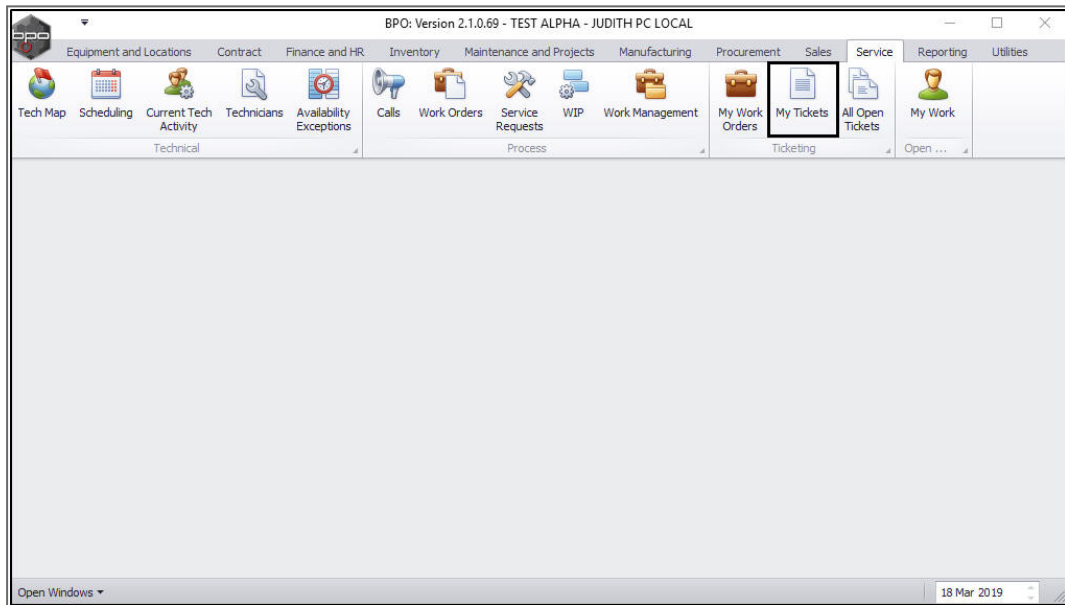


# SERVICE

## MY TICKETS

**BPO\_Ticketing** is an application that gives the user the ability to both view and work on Calls and/or Projects where they are the owner (responsible person) for the Call or Project's underlying work order. The user can also create ticket assignments to pass the work on to the next responsible person.

**Ribbon Access:** *Service > My Tickets*



The **My Tickets** screen will be displayed.

1. A list of tickets specific to the **user logged on** to the system can be viewed.
2. You can view all tickets that you have **created** and **assigned** to another person.

3. You can also view all the tickets that other people have *assigned to you*.
4. However, this list will only show these tickets if they are still in the *New Status*.

CallReference	WOCode	Description	Priority	Note	CreateDate	CreateBy	AssignedTo	Status	Read	CustomerCode	Cus
PCN0000026	PW0000064	3MS - 3 Month Service	2	Scheduled Service	2018/08/07	Abigail Milne	Bianca Du Toit	N	No	SAM001	Sa
PCN0000027	PW0000084	TT003 - Monthly - Call p...	2	Scheduled Service	2018/08/07	Abigail Milne	Belinda Sharman	N	No	SAM001	Sa
PRJ0000283	WO0001604	Site Inspection required	2	Machine Installation	2018/10/29	Abigail Milne	Theo Peterson	N	No	HOP001	Ho
PRJ0000071	WO0001668	SP240 New Deal.	2	SP240 New Deal.	2018/05/24	Abigail Milne	Abigail Milne	N	Yes	TIA001	Ti
CN0000578	WO0001687	Return machine from co...	2	Return all from short ...	2018/07/24	Abigail Milne	Theo Peterson	N	No	HOP001	Ho
CN0000582	WO0001694	TT009 - Daily, Mono 100...	2	Scheduled Service	2018/08/07	Abigail Milne	Belinda Sharman	N	No	HOP001	Ho
PRJ0000071	WO0001746	SP240 New Deal.	2	SP240 New Deal.	2019/04/12	Theo Peterson	Abigail Milne	N	No	TIA001	TR
PRJ0000301	WO0001751	Installation Project 1	2	Installation Project 1	2019/04/12	Abigail Milne	Belinda Sharman	N	No	HOP001	Ho
PRJ0000304	WO0001754	Installation Project 4	2	Installation Project 4	2019/04/12	Abigail Milne	Belinda Sharman	N	No	HOP001	Ho
PRJ0000305	WO0001757	Installation Project 5	2	Installation Project 5	2019/04/12	Abigail Milne	Belinda Sharman	N	No	HOP001	Ho

This screen also lists:

1. the **Call or Project Reference** number.
2. the **Work Order Code** and **Description**
3. the work order **Priority** (1 = Most Important, 5 = Least Important)
4. any **Notes** linked to the work order
5. the **Create Date** of each work order
6. whether the ticket has been **Read**: [Yes] or not: [No]

My Tickets - BPO: Version 2.1.0.69 - Example Company

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

1 Edit | 2 Complete Work | 3 Save Layout | 4 Workspaces | 5 Save Filter | 6 Refresh | 7 Export

Drag a column header here to group by this column

CallReference	WOCode	Description	Priority	Note	CreateDate	CreateBy	AssignedTo	Status	Read	CustomerCode	Cus
PCN0000026	PW0000064	3MS - 3 Month Service	2	Scheduled Service	2018/08/07	Abigail Milne	Bianca Du Toit	N	No	SAM001	Sa
PCN0000027	PW0000084	TT003 - Monthly - Call p...	2	Scheduled Service	2018/08/07	Abigail Milne	Belinda Sharman	N	No	SAM001	Sa
PRJ0000283	WO0001604	Site Inspection required	2	Machine Installation	2018/10/29	Abigail Milne	Theo Peterson	N	No	HOP001	Ho
PRJ0000071	WO0001668	SP240 New Deal.	2	SP240 New Deal.	2018/05/24	Abigail Milne	Abigail Milne	N	Yes	TIA001	Tit
CN0000578	WO0001687	Return machine from co...	2	Return all from short ...	2018/07/24	Abigail Milne	Theo Peterson	N	No	HOP001	Ho
CN0000582	WO0001694	TT009 - Daily, Mono 100...	2	Scheduled Service	2018/08/07	Abigail Milne	Belinda Sharman	N	No	HOP001	Ho
PRJ0000071	WO0001746	SP240 New Deal.	2	SP240 New Deal.	2019/04/12	Theo Peterson	Abigail Milne	N	No	TIA001	Tit
PRJ0000301	WO0001751	Installation Project 1	2	Installation Project 1	2019/04/12	Abigail Milne	Belinda Sharman	N	No	HOP001	Ho
PRJ0000304	WO0001754	Installation Project 4	2	Installation Project 4	2019/04/12	Abigail Milne	Belinda Sharman	N	No	HOP001	Ho
PRJ0000305	WO0001757	Installation Project 5	2	Installation Project 5	2019/04/12	Abigail Milne	Belinda Sharman	N	No	HOP001	Ho

Count: 10

Open Windows | 21 May 2019

7. the **Customer Code** and **Customer Name** number.
8. the number of **Days** that the ticket has been **Unattended**
9. the number of **Days** that the ticket has remained **Open**
10. the **Elapsed Hours**.

Priority	Note	CreateDate	CreateBy	AssignedTo	Status	Read	CustomerCode	CustomerName	DaysUnattended	DaysOpen	ElapsedHours
2	Scheduled Service	2018/08/07	Abigail Milne	Bianca Du Toit	N	No	SAM001	Samanthas Diner	289	289	10 321.12
2	Scheduled Service	2018/08/07	Abigail Milne	Belinda Sharman	N	No	SAM001	Samanthas Diner	289	289	4 966.12
2	Machine Installation	2018/10/29	Abigail Milne	Theo Peterson	N	No	HOP001	Hope Works	206	561	0.00
2	SP240 New Deal.	2018/05/24	Abigail Milne	Abigail Milne	N	Yes	TIA001	Titan Group	364	364	0.00
2	Return all from short ...	2018/07/24	Abigail Milne	Theo Peterson	N	No	HOP001	Hope Works	303	303	1 954.58
2	Scheduled Service	2018/08/07	Abigail Milne	Belinda Sharman	N	No	HOP001	Hope Works	289	289	1 865.18
2	SP240 New Deal.	2019/04/12	Theo Peterson	Abigail Milne	N	No	TIA001	Titan Group	41	41	0.00
2	Installation Project 1	2019/04/12	Abigail Milne	Belinda Sharman	N	No	HOP001	Hope Works	41	41	0.00
2	Installation Project 4	2019/04/12	Abigail Milne	Belinda Sharman	N	No	HOP001	Hope Works	41	41	0.00
2	Installation Project 5	2019/04/12	Abigail Milne	Belinda Sharman	N	No	HOP001	Hope Works	41	41	0.00

## IMPORTANT NOTES

### OWNERSHIP

For a ticket to be displayed in this list, the user should **take ownership** of the call in **BPO** by:

*Either*

- i. Selecting the call in the call screen and clicking on **My Call**

*Or*

- ii. The Call Centre person can **Assign** you to be the responsible person in the **Call Listing** screen.

1. **Unread tickets:** these tickets have not been opened for viewing - the text will be in **bold** and the **Read** column will state **No**.

2. **Open/Read tickets** : As soon as a ticket is opened for viewing – the text will no longer be in bold and the **Read** column will state **Yes**.

## TICKET COLOUR

3. **Red** : Ticket has been assigned to **you** and is for your attention.
4. **Blue** : Ticket that you have assigned to **another** employee

The screenshot shows a web application window titled "My Tickets - BPO: Version 2.1.0.69 - Example Company". The interface includes a menu bar with options like Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the menu is a toolbar with icons for Edit, Complete Work, Save Layout, Workspaces, Save Filter, Refresh, and Export. The main area displays a table of tickets with columns: Priority, Note, CreateDate, CreateBy, AssignedTo, Status, Read, CustomerCode, CustomerName, DaysUnattended, DaysOpen, and ElapsedHours. The table contains 10 rows of data. Annotations are placed on the table: '1' points to the 'AssignedTo' column header, '2' points to the 'CustomerName' column header, '3' points to the 'CustomerName' cell of the first row, and '4' points to the 'AssignedTo' cell of the first row. The table shows various ticket statuses and read flags, with some rows highlighted in red or blue.

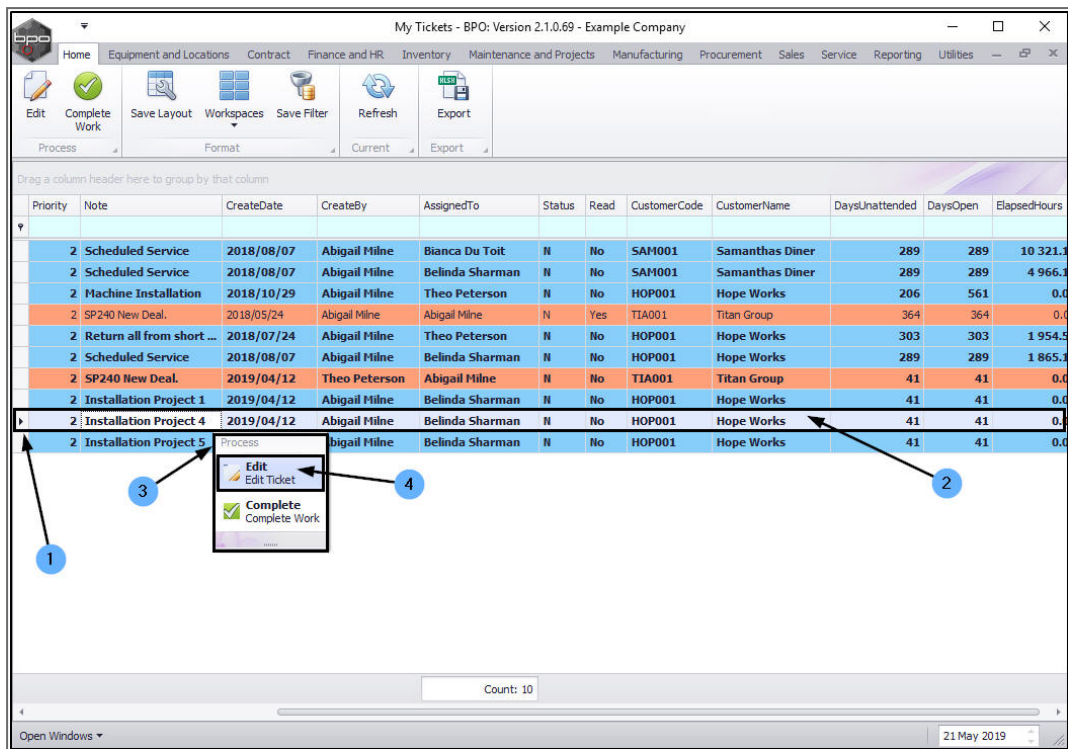
Priority	Note	CreateDate	CreateBy	AssignedTo	Status	Read	CustomerCode	CustomerName	DaysUnattended	DaysOpen	ElapsedHours
2	Scheduled Service	2018/08/07	Abigail Milne	Bianca Du Toit	N	No	SAM001	Samanthas Diner	289	289	10 321.1
2	Scheduled Service	2018/08/07	Abigail Milne	Belinda Sharman	N	No	SAM001	Samanthas Diner	289	289	4 966.1
2	Machine Installation	2018/10/29	Abigail Milne	Theo Peterson	N	No	HOP001	Hope Works	206	561	0.0
2	SP240 New Deal.	2018/05/24	Abigail Milne	Abigail Milne	N	Yes	TIA001	Titan Group	364	364	0.0
2	Return all from short ...	2018/07/24	Abigail Milne	Theo Peterson	N	No	HOP001	Hope Works	303	303	1 954.5
2	Scheduled Service	2018/08/07	Abigail Milne	Belinda Sharman	N	No	HOP001	Hope Works	289	289	1 865.1
2	SP240 New Deal.	2019/04/12	Theo Peterson	Abigail Milne	N	No	TIA001	Titan Group	41	41	0.0
2	Installation Project 1	2019/04/12	Abigail Milne	Belinda Sharman	N	No	HOP001	Hope Works	41	41	0.0
2	Installation Project 4	2019/04/12	Abigail Milne	Belinda Sharman	N	No	HOP001	Hope Works	41	41	0.0
2	Installation Project 5	2019/04/12	Abigail Milne	Belinda Sharman	N	No	HOP001	Hope Works	41	41	0.0

## VIEW A TICKET

1. Select a ticket.
2. The colour of the ticket will change to a **grey**.

*Either*

3. **Right click** on the selected row to display a **Process** menu.
4. Click on **Edit** - Edit Ticket.



Or

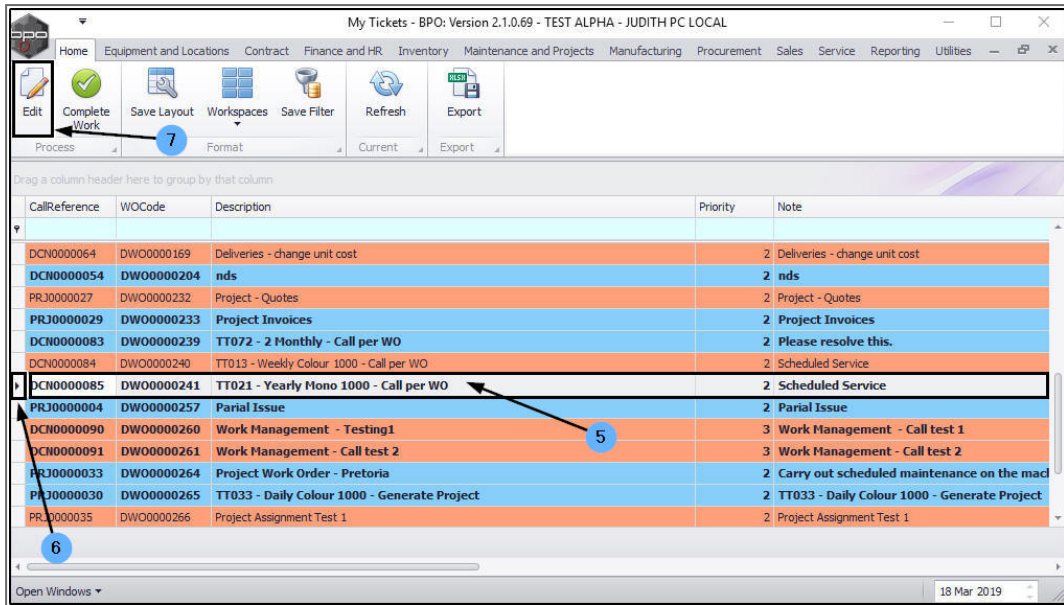
5. **double click** on the ticket row.

Or

6. Ensure that the correct row is selected.

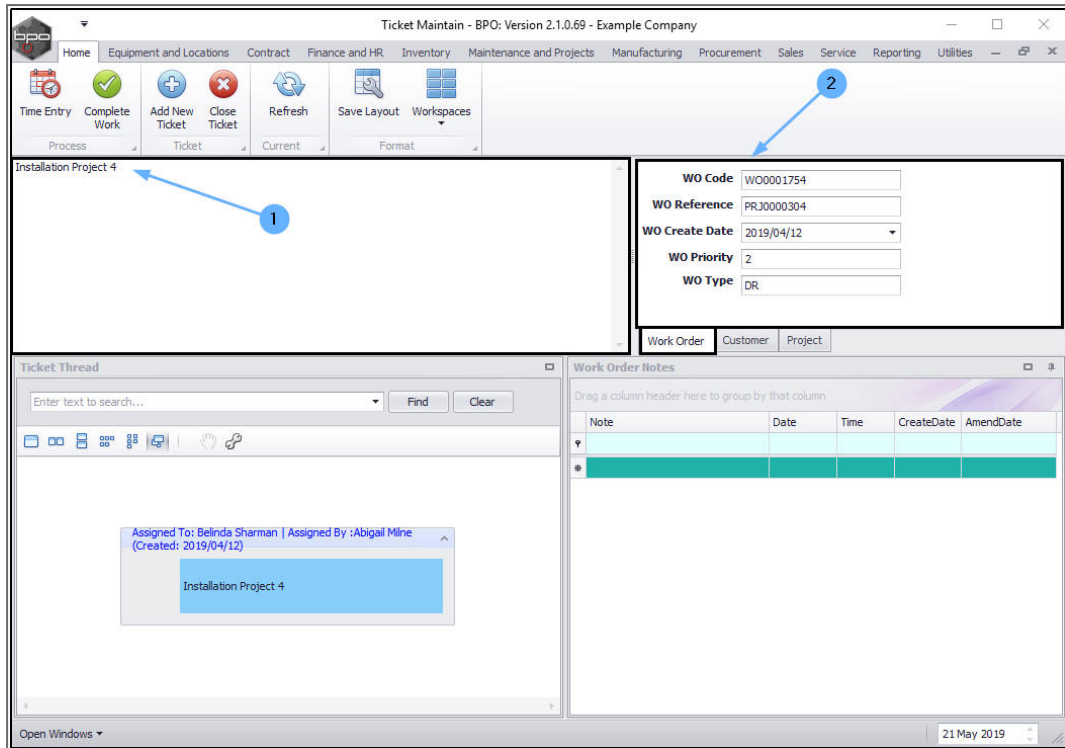
7. Click on **Edit**.

