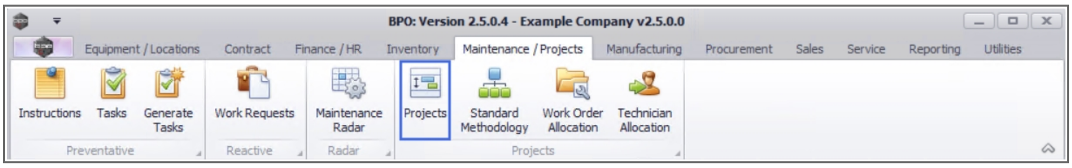
PROJECTS

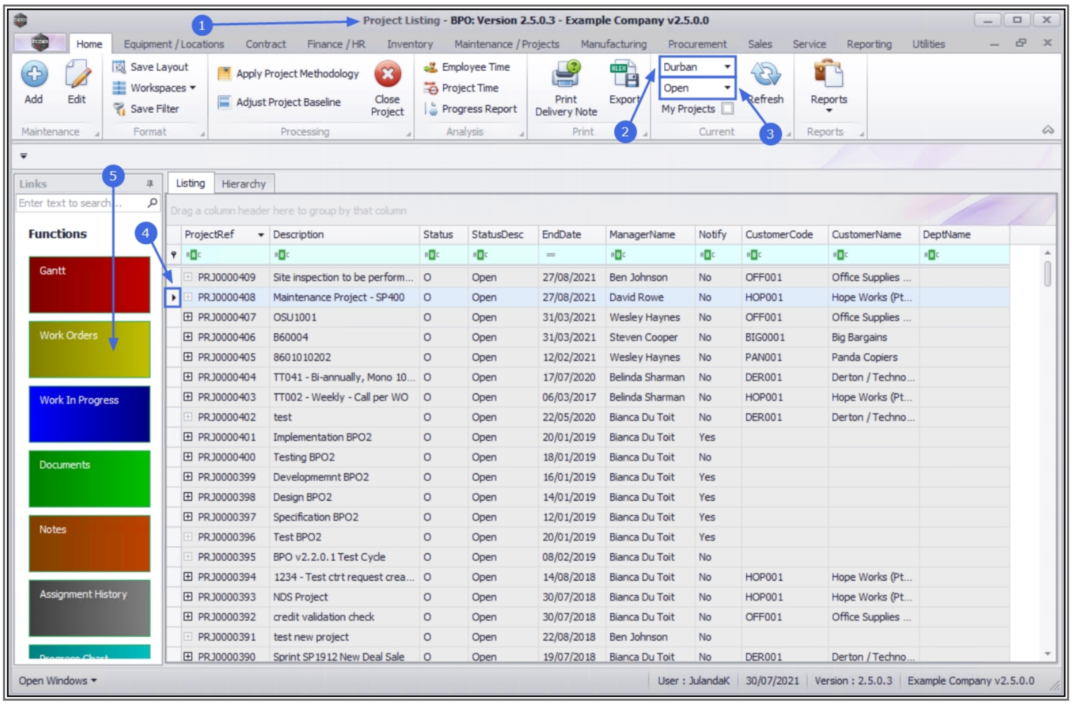
PROJECTS - WORK ORDERS

You can link the Customer Contact and Delivery Address to a Project Work Order, to display these details on the Work Order document and on TechCon-nect.

Ribbon Access: *Maintenance / Projects > Projects*



1. The ***Project Listing*** screen will be displayed.
2. Select the ***Site*** where the project can be located.
    - The example has ***Durban*** selected.
3. Ensure that the project ***Status*** is set to ***Open***.
4. Select the ***row*** of the Project you wish to ***link*** a ***work order*** to.
5. Click on the ***Work Orders*** tile.

