345
Comment
Links :
RefType
ReferenceType
ReferenceNo
CALL
Call Reference
PMNG
Project Reference
2
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
Rectification Comments
Completion Date
14 Jun 2018
00:00:00
3
Equipment Info
Additional Data
Customer Info
Required Crafts
Meters
Open Windows
17 May 2018

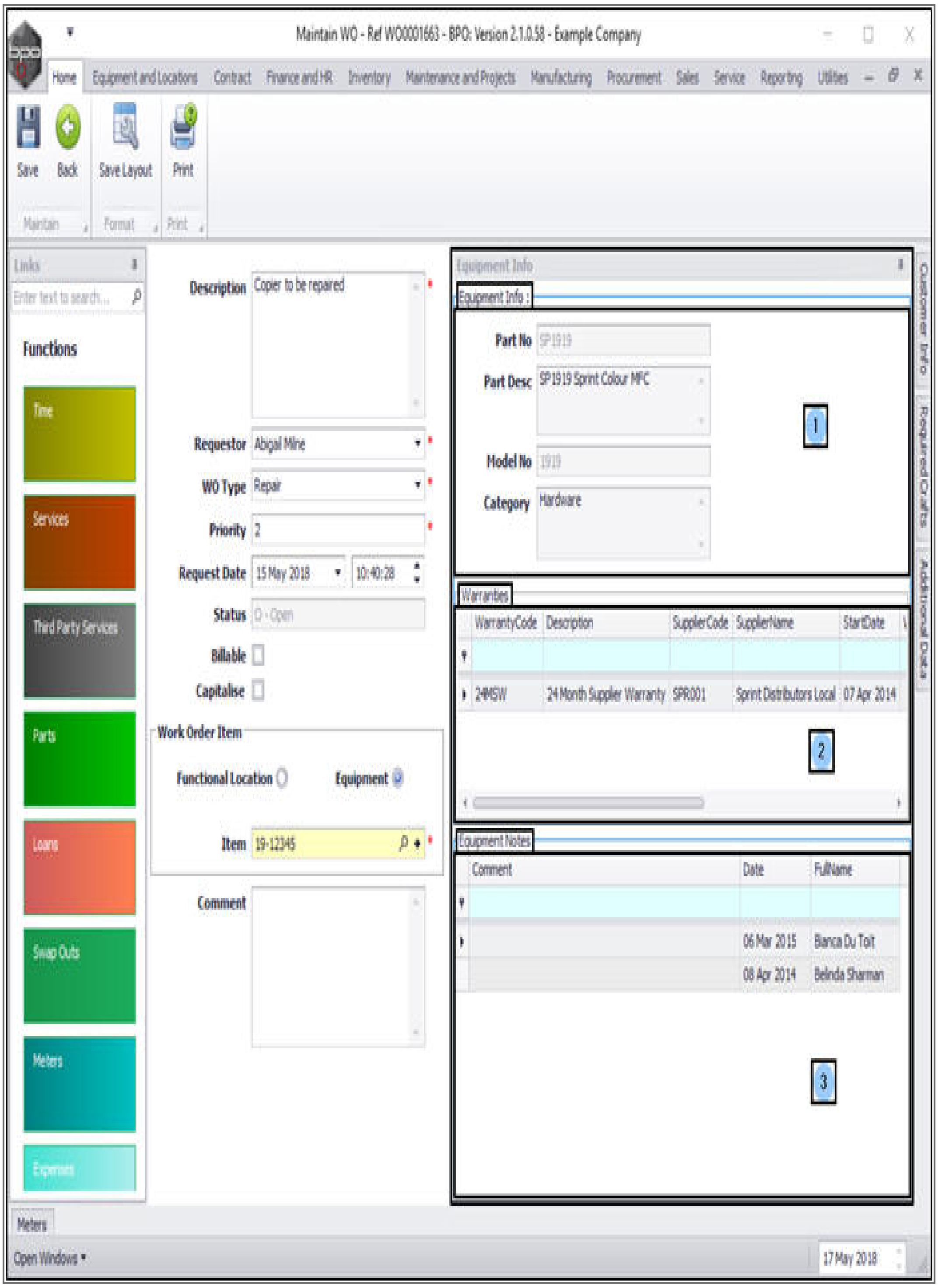
EQUIPMENT INFO

- In the ***Maintain WO - Ref [ ]*** screen, click on the ***Equipment Info*** tab on the right side of the screen.



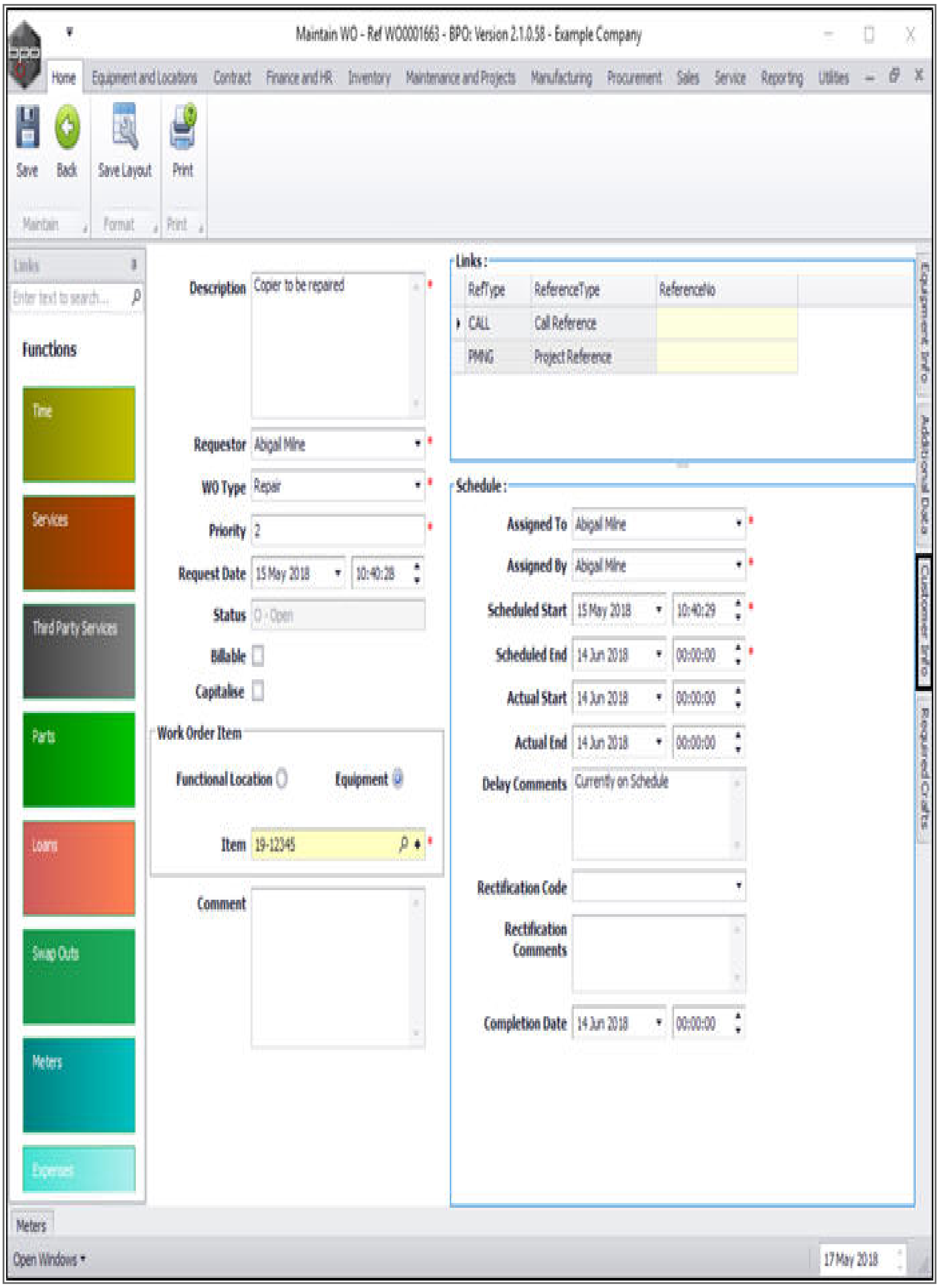
The ***Equipment Info*** docking panel will be expanded. Here you can view:

1. Equipment Information details (e.g. part no., model no.)
2. Warranty information
3. Equipment Notes



CUSTOMER INFO

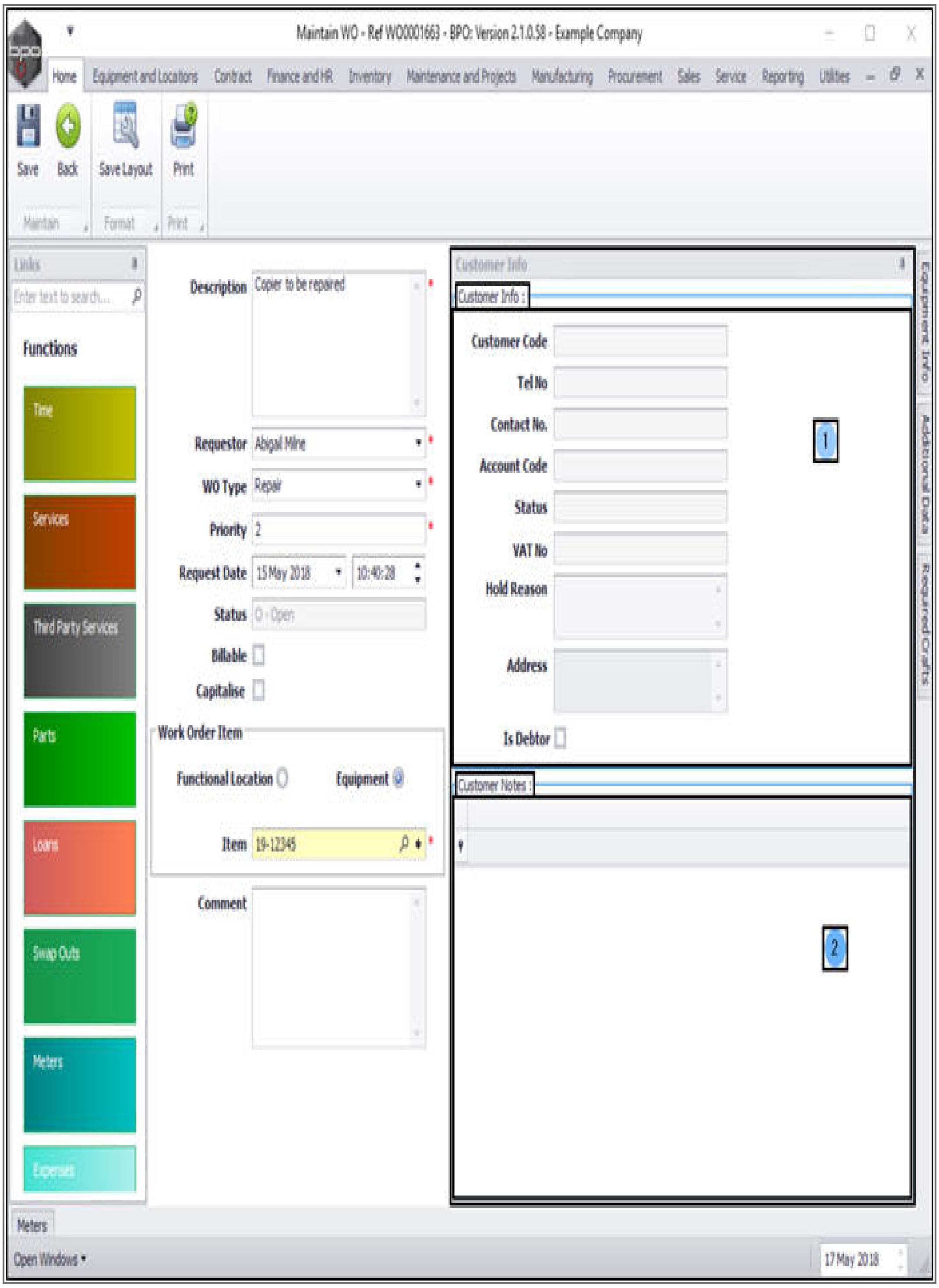
- In the ***Maintain WO - Ref [ ]*** screen, click on the ***Customer Info*** tab on the right side of the screen.



The ***Customer Info*** docking panel will be expanded.

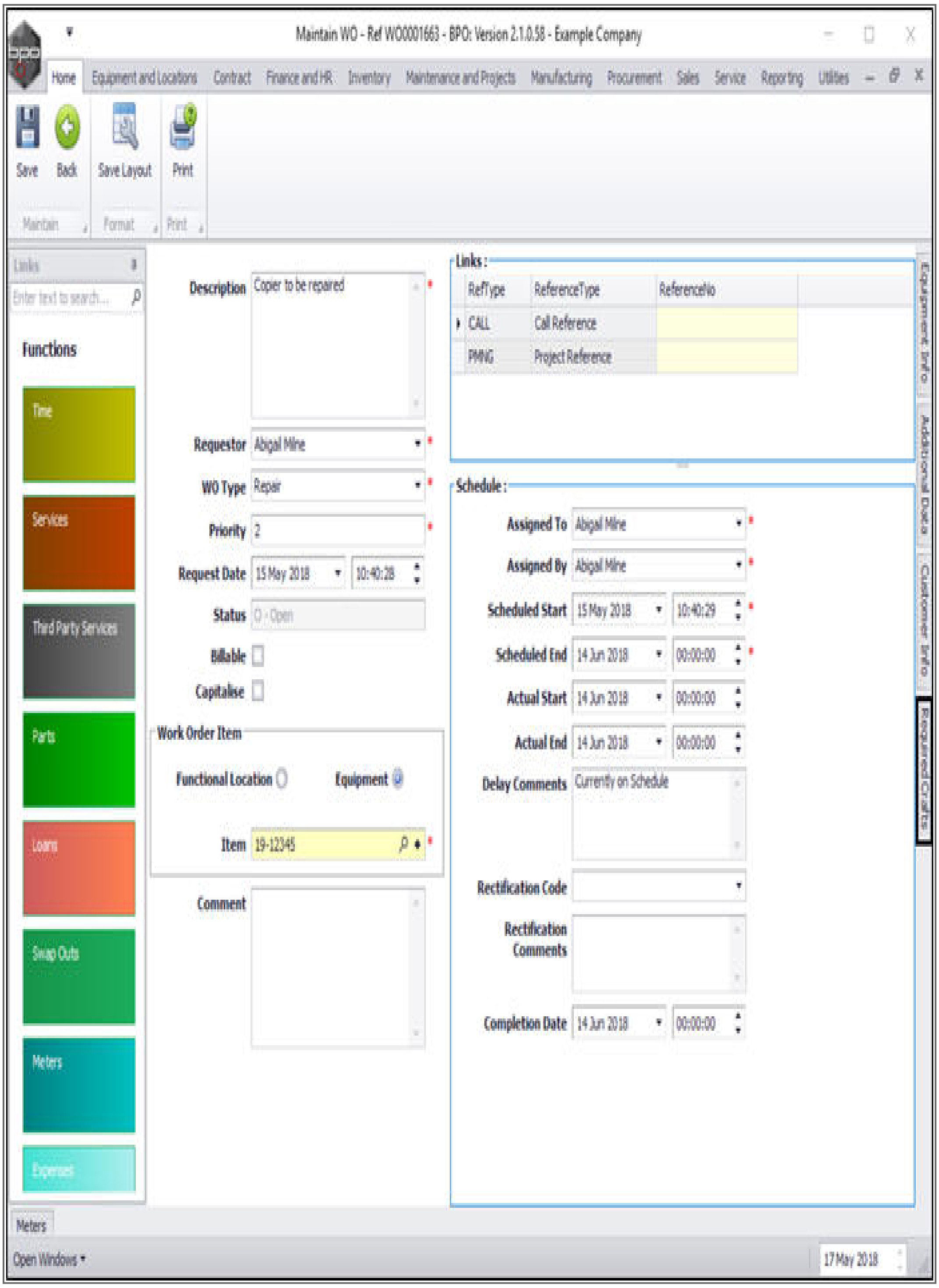
Here you can view:

1. Customer Information details (e.g. phone no., address).
2. Customer Notes



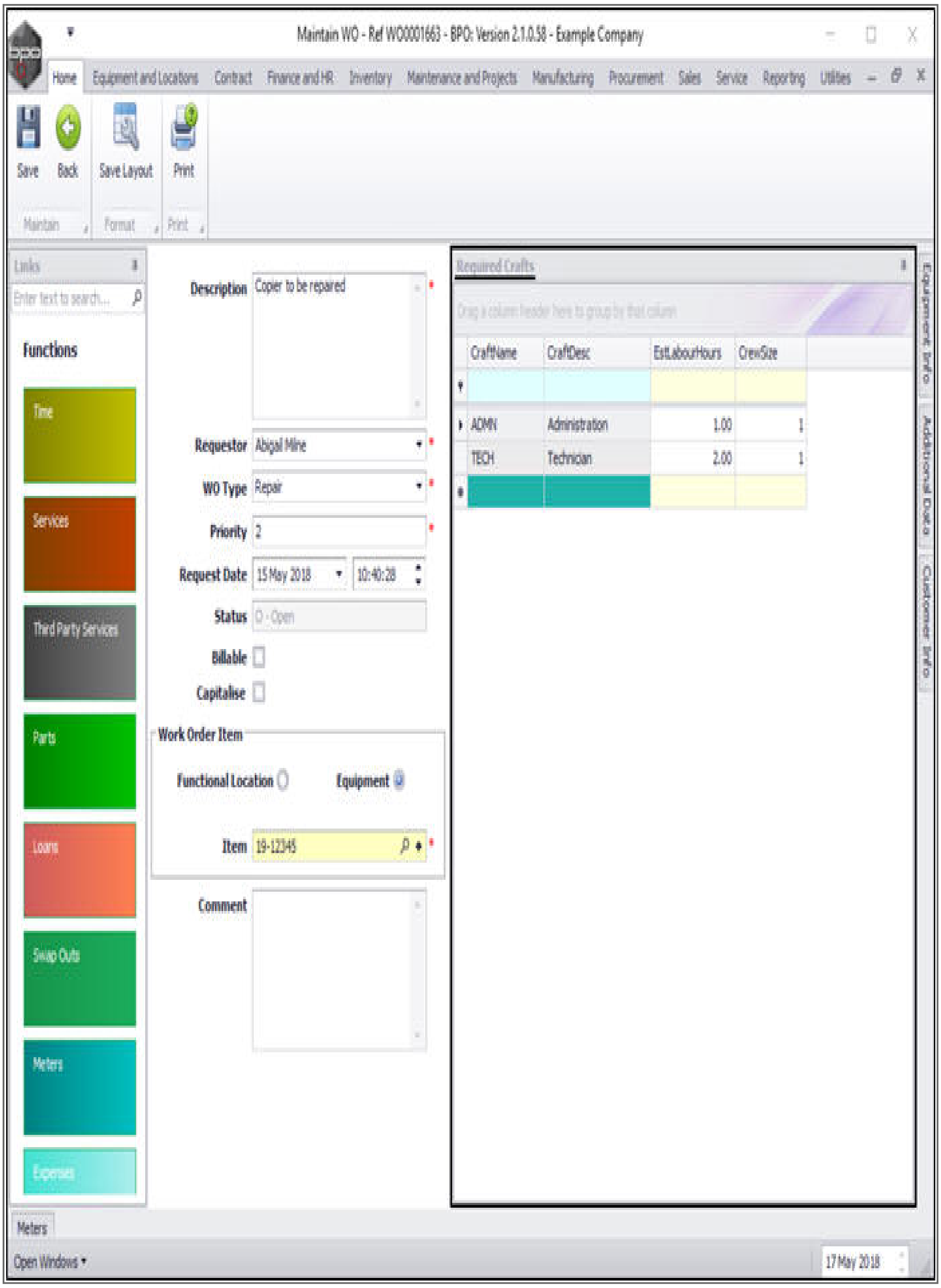
REQUIRED CRAFTS

- In the ***Maintain WO - Ref [ ]*** screen, click on the ***Required Crafts*** tab on the right side of the screen.



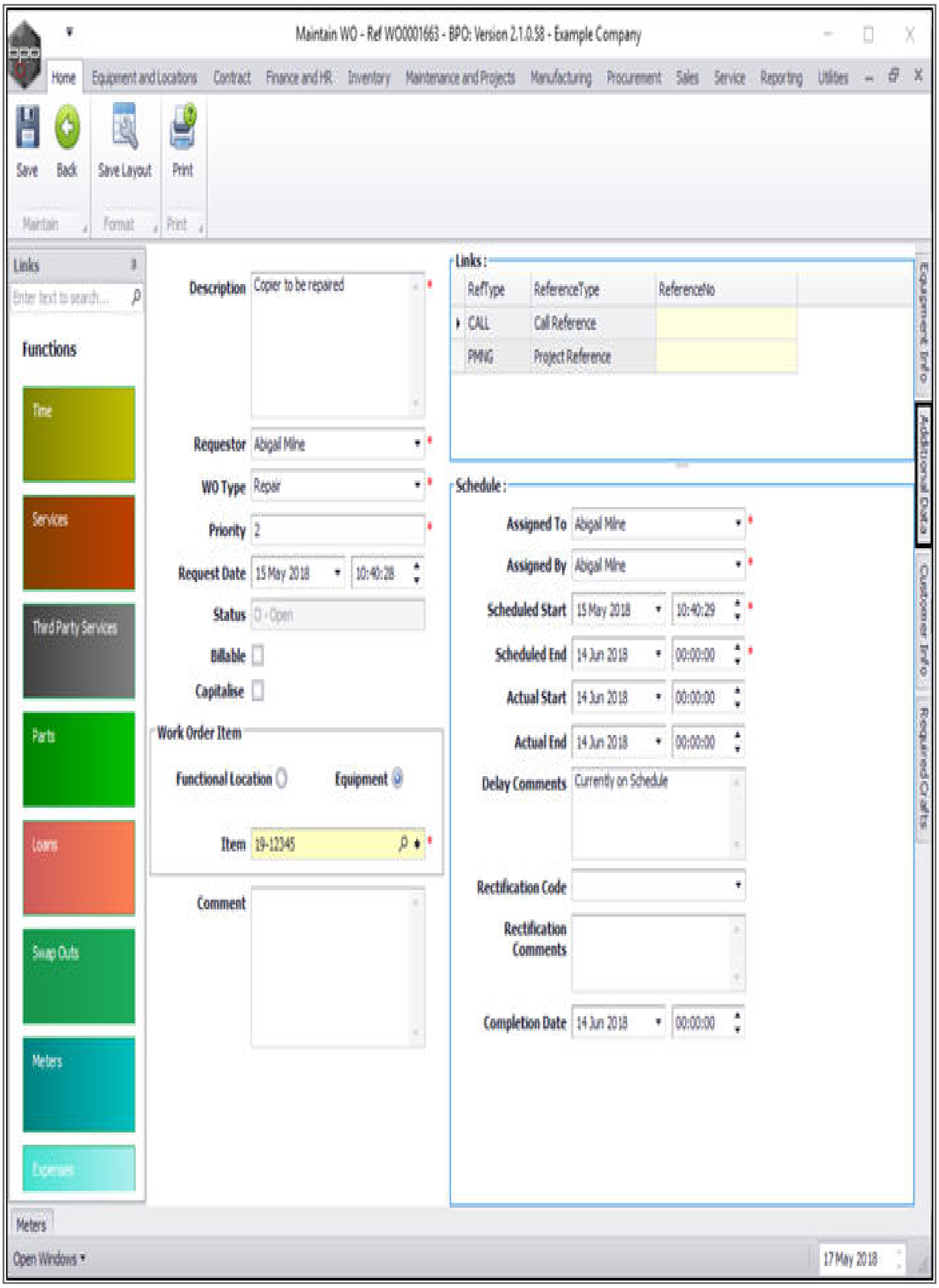
The ***Required Crafts*** docking panel will be expanded.