- In this image, **DCN0000085** has been selected.

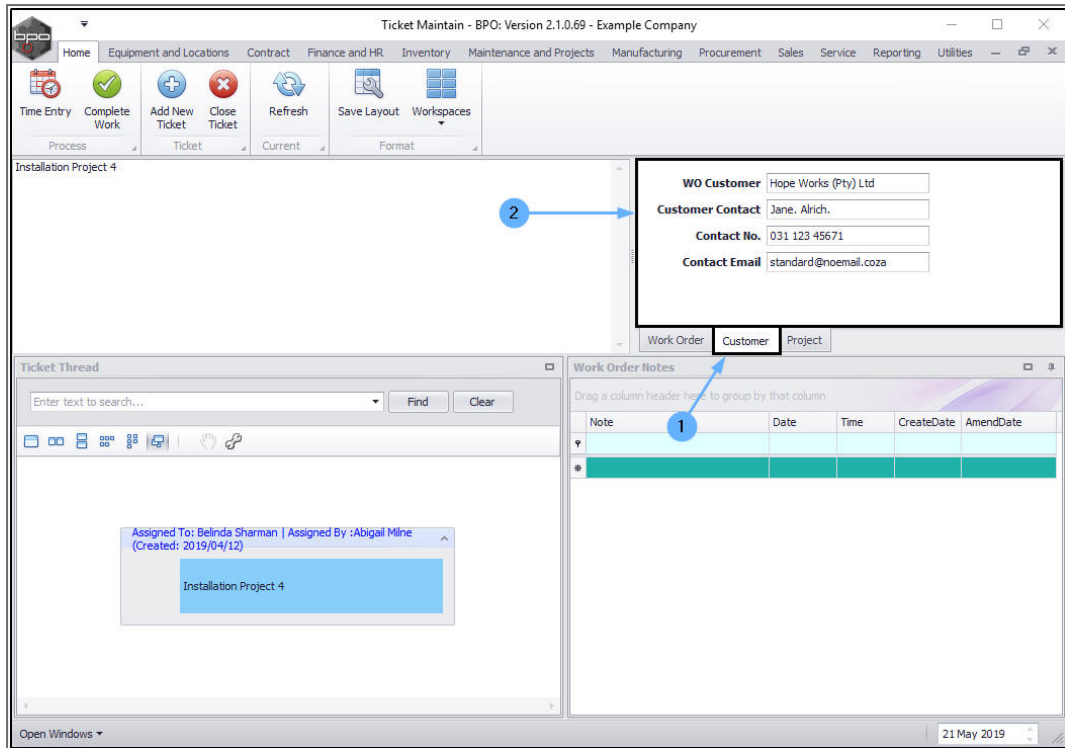


The **Ticket Maintain** screen will be displayed.

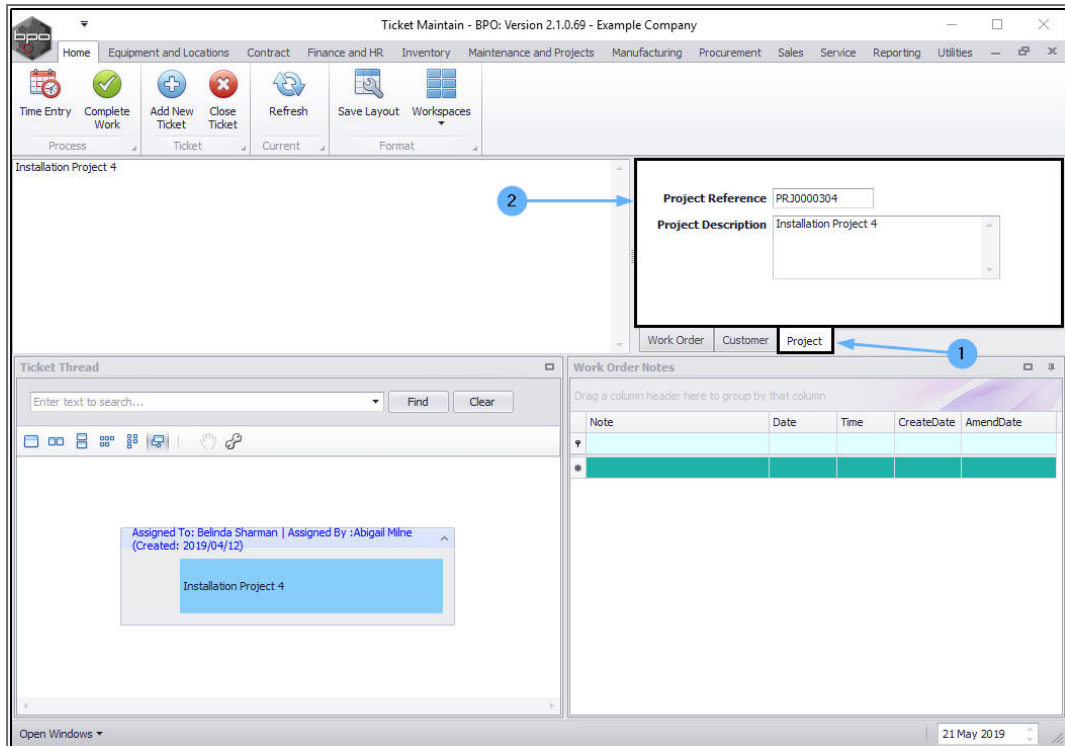
1. The **Work Order Description** can be viewed in the top left frame of this screen.
2. The **Work Order Details** (Code, Reference, Create Date, Priority and Type) can be viewed in the top right frame of this screen.



1. Click on the **Customer** tab.
2. If this work order is linked to a customer, the **Customer Details** (Name, Contact, Contact No, Contact Email) can be viewed.

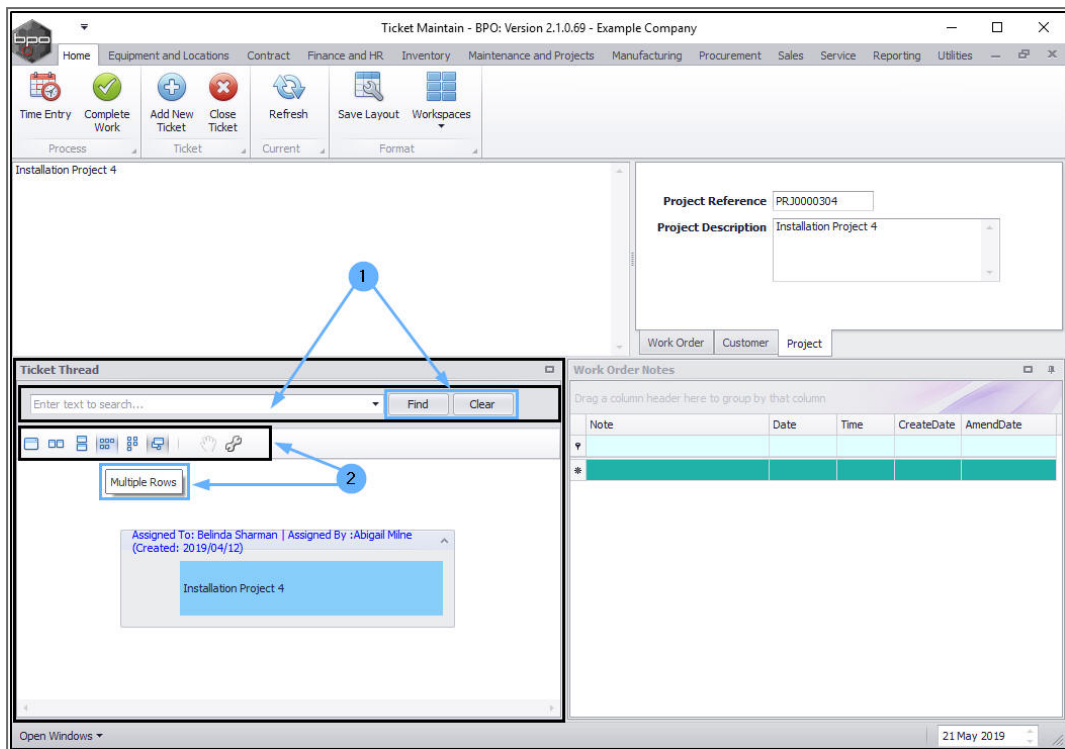


1. Click on the **Project** (or **Call**) tab.
2. If this work order is linked to a **Project** (as in this example) or a **Call**, the **Project** (or Call) **Details** (Reference No, Description) can be viewed here.

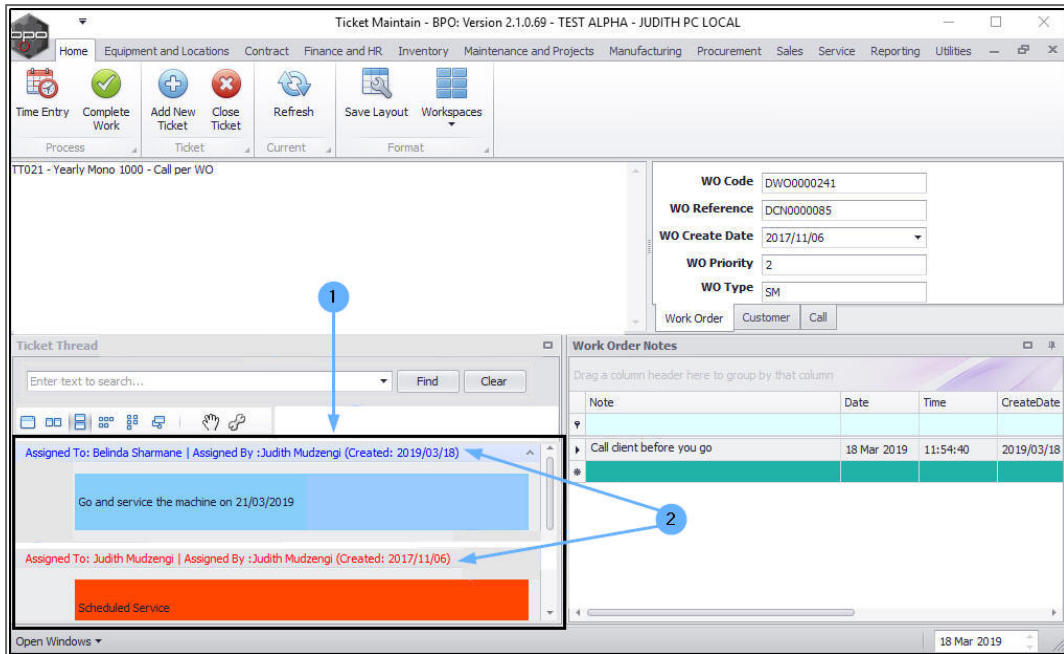


## THE TICKET THREAD FRAME

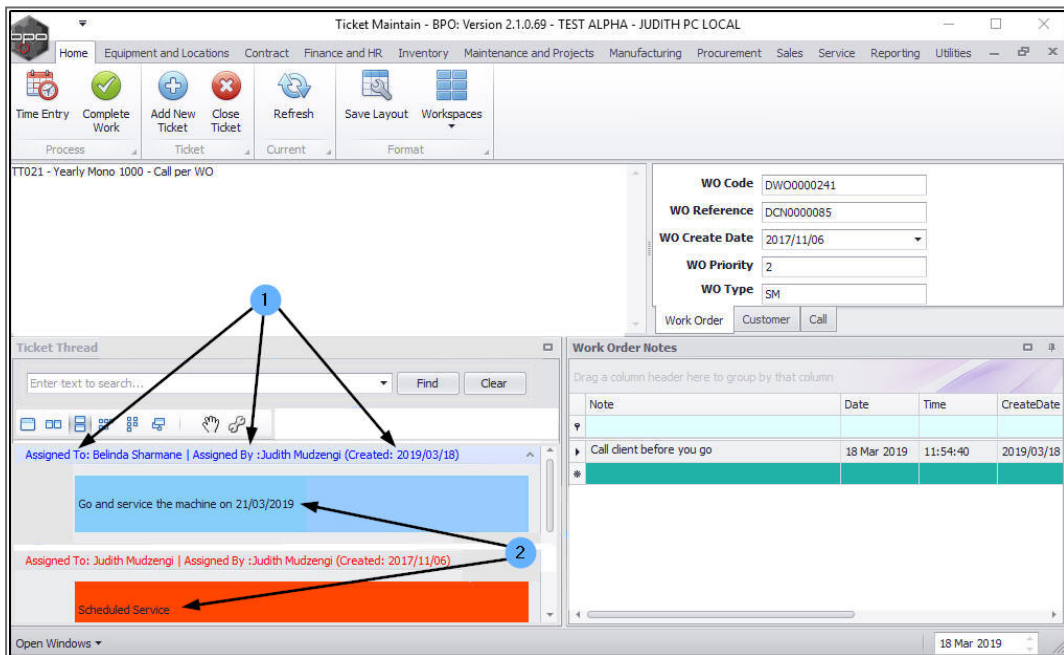
1. Use the ***Search field*** to search for any ticket in the ticket thread.
  - Type in the text box and click on ***Find***.
  - To clear the search, click on ***Clear***.
2. The ***Customization toolbar*** contains icons which will adjust the view layout of the ticket thread. For example, you can view the thread in One row, Multiple Columns or Carousel Mode.
  - If you ***hover*** any icon, the ***icon description*** will pop up.



1. All tickets linked to the selected work order are displayed in this frame.
2. The tickets are in inverse chronological order. The most recently created ticket will be at the top of the list.

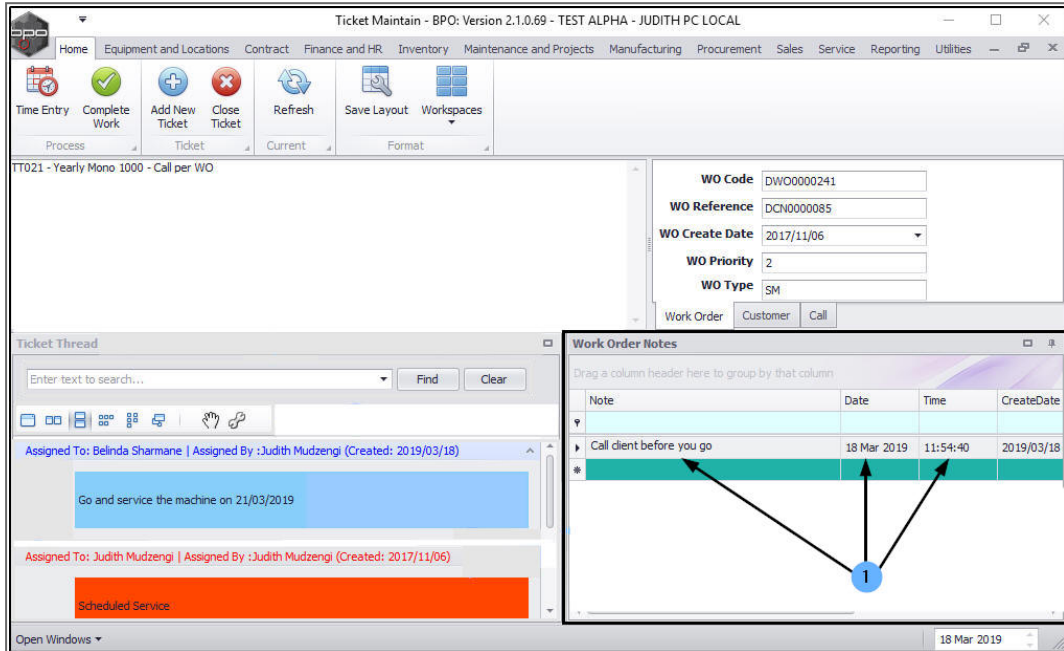


1. **Assignment Details:** In this frame, you can see the *assignor*, *assignee* and the *date* the ticket was created.
2. **Comments :** You can also view the ticket *comments* relating to the work order.



## THE WORK ORDER NOTES FRAME

- Here you can view the work order *notes* with the *date* and *time* they were created.



## ASSIGN A TICKET

- Select the ticket that you wish to assign to another person.
- Click on *Edit*
  - In this image, *DCN0000029* is selected.

My Tickets - BPO: Version 2.1.0.69 - TEST ALPHA - JUDITH PC LOCAL

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

Edit Complete Work Save Layout Workspaces Save Filter Refresh Export

Process Format Current Export

Drag a column header here to group by that column

CallReference	WOCode	Description	Priority	Note
PRJ0000002	DW0000004	1234	2	1234
DCN0000029	DW0000064	TT002 - Weekly - Call per WO	2	test 2
DCN0000031	DW0000066	TT002 - Weekly - Call per WO	2	Scheduled Service
DCN0000032	DW0000067	TT002 - Weekly - Call per WO	2	Scheduled Service
DCN0000040	DW0000089	TT002 - Weekly - Call per WO	2	Needed today
DCN0000020	DW0000106	asset on contract- return	2	asset on contract- return
DCN0000038	DW0000107	TT008 - Mono 1000, Colour 1000 - Call per WO	2	TT008 - Mono 1000, Colour 1000 - Call per WO
DCN0000037	DW0000108	TT009 - Daily, Mono 1000 - Call per WO	2	TT009 - Daily, Mono 1000 - Call per WO
DCN0000030	DW0000109	TT002 - Weekly - Call per WO	2	TT002 - Weekly - Call per WO
DCN0000033	DW0000110	TT003 - Monthly - Call per WO	2	TT003 - Monthly - Call per WO
DCN0000051	DW0000133	3MS - 3 Month Service	2	Scheduled Service
DCN0000053	DW0000138	ndr 1	2	ndr 1
DCN0000054	DW0000140	nds	2	nds
DCN0000057	DW0000149	ndrmg	2	ndrmg
DCN0000058	DW0000150	ndrsa	2	ndrsa

Open Windows 18 Mar 2019

- The **Ticket Maintain** screen will be displayed.
- Click on **Add New Ticket**.