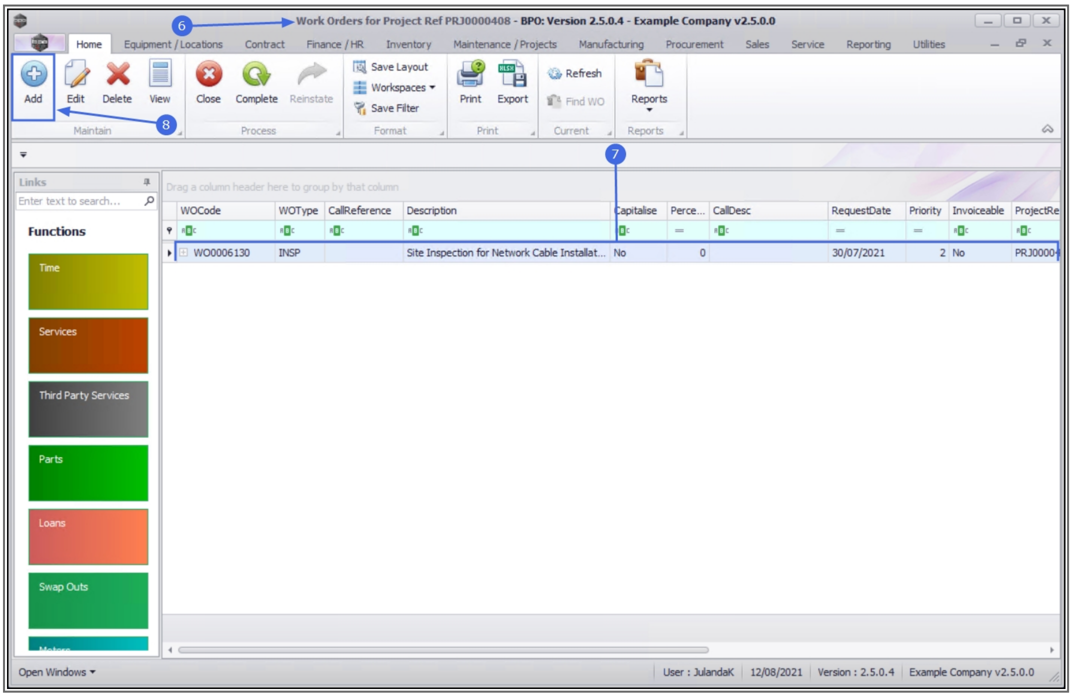


6. The ***Work Orders for Project Ref [****project ref number****]*** screen will be displayed.
7. Any Work Orders that have already been linked to the project, will display.

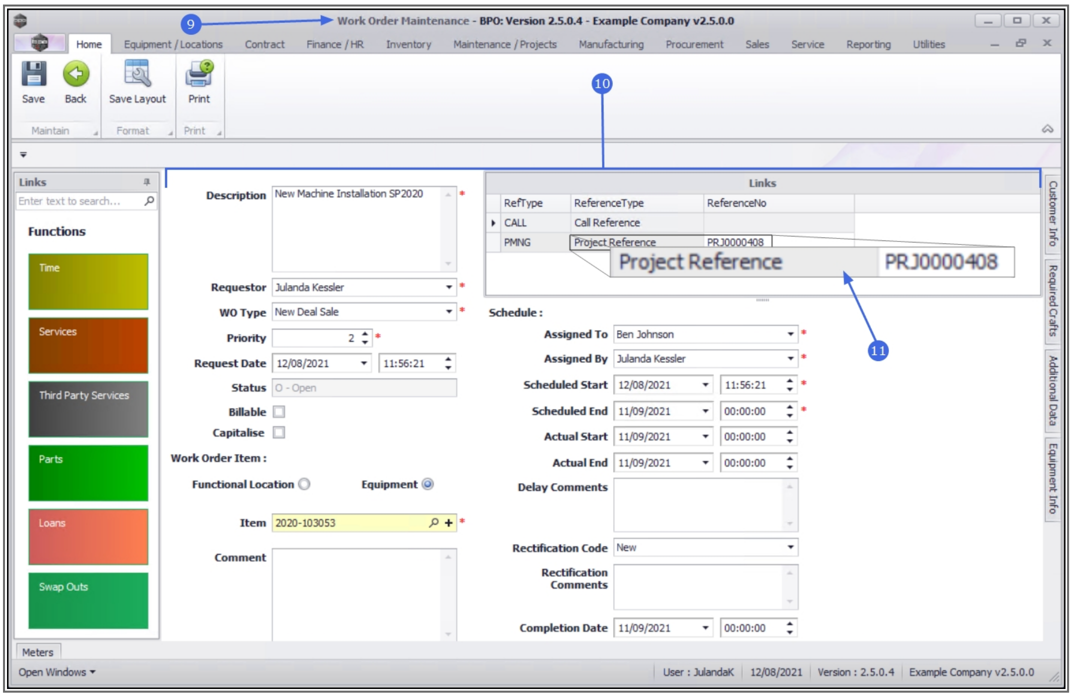
ADD WORK ORDER

8. Click on ***Add***.

> **Short cut key:** ***Right click*** to display the ***All groups*** menu list. Click on ***Add***.