- Here you can view a list of the ***crafts*** and the corresponding ***labour time*** and ***crew size*** needed to complete this work order.



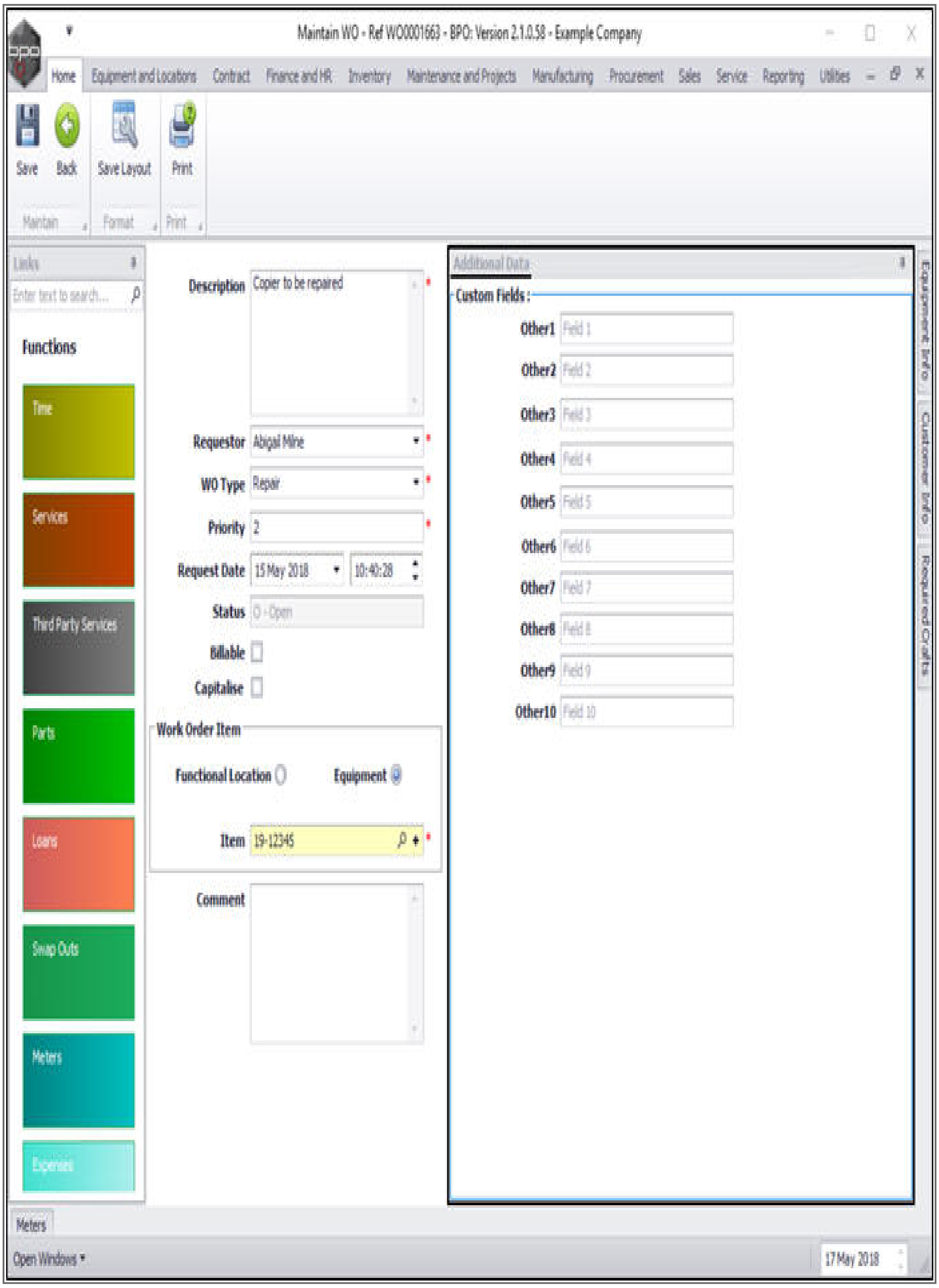
ADDITIONAL DATA

- In the ***Maintain WO - Ref [ ]*** screen, click on the ***Additional Data*** tab on the right side of the screen.



The ***Additional Data*** docking panel will be expanded.

- Here you can create ***customised fields*** of additional data pertinent to this work order if required.

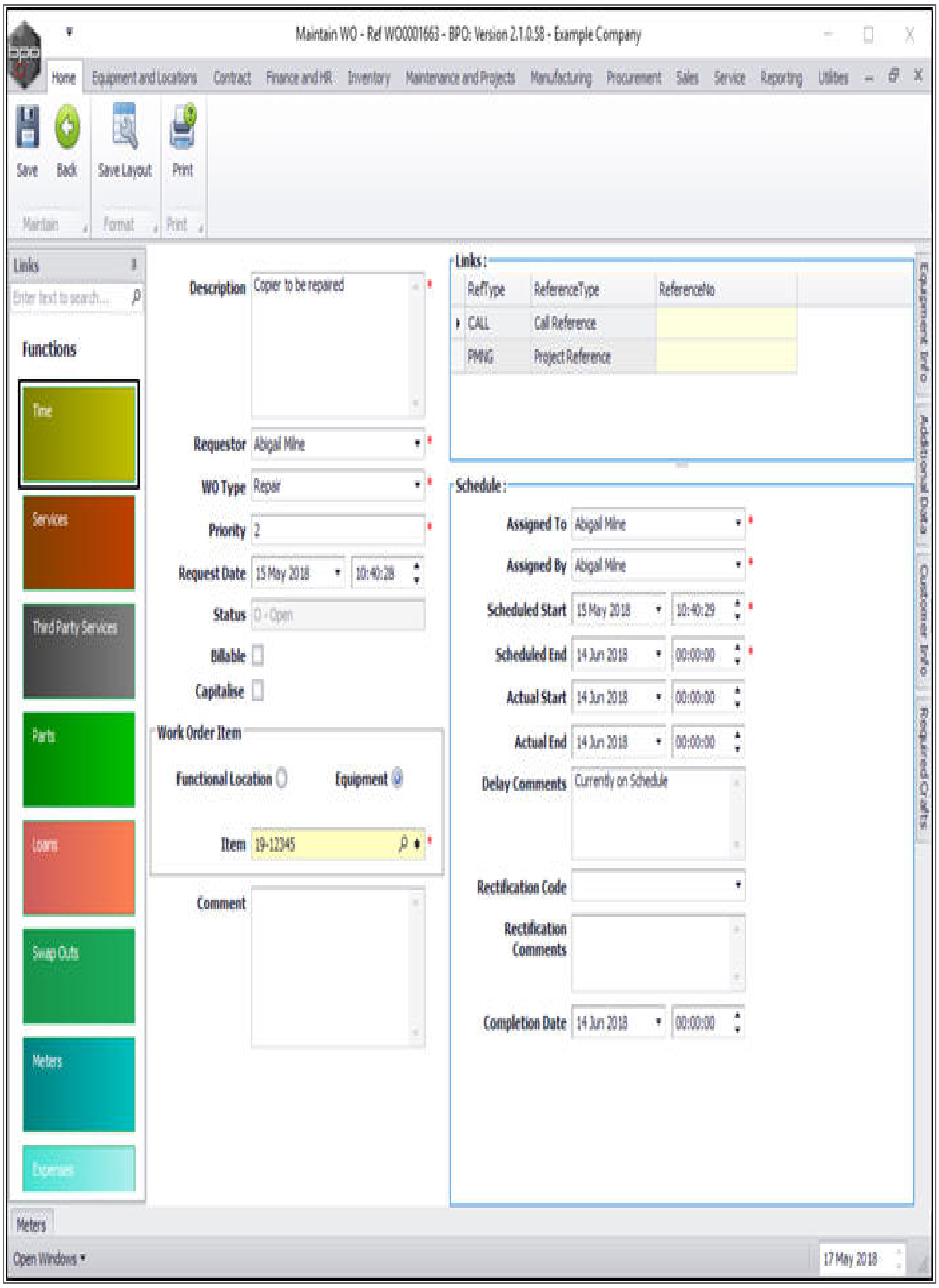


THE FUNCTIONS TILES

On the left side of this ***Maintain WO*** screen is the ***Links*** docking panel. This panel contains tiles that direct you to more information linked to the selected work order.

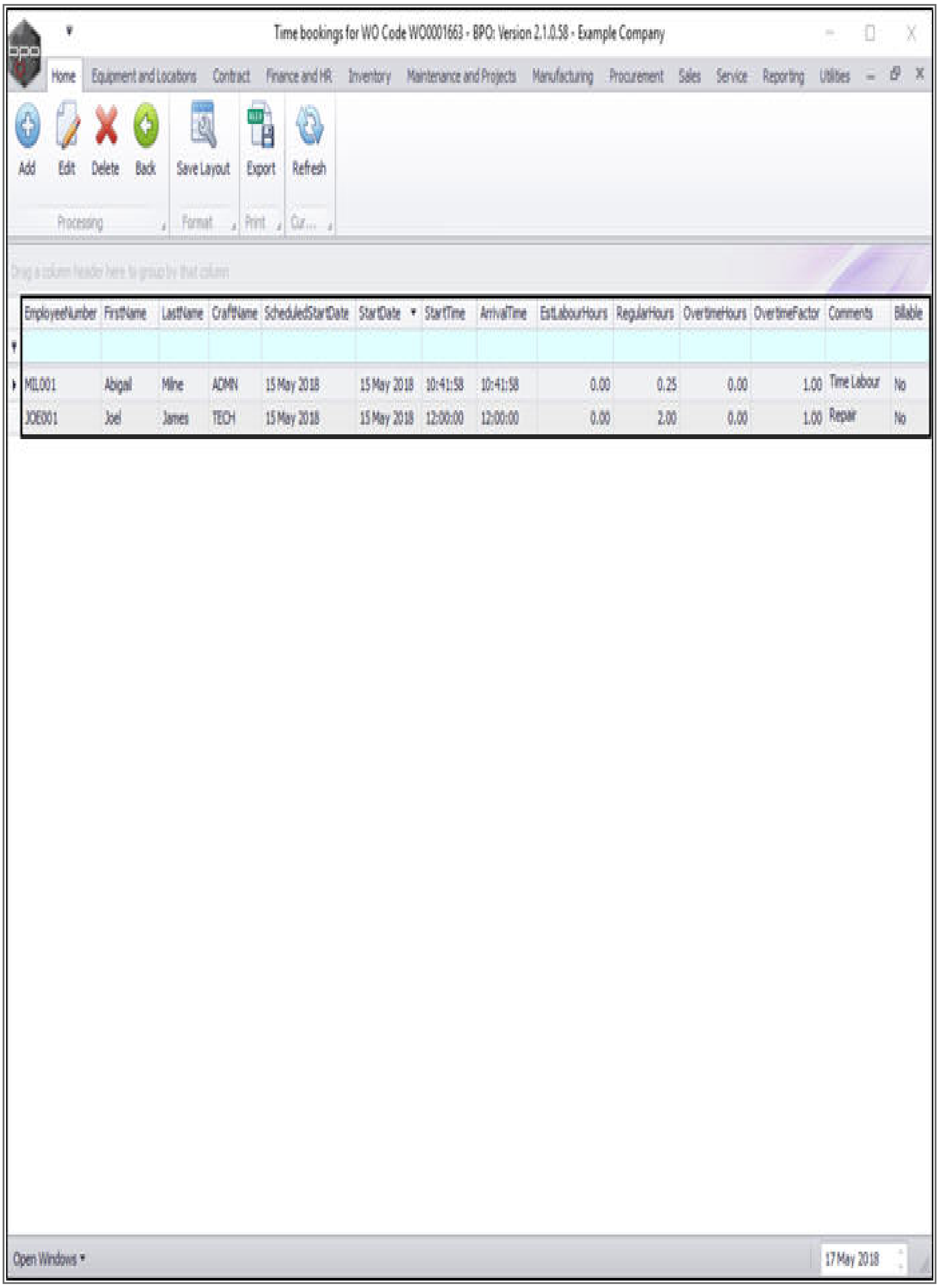
Time

- In the ***Maintain WO - Ref [ ]*** screen, click on the ***Time*** tile.



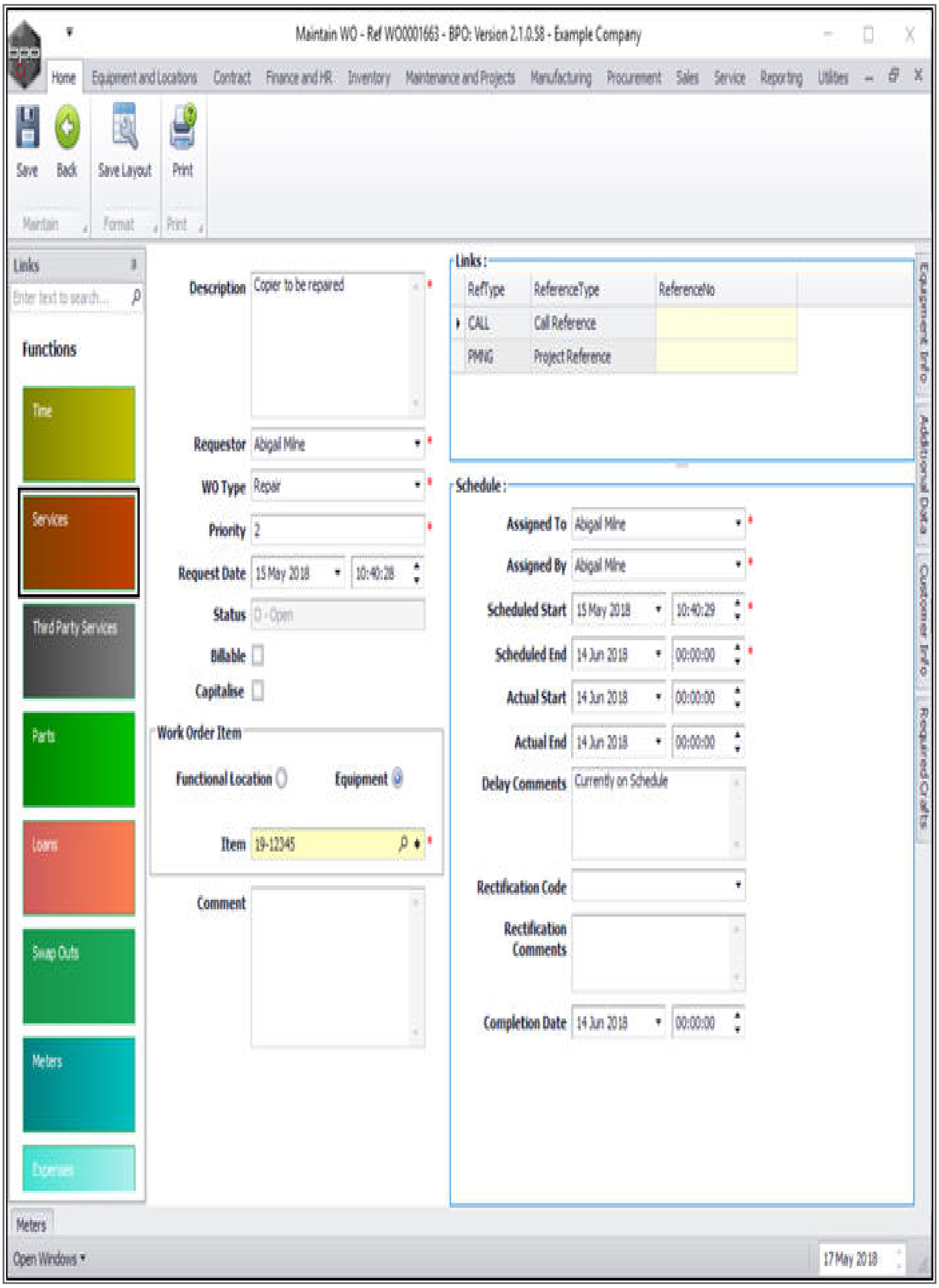
The ***Time bookings for WO Code [ ]*** screen will be displayed.

- Here you can ***Add*** to, ***Edit***, ***Delete*** and ***View*** a list of labour time bookings linked to this work order.



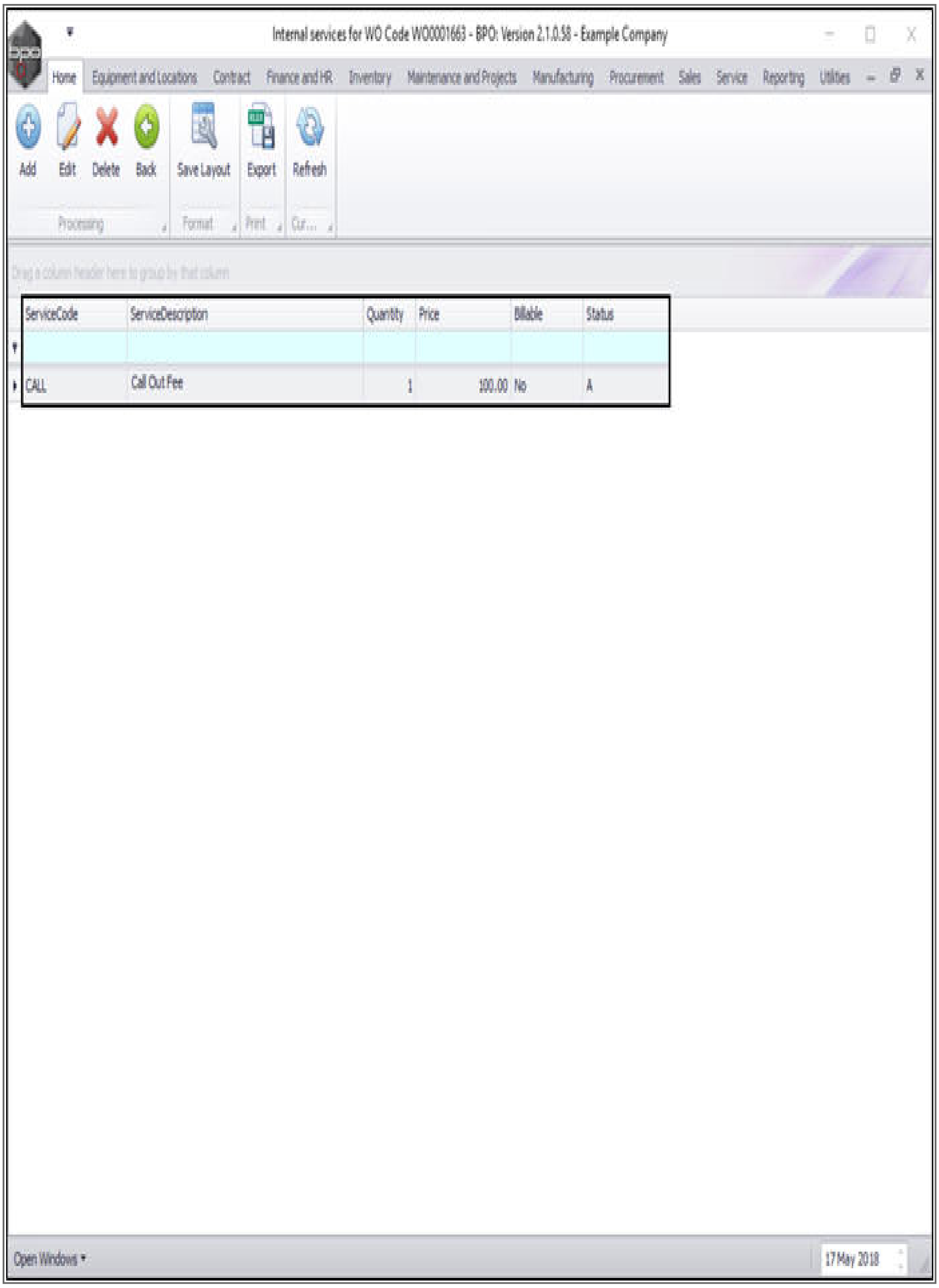
Services

- In the ***Maintain WO - Ref [ ]*** screen, click on the ***Services*** tile.



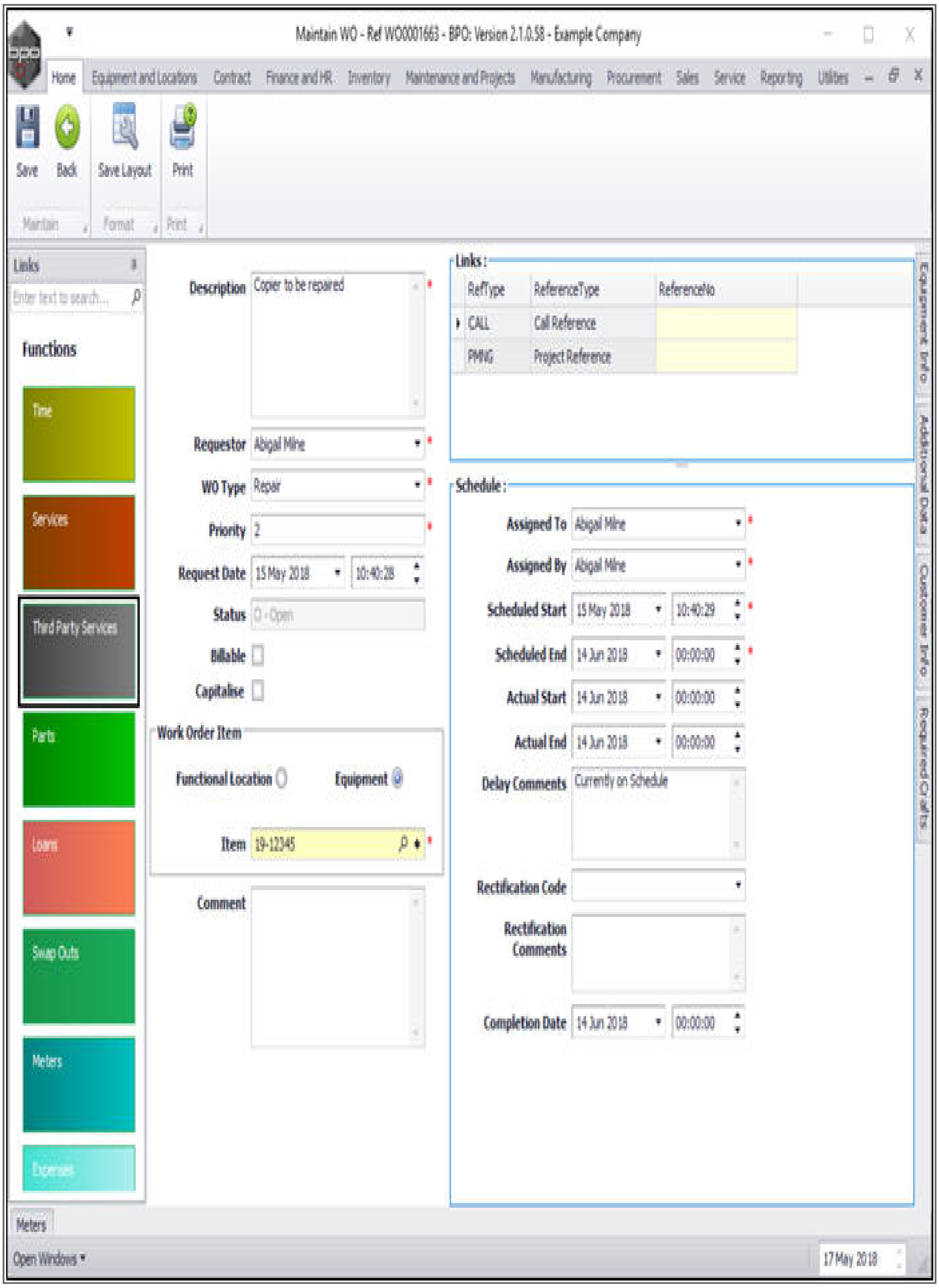
The ***Internal Services for WO Code [ ]*** screen will be displayed.