Ticket Maintain - BPO: Version 2.1.0.69 - TEST ALPHA - JUDITH PC LOCAL

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

Time Entry Complete Work Add New Ticket Close Ticket Refresh Save Layout Workspaces

Process Ticket Current Format

TT002 - Weekly - Call per WO

WO Code: DW0000064  
 WO Reference: DCN0000029  
 WO Create Date: 2017/06/14  
 WO Priority: 2  
 WO Type: SM

Work Order Customer Call

Ticket Thread

Enter text to search... Find Clear

Assigned To: Judith Mudzengi | Assigned By: Judith Mudzengi (Created: 2018/10/08)

test 2

Assigned To: Judith Mudzengi | Assigned By: Judith Mudzengi (Created: 2017/07/12)

Scheduled Service

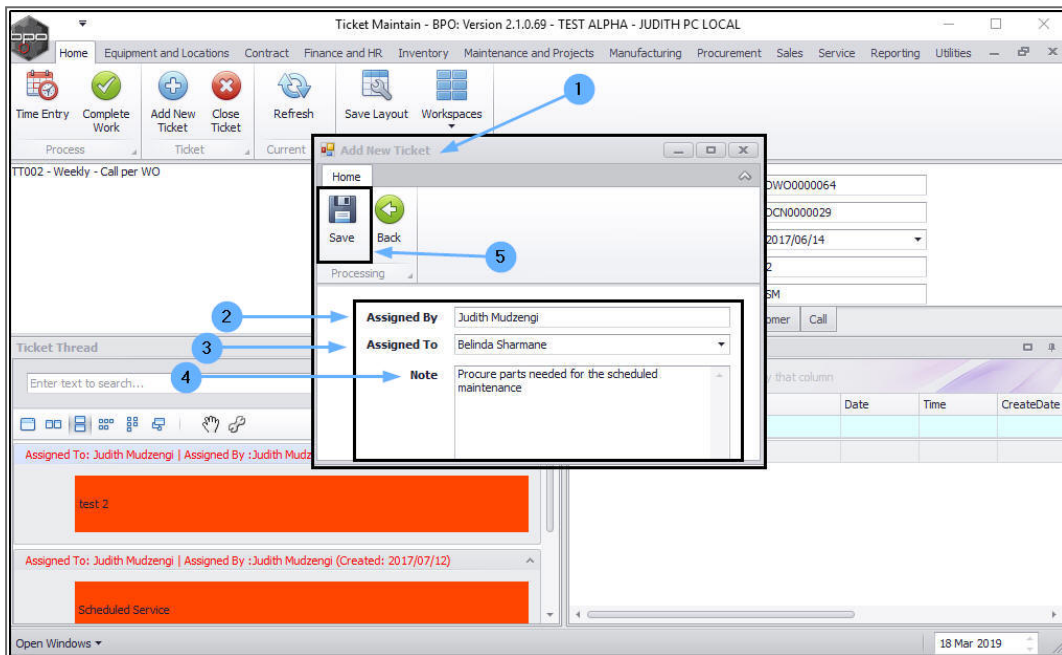
Work Order Notes

Drag a column header here to group by that column

Note	Date	Time	CreateDate

Open Windows 18 Mar 2019

1. The **Add New Ticket** pop up screen will appear.
2. **Assigned by:** This will auto-populate with the name of the user currently logged onto the system.
3. **Assigned To:** Click on the drop-down arrow and select from the list, the person you wish to assign the ticket to.
4. **Note:** Type in notes or instructions you wish to relay to the person you are assigning the ticket to.
5. Click on **Save**.



The **Add New Ticket** screen and **Ticket Maintain** screen will close and you will return to the **My Tickets** screen.

- The ticket that you assigned will no longer be displayed in the list.
- A new ticket has been created and displayed with status **N** - New.

My Tickets - BPO: Version 2.1.0.69 - TEST ALPHA - JUDITH PC LOCAL

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

Edit | Complete Work | Save Layout | Workspaces | Save Filter | Refresh | Export

Process | Format | Current | Export

Drag a column header here to group by that column

CallReference	WCode	Description	Priority	Note	Status
PRJ0000002	DW0000004	1234	2	1234	N
DCN0000029	DW0000064	TT002 - Weekly - Call per WO	2	Procure parts needed for the scheduled maintenance	N
DCN0000031	DW0000066	TT002 - Weekly - Call per WO	2	Scheduled Service	N
DCN0000032	DW0000067	TT002 - Weekly - Call per WO	2	Scheduled Service	N
DCN0000040	DW0000089	TT002 - Weekly - Call per WO	2	Needed today	N
DCN0000020	DW0000106	asset on contract- return	2	asset on contract- return	N
DCN0000038	DW0000107	TT008 - Mono 1000, Colour 1000 - Call per WO	2	TT008 - Mono 1000, Colour 1000 - Call per WO	N
DCN0000037	DW0000108	TT009 - Daily, Mono 1000 - Call per WO	2	TT009 - Daily, Mono 1000 - Call per WO	N
DCN0000030	DW0000109	TT002 - Weekly - Call per WO	2	TT002 - Weekly - Call per WO	N
DCN0000033	DW0000110	TT003 - Monthly - Call per WO	2	TT003 - Monthly - Call per WO	N
DCN0000051	DW0000133	3MS - 3 Month Service	2	Scheduled Service	N
DCN0000053	DW0000138	ndr1	2	ndr1	N
DCN0000054	DW0000140	nds	2	nds	N
DCN0000057	DW0000149	ndrmg	2	ndrmg	N
DCN0000058	DW0000150	ndrsa	2	ndrsa	N

Open Windows | 18 Mar 2019

## ADD WORK ORDER NOTES

- Select the ticket you wish to add work order notes to.
- Click on **Edit**.
  - In this image, **DCN0000040** was selected.

My Tickets - BPO: Version 2.1.0.69 - TEST ALPHA - JUDITH PC LOCAL

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

Edit | Complete Work | Save Layout | Workspaces | Save Filter | Refresh | Export

Process | Format | Current | Export

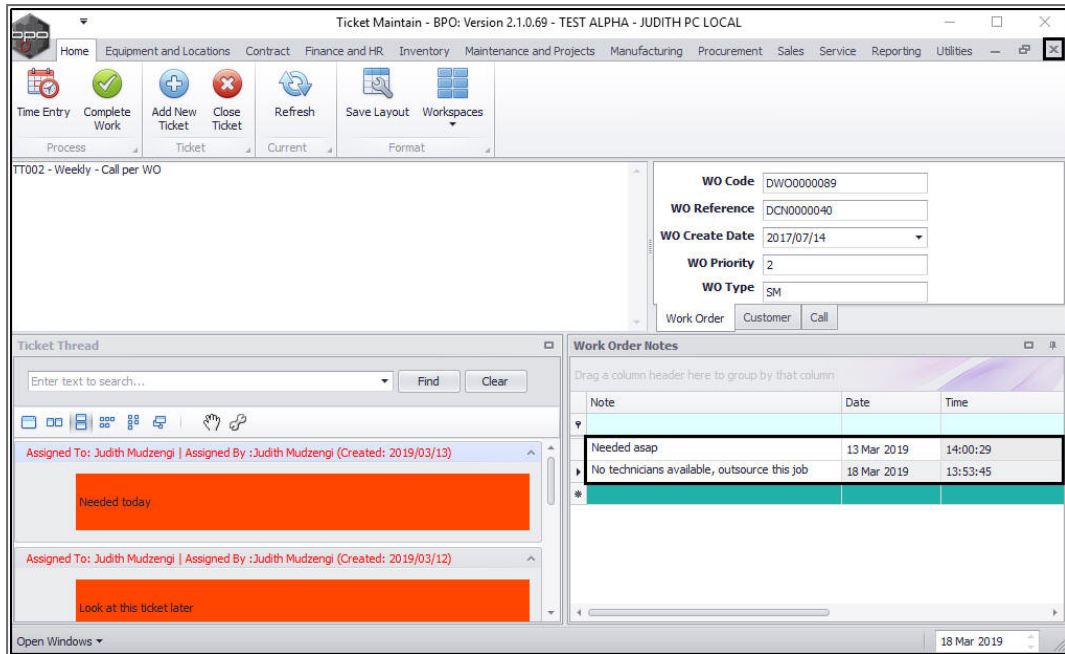
Drag a column header here to group by that column

CallReference	WOCode	Description	Priority	Note	Status
PRJ0000002	DW0000004	1234	2	1234	N
DCN0000029	DW0000064	TT002 - Weekly - Call per WO	2	Procure parts needed for the scheduled maintenance	N
DCN0000031	DW0000066	TT002 - Weekly - Call per WO	2	Scheduled Service	N
DCN0000032	DW0000067	TT002 - Weekly - Call per WO	2	Scheduled Service	N
DCN0000040	DW0000089	TT002 - Weekly - Call per WO	2	Needed today	N
DCN0000020	DW0000106	asset on contract- return	2	asset on contract- return	N
DCN0000038	DW0000107	TT008 - Mono 1000, Colour 1000 - Call per WO	2	TT008 - Mono 1000, Colour 1000 - Call per WO	N
DCN0000037	DW0000108	TT009 - Daily, Mono 1000 - Call per WO	2	TT009 - Daily, Mono 1000 - Call per WO	N
DCN0000030	DW0000109	TT002 - Weekly - Call per WO	2	TT002 - Weekly - Call per WO	N
DCN0000033	DW0000110	TT003 - Monthly - Call per WO	2	TT003 - Monthly - Call per WO	N
DCN0000051	DW0000133	3MS - 3 Month Service	2	Scheduled Service	N
DCN0000053	DW0000138	ndr 1	2	ndr 1	N
DCN0000054	DW0000140	nds	2	nds	N
DCN0000057	DW0000149	ndrmg	2	ndrmg	N
DCN0000058	DW0000150	ndrsa	2	ndrsa	N

Open Windows | 18 Mar 2019

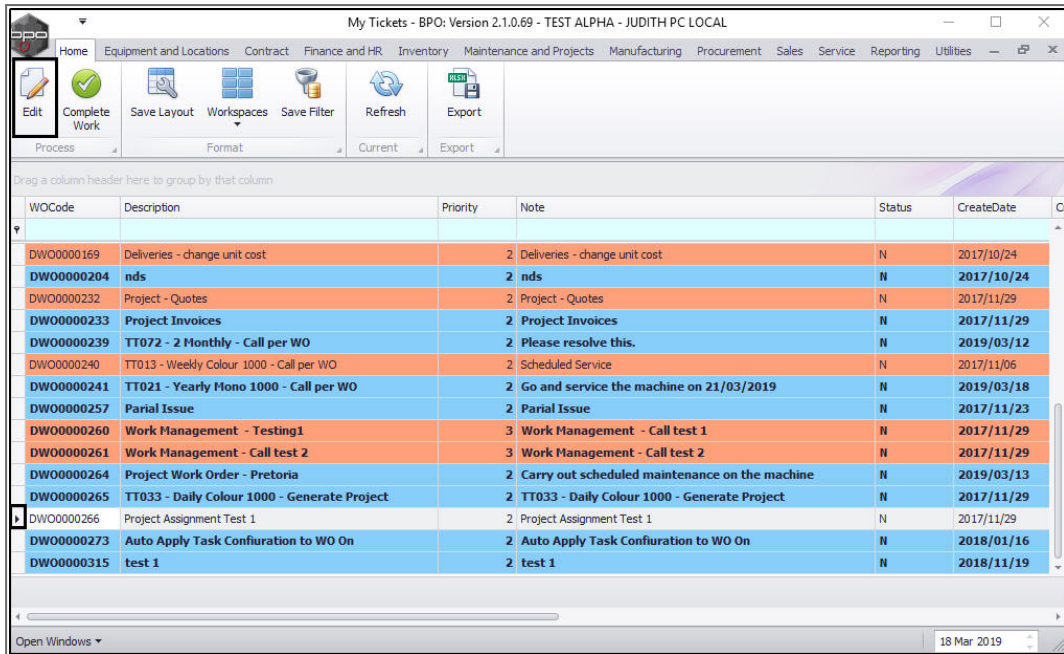
The **Ticket Maintain** screen will be displayed.

- Type in a relevant note in the **Note** column.
- All the other fields in this frame will auto populate.
- Click on **Enter** on the keyboard, type in the next note if required. You can add multiple notes.
- When you are done typing in the notes, click on **Close** to exit the screen.



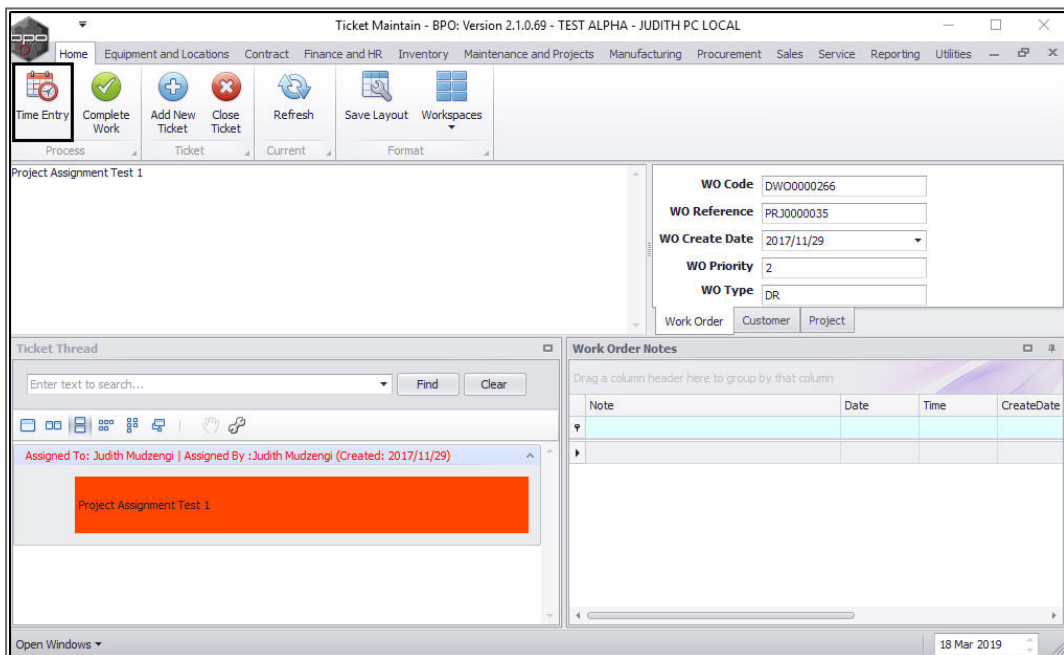
## TIME BOOKING

- The system will log your time as you work based on you **Starting** and **Ending** work.
- Select the ticket you want to book time for.
- Click on **Edit**
  - In this image, **DWO0000266** was selected.



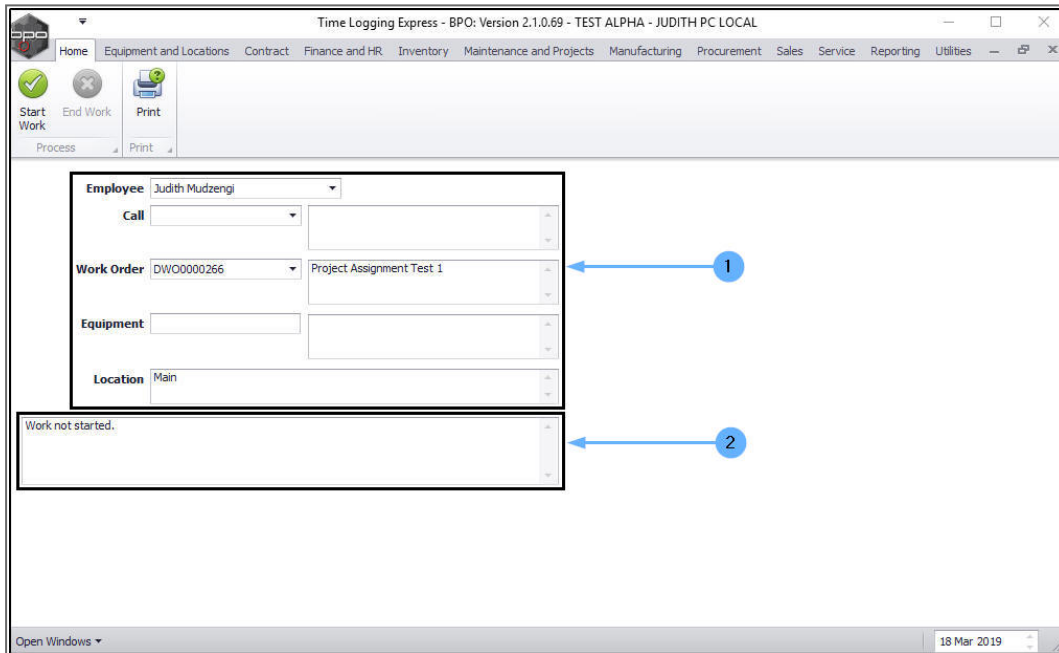
The **Ticket Maintain** screen will be displayed.

- Click on **Time Entry**.



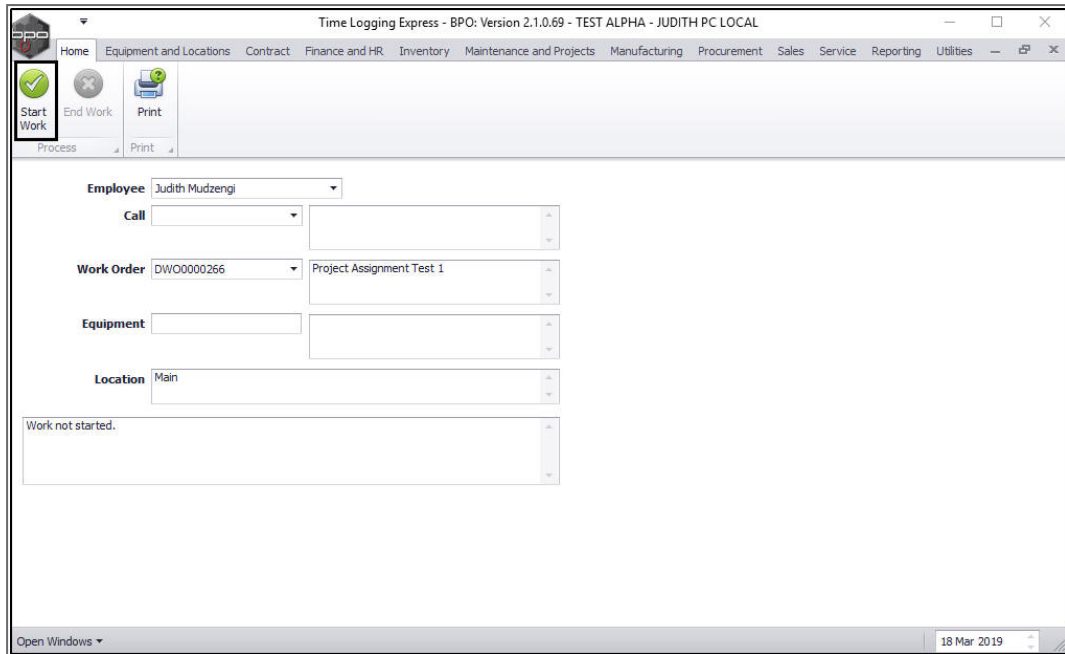
The **Time Logging Express** screen will be displayed.