- Here you can ***Add*** to, ***Edit***, ***Delete*** and ***View*** a list of requests for in-house service (non-stock) work linked to this work order.


Internal services for WO Code WO0001663 - BPO: Version 2.1.0.58 - 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
Export
Refresh
Processing
Format
Print
Cur...
Drag a column header here to group by that column
ServiceCode
ServiceDescription
Quantity
Price
Billable
Status
CALL
Call Out Fee
1
100.00
No
A
Open Windows
17 May 2018

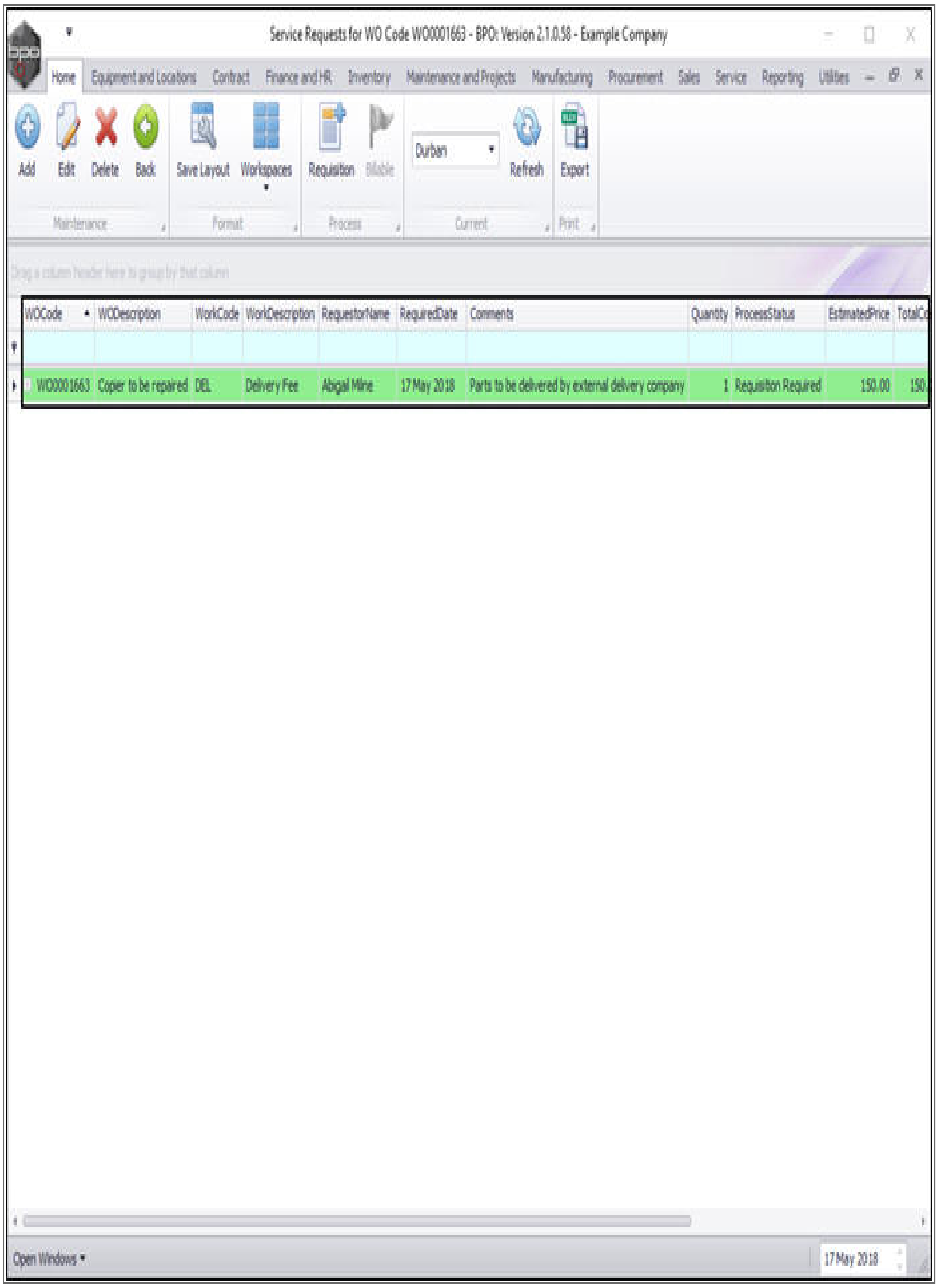
THIRD PARTY SERVICES

- In the ***Maintain WO - Ref [ ]*** screen, click on the ***Third Party Services*** tile.



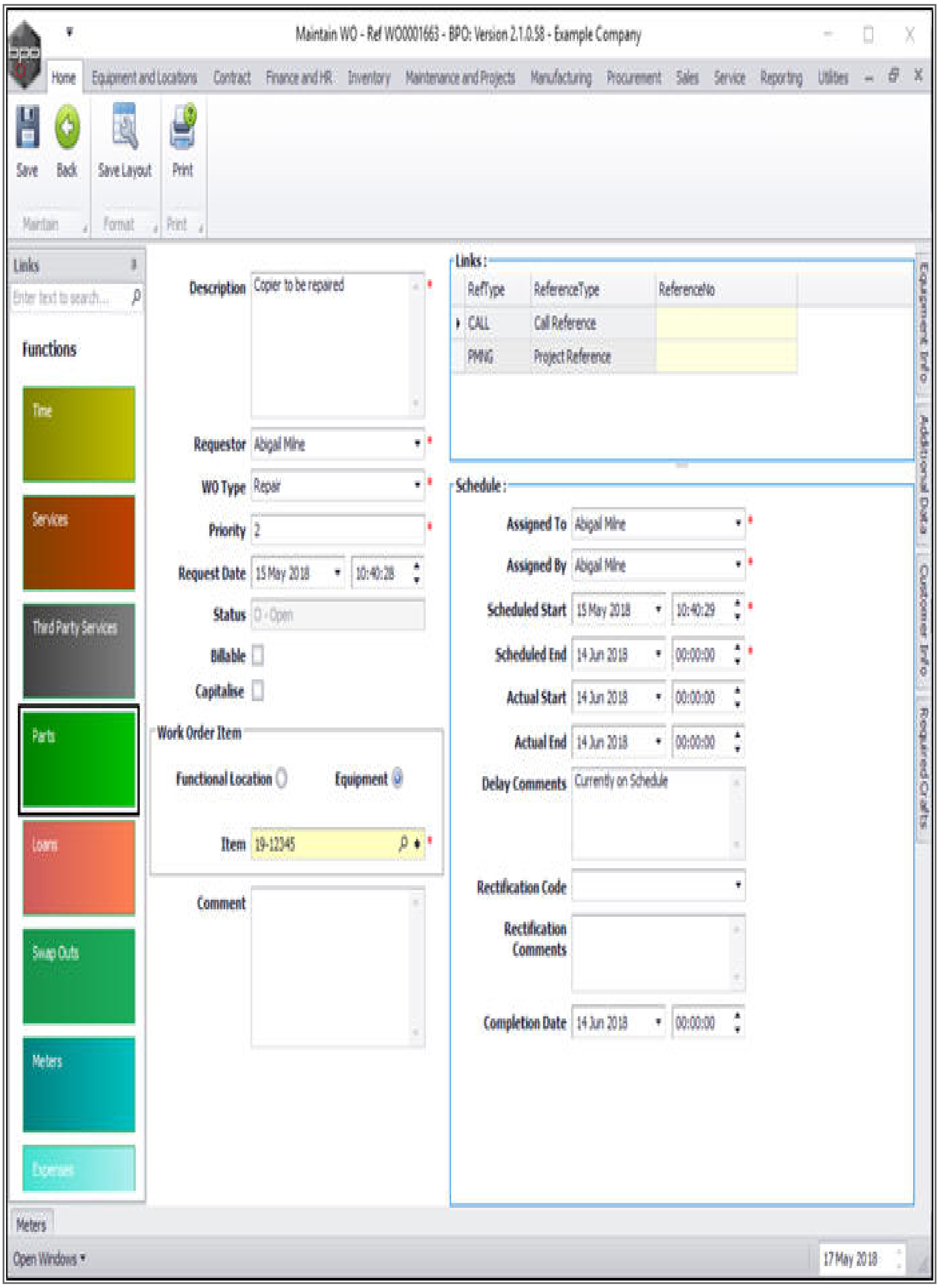
The ***Services Requests for WO Code [ ]*** screen will be displayed.

- Here you can ***Add*** to, ***Edit***, ***Delete*** and ***View*** a list of requests for third party contract work linked to this work order.



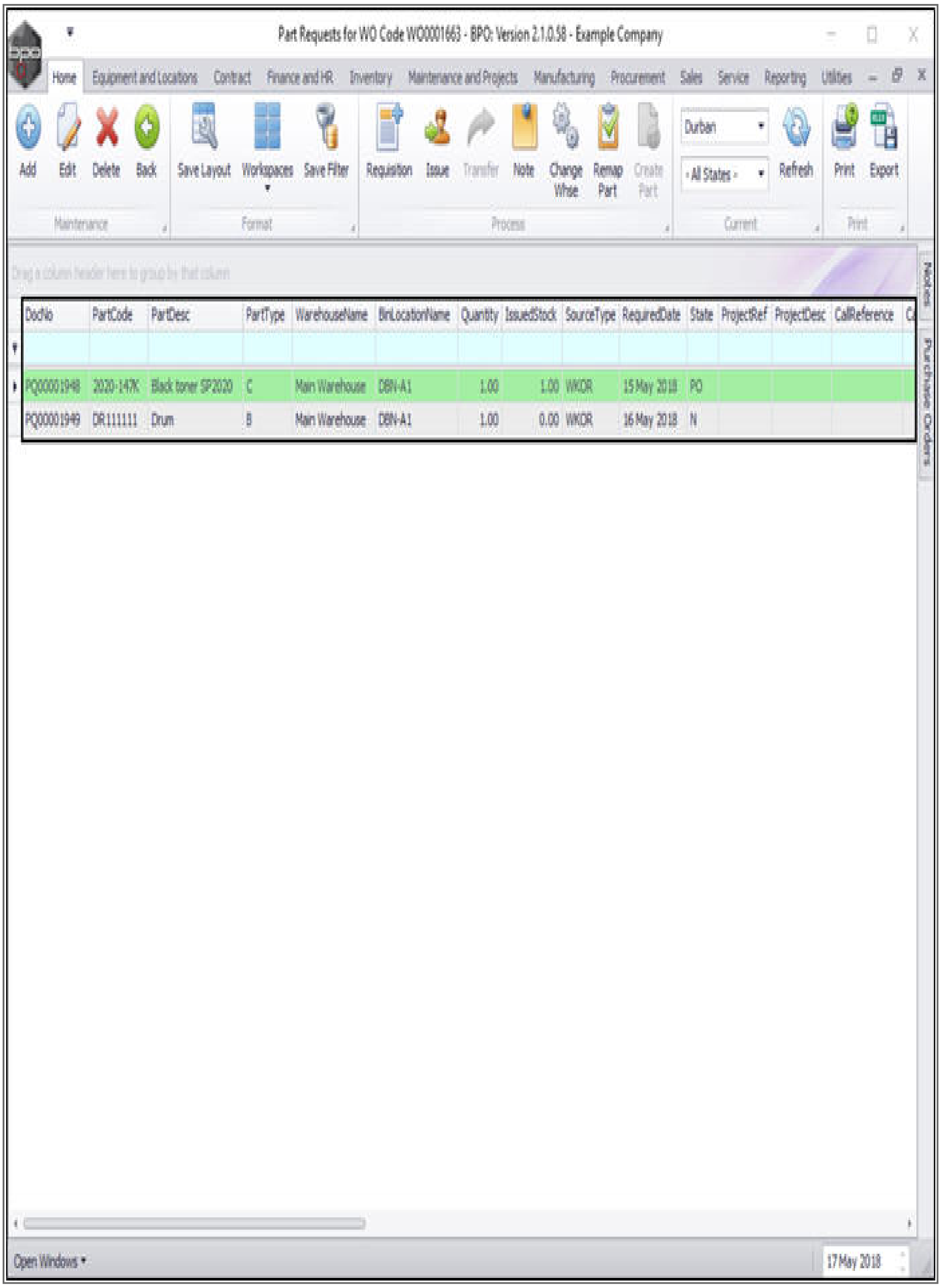
Parts

- In the ***Maintain WO - Ref [ ]*** screen, click on the ***Parts*** tile.



The ***Part Requests for WO Code [ ]*** screen will be displayed.

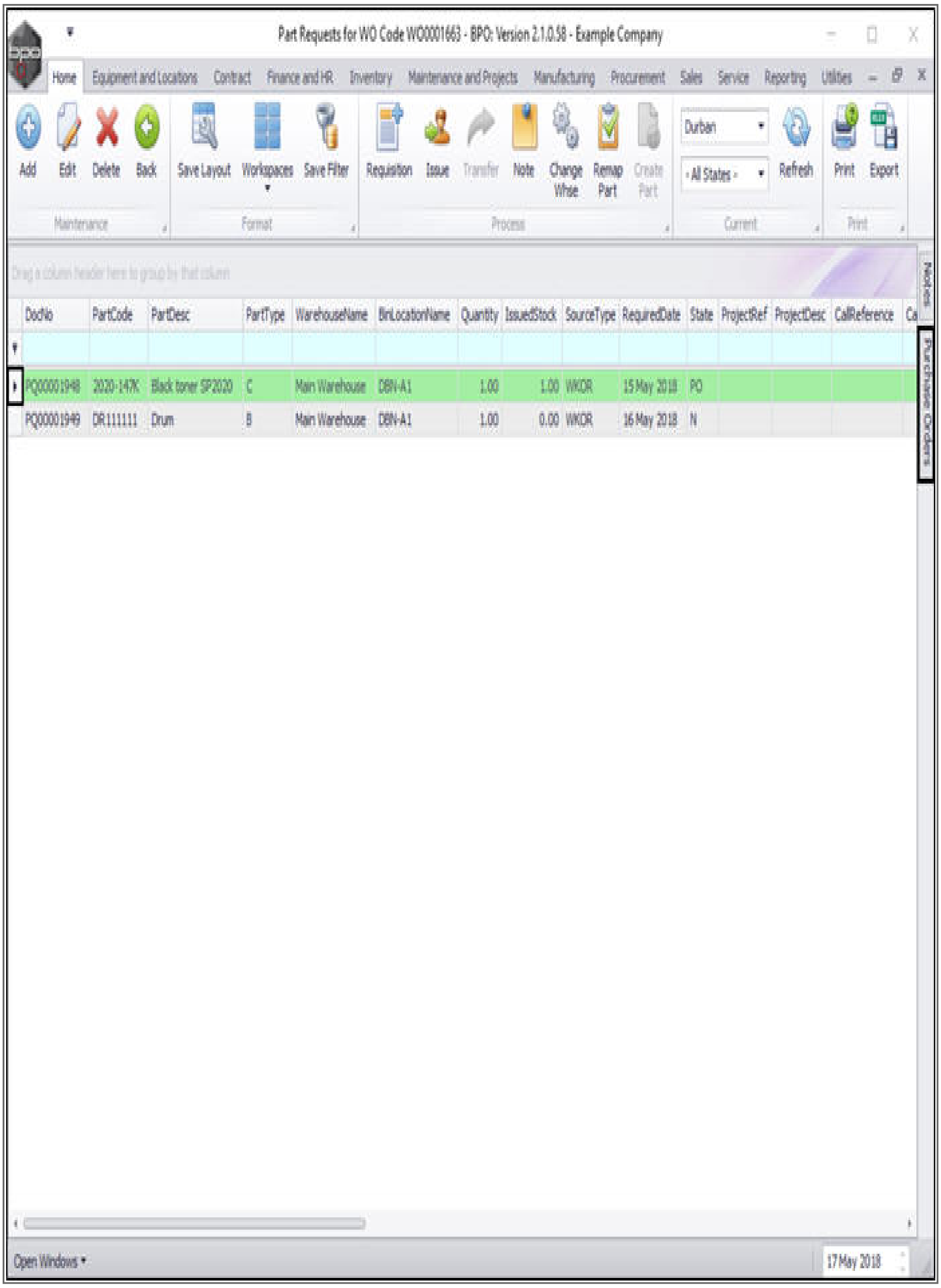
- Here you can ***Add*** to, ***Edit***, ***Delete*** and ***View*** a list of requests for parts from store linked to this work order



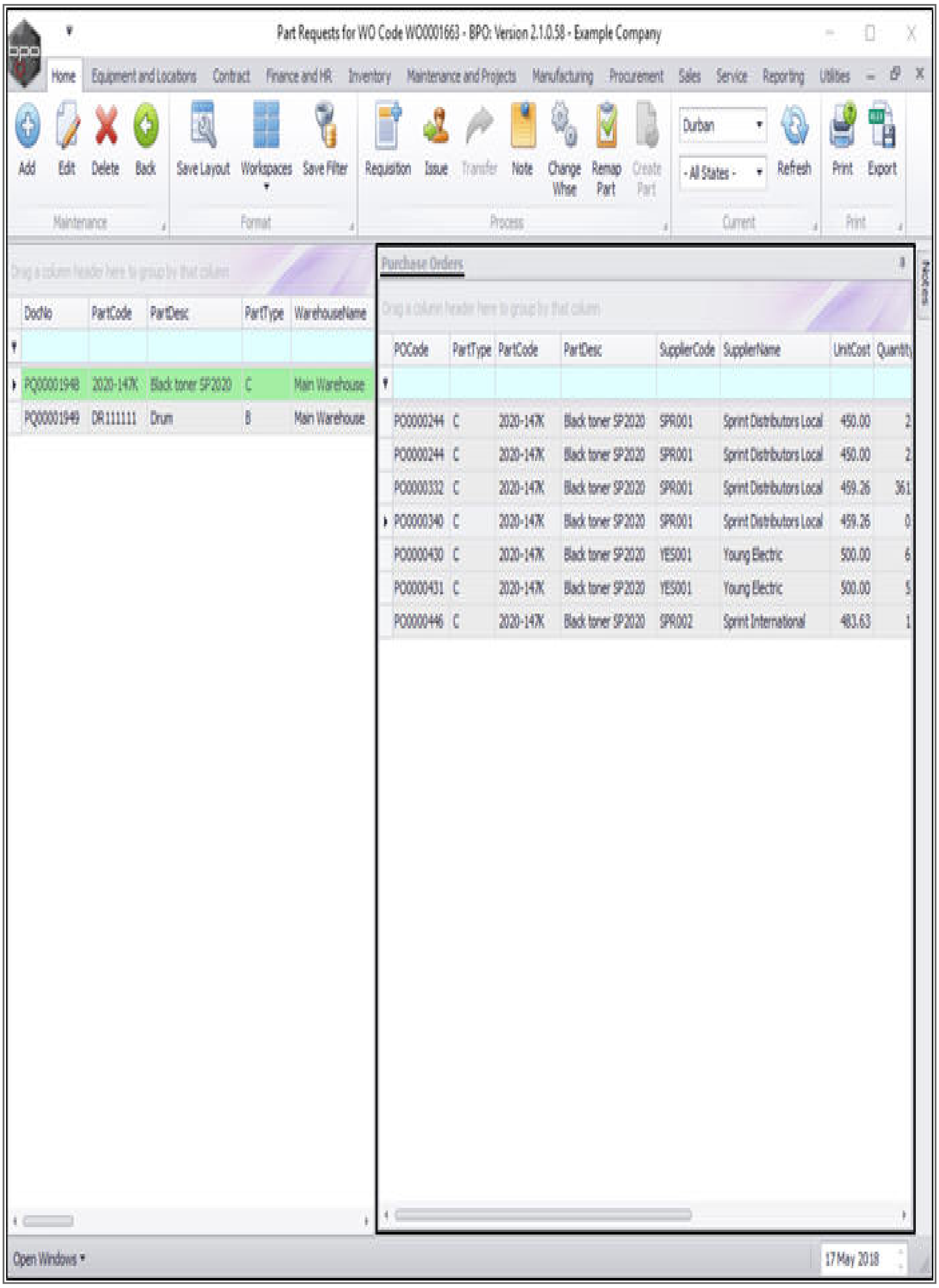
Purchase Orders

In this screen you can also view the ***Purchase Orders*** linked to each part request.

- Click on the ***row selector*** in front of any ***part request***.
- Click on the ***Purchase Orders*** tab on the right side of the screen.

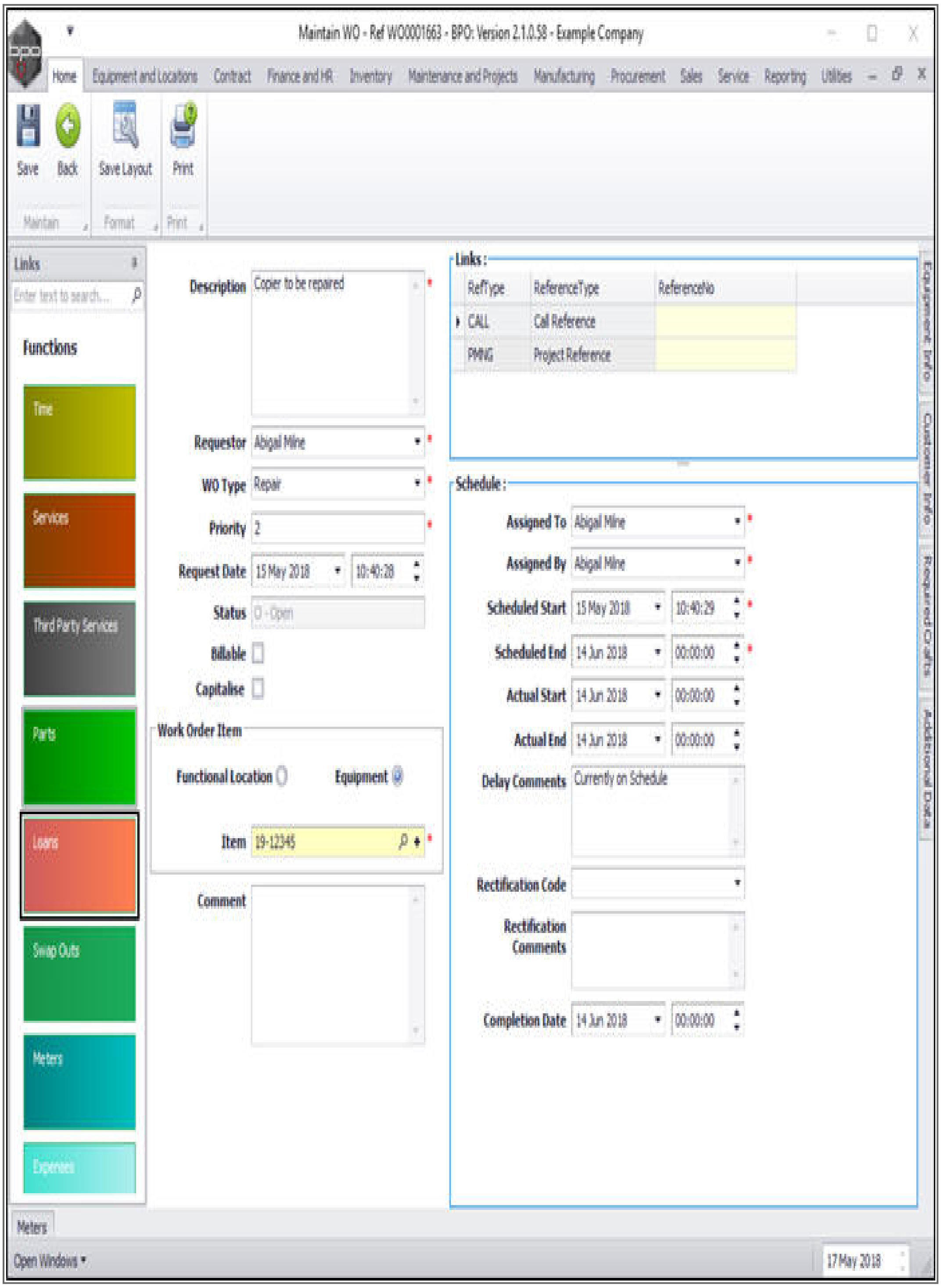


- The docking panel will be expanded to display all the ***purchase orders*** linked to the selected ***part***.

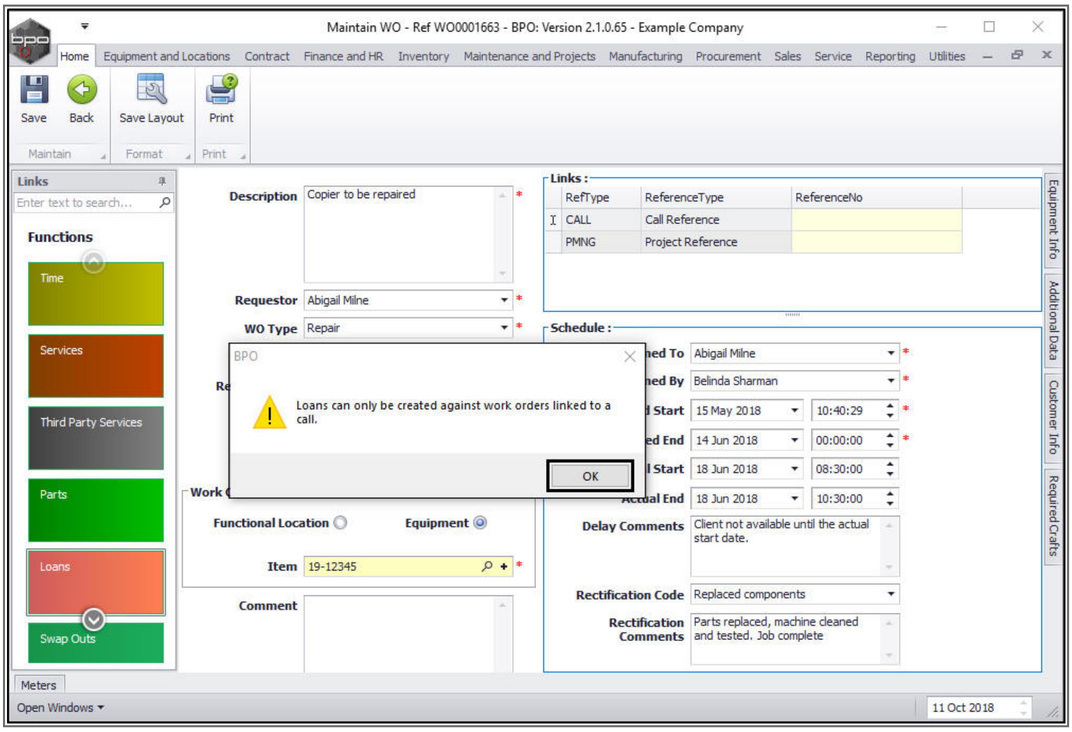

Part Requests for WO Code WO0001663 - BPO: Version 2.1.0.58 - Example Company
Home
Equipment and Locations
Contract
Finance and HR
Inventory
Maintenance and Projects
Manufacturing
Procurement
Sales
Service
Reporting
Utilities
Add
Edit
Delete
Back
Save Layout
Workspaces
Save Filter
Requisition
Issue
Transfer
Note
Change Whse
Remap Part
Create Part
Durban
- All States -
Refresh
Print
Export
Maintenance
Format
Process
Current
Print
Purchase Orders
DocNo
PartCode
PartDesc
PartType
WarehouseName
POCode
SupplierCode
SupplierName
UnitCost
Quantity
Open Windows
17 May 2018

Loans

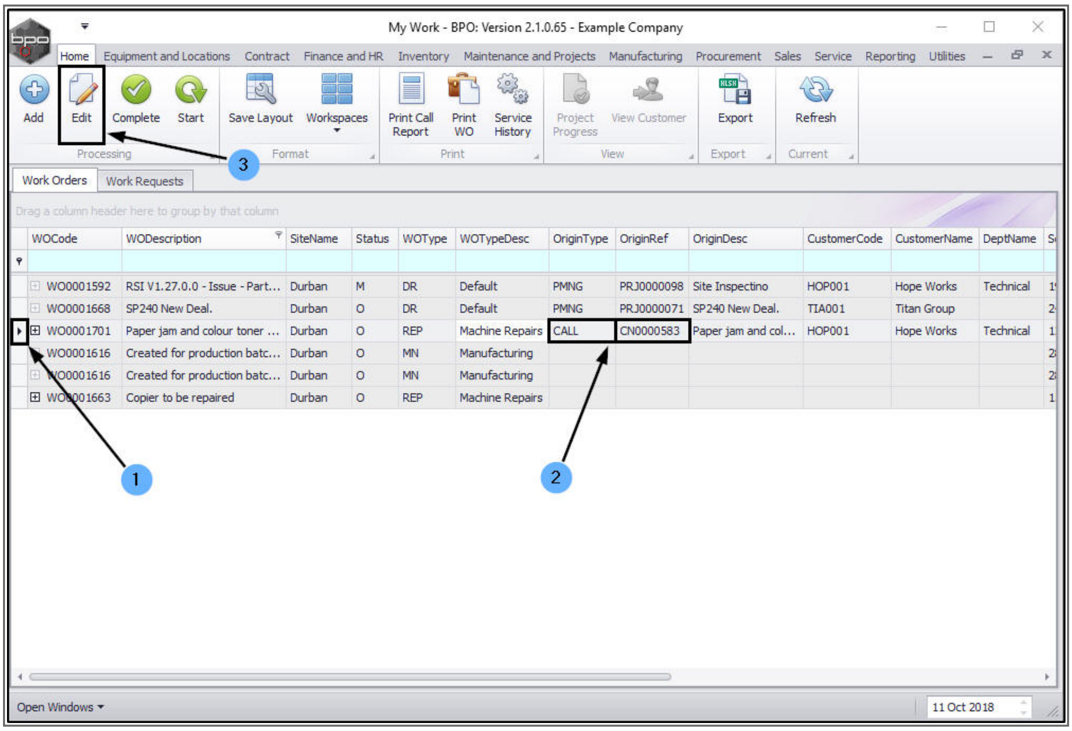
- In the ***Maintain WO - Ref [ ]*** screen, click on the ***Loans*** tile.



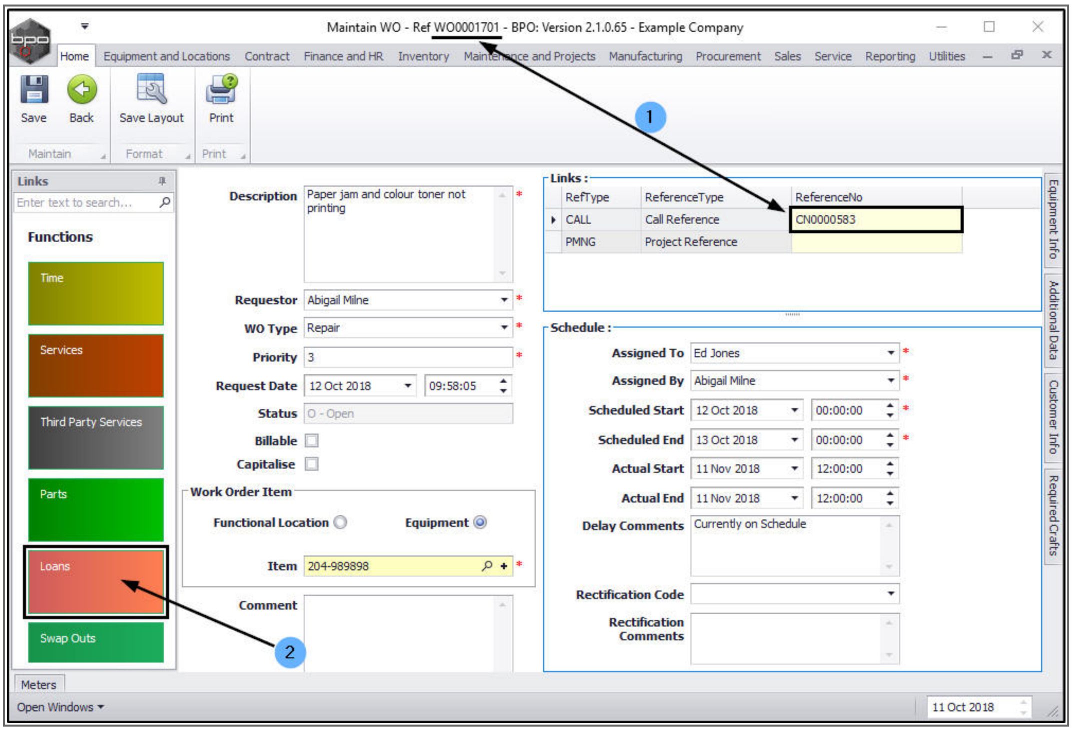
- If your initially selected work order is not linked to a ***call*** then the following BPO processing message will pop up;
  - ***Loans can only be created against work orders linked to a call.***
- Click on ***OK***.



1. Go back to the ***My Work*** listing screen and select a work order that is ***linked to a call***.
2. Check the ***Origin Type*** and ***Origin Reference*** column to see whether the selected work order is linked to a ***call***
3. Click on ***Edit***.

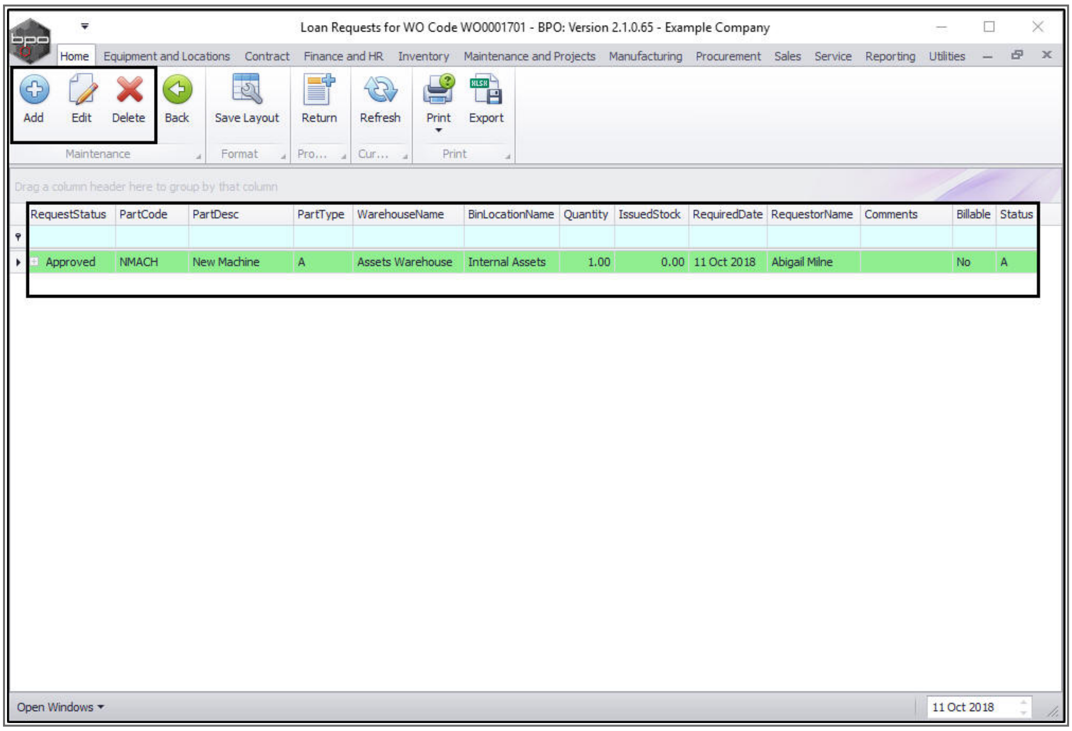


- The ***Maintain WO - Ref [ ]*** screen will be displayed for the selected work order that is now linked to a ***call***.
- Click on the ***Loans*** tile.



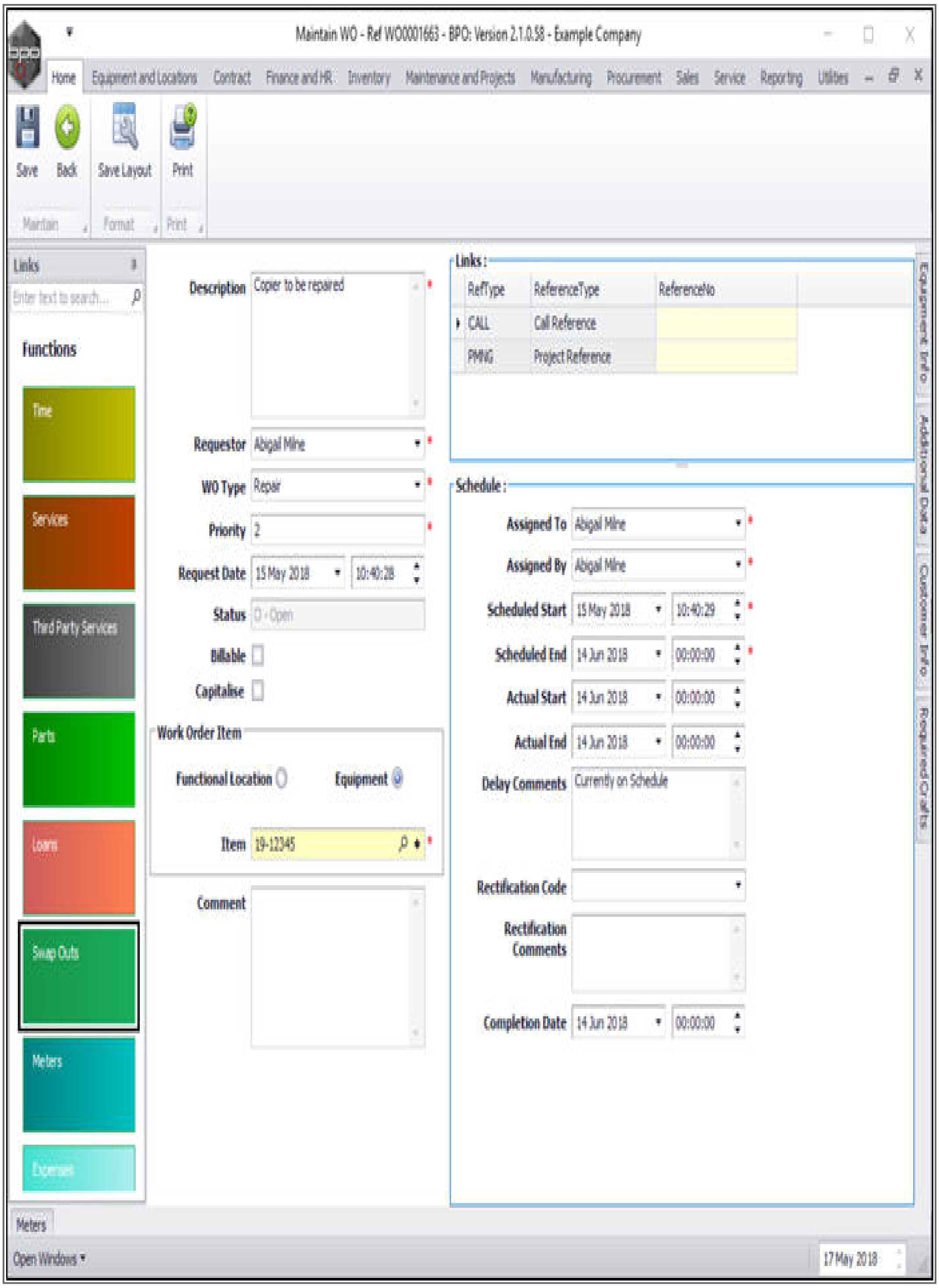
The ***Loan Requests for WO Code [ ]*** screen will be displayed.

- Here you can ***Add*** to, ***Edit***, ***Delete*** and ***View*** a list of loan requests from store linked to this work order.



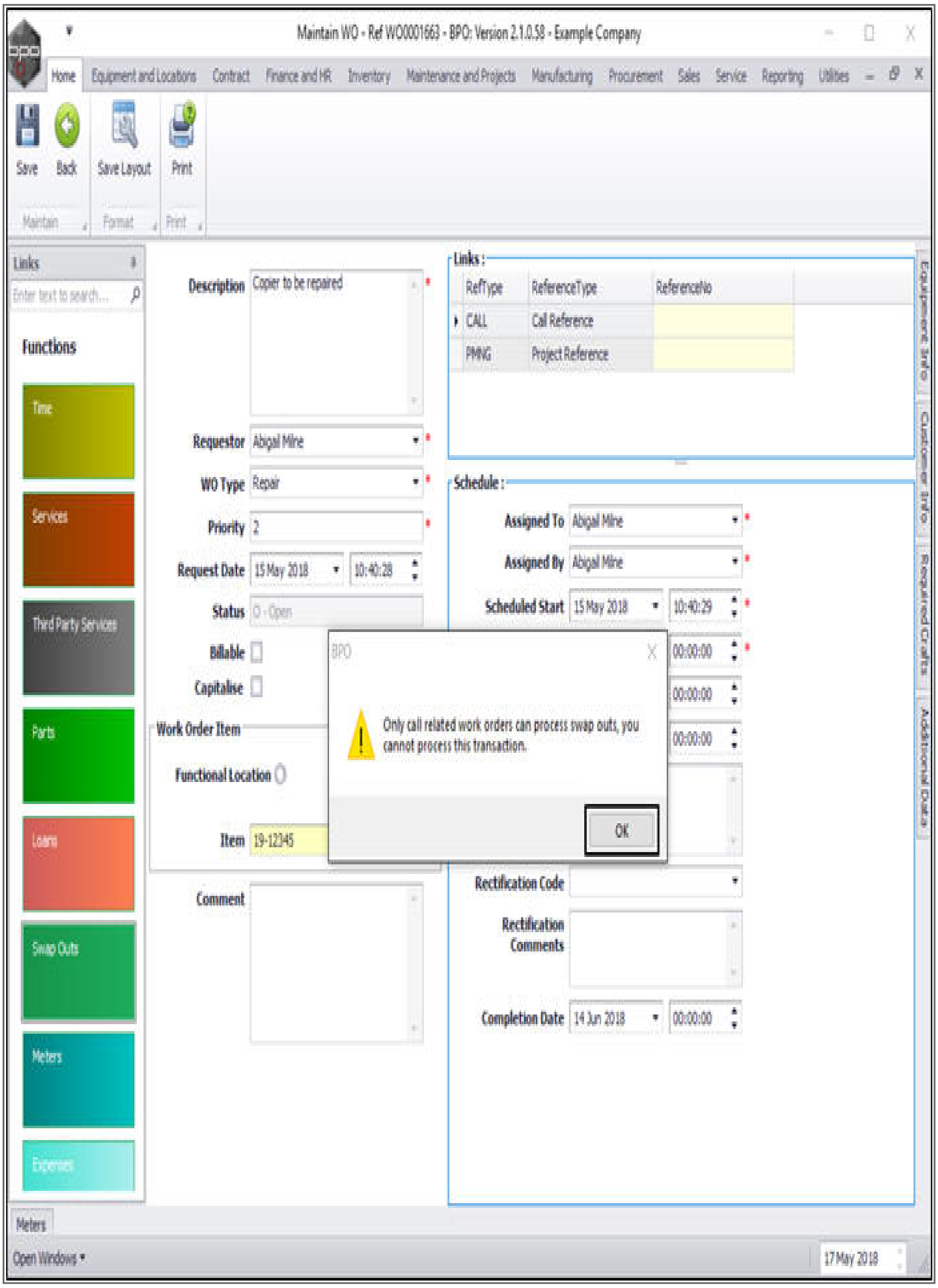
Swap Outs

- In the ***Maintain WO - Ref [ ]*** screen, click on the ***Swap Outs*** tile.

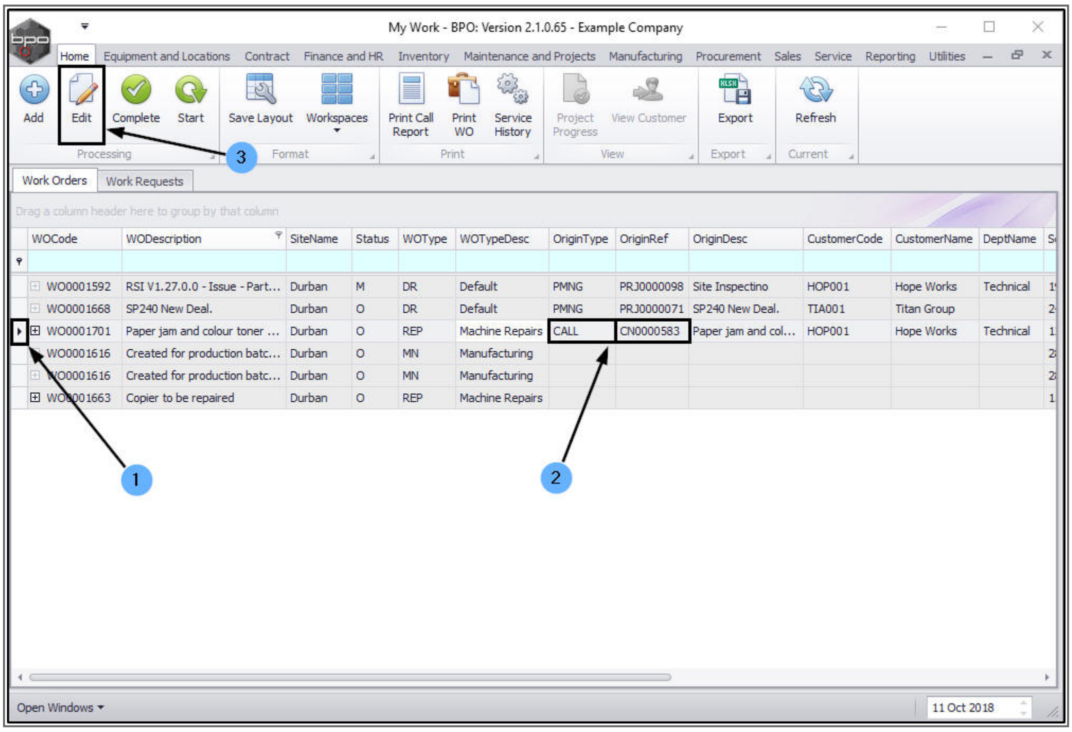


- If your initially selected work order is <u>not</u> linked to a ***call*** then the following ***BPO*** processing message will pop up;

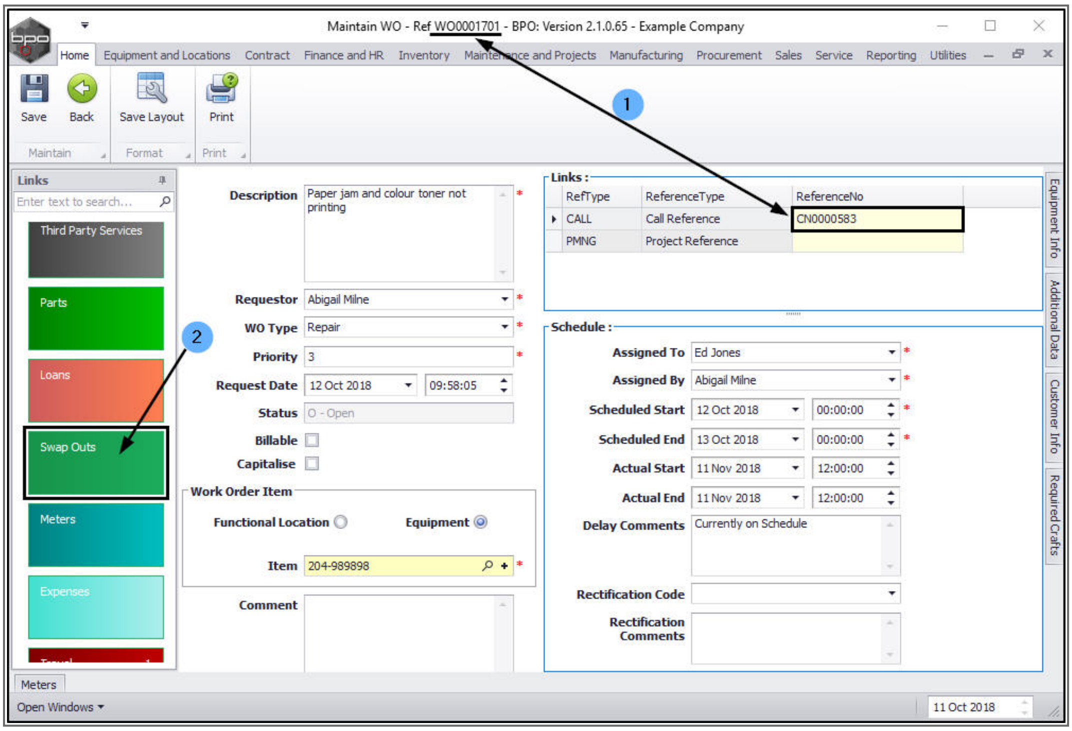
- ***Only call related work orders can process swap outs, you cannot process this transaction.***
- Click on ***OK***.