1. **Employee** : This will auto populate with the person currently logged on to the system.
  - **Call** : This will auto populate with the *call number* and *description* if the work order is linked to a call.
  - **Work Order** : This will auto populate with the *work order number* and *description*.
  - **Equipment** : This will auto populate with the *serial number* and *description* if a machine is linked to the work order.
  - **Location** : This will auto populate with the *location* if a *functional location* is linked to the work order.
2. **Status**: The final field in this frame will contain a brief description of the *status* of the work e.g. 'Work not started'.

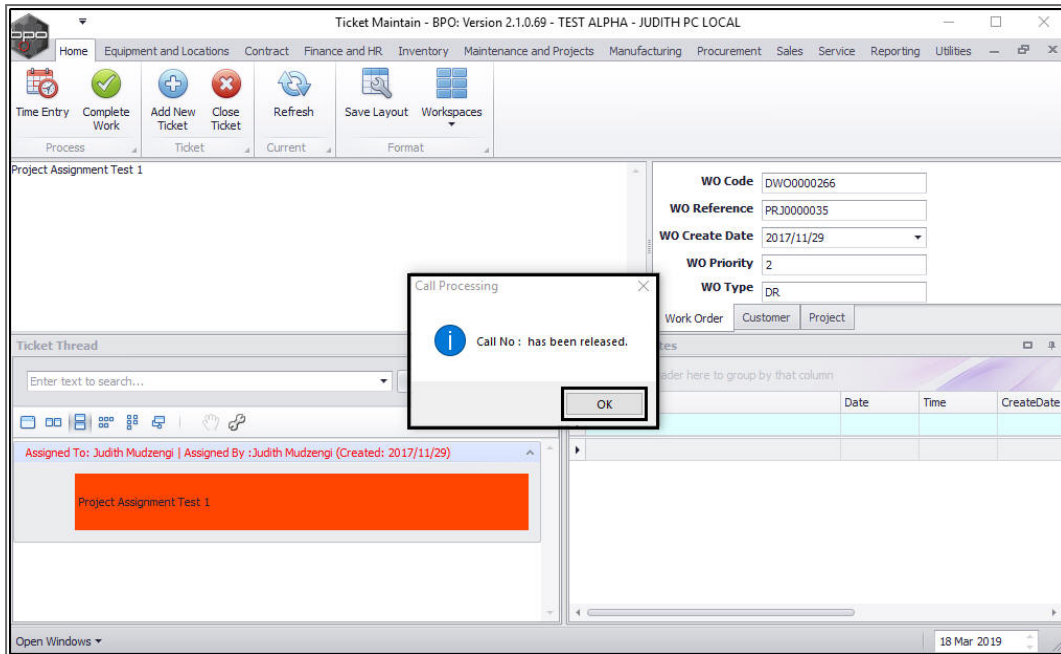


## START WORK

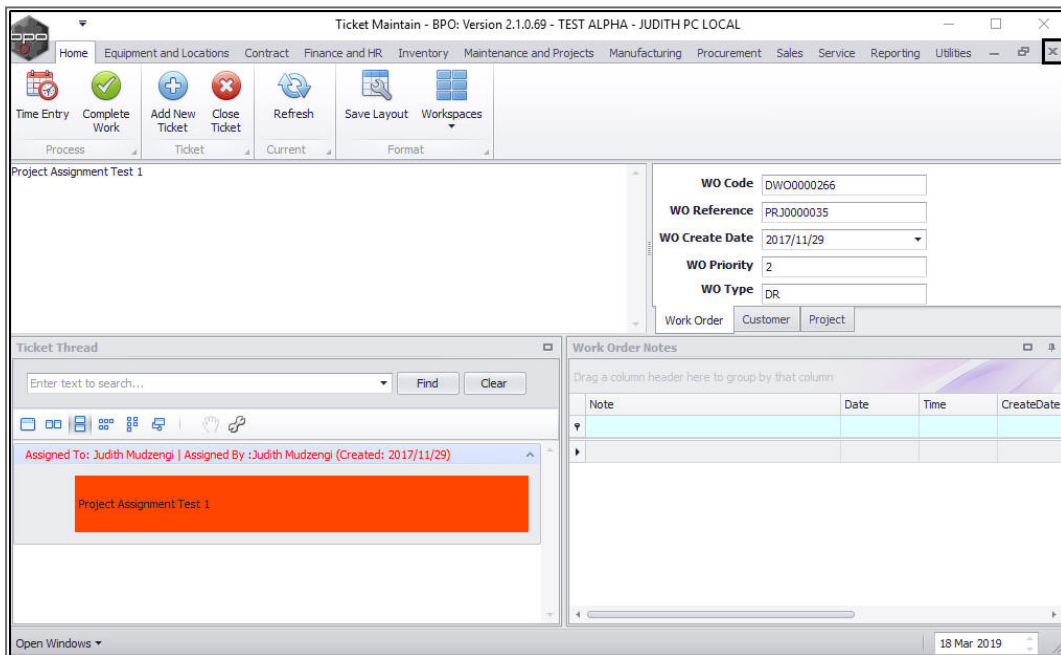
- Click on **Start Work**.



- The ***Time Logging Express*** screen will close and you will return to the ***Ticket Maintain*** screen.
- A ***Call Processing*** message box will pop up informing you that;
  - ***Call No: [ ] has been released.***
- Click on ***Ok.***

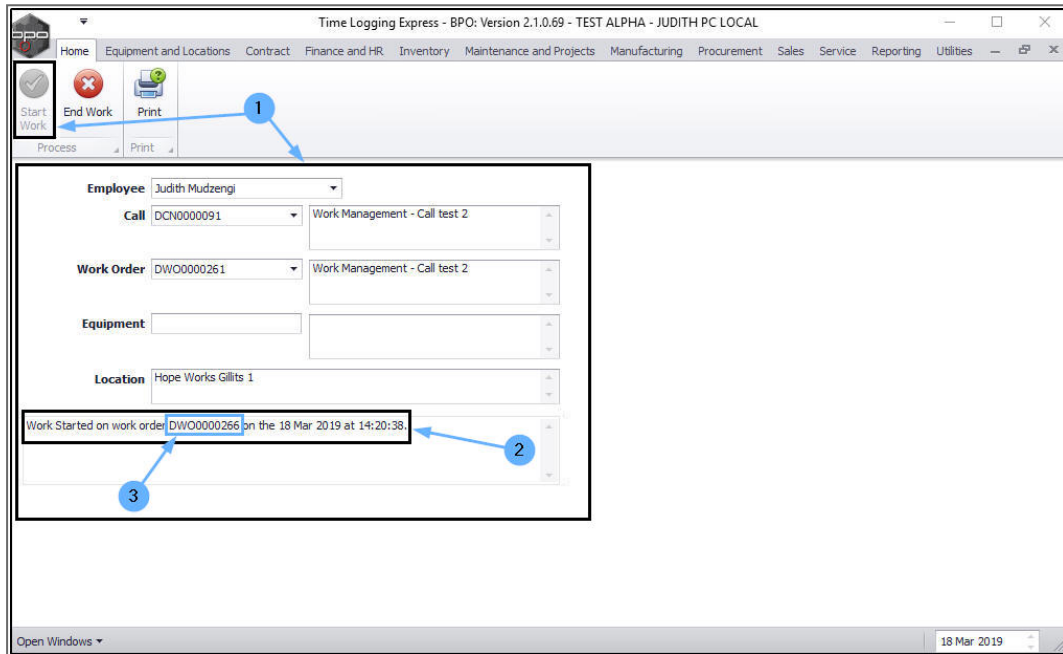


- The **Call Processing** message will close.
- Exit the **Ticket Maintain** screen.



**Important Note:** You cannot **start work** on a new ticket before **ending work** on the previous ticket.

1. Although details of the current ticket will be displayed in the **Time Logging Express** screen, the **Start Work** button will be **Inactive** (grey).
2. The **work status** of the previous ticket will be displayed.
3. Take note of the **work order number**, close this screen and follow the process to **end work** on the previous ticket.

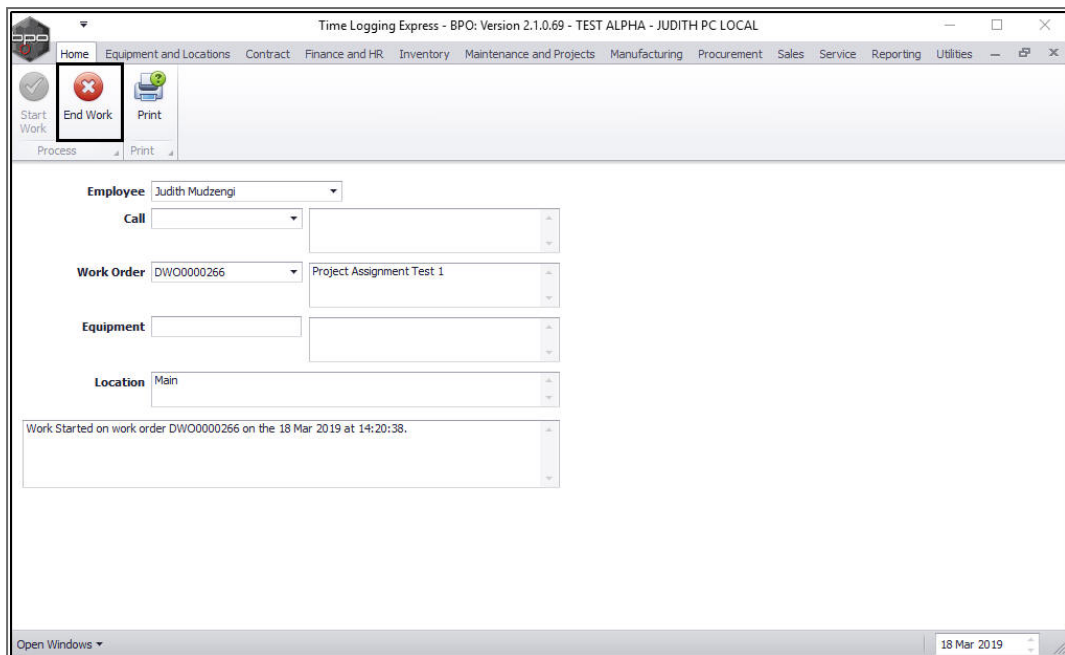


## END WORK

If you need to stop the current work, use this **End Work** option. This will book your time for the current work. Remember to type in a **note** regarding what work was done during this time.

If the work is done, then use the **Complete Work** process.

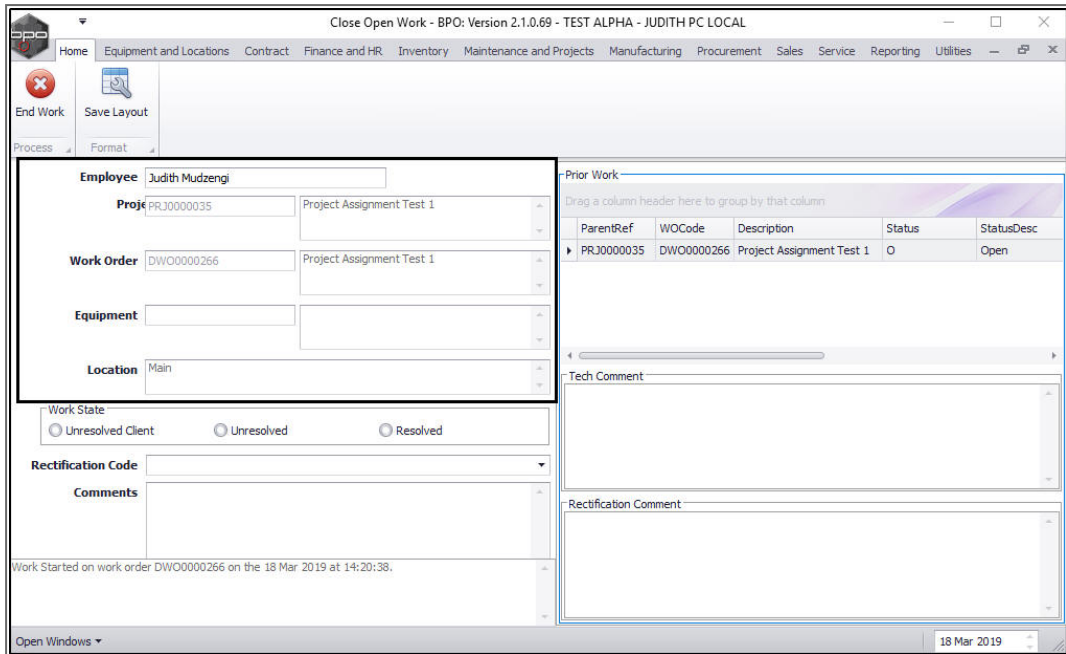
- Click on **End Work**.



The *Close Open Work* screen will be displayed.

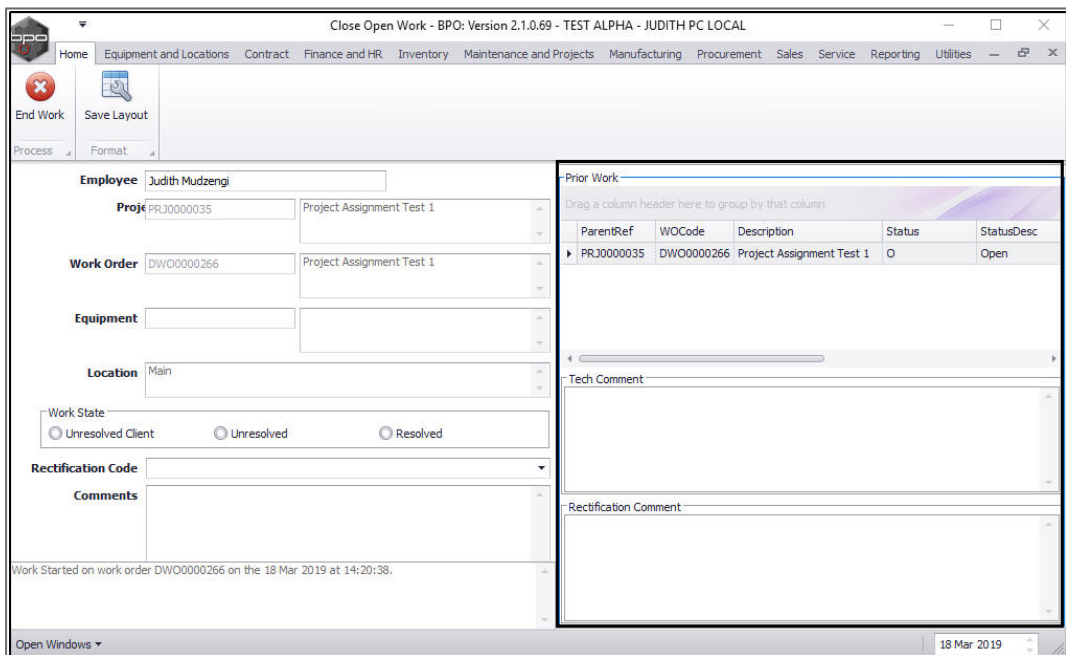
## TICKET DETAILS:

- **Employee** : This will auto populated with the person logged on to the system.
- **Call or Project** : This will auto populate with the **Call** or **Project number** and **description** if the work order is linked to a **Call** or **Project**.
- **Work Order** : This will auto populate with the **work order number** and **description**.
- **Equipment** : This will auto populate with the **serial number** and **description** if a **machine** is linked to the work order.
- **Location** : This will auto populate with the **location** if a **functional location** is linked to the work order.



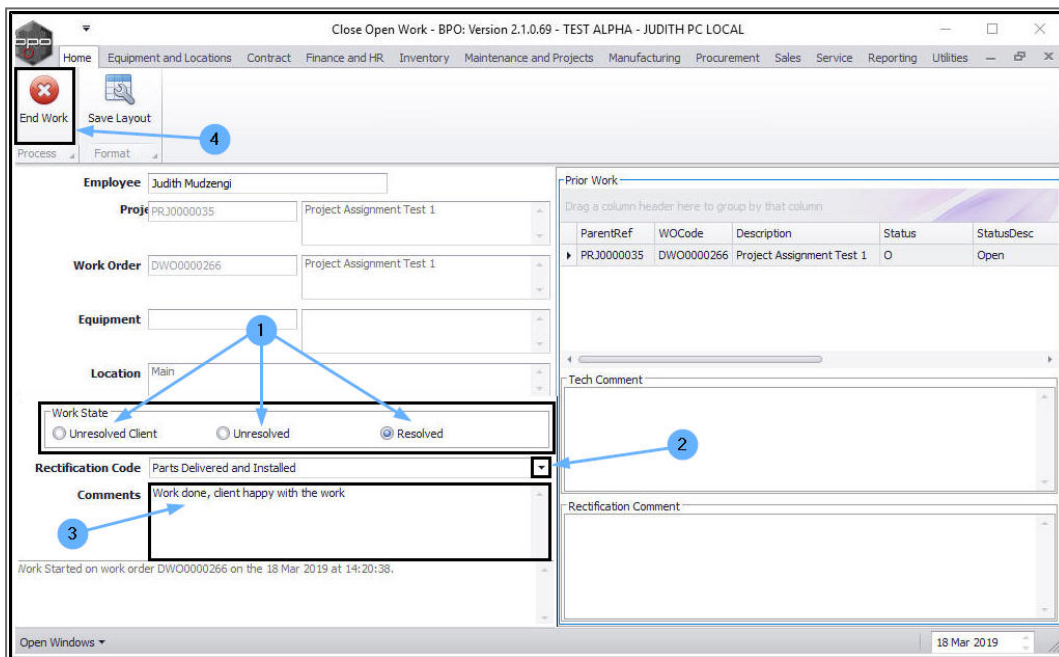
## PRIOR WORK

- This section shows you prior work done and the comments logged against this work.