1. Go back to the ***My Work*** listing screen and select a work order that is linked to a ***call***.
2. Check the ***Origin Type*** and ***Origin Reference*** column to see whether the selected work order is linked to a ***call***
3. Click on ***Edit***.

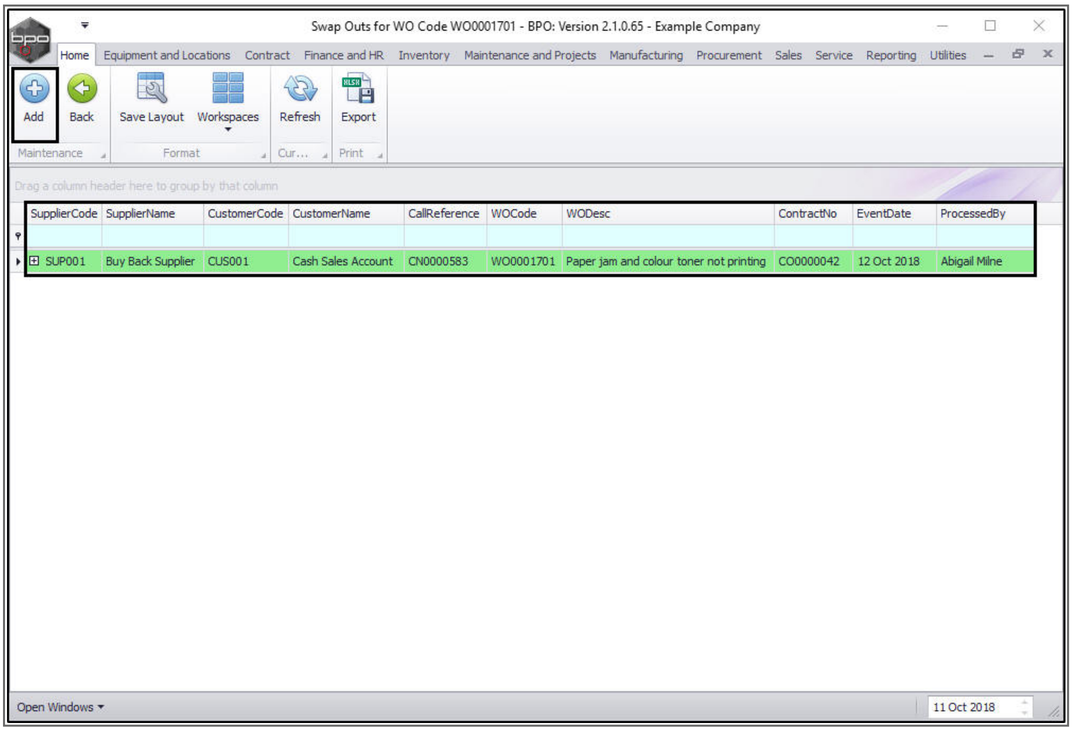


- The ***Maintain WO - Ref [ ]*** screen will be displayed for the selected work order that is now linked to a ***call***.
- Click on the ***Swap Outs*** tile.



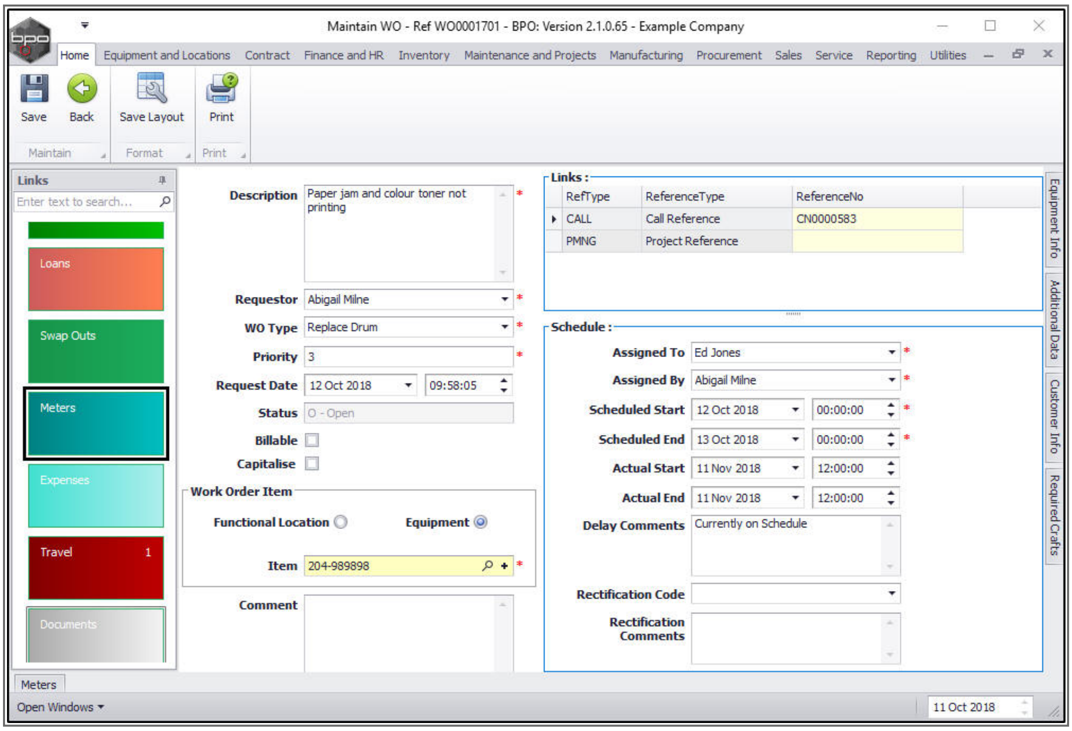
The ***Swap Outs for WO Code [ ]*** screen will be displayed.

- Here you can ***Add*** to and ***View*** a list of swap outs from store linked to this work order.



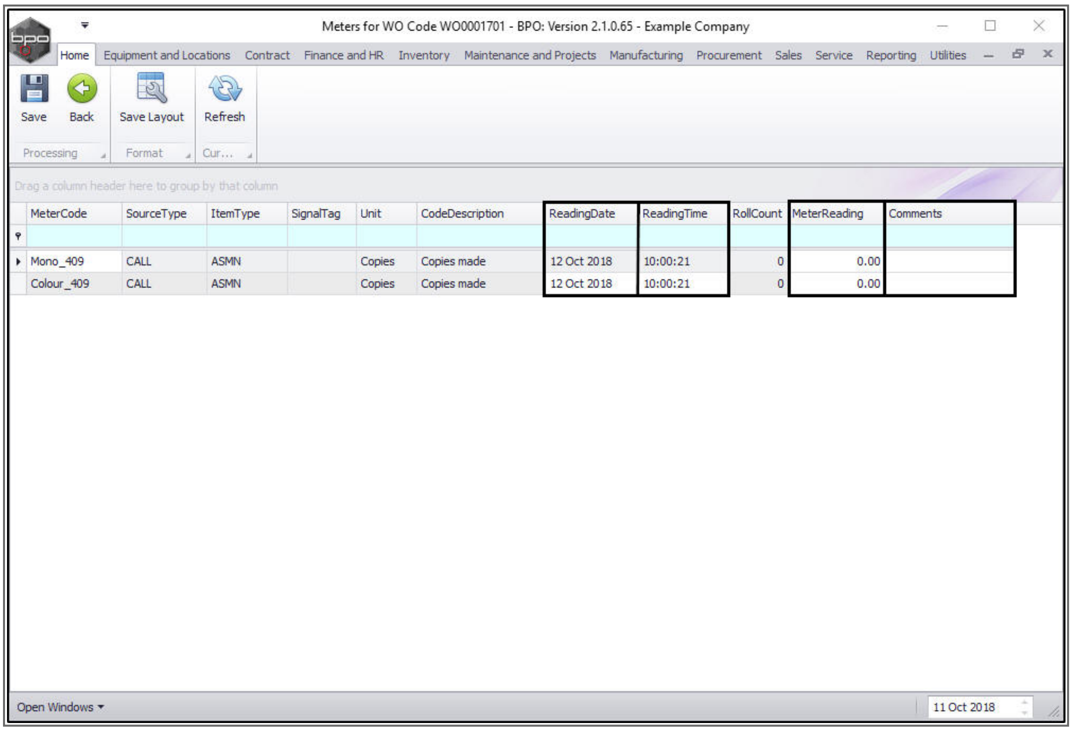
Meters

- In the ***Maintain WO - Ref [ ]*** screen, click on the ***Meters*** tile.



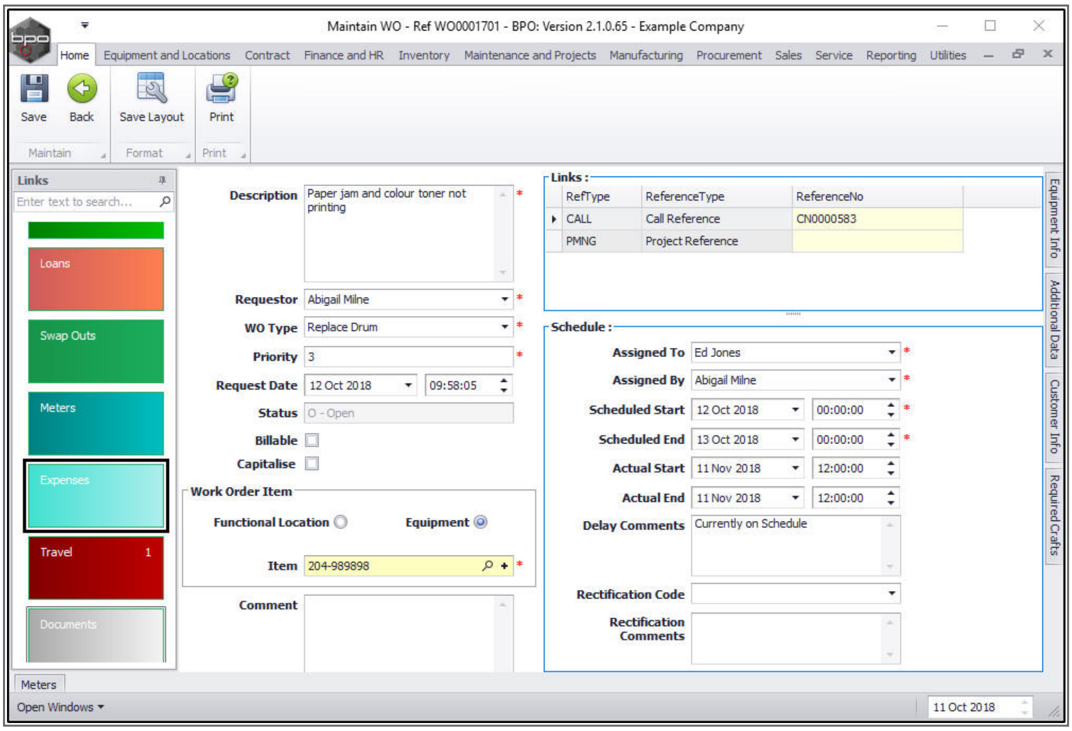
The ***Meters for WO Code [ ]*** screen will be displayed.

- Here you can view a list of the ***meter readings*** for the items linked to the selected work order.
- In this screen you can edit/add to the ***Reading Date***, ***Reading Time***, ***Meter Reading*** and ***Comments*** columns as required.



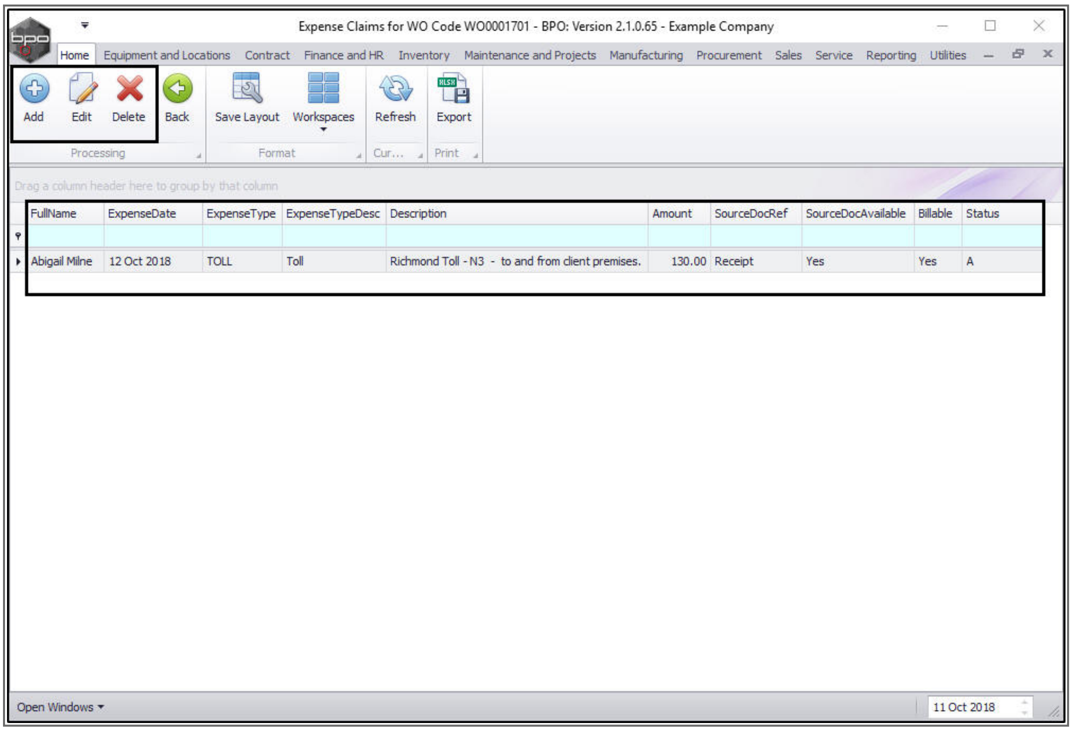
Expenses

- In the ***Maintain WO - Ref [ ]*** screen, click on the ***Expenses*** tile.



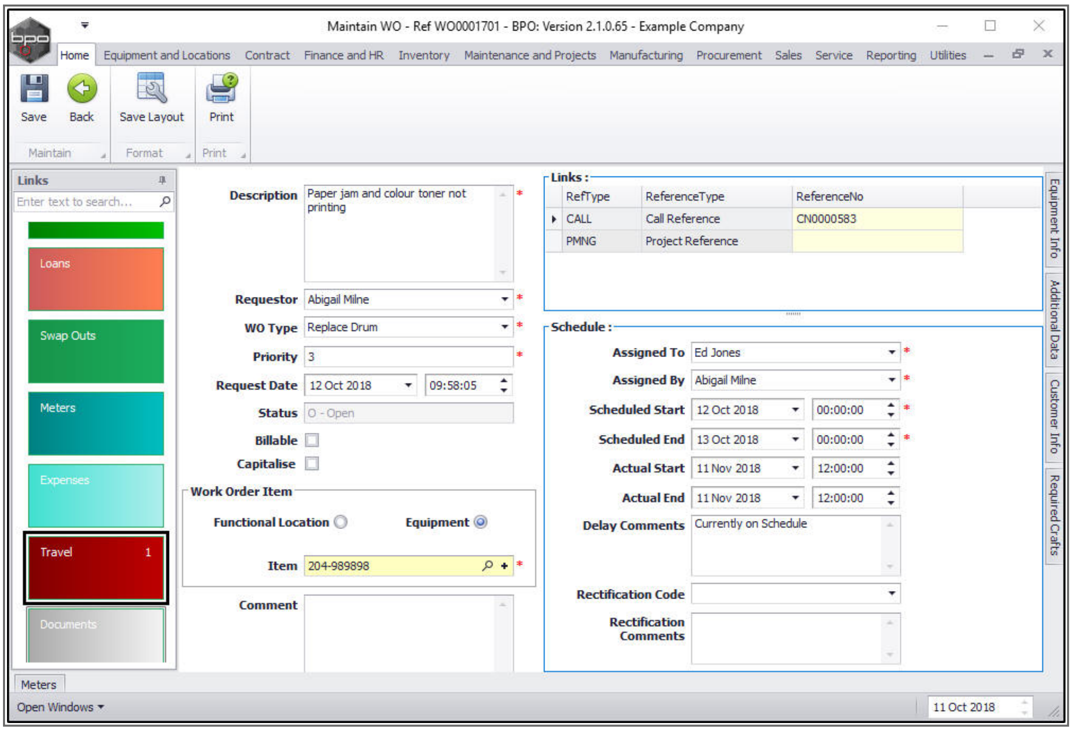
The ***Expense Claims for WO Code [ ]*** screen will be displayed.

- Here you can view a list of the ***expense claims*** linked to the selected work order.
- In this screen you can ***Add***, ***Edit*** or ***Delete*** expense claims as required.



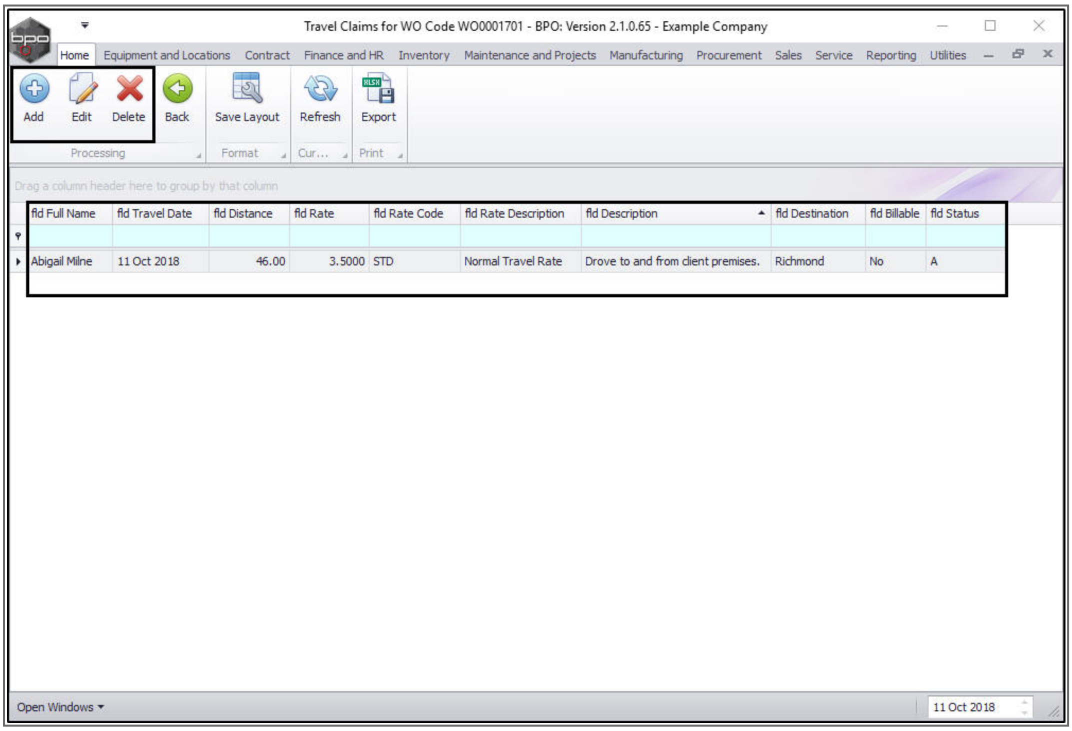
Travel

- In the ***Maintain WO - Ref [ ]*** screen, click on the ***Travel*** tile.



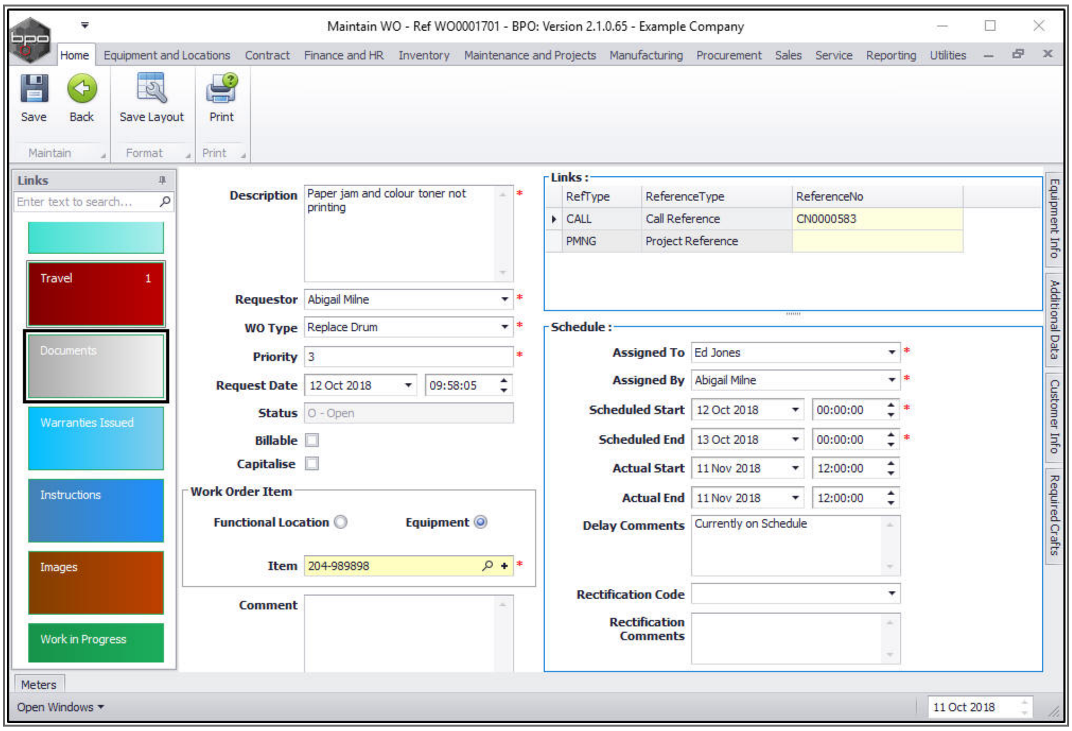
The ***Travel Claims for WO Code [ ]*** screen will be displayed.

- Here you can view a list of the ***travel claims*** linked to the selected work order.
- In this screen you can ***Add***, ***Edit*** or ***Delete*** travel claims as required.



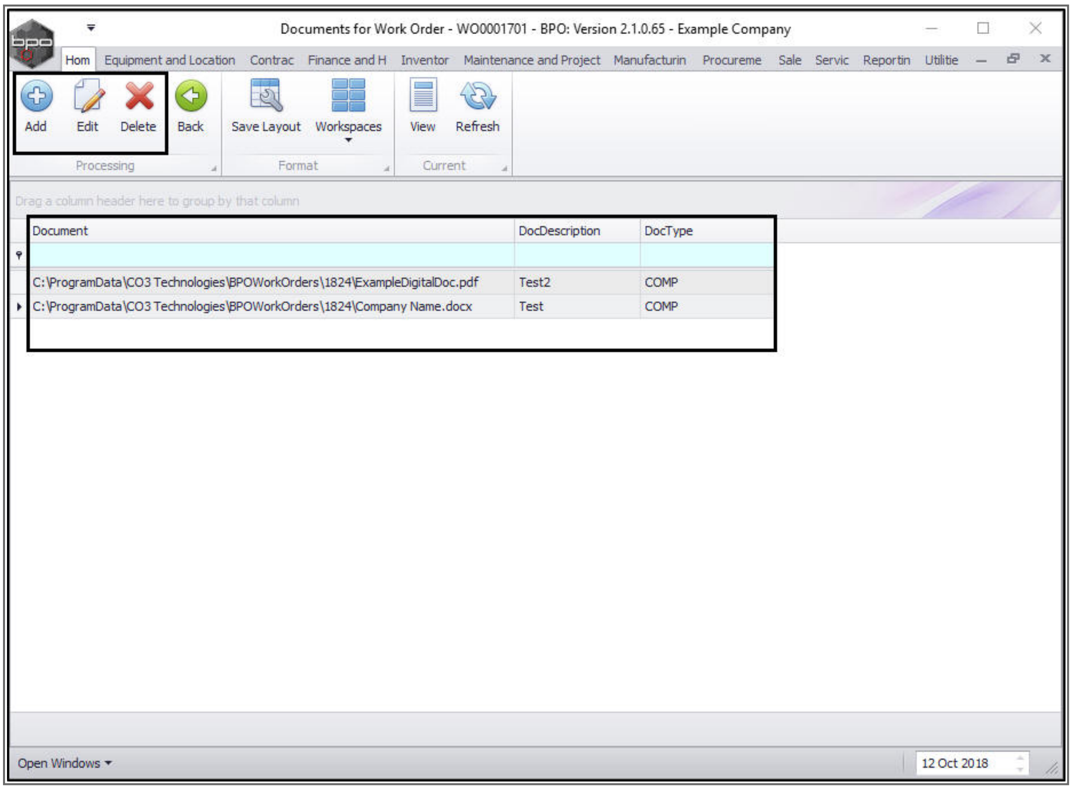
Documents

- In the ***Maintain WO - Ref [ ]*** screen, click on the ***Documents*** tile.



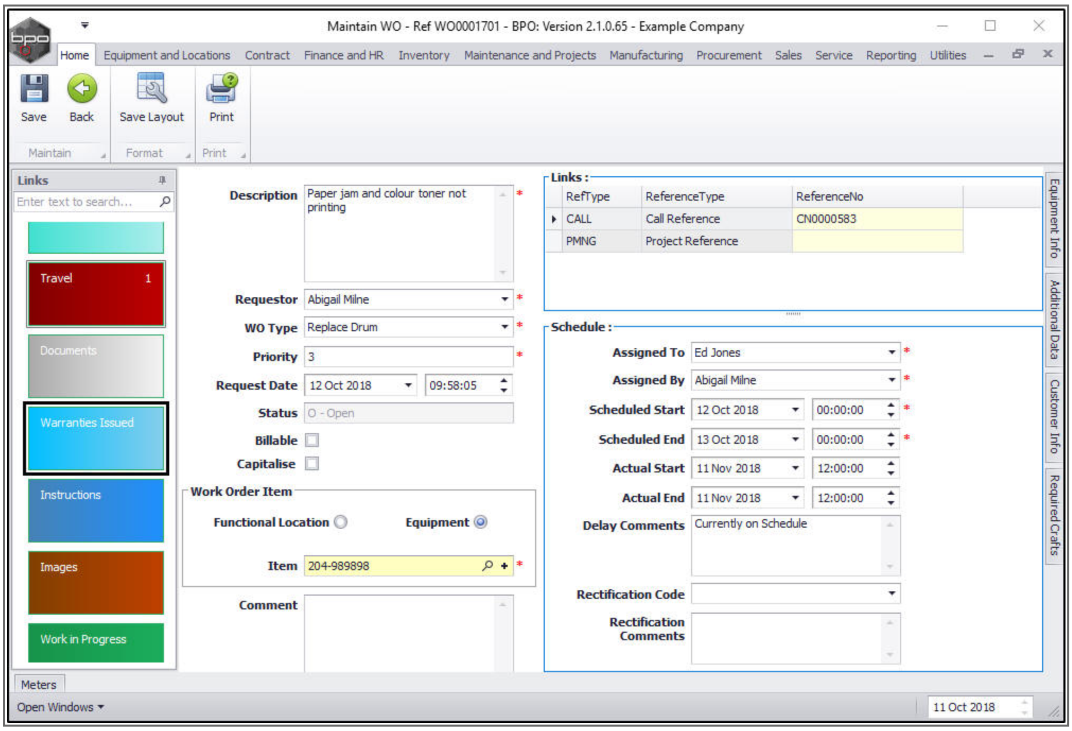
The ***Documents for WO Code [ ]*** screen will be displayed.

- Here you can view a list of the ***digital documents*** linked to the selected work order.
- In this screen you can ***view***, ***Add***, ***Edit*** or ***Delete*** digital documents as required.



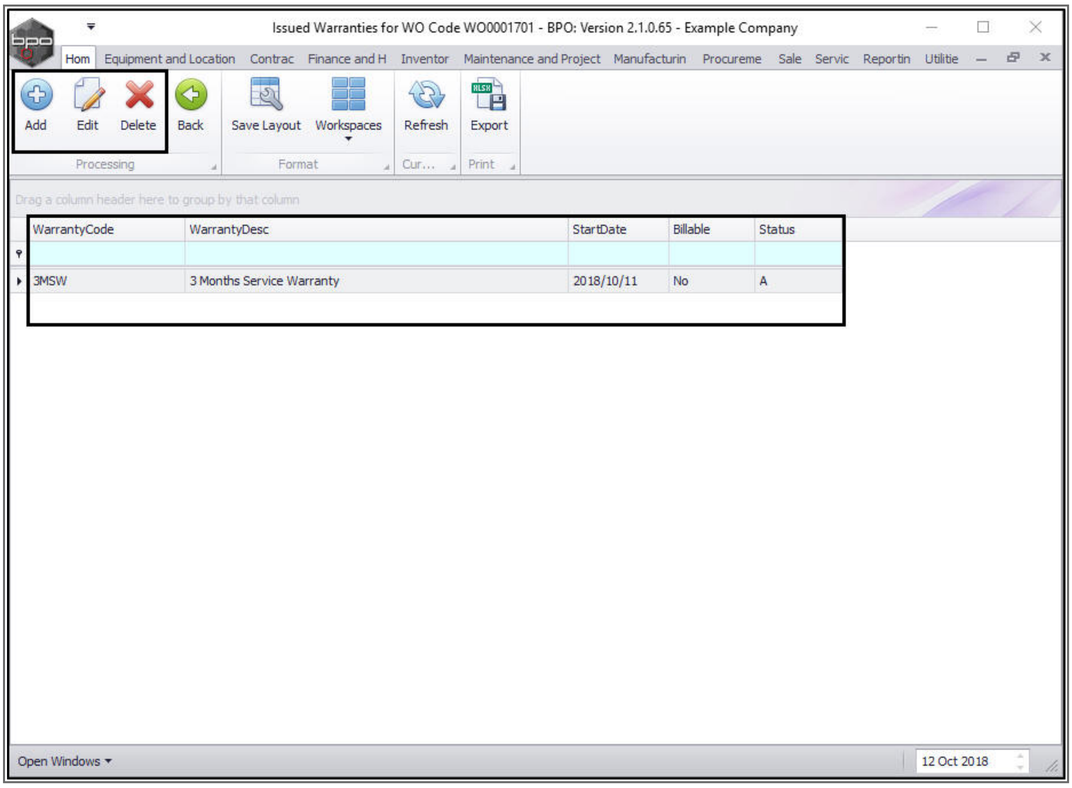
Warranties Issued

- In the ***Maintain WO - Ref [ ]*** screen, click on the ***Warranties Issued*** tile.



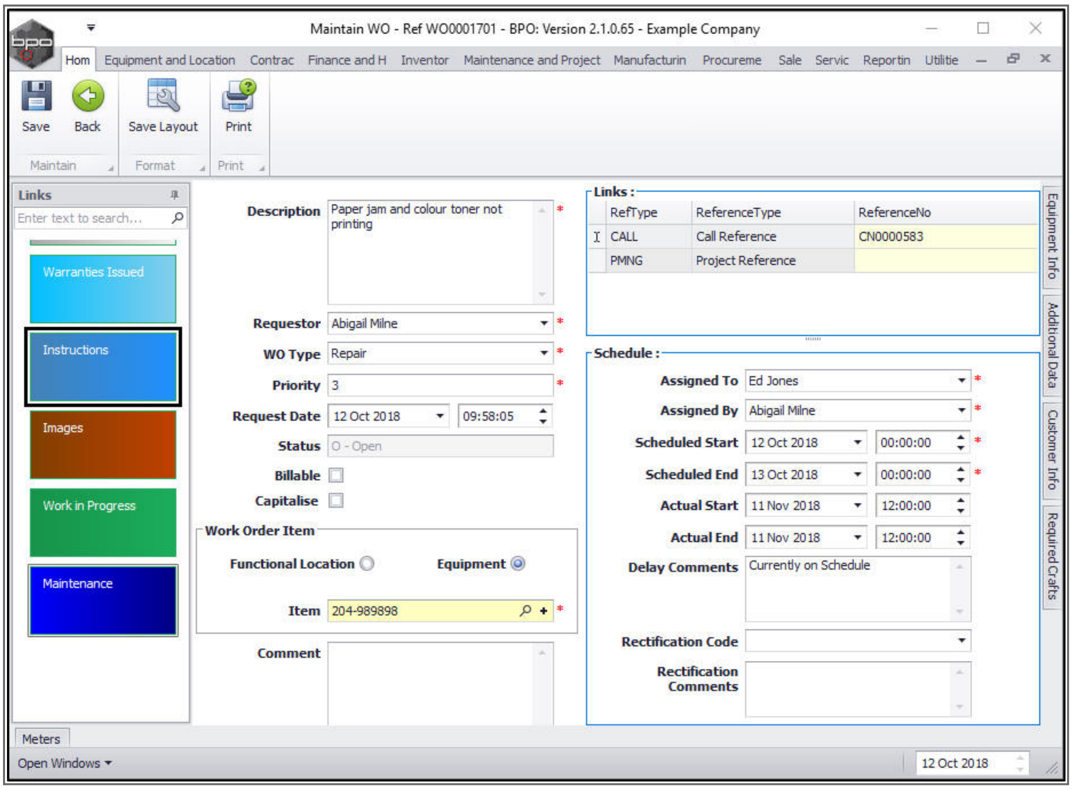
The ***Issued Warranties for WO Code [ ]*** screen will be displayed.

- Here you can view a list of the ***issued warranties*** linked to the selected work order.
- In this screen you can ***Add***, ***Edit*** or ***Delete*** warranties as required.



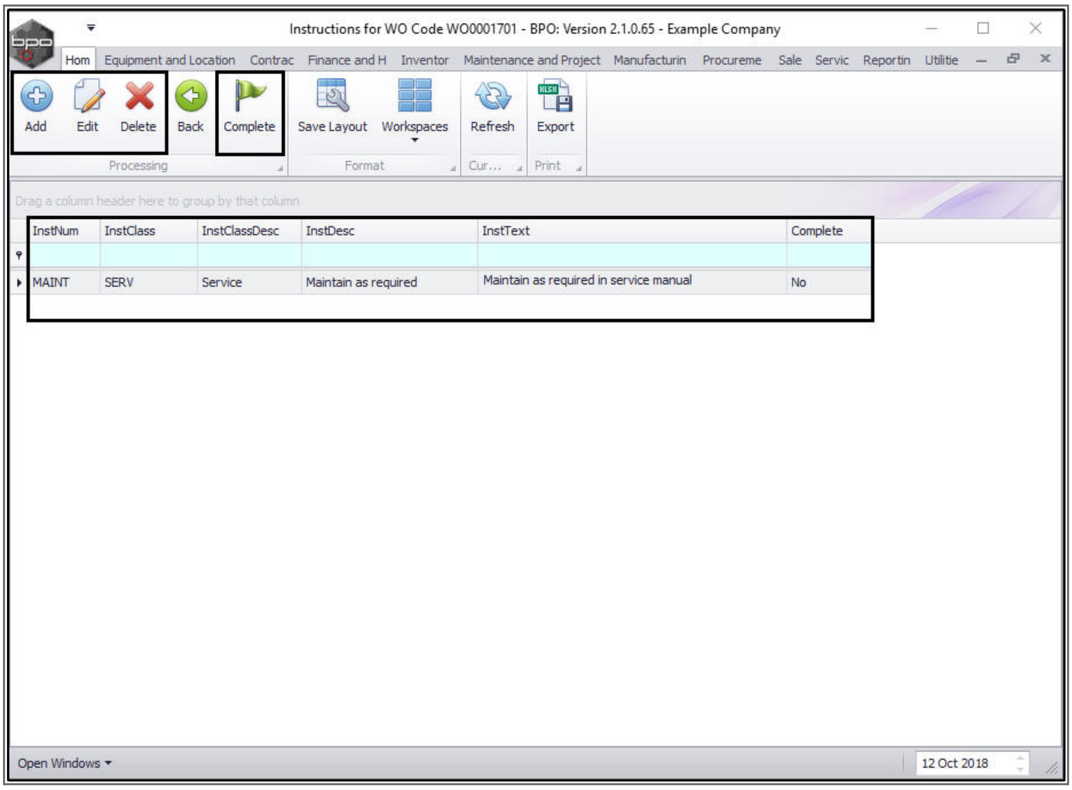
Instructions

- In the ***Maintain WO - Ref [ ]*** screen, click on the ***Instructions*** tile.



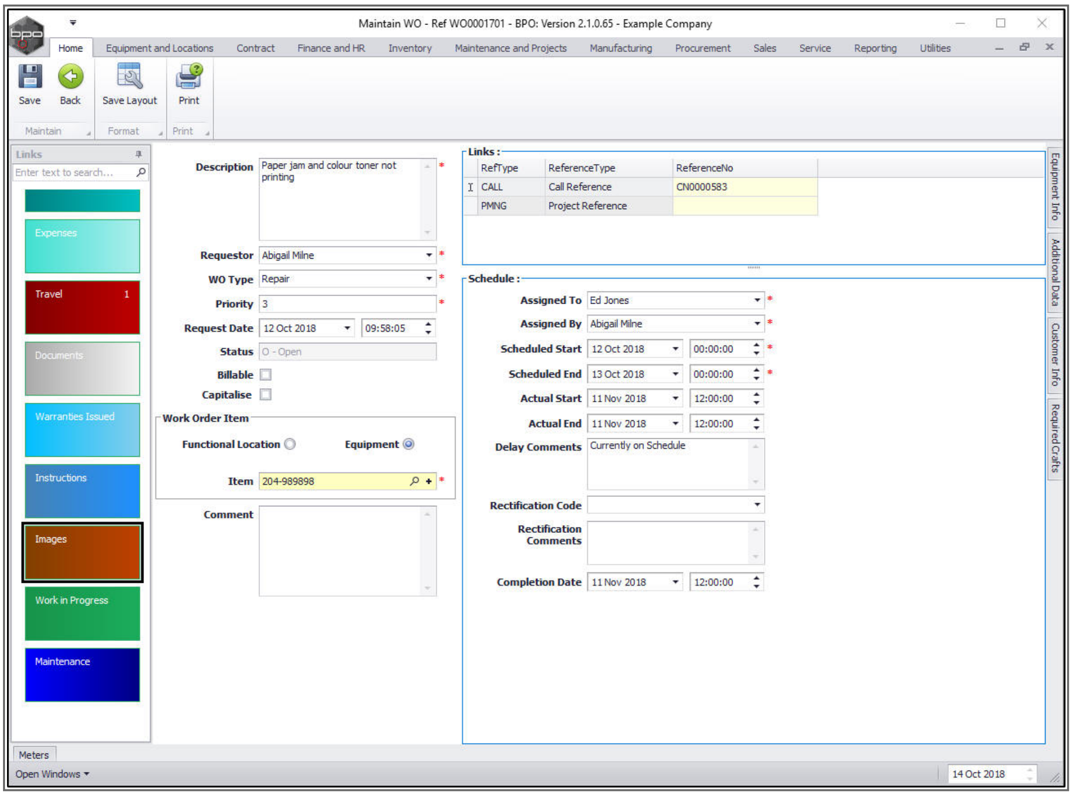
The ***Instructions for WO Code [ ]*** screen will be displayed.

- Here you can view a list of the ***instructions*** linked to the selected work order.
- In this screen you can ***Add***, ***Edit***, ***Delete*** or ***Complete*** instructions as required.



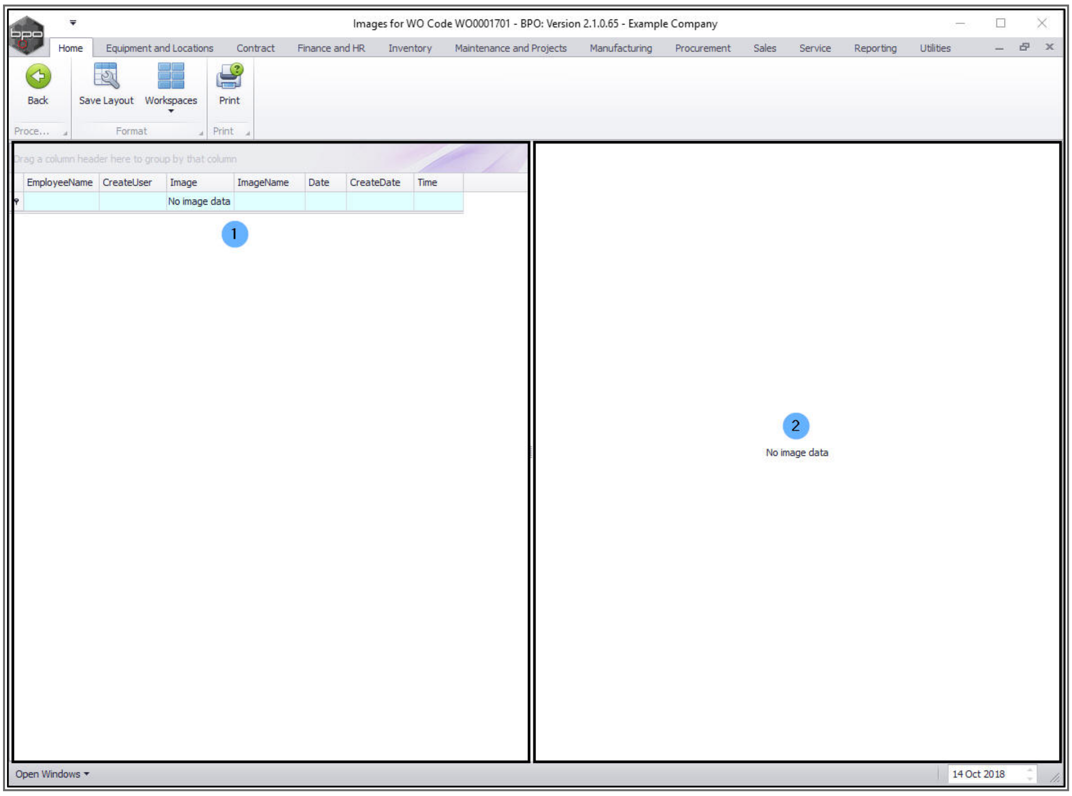
Images

- In the ***Maintain WO - Ref [ ]*** screen, click on the ***Images*** tile.



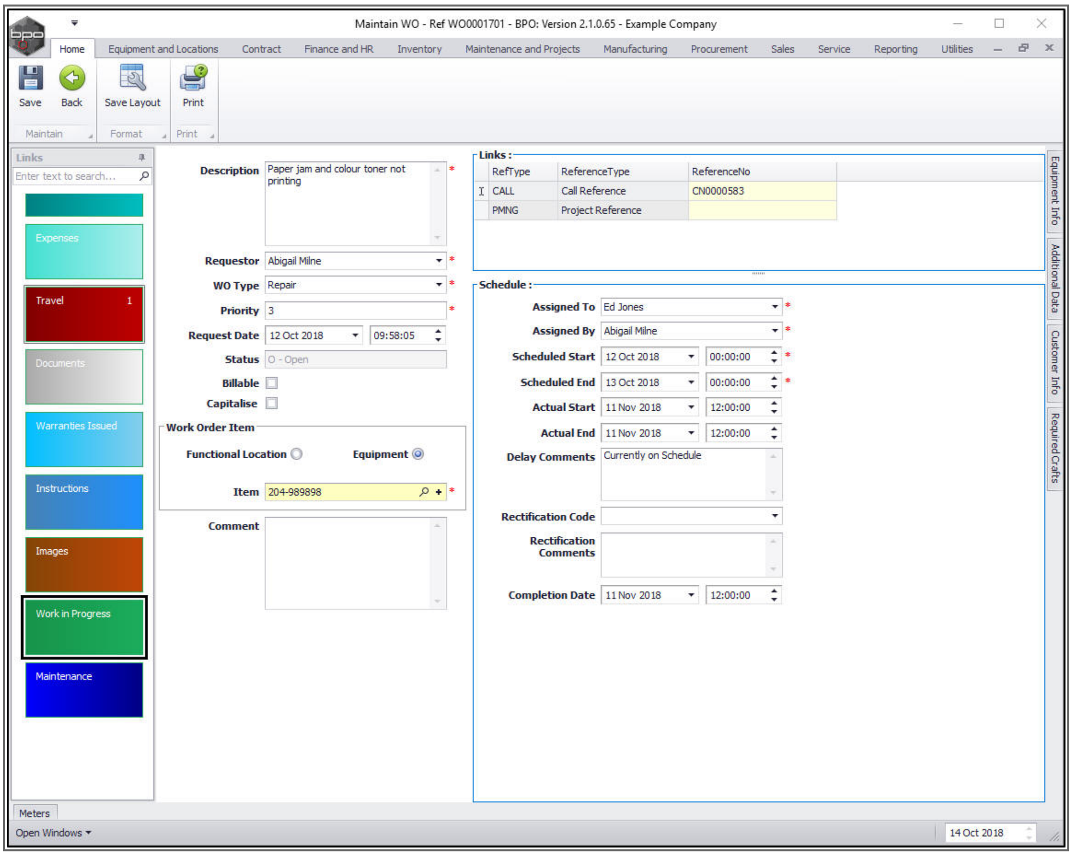
The ***Images for WO Code [ ]*** screen will be displayed.

1. The left side of the screen will list the ***employee name*** and details of the ***image name***, ***date***, ***create date*** and ***time***. Click on the row selector in front of the image name that you wish to view.
2. On the right side of the screen, is where you can view the ***image*** , when you have selected the row on the left.