## WORK STATE AND RESOLUTION ACTIONS

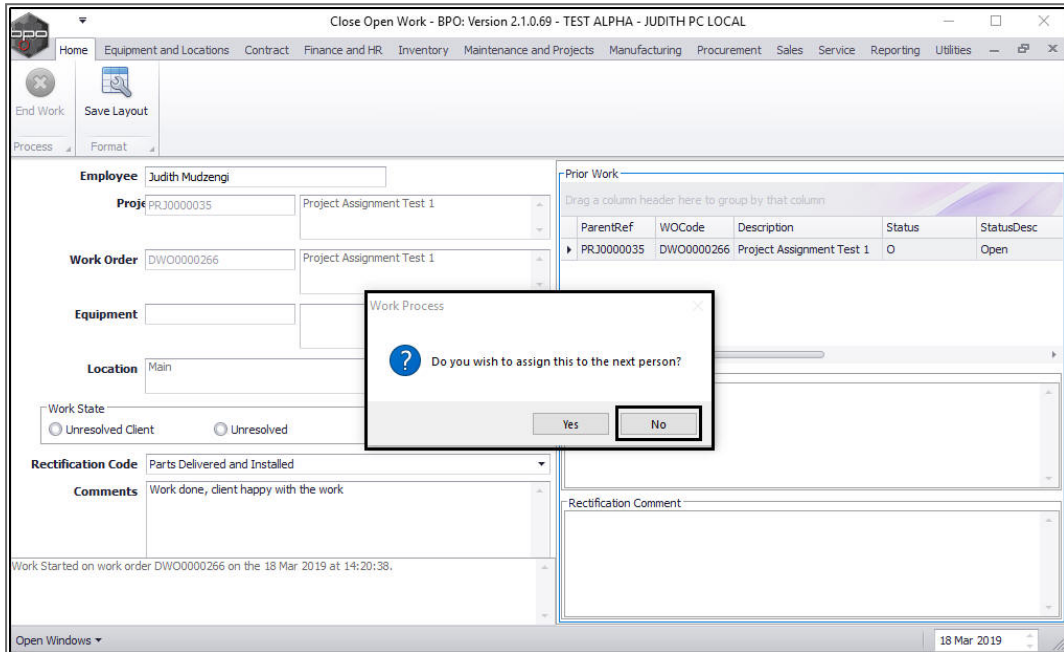
1. Select one of the 3 listed *Work States*.
  - **Unresolved (Client)** - once processed, this call will move to on *Hold*.
  - **Unresolved** - once processed, this call will move to *Pending*.
  - **Resolved** - once processed, this call will move to *Complete*.
2. Click on the *down arrow* in the *Rectification Code* field and select from the drop-down menu, the appropriate *Rectification Code*, e.g. 'Replaced Components', 'Parts Delivered and Installed', 'Fixed Machine' etc.
3. Type in a relevant *Comment(s)*.
4. Click on *End Work*.



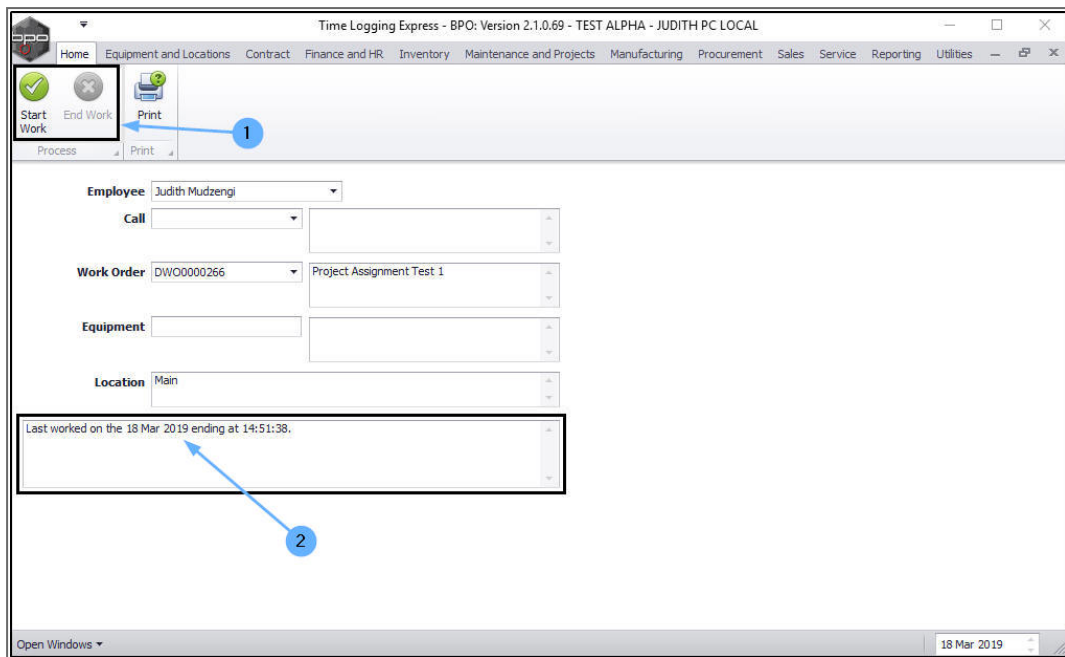
You now need to decide whether to **end the work without assigning any work to the next person** or whether to **end the work and assign it to the next person**.

## END WORK WITHOUT ASSIGNING TO THE NEXT PERSON

- A **Work Process** message will be displayed asking you;
  - **Do you wish to assign this to the next person?**
- Click on **No**.



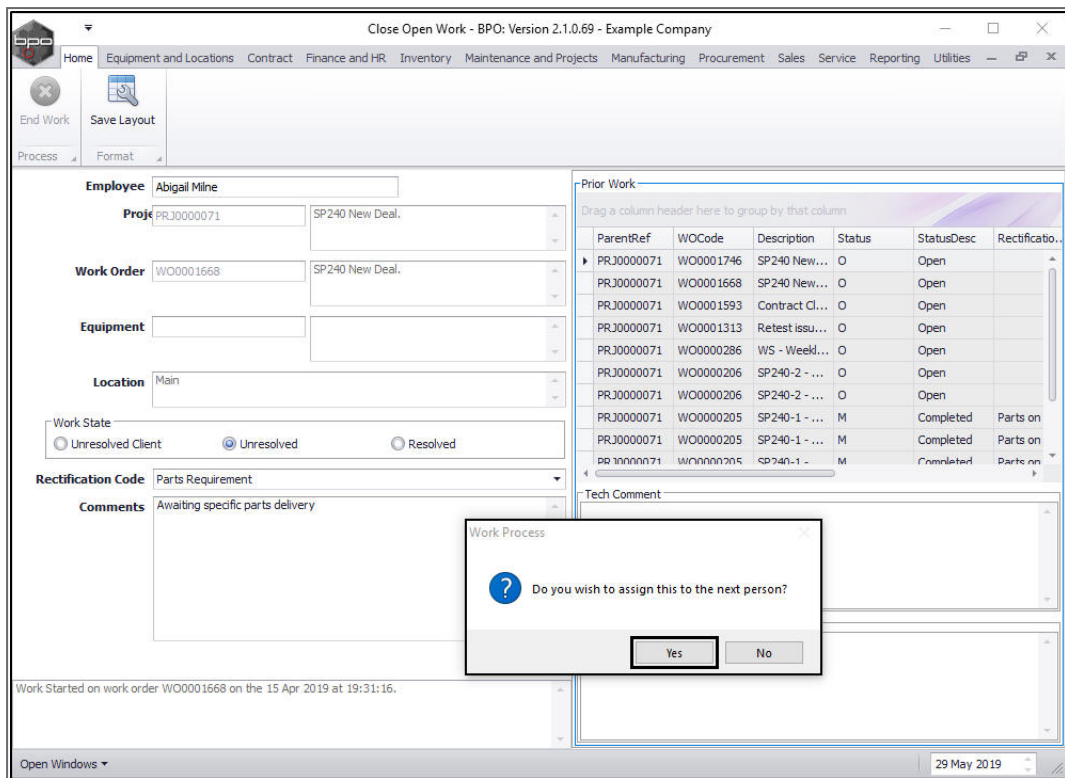
- The **Close Open Work Screen** will close.
  - The **Time Logging Express Screen** will be displayed.
1. **Note 1:** In this example, the **End Work** button is now inactive (greyed out). However, sometimes the **Start Work** button will be greyed out while the **End Work** button is not.
  2. **Note 2:** In this example, the work status description notes that work was ended. However, sometimes the work status message will display as **Work started on work order [ ] on the [ ]** - even if work has been ended.



## END WORK AND ASSIGN TO THE NEXT PERSON

In the *Close Open Work* screen.

- A **Work Process** message will be displayed;
  - **Do you wish to assign this to the next person?**
- Click on **Yes**.



The **Project (or Call) Assignment** screen will be displayed.

- **Assigned To:** Click on the drop-down arrow in this field.

Project Assignment : Reference No. : PRJ0000071 - BPO: Version 2.1.0.69 - Example Company

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

Save | Back | Save Layout

Process | Format

Assigned To

Detail SP240 New Deal.

Assignment Date 30 May 2019 12:10:33

Assigned By Abigail Milne

Functional Location  Equipment

Item Main

Location Main

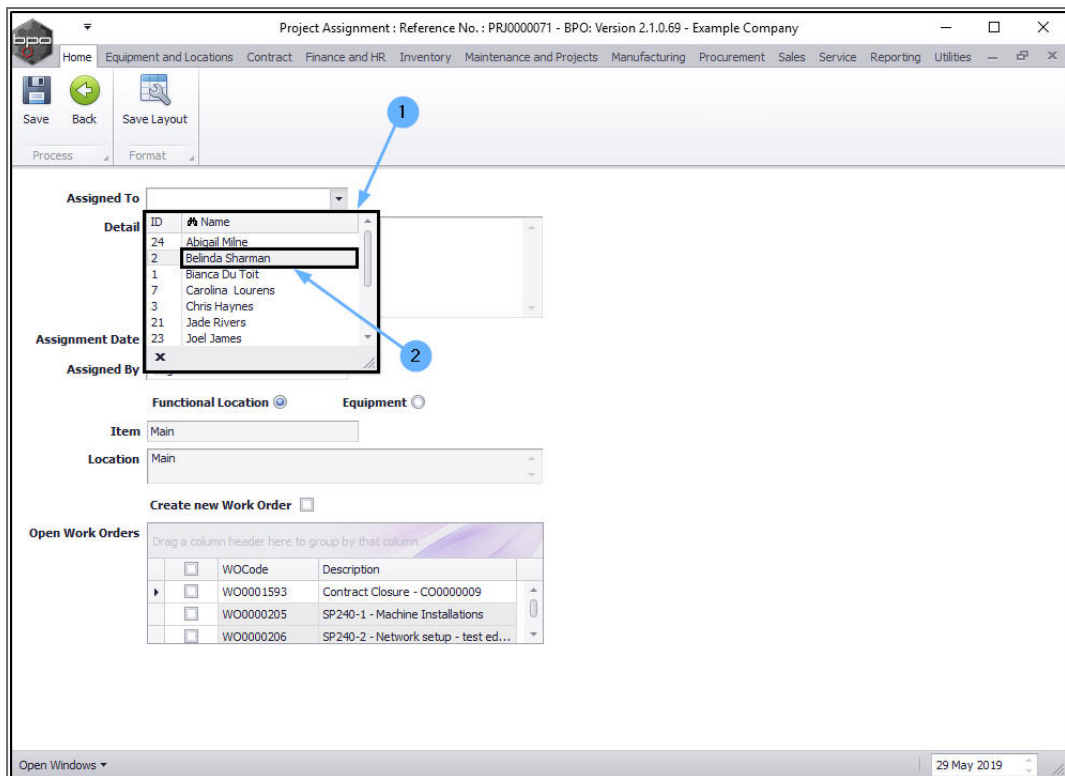
Create new Work Order

Open Work Orders

Drag a column header here to group by that column	
<input type="checkbox"/>	WOCCode Description
<input checked="" type="checkbox"/>	WO0001593 Contract Closure - CO0000009
<input type="checkbox"/>	WO0000205 SP240-1 - Machine Installations
<input type="checkbox"/>	WO0000206 SP240-2 - Network setup - test ed...

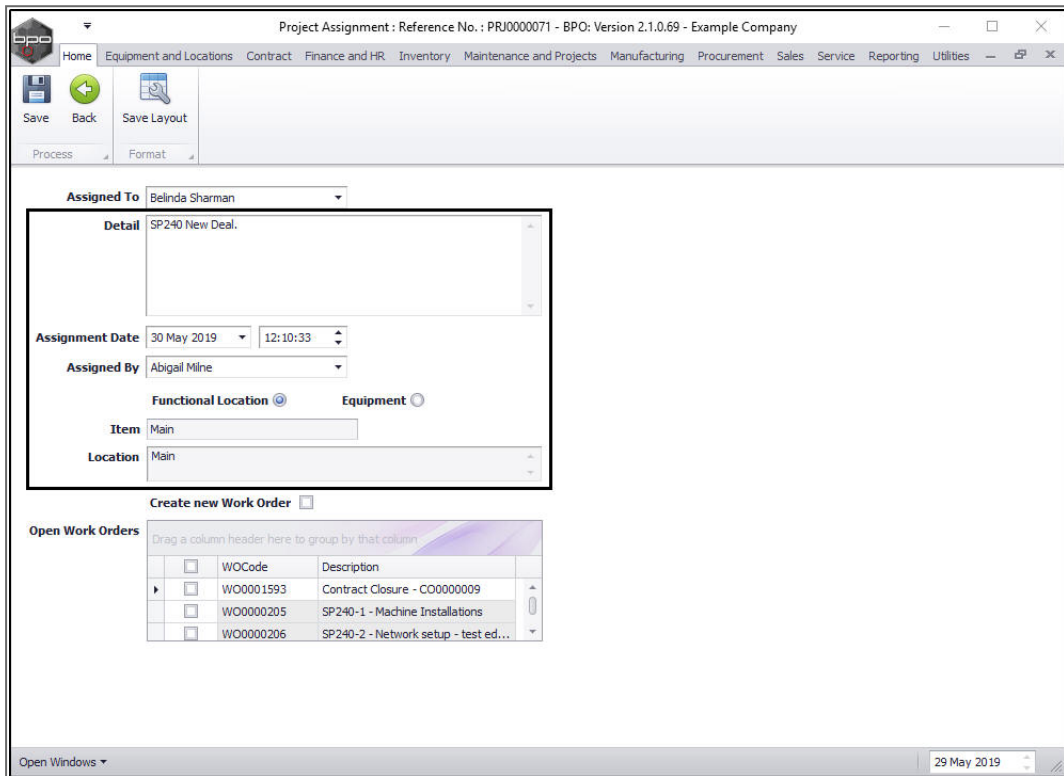
Open Windows | 29 May 2019

1. The **Name** menu will be displayed.
2. Select from this list, the **person** you wish to assign this to.



- **Detail:** This will auto populate but you can edit the text, if required.
- **Assignment Date:** This will auto populate with the current date and time.
  - **Date:** You can either type in or click on the drop-down arrow and use the calendar function to select an alternative date, if required.
  - **Time:** You can either type in or use the directional arrows to select an alternative time, if required.
- **Assigned By:** This will auto populate with the person currently logged on to the system but you can click on the drop-down arrow and select an alternative person, if required.

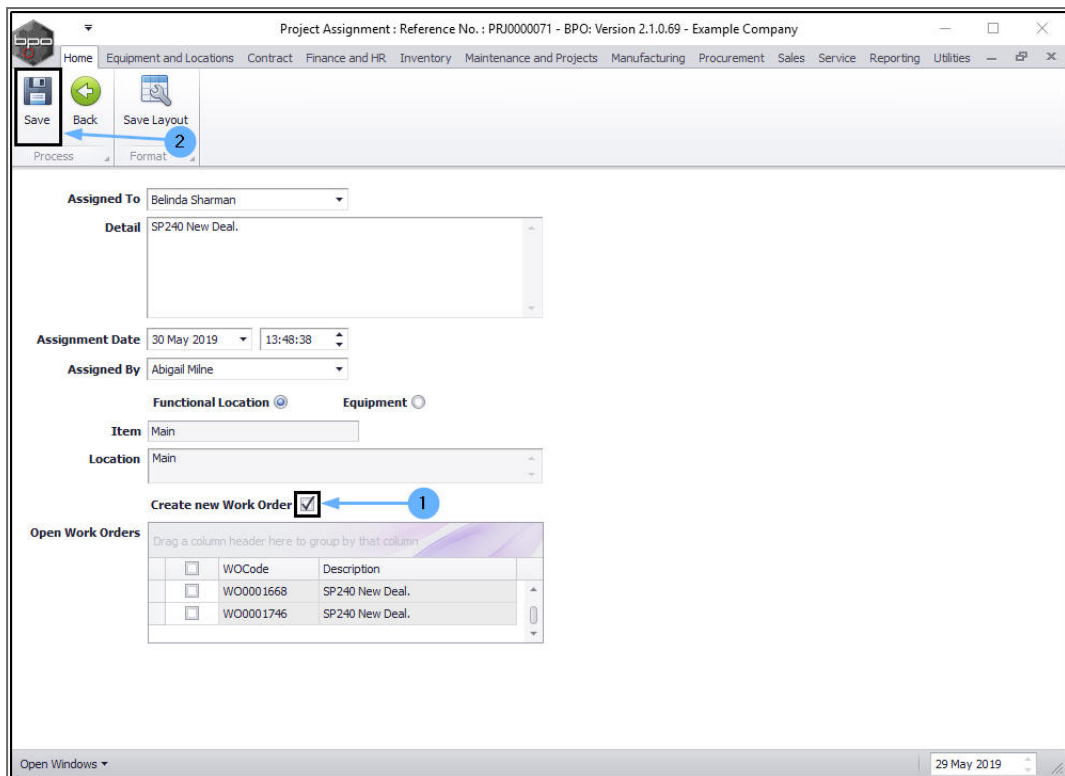
- **Functional Location** or **Equipment**: This will populate depending on whether the call, project or work order selected, is linked to a location or a machine.
- **Item** and **Location**: This will populate depending on whether the call, project or work order selected, is linked to a location or a machine.



You now need to decide whether to **create a new work order** or whether to **select an existing open work order**.

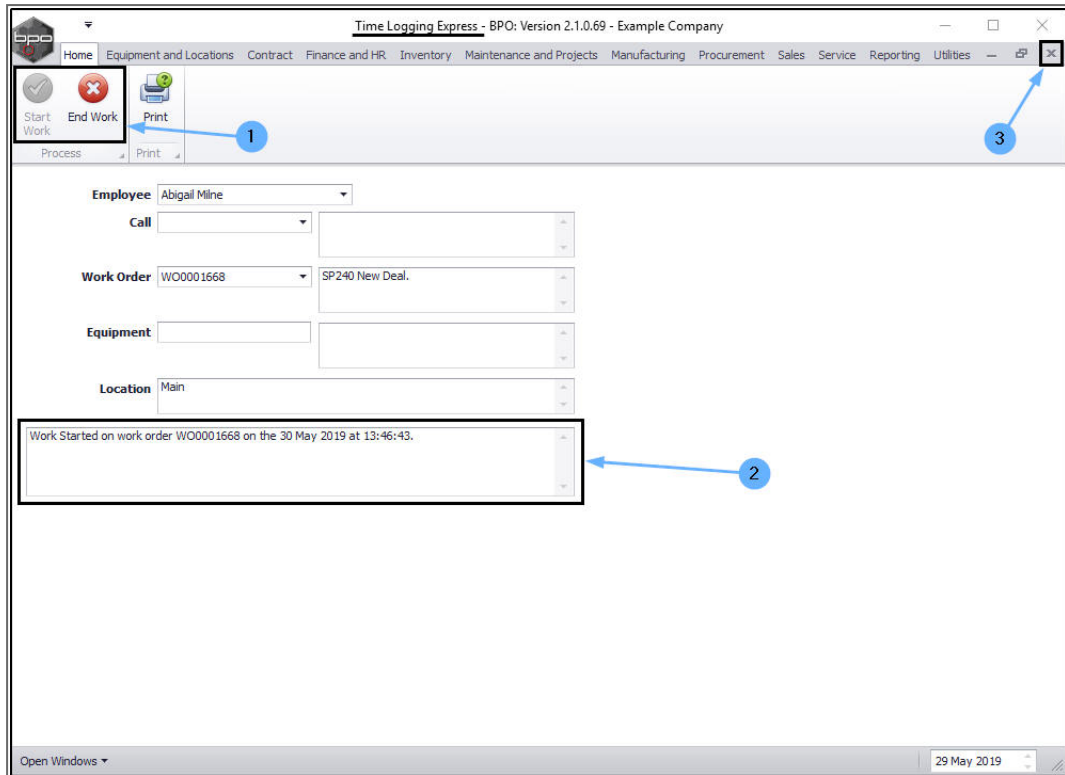
## CREATE NEW WORK ORDER

1. Tick the **Create new Work Order** check box to create a **new** work order that you will assign to the selected person.
2. Click on **Save**.



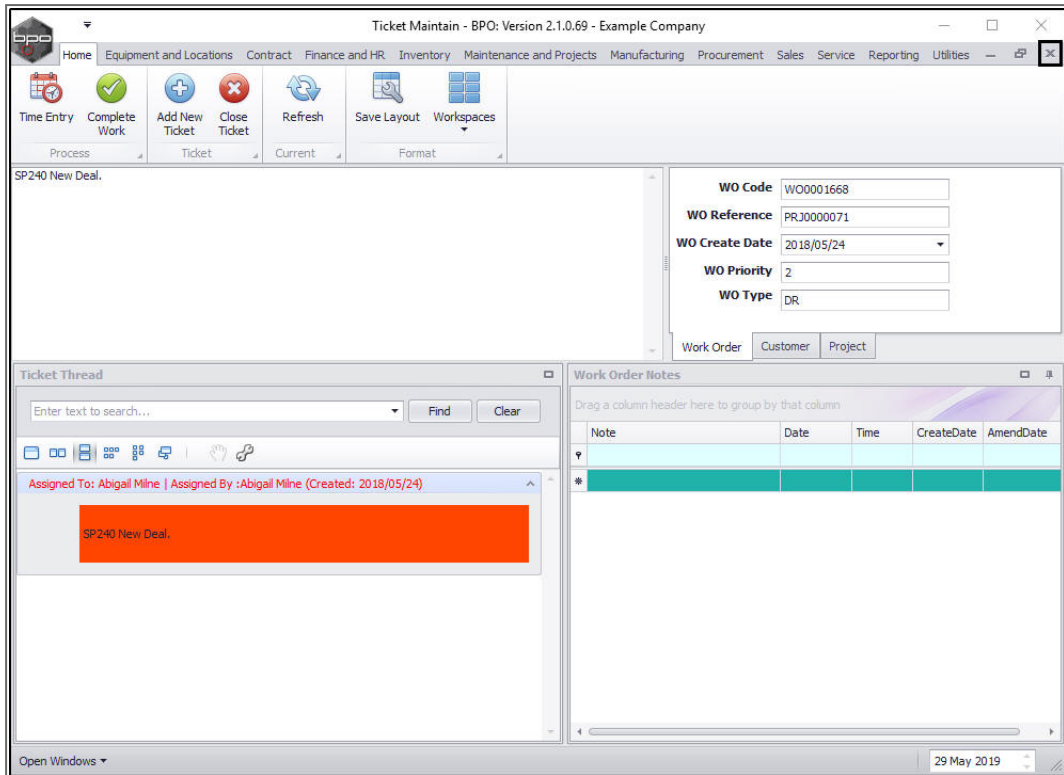
You will return to the *Time Logging Express* screen.

1. The **Start Work** button will be greyed out while the **End Work** button is not.
2. The work status message may display as **Work started on work order [ ] on the [ ]**, even if work was ended.
3. Exit the screen.



You will return to the ***Ticket Maintain*** screen.

- ***Exit*** this screen.



You will return to the **My Tickets** screen.

- Here you can view the **new work order**.

My Tickets - BPO: Version 2.1.0.69 - Example Company

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

Edit Complete Work Save Layout Workspaces Save Filter Refresh Export

Process Format Current Export

Drag a column header here to group by that column

CallReference	WOCODE	Description	Priority	Note	CreateDate	CreateBy	AssignedTo
PRJ0000283	W00001604	Site Inspection required	2	Machine Installation	2018/10/29	Abigail Milne	Theo Peterson
CN0000578	W00001687	Return machine from co...	2	Return all from sho...	2018/07/24	Abigail Milne	Theo Peterson
PCN0000026	PW00000064	3MS - 3 Month Service	2	Scheduled Service	2018/08/07	Abigail Milne	Bianca Du Toit
PCN0000027	PW00000084	TT003 - Monthly - Call p...	2	Scheduled Service	2018/08/07	Abigail Milne	Belinda Sharman
CN0000582	W00001694	TT009 - Daily, Mono 100...	2	Scheduled Service	2018/08/07	Abigail Milne	Belinda Sharman
PRJ0000071	W00001746	SP240 New Deal.	2	SP240 New Deal.	2019/04/12	Theo Peterson	Abigail Milne
PRJ0000301	W00001751	Installation Project 1	2	Installation Project 1	2019/04/12	Abigail Milne	Belinda Sharman
PRJ0000304	W00001754	Installation Project 4	2	Installation Project 4	2019/04/12	Abigail Milne	Belinda Sharman
PRJ0000305	W00001757	Installation Project 5	2	Installation Project 5	2019/04/12	Abigail Milne	Belinda Sharman
PRJ0000071	W00001771	SP240 New Deal.	2	SP240 New Deal.	2019/05/30	Abigail Milne	Belinda Sharman

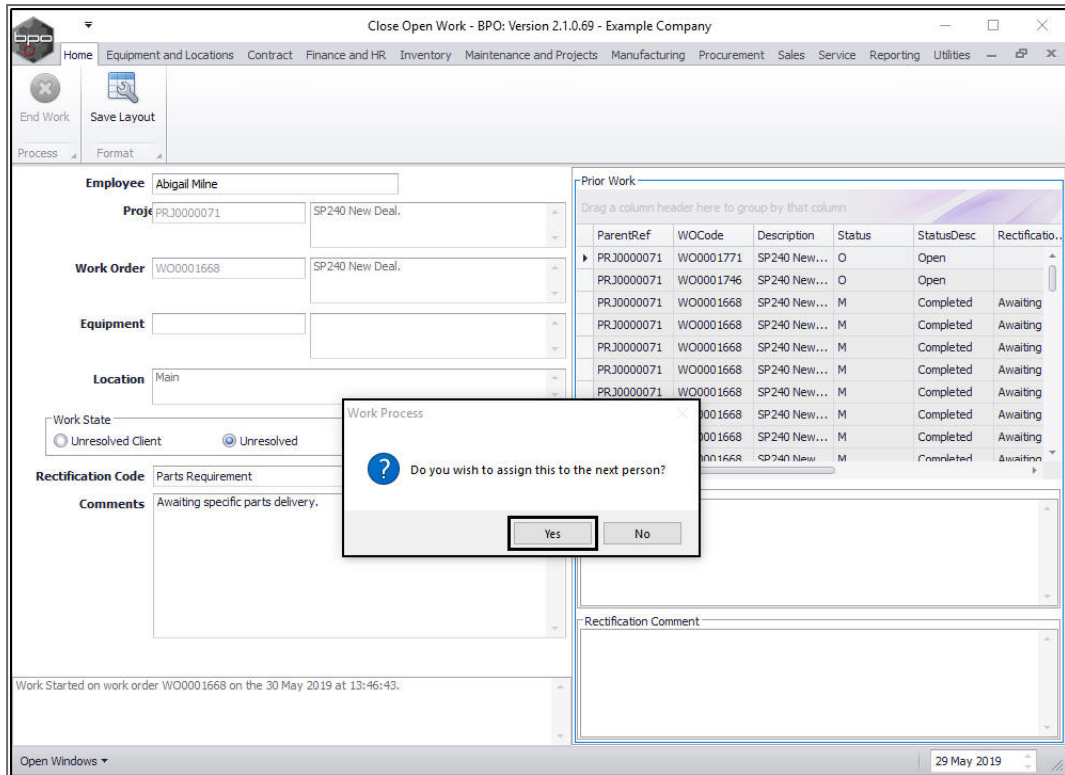
Count: 10

Open Windows 29 May 2019

## SELECT EXISTING OPEN WORK ORDER

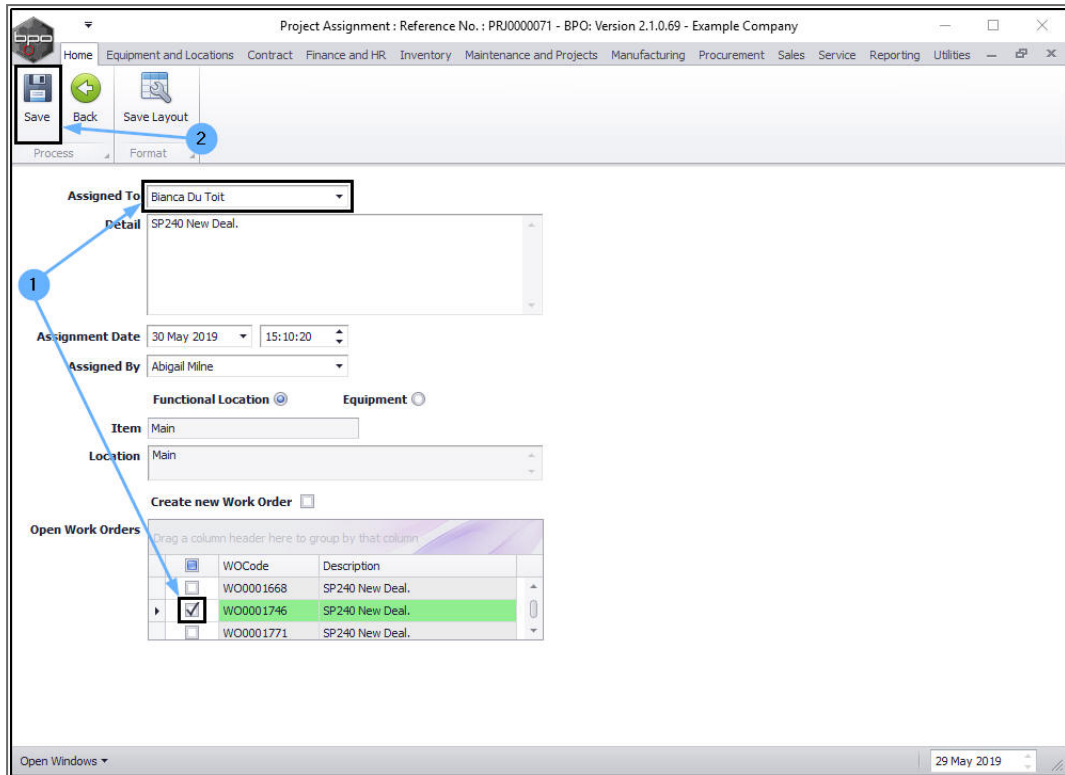
Instead of creating a new work order for the person you wished to assign the work order to, you could select an existing open work order to assign.

- **Note:** You cannot choose a work order that was previously assigned to someone.
- In the **Close Open Work screen**, select **Yes** in the **Work Process** message box.



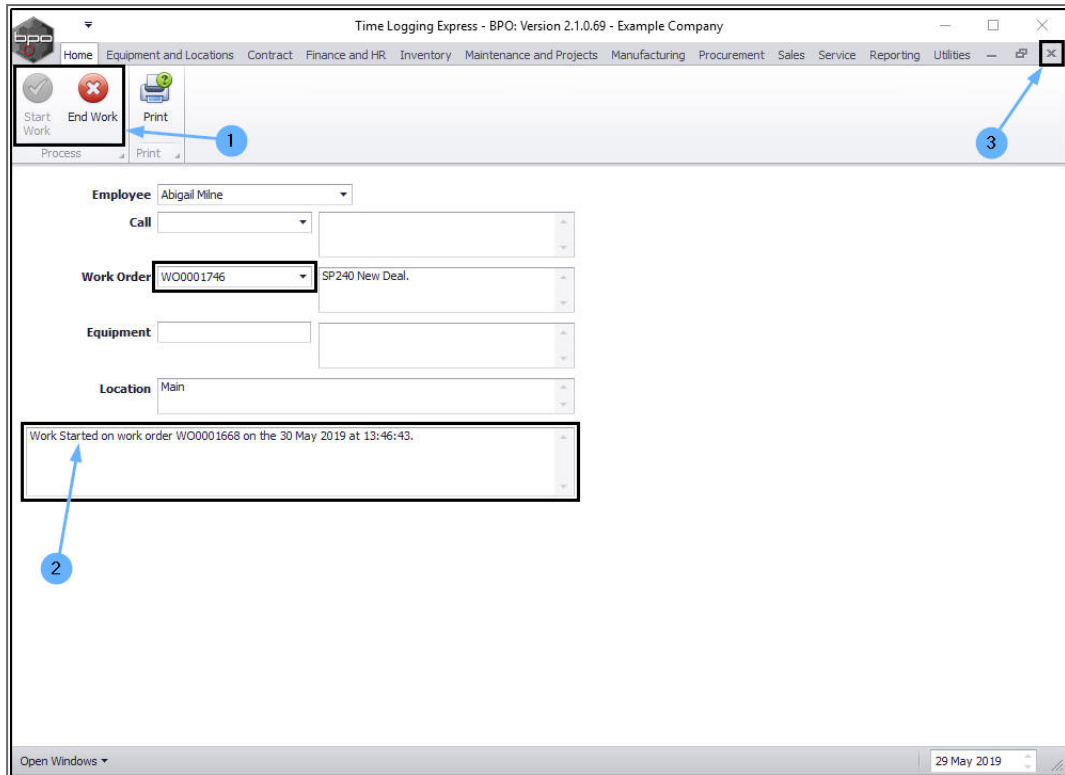
The **Project** or **Call Assignment** screen will be displayed.

1. Click on the **check box** in front of the **open work order** that you wish to assign on to the **assignee**.
2. Click on **Save**.



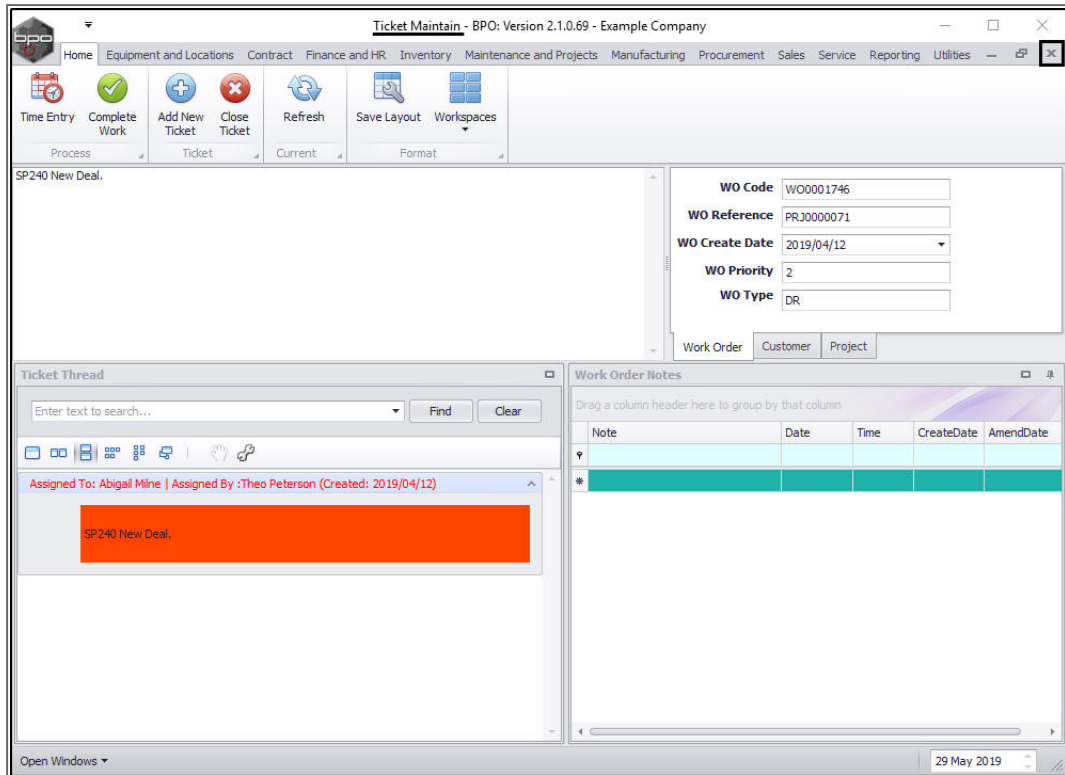
The **Project** or **Call Assignment** screen will close and you will return to the **Time Logging Express** screen.

1. You will note that the **Start Work** button is 'inactive' (greyed out) but the **End Work** button is 'active'.
2. The **Work Status** text box may display "**Work started....**"
3. **Exit** the screen.



You will return to the **Ticket Maintain** screen.

- **Exit** this screen.



You will return to the **My Tickets** screen.

- Here you can view the **open work order** that has been assigned on.

My Tickets - BPO: Version 2.1.0.69 - Example Company

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

Edit Complete Work Save Layout Workspaces Save Filter Refresh Export

Process Format Current Export

Drag a column header here to group by that column

CallReference	WOCODE	Description	Priority	Note	CreateDate	CreateBy	AssignedTo	Status	Read	CustomerCod
PRJ0000283	WO0001604	Site Inspection required	2	Machine Installation	2018/10/29	Abigail Milne	Theo Peterson	N	No	HOP001
CN0000578	WO0001687	Return machine from co...	2	Return all from sho...	2018/07/24	Abigail Milne	Theo Peterson	N	No	HOP001
PCN0000026	PWO0000064	3MS - 3 Month Service	2	Scheduled Service	2018/08/07	Abigail Milne	Bianca Du Toit	N	No	SAH001
PCN0000027	PWO0000084	TT003 - Monthly - Call p...	2	Scheduled Service	2018/08/07	Abigail Milne	Belinda Sharman	N	No	SAH001
CN0000582	WO0001694	TT009 - Daily, Mono 100...	2	Scheduled Service	2018/08/07	Abigail Milne	Belinda Sharman	N	No	HOP001
PRJ0000071	WO0001746	SP240 New Deal.	2	SP240 New Deal.	2019/05/30	Abigail Milne	Bianca Du Toit	N	No	TIA001
PRJ0000301	WO0001751	Installation Project 1	2	Installation Project 1	2019/04/12	Abigail Milne	Belinda Sharman	N	No	HOP001
PRJ0000304	WO0001754	Installation Project 4	2	Installation Project 4	2019/04/12	Abigail Milne	Belinda Sharman	N	No	HOP001
PRJ0000305	WO0001757	Installation Project 5	2	Installation Project 5	2019/04/12	Abigail Milne	Belinda Sharman	N	No	HOP001
PRJ0000071	WO0001771	SP240 New Deal.	2	SP240 New Deal.	2019/05/30	Abigail Milne	Theo Peterson	N	No	TIA001

Count: 10

Open Windows | 29 May 2019

## VIEW UPDATED TICKET THREAD

- Select the **ticket** that you have just re-assigned.
- Click on **Edit**.