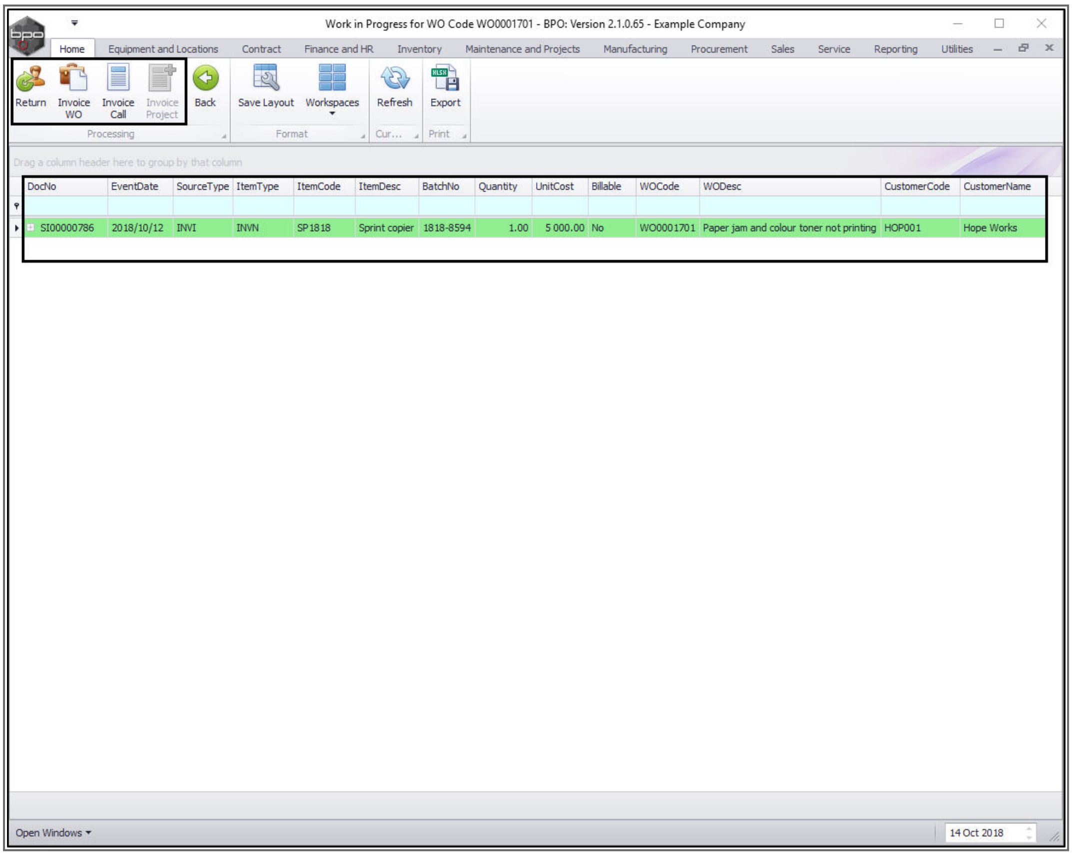
Work in Progress

- In the ***Maintain WO - Ref [ ]*** screen, click on the ***Work in Progress*** tile.



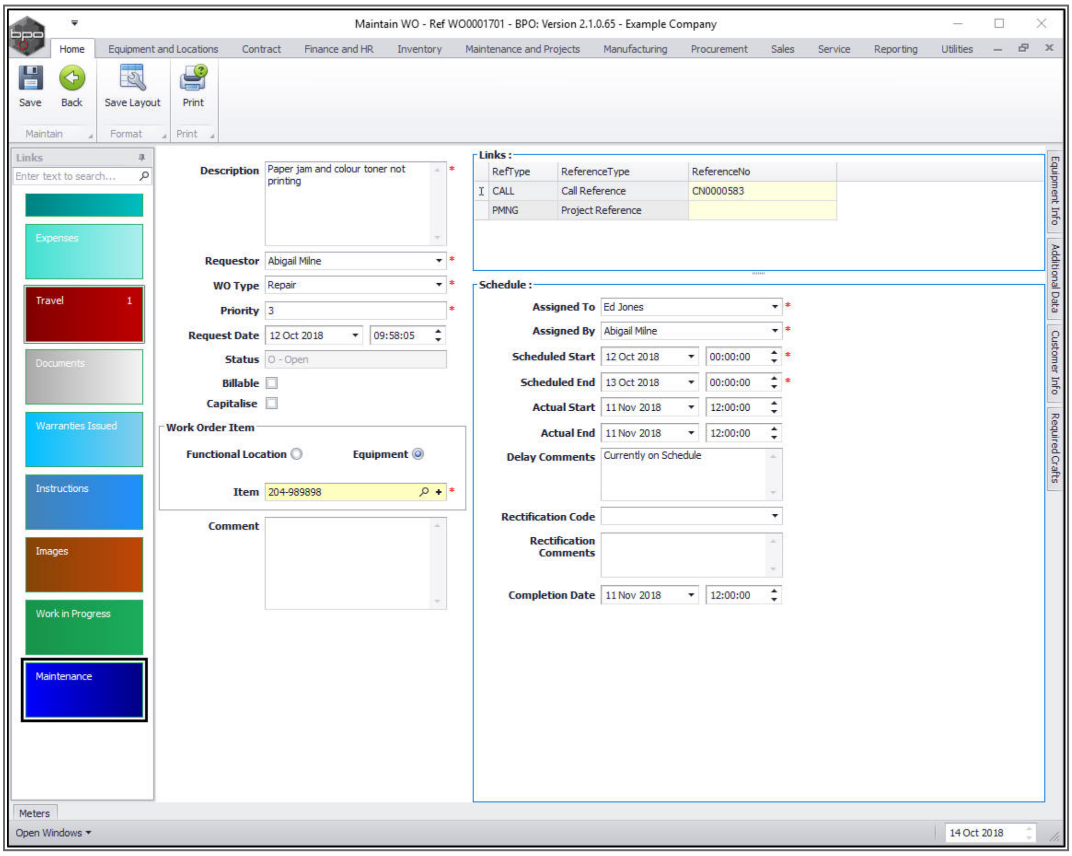
The ***Work in Progress for WO Code [ ]*** screen will be displayed.

1. Here you can view a list of all the ***work in progress*** for the selected work order.
2. In this screen you can ***Return*** the item linked to the WO, ***Invoice the WO***, ***Invoice the Call or Project*** (depending on whether the work order is linked to a call or project).



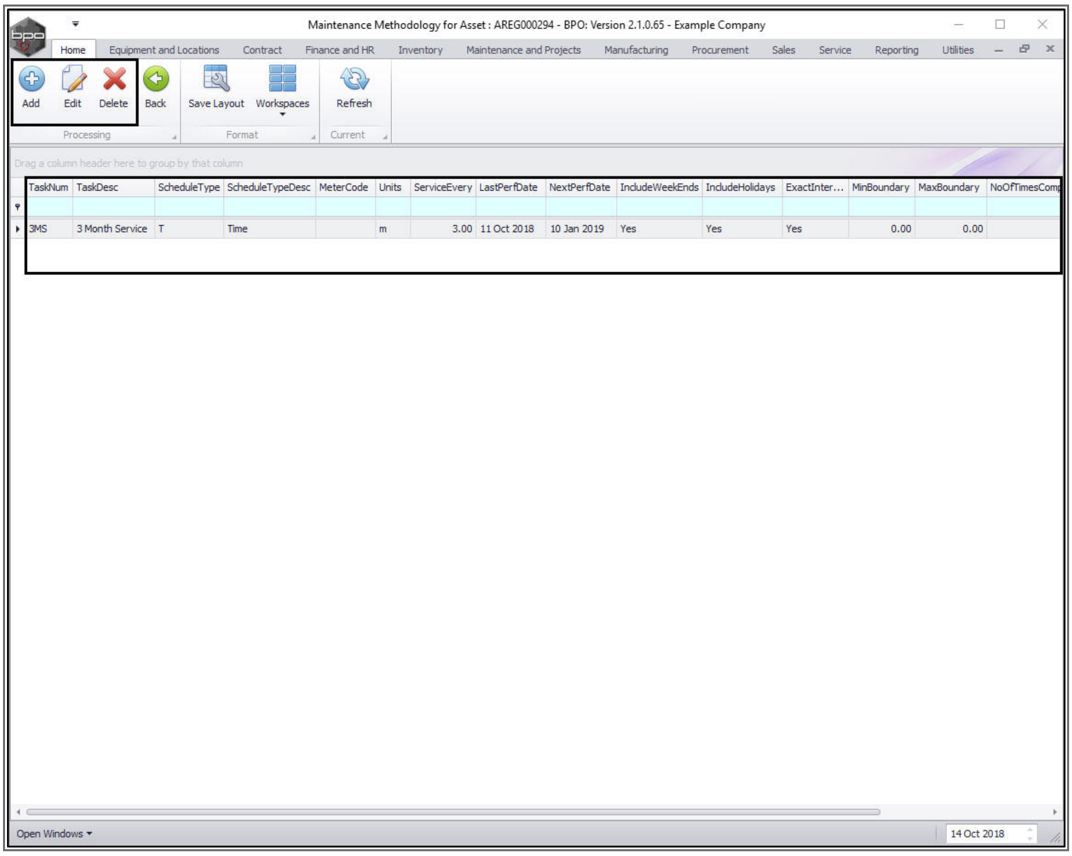
Maintenance

- In the ***Maintain WO - Ref [ ]*** screen, click on the ***Maintenance*** tile.



The ***Maintenance Methodology for Asset: [ ]*** screen will be displayed.

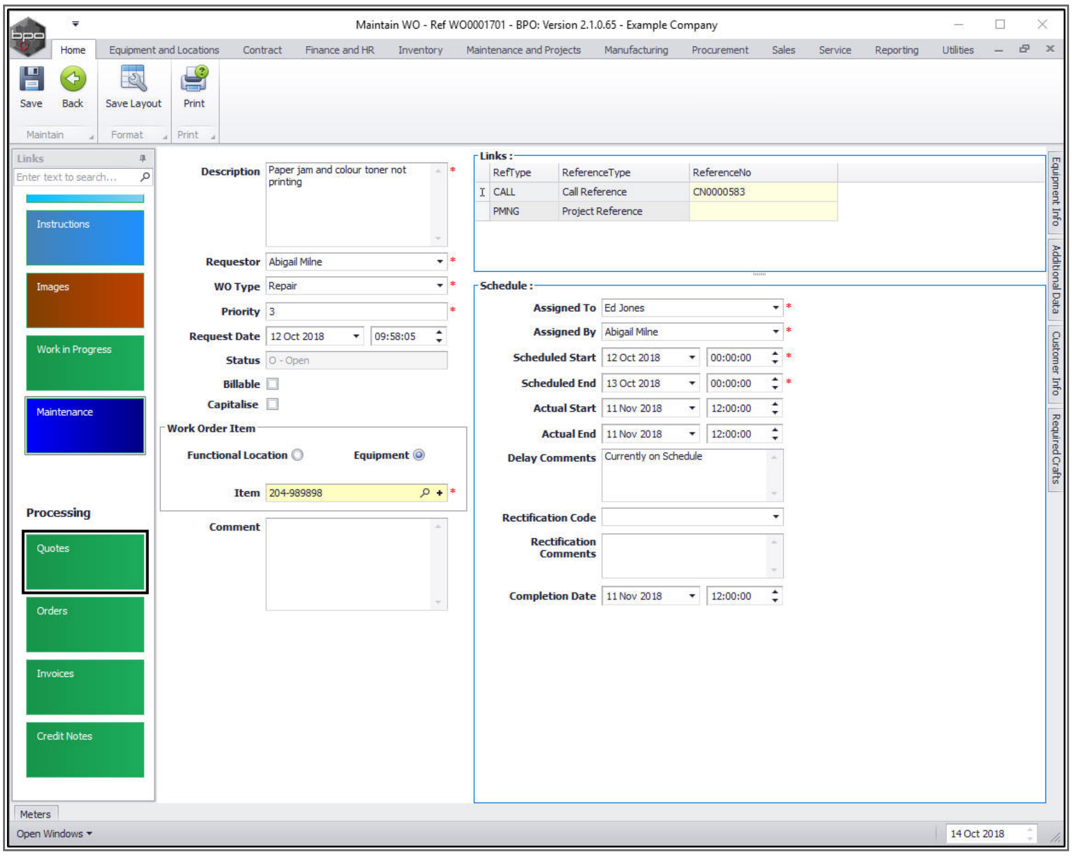
- In this screen, you can ***Add***, ***Edit*** or ***Delete*** a maintenance methodology as required.



THE PROCESSING TILES

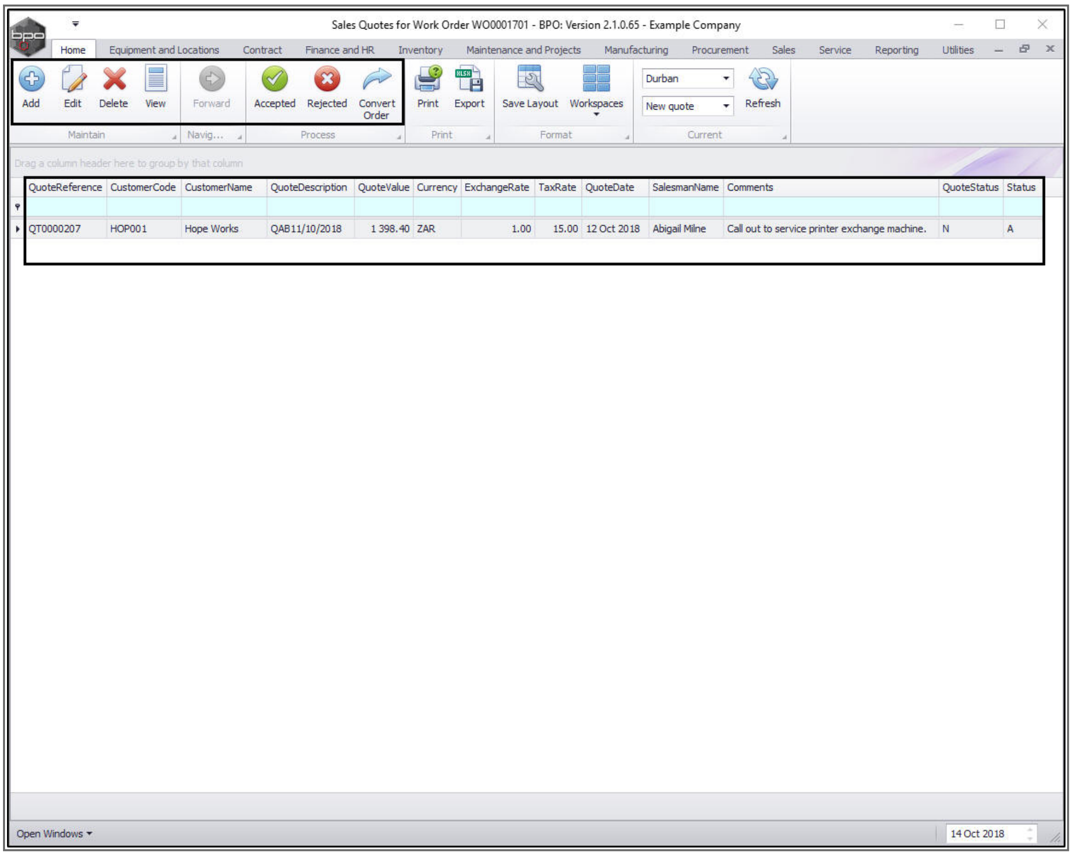
Quotes

- In the ***Maintain WO - Ref [ ]*** screen, click on the ***Quotes*** tile.



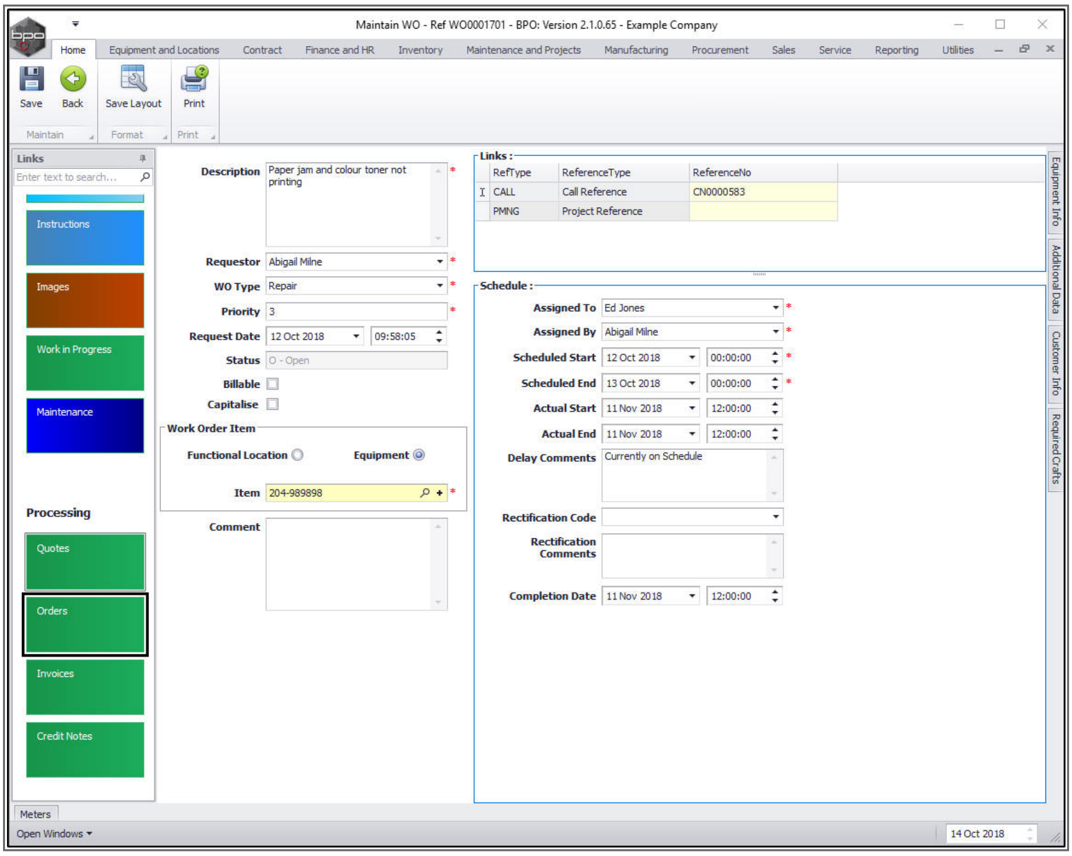
The ***Sales Quotes for Work Order [ ]*** screen will be displayed.

- Here you can view a list of the ***sales quotes*** linked to the selected work order.
- In this screen you can ***Add***, ***Edit***, ***Delete*** or ***View*** a selected sale quote.
- You can also ***Accept***, ***Reject*** or ***Convert*** the sales quote to an order as required.



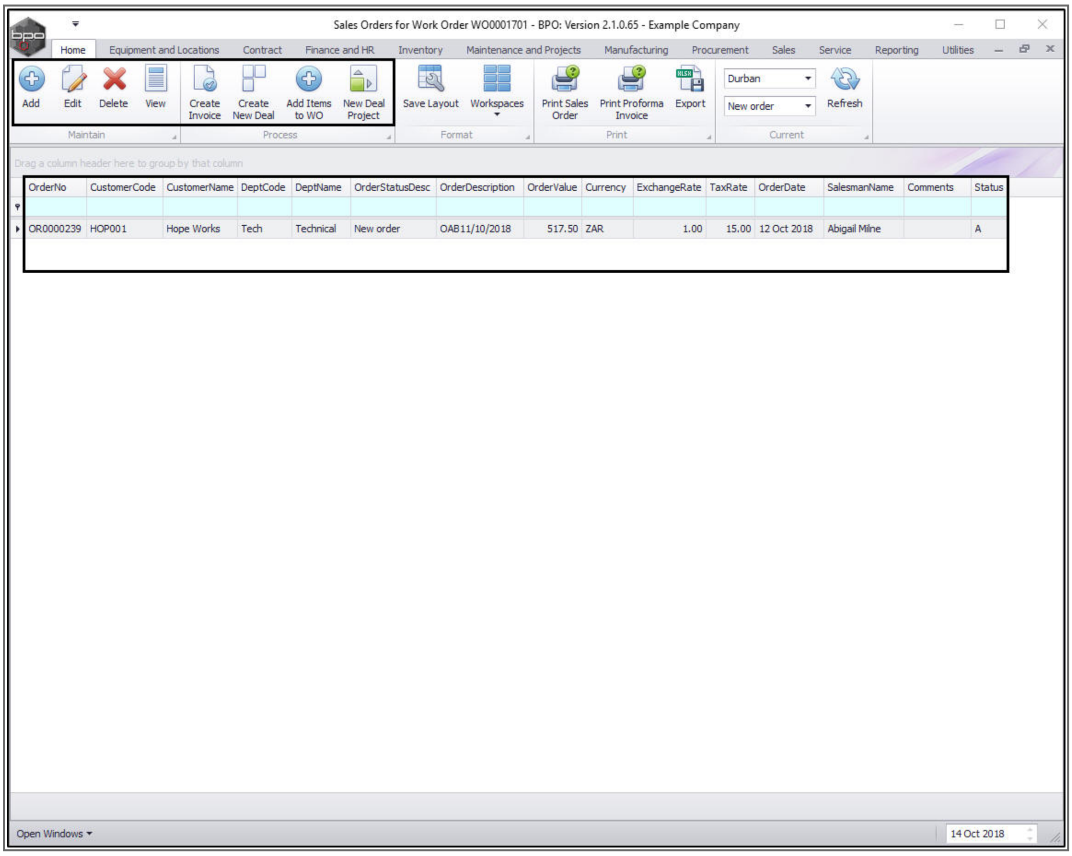
Orders

- In the ***Maintain WO - Ref [ ]*** screen, click on the ***Orders*** tile.



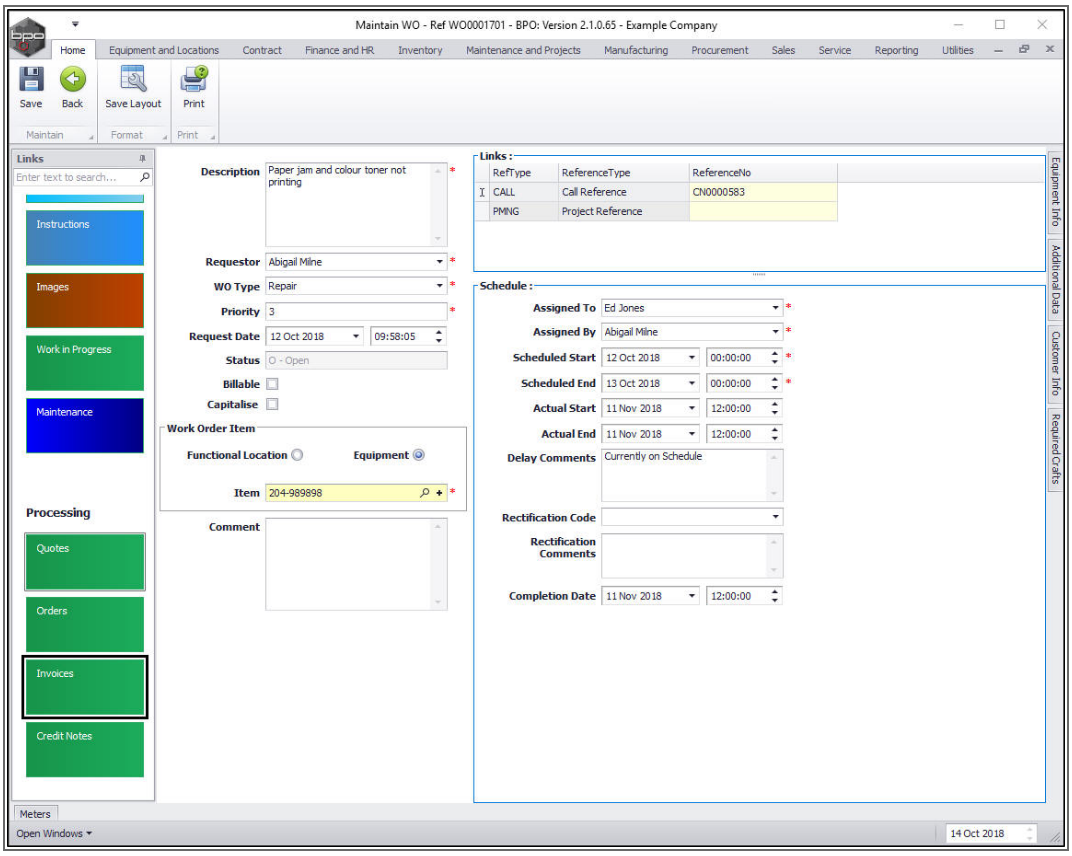
The ***Sales Orders for Work Order [ ]*** screen will be displayed.