My Tickets - BPO: Version 2.1.0.69 - Example Company

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

Edit Complete Work Save Layout Workspaces Save Filter Refresh Export

Process Format Current Export

Drag a column header here to group by that column

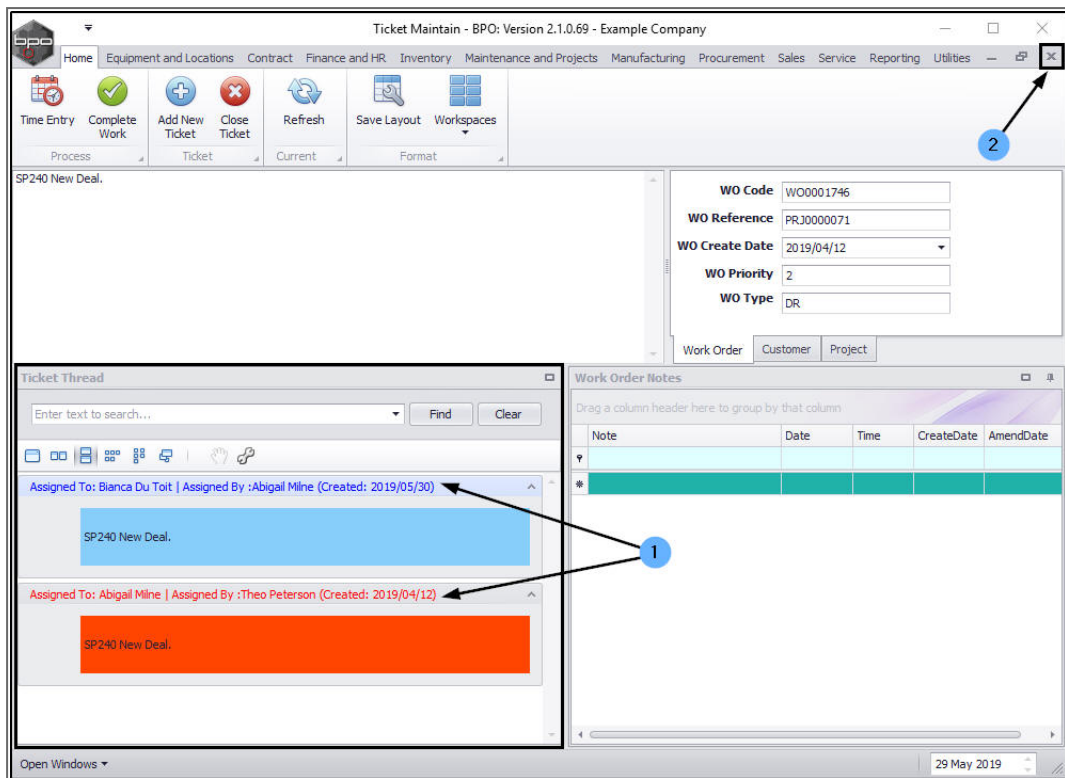
CallReference	WOCODE	Description	Priority	Note	CreateDate	CreateBy	AssignedTo
PRJ0000283	WO0001604	Site Inspection required	2	Machine Installation	2018/10/29	Abigail Milne	Theo Peterson
CN0000578	WO0001687	Return machine from co...	2	Return all from sho...	2018/07/24	Abigail Milne	Theo Peterson
PCN0000026	PWO0000064	3MS - 3 Month Service	2	Scheduled Service	2018/08/07	Abigail Milne	Bianca Du Toit
PCN0000027	PWO0000084	TT003 - Monthly - Call p...	2	Scheduled Service	2018/08/07	Abigail Milne	Belinda Sharman
CN0000582	WO0001694	TT009 - Daily, Mono 100...	2	Scheduled Service	2018/08/07	Abigail Milne	Belinda Sharman
PRJ0000071	WO0001746	SP240 New Deal.	2	SP240 New Deal.	2019/05/30	Abigail Milne	Bianca Du Toit
PRJ0000301	WO0001751	Installation Project 1	2	Installation Project 1	2019/04/12	Abigail Milne	Belinda Sharman
PRJ0000304	WO0001754	Installation Project 4	2	Installation Project 4	2019/04/12	Abigail Milne	Belinda Sharman
PRJ0000305	WO0001757	Installation Project 5	2	Installation Project 5	2019/04/12	Abigail Milne	Belinda Sharman
PRJ0000071	WO0001771	SP240 New Deal.	2	SP240 New Deal.	2019/05/30	Abigail Milne	Theo Peterson

Count: 10

Open Windows 29 May 2019

The **Ticket Maintain** screen will be displayed.

- In the **Ticket Thread** frame, you can see that there are now **2** tickets in the thread, the one assigned to yourself and the one you have assigned on to another person.
- **Exit** the screen.



## PRINT WORK ORDER REPORT

- Select the ticket you wish to print a work order report for.
- Click on **Edit**.
  - In this image, **DWO0000067** was selected.

**Note:** You can do this process once you have **started** or **ended** work without first exiting the **Time Logging Express** screen first.

My Tickets - BPO: Version 2.1.0.69 - TEST ALPHA - JUDITH PC LOCAL

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

Edit Complete Work Save Layout Workspaces Save Filter Refresh Export

Process Format Current Export

Drag a column header here to group by that column

WCode	Description	Priority	Note
DWO0000004	1234	2	1234
DWO0000064	TT002 - Weekly - Call per WO	2	Procure parts needed for the scheduled maintenance
DWO0000066	TT002 - Weekly - Call per WO	2	Scheduled Service
DWO0000067	TT002 - Weekly - Call per WO	2	Do maintenance work on the 25/04/2019
DWO0000089	TT002 - Weekly - Call per WO	2	Needed today
DWO0000106	asset on contract- return	2	asset on contract- return
DWO0000107	TT008 - Mono 1000, Colour 1000 - Call per WO	2	TT008 - Mono 1000, Colour 1000 - Call per WO
DWO0000108	TT009 - Daily, Mono 1000 - Call per WO	2	TT009 - Daily, Mono 1000 - Call per WO
DWO0000109	TT002 - Weekly - Call per WO	2	TT002 - Weekly - Call per WO
DWO0000110	TT003 - Monthly - Call per WO	2	TT003 - Monthly - Call per WO
DWO0000133	3MS - 3 Month Service	2	Scheduled Service
DWO0000138	ndr1	2	ndr1
DWO0000140	nds	2	nds
DWO0000149	ndrmg	2	ndrmg
DWO0000150	ndrsa	2	ndrsa

Open Windows 18 Mar 2019

- The **Ticket Maintain** screen will be displayed.
- Click on **Time Entry**.

Ticket Maintain - BPO: Version 2.1.0.69 - TEST ALPHA - JUDITH PC LOCAL

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

Time Entry Complete Work Add New Ticket Close Ticket Refresh Save Layout Workspaces

Process Ticket Current Format

TT002 - Weekly - Call per WO

WO Code: DWO0000067  
 WO Reference: DCN0000032  
 WO Create Date: 2017/06/14  
 WO Priority: 2  
 WO Type: SM

Work Order Customer Call

Ticket Thread

Enter text to search... Find Clear

Assigned To: Judith Mudzengi | Assigned By: :Judith Mudzengi (Created: 2019/03/18)

Do maintenance work on the 25/04/2019

Assigned To: James Magombo | Assigned By: :Judith Mudzengi (Created: 2017/07/12)

Scheduled Service

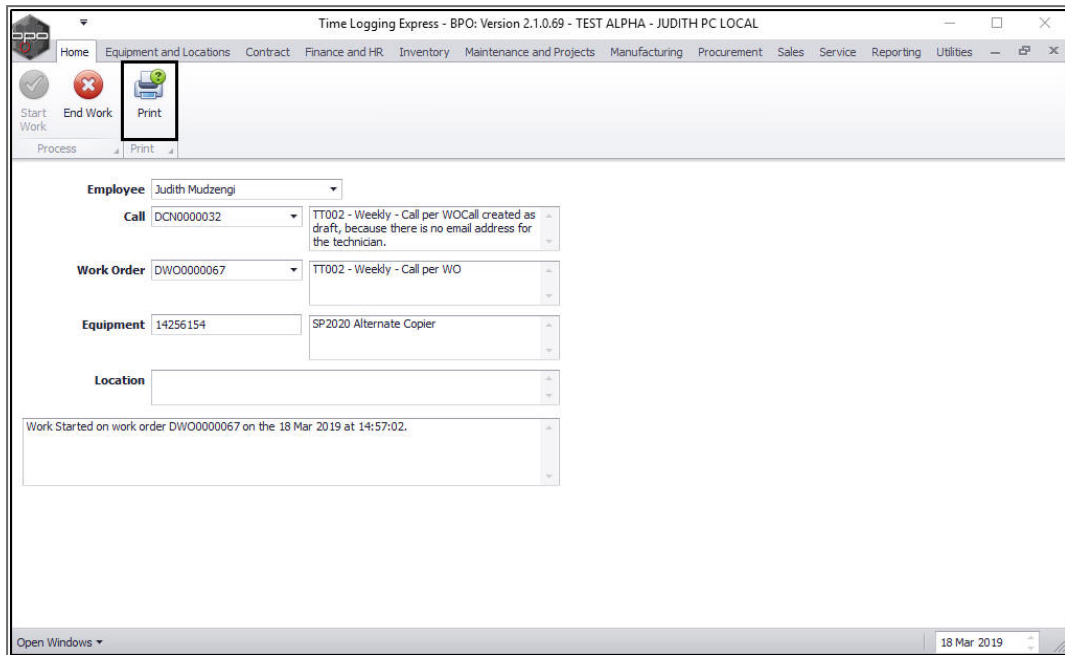
Work Order Notes

Drag a column header here to group by that column

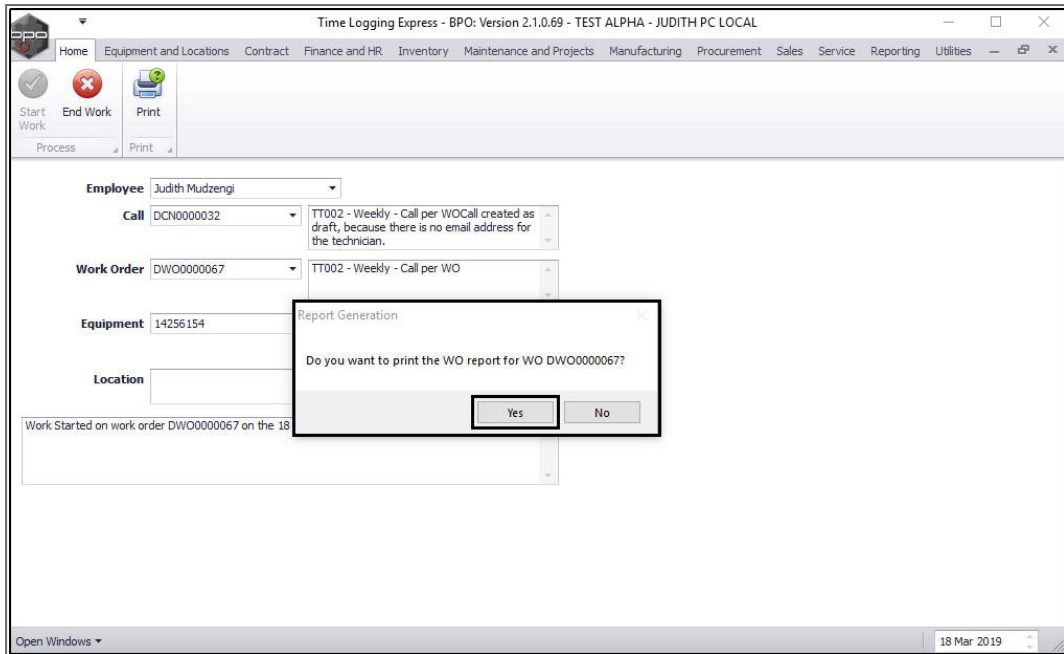
Note	Date	Time	CreateDate

Open Windows 18 Mar 2019

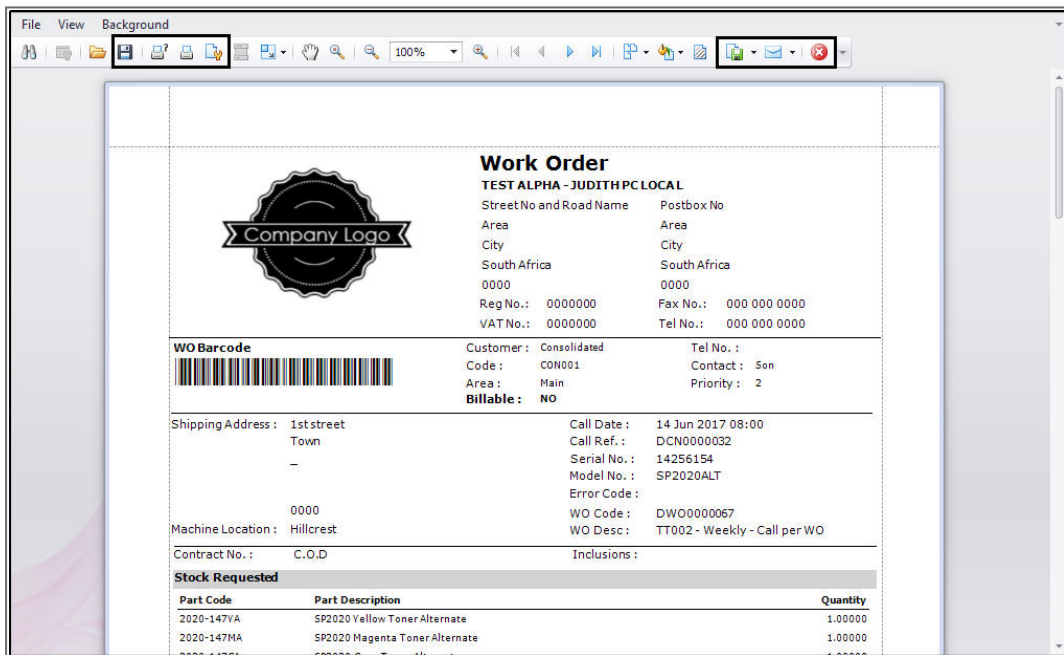
- The **Time Logging Express** screen will be displayed.
- Click on **Print**.



- A **Report Generation** message will be displayed asking you;
- **Do you want to print the WO Report for WO [ ]?**
- Click on **Yes**.

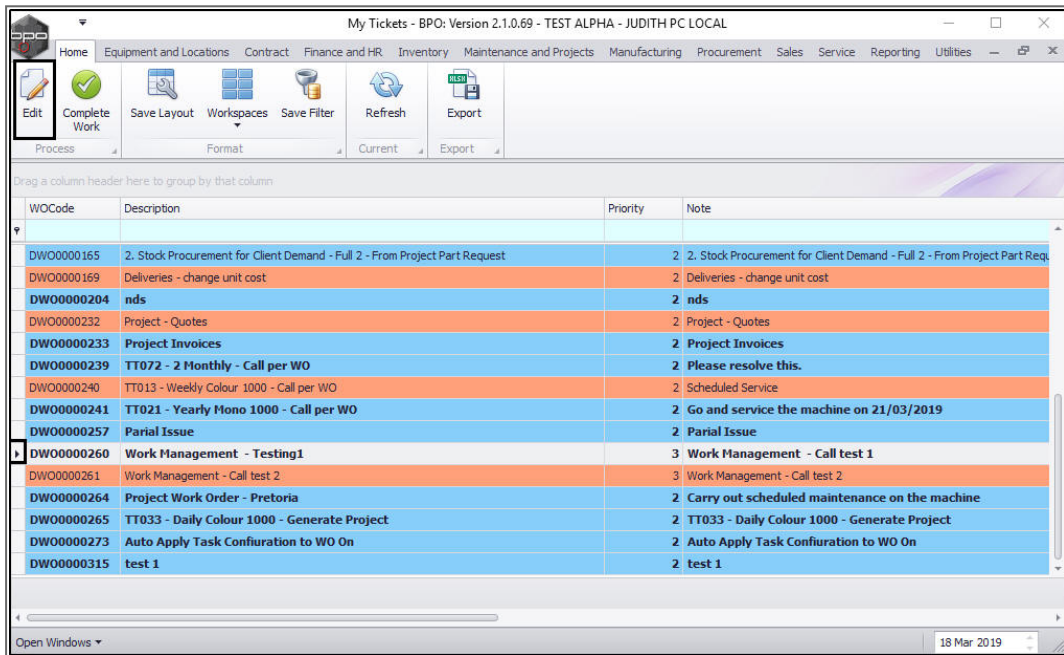


- The **Work Order Report** will be displayed.
- You can save, print or email this report.
- Click on **Close** to exit this screen.

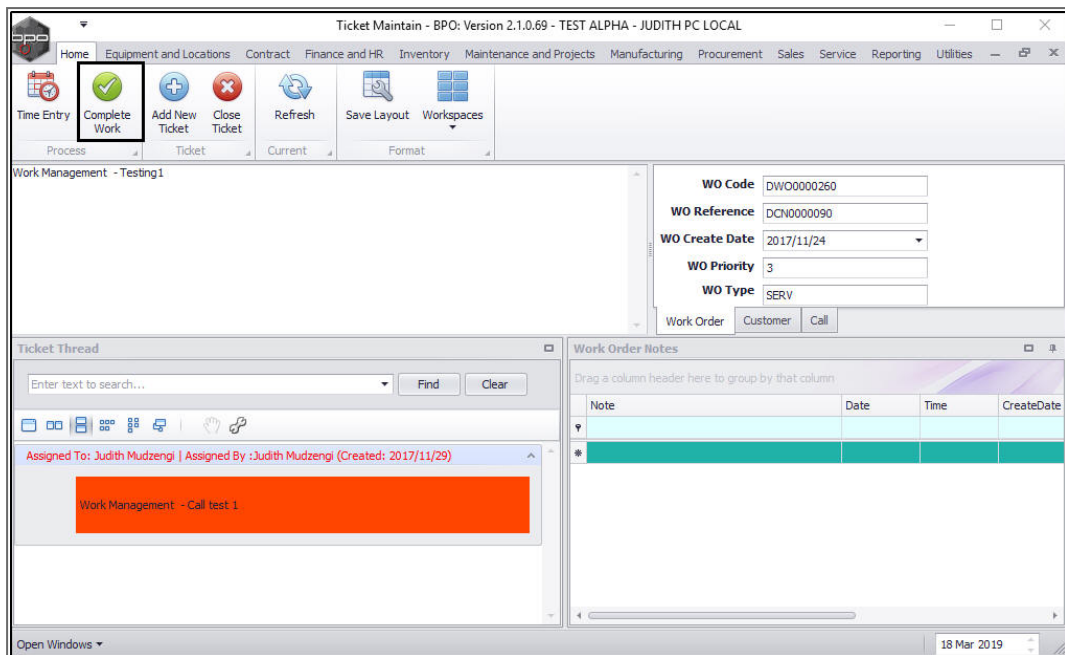


## COMPLETE WORK

- You can use this functionality once your work has been **completed**, or if you can no longer continue with the work if, for example, you are waiting for a Parts Requirement or you are awaiting client confirmation.
- Select the ticket you want to complete work for.
- Click on **Edit**.
  - In this image, **DWO0000260** was selected.

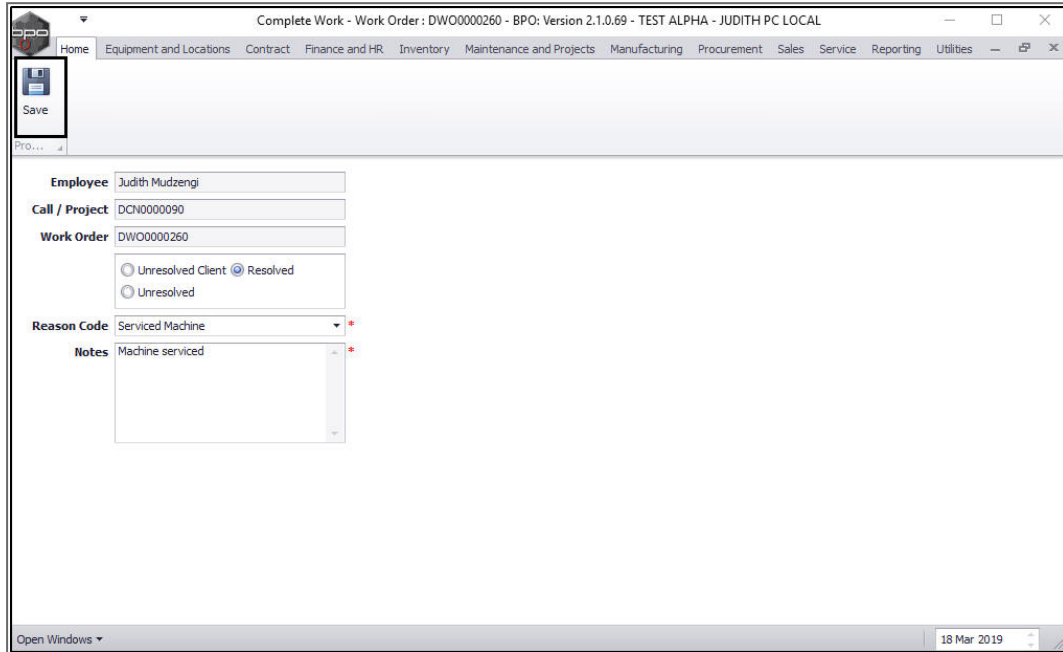


- The **Ticket Maintain** screen will be displayed.
- Click on **Complete Work**.



- The **Complete Work** screen will be displayed.
  - **Employee:** This will auto populate with the name of the employee currently logged onto the system.
  - **Call/Project:** This will auto populate with the call/-project number if the work order is linked to a project or call.
  - **Work Order:** This will auto populate with the work order number.
  - **Resolution Actions:** Select one of the 3 resolution actions
    - **Resolved** - once processed, this call will move to **Complete**.
    - **Unresolved** - once processed, this call will move to **Pending**.
    - **Unresolved (Client)** - once processed, this call will move to **On Hold**.

- **Reason Code:** Click on the down arrow and select the reason code.
- **Notes:** Type in the relevant notes.
- Click on **Save**.

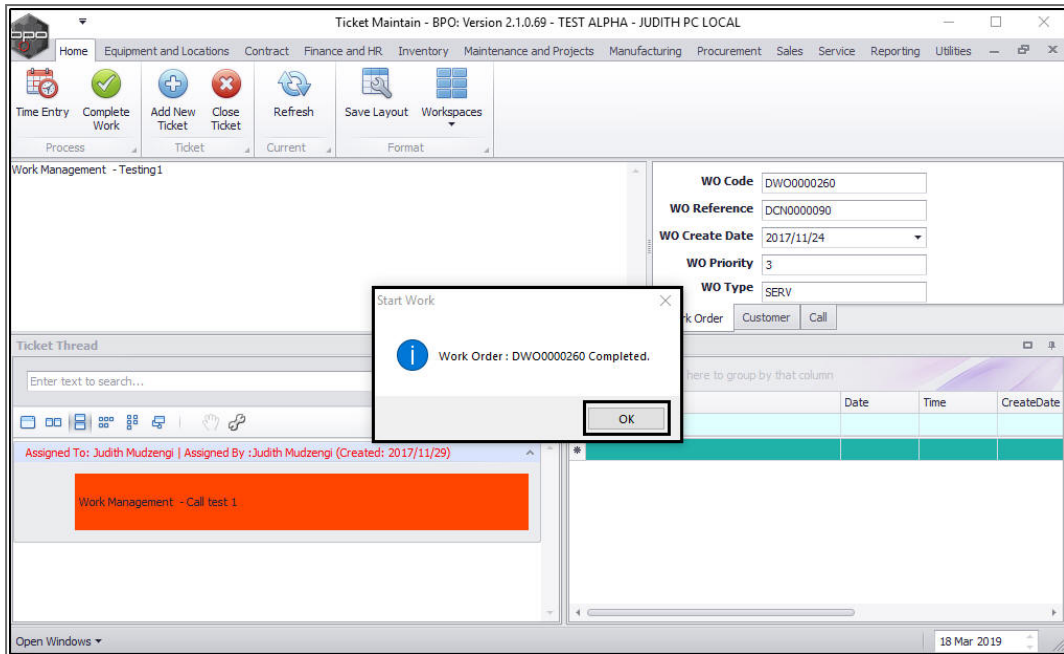


The screenshot shows a web application window titled "Complete Work - Work Order : DWO0000260 - BPO: Version 2.1.0.69 - TEST ALPHA - JUDITH PC LOCAL". The interface includes a navigation menu with options like Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. A "Save" button is highlighted in the top left corner. The main form contains the following fields:

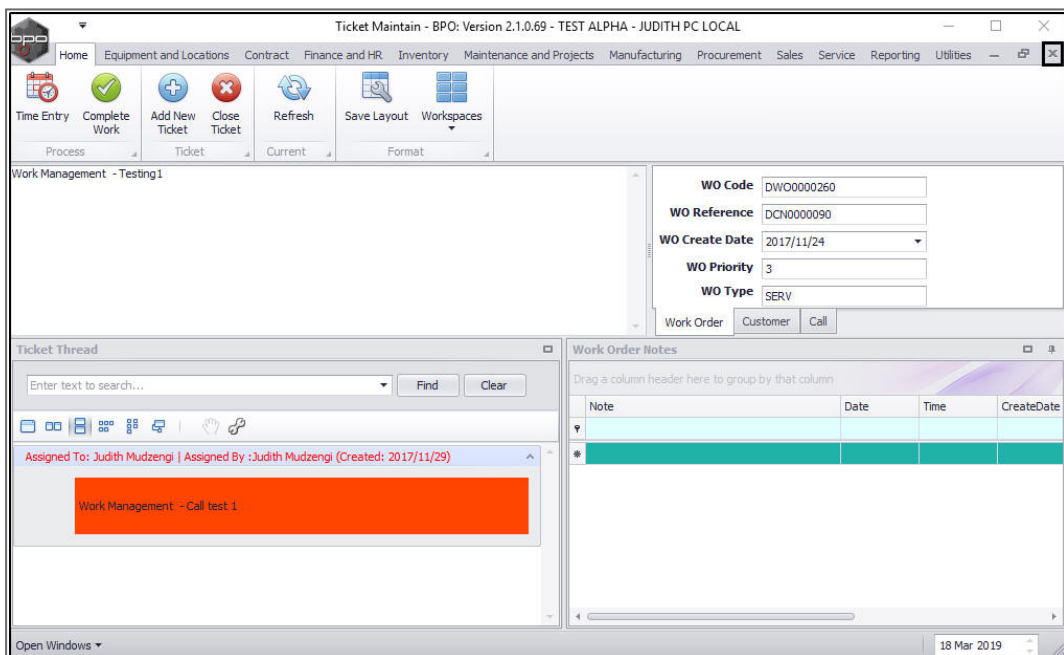
- Employee:** Judith Mudzengi
- Call / Project:** DCN0000090
- Work Order:** DWO0000260
- Status:** Radio buttons for "Unresolved Client", "Resolved" (selected), and "Unresolved".
- Reason Code:** Serviced Machine
- Notes:** Machine serviced

The bottom of the window shows "Open Windows" and the date "18 Mar 2019".

- A **Start Work** message will be displayed telling you;
  - **Work Order: [ ] Completed.**
- Click on **Ok**.

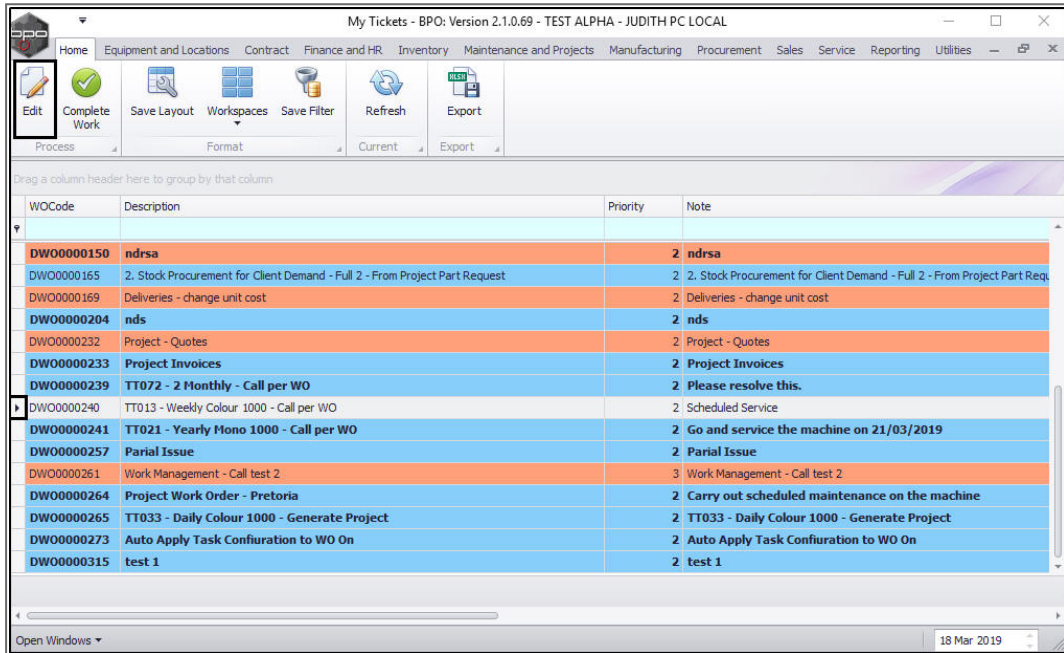


- The **Start Work** message will be closed.
- Click on **Close** to exit this screen.

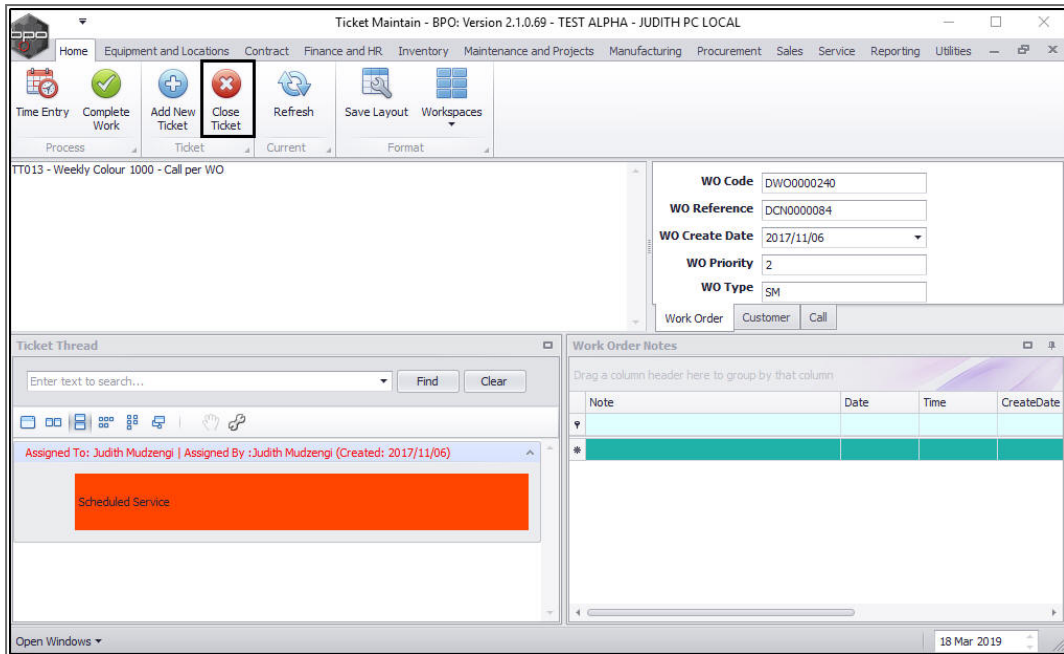


## CLOSE TICKET

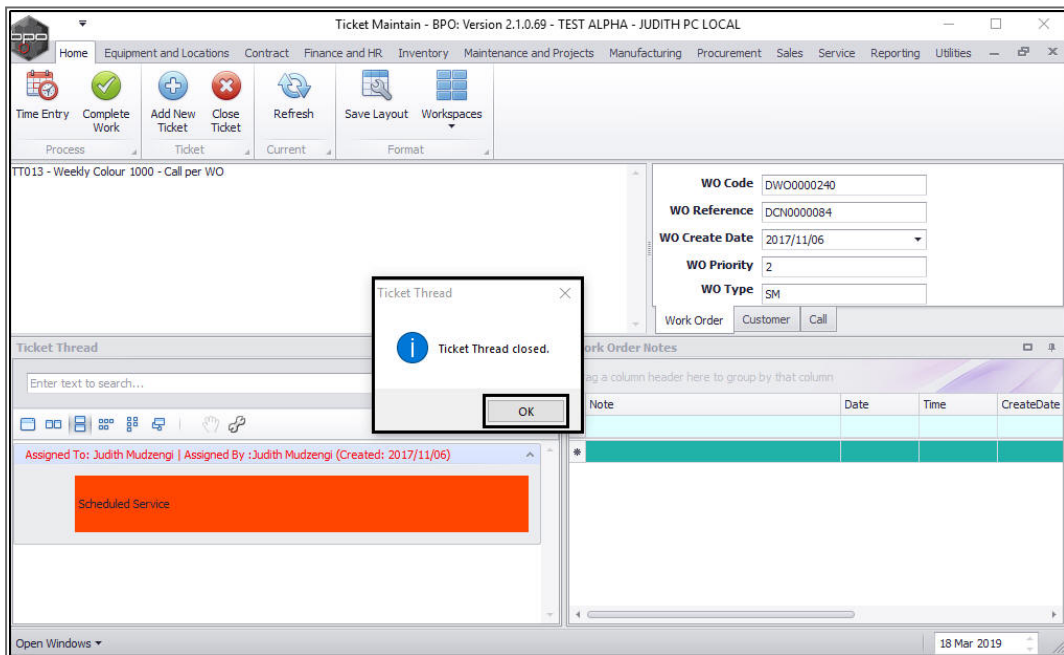
- Once **all** work has been done and **completed**, a ticket thread can be closed.
- Select the ticket you want to complete work for.
- Click on **Edit**.
  - In this image, **DWO0000240** was selected.



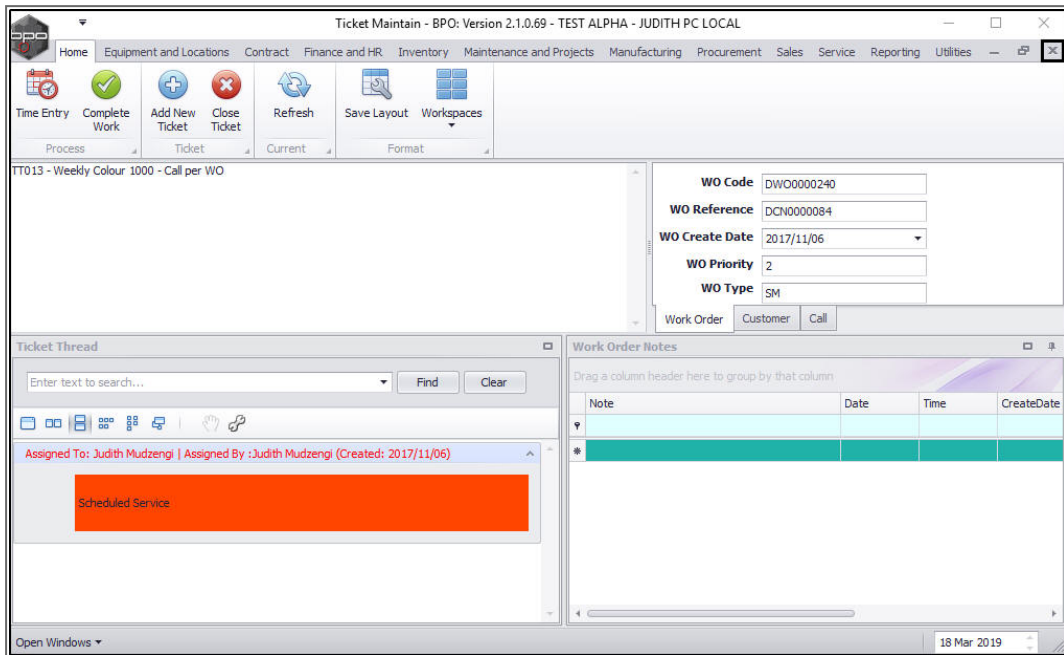
- The **Ticket Maintain** screen will be displayed.
- Click on **Close Ticket**.



- The ***Ticket Thread*** message will be displayed telling you;
  - ***Ticket Thread closed.***
- Click on ***Ok.***



- The ***Ticket Thread*** message will closed.
- To exit this screen, click on ***Close***.



## Related References

- [All Open Tickets](#)

CAP.001.002