- Here you can view a list of the ***sales orders*** linked to the selected work order.
- In this screen you can ***Add***, ***Edit***, ***Delete*** or ***View*** sales quotes as required. You can also ***Create an invoice***, ***Create a New Deal Sale*** or ***Project*** and ***Add Items*** to the linked work order as required.



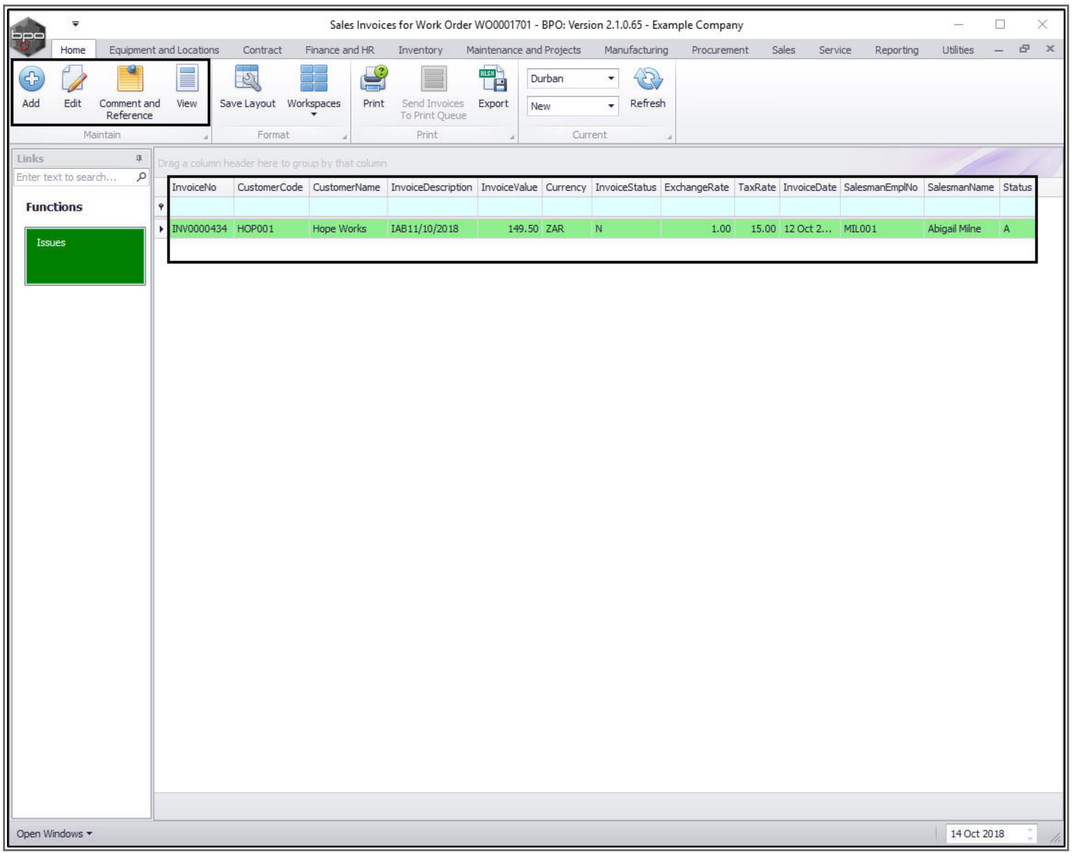
Invoices

- In the ***Maintain WO - Ref [ ]*** screen, click on the ***Invoices*** tile.



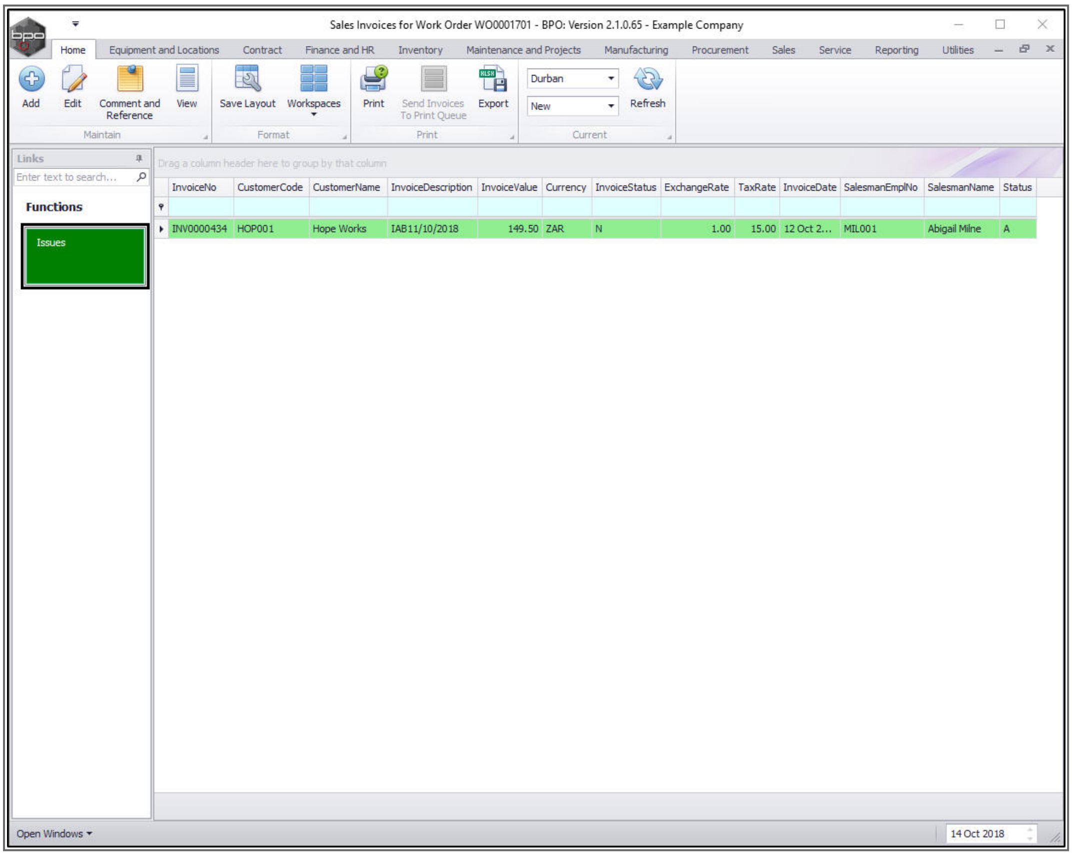
The ***Sales Invoices for Work Order [ ]*** screen will be displayed.

- Here you can view a list of the ***sales invoices*** linked to the selected work order.
- In this screen you can ***Add***, ***Edit***, record ***Comments*** and ***References*** and ***View*** sales invoices as required.



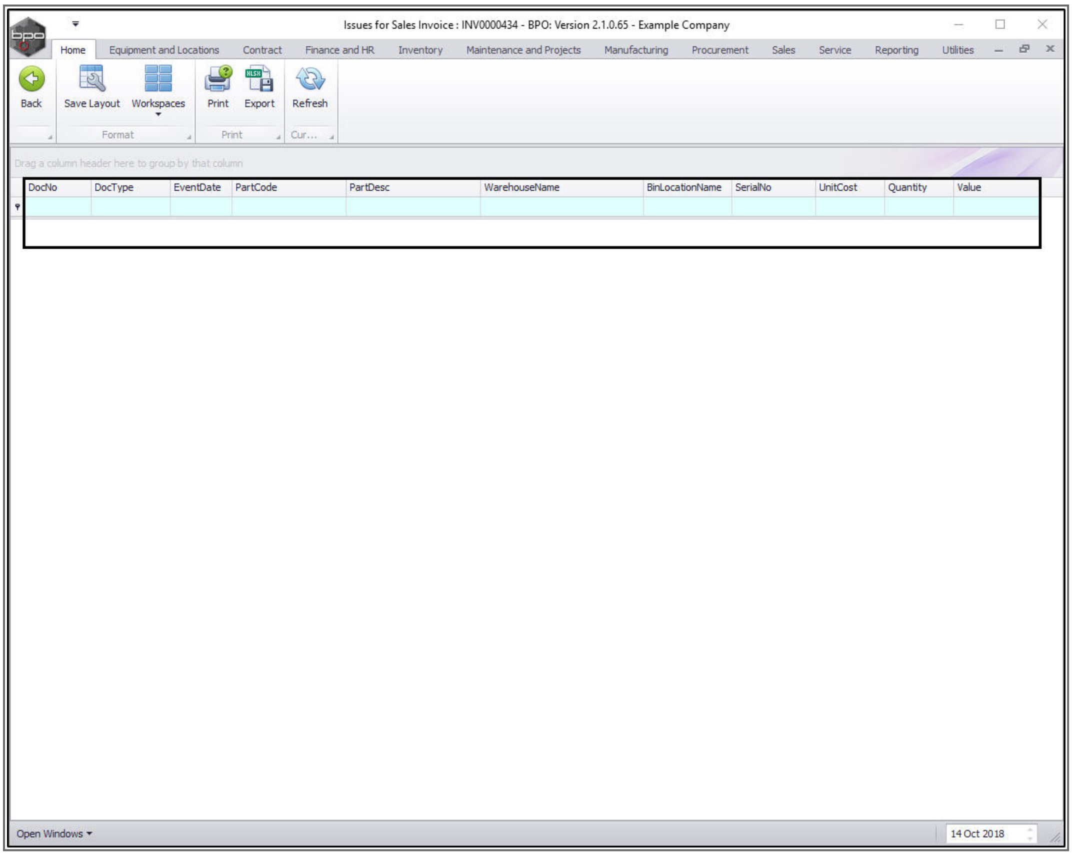
Issues

- Click on the ***Issues*** tile in this screen.



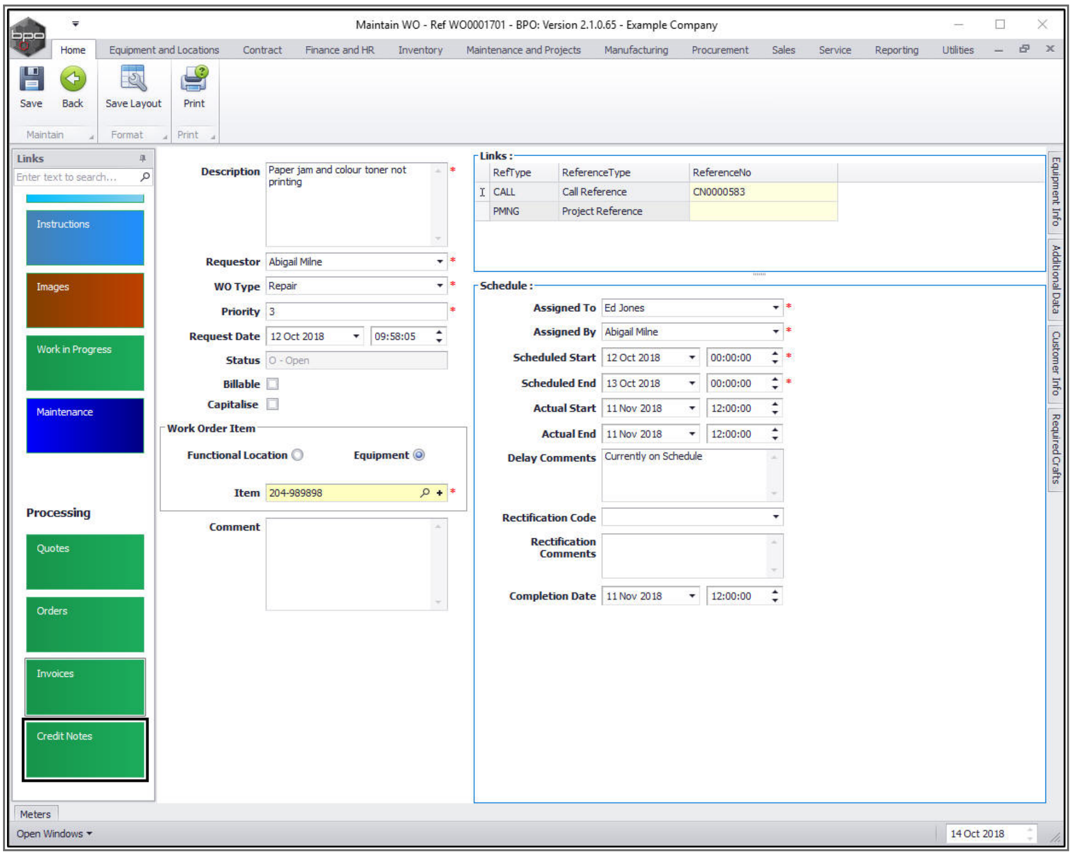
The ***Issues for Sales Invoice: [ ]*** screen will be displayed.

- If there are any ***part issues*** linked to the selected sales invoice, they will be listed in this screen.



Credit Notes

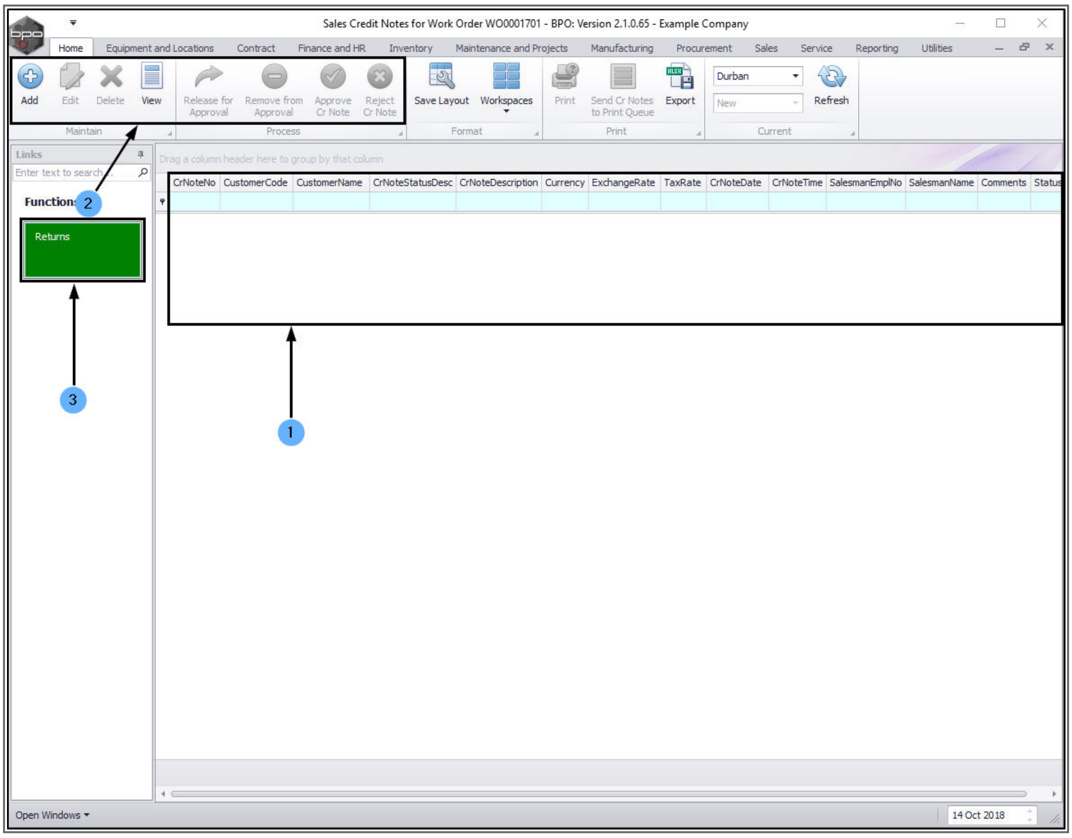
- In the ***Maintain WO - Ref [ ]*** screen, click on the ***Credit Notes*** tile.



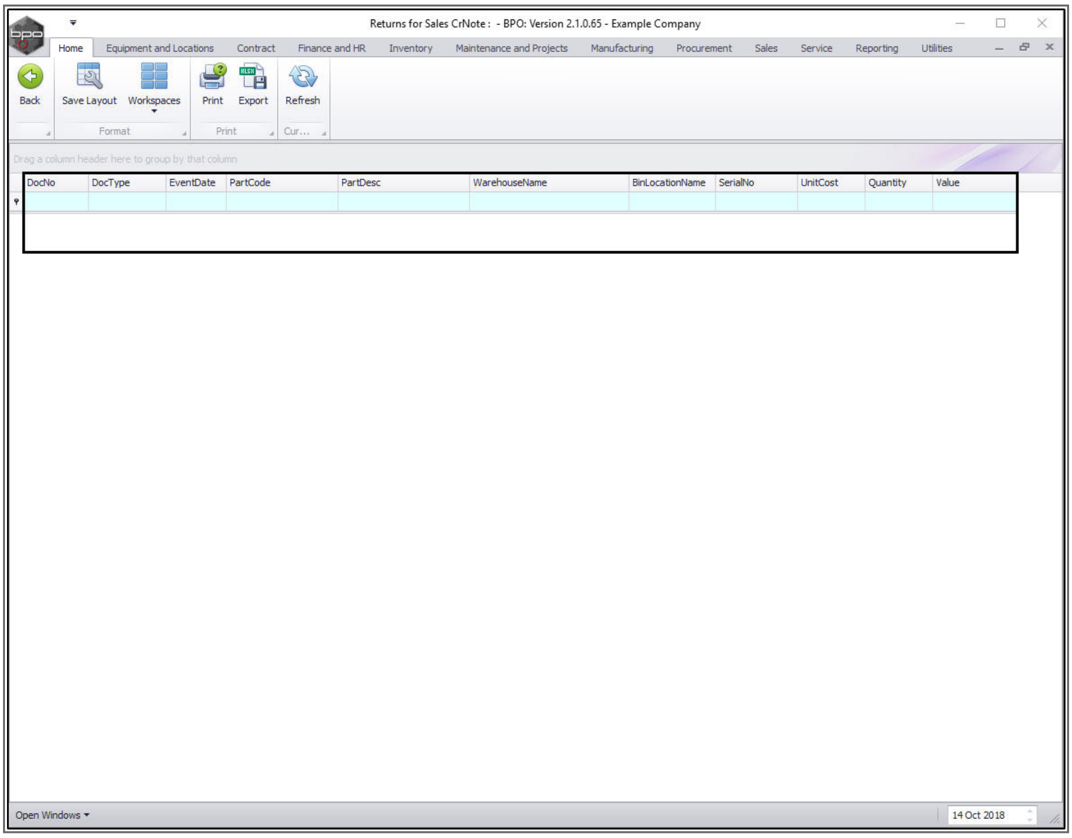
1. The ***Sales Credit Notes for Work Order [ ]*** screen will be displayed.
2. Here you can ***Add***, ***Edit***, ***Delete***, ***View***, ***Release for Approval***, ***Remove from Approval***, ***Approve*** or ***Reject*** the selected credit note.

Returns

- Click on the ***Returns*** tile

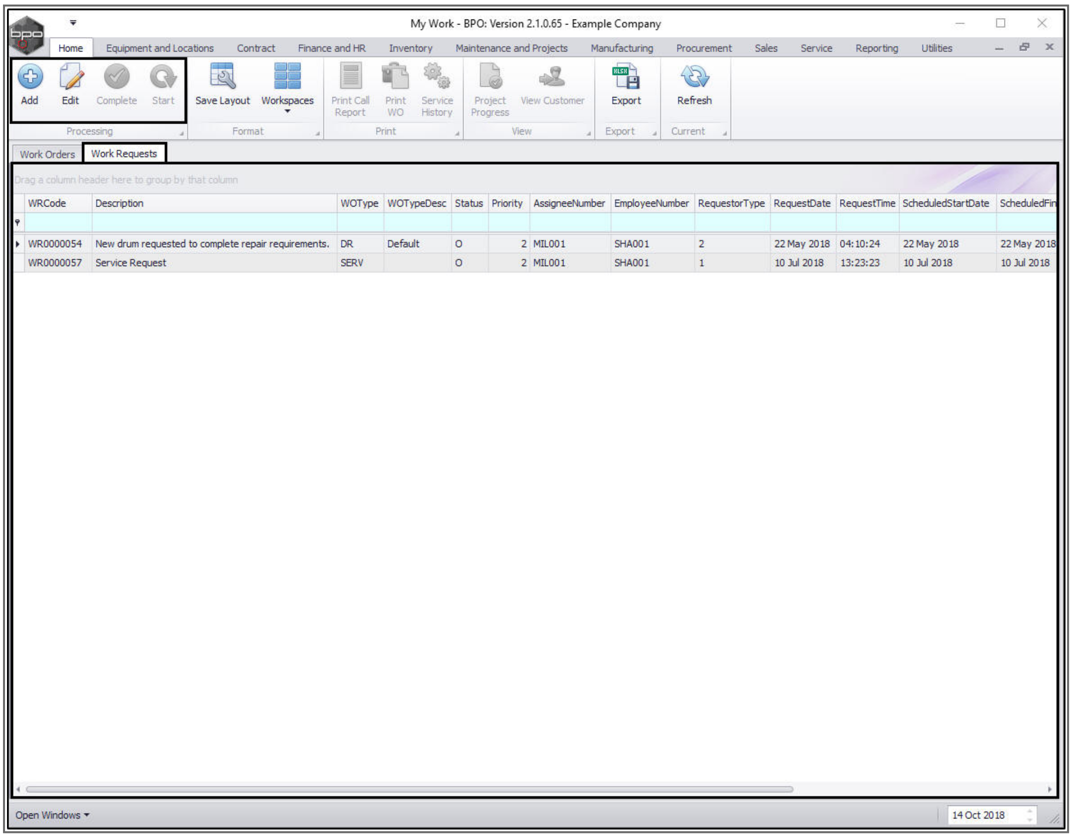


- The ***Returns for Sales Cr Note*** screen will be displayed.
- If there is a ***part return*** linked to the selected sales credit note, then this will be listed in this screen.



THE WORK REQUESTS FRAME

- Go back to the ***My Work*** Listing screen and click on the ***Work Requests*** tab
- A list of ***work requests*** assigned to this specific employee will be displayed.
    - Note: A work request can be raised if additional work is required, which can be viewed and approved / rejected by a supervisor or manager and will then become a work order.


My Work - BPO: Version 2.1.0.65 - Example Company
Home
Equipment and Locations
Contract
Finance and HR
Inventory
Maintenance and Projects
Manufacturing
Procurement
Sales
Service
Reporting
Utilities
Add
Edit
Complete
Start
Save Layout
Workspaces
Print Call Report
Print WO
Service History
Project Progress
View Customer
Export
Refresh
Processing
Format
Print
View
Export
Current
Work Orders
Work Requests
Drag a column header here to group by that column
WRCode
Description
WOType
WOTypeDesc
Status
Priority
AssigneeNumber
EmployeeNumber
RequestorType
RequestDate
RequestTime
ScheduledStartDate
WR0000054
New drum requested to complete repair requirements.
DR
Default
O
2
MIL001
SHA001
2
22 May 2018
04:10:24
22 May 2018
WR0000057
Service Request
SERV
O
2
MIL001
SHA001
1
10 Jul 2018
13:23:23
10 Jul 2018
Open Windows
14 Oct 2018

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