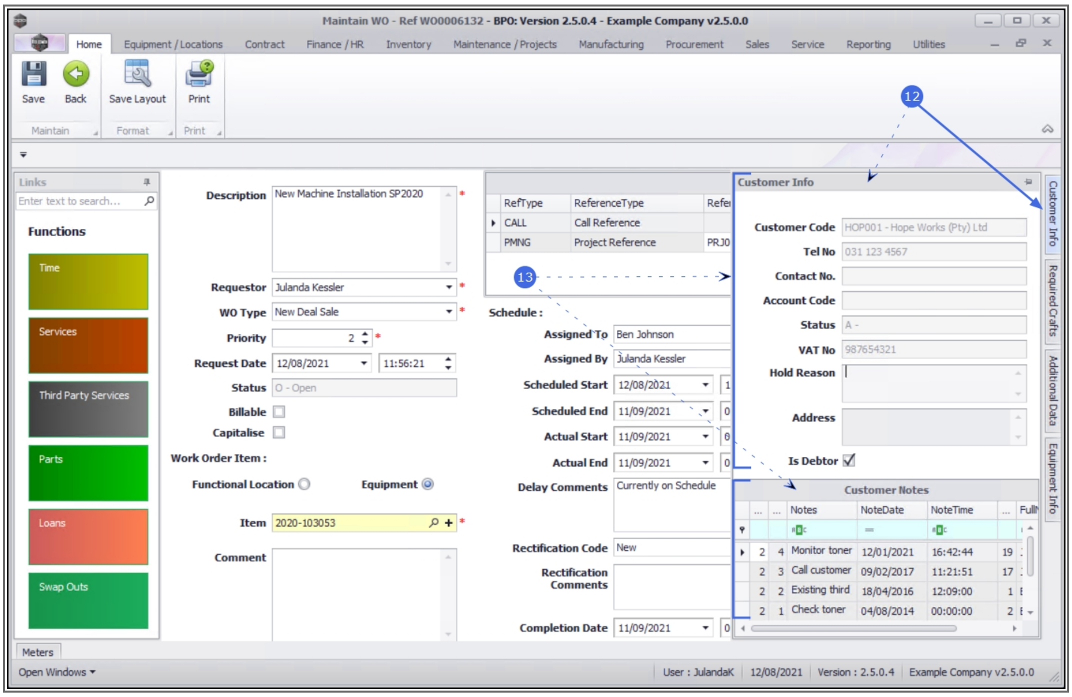


9. " The Work Order Maintenance screen will be displayed. " on page 2
10. Complete the Work Order details for the project.
11. In the ***Links*** frame note that the ***Project Reference*** has automatically been linked to the project reference you have selected.



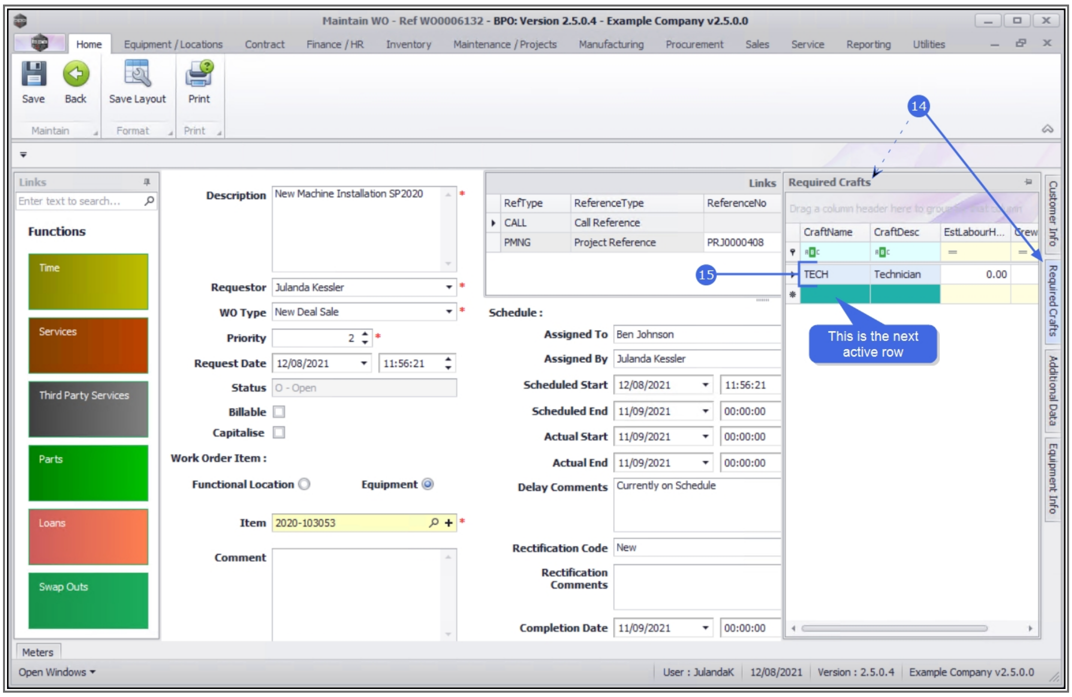
CUSTOMER INFO TAB

12. Click on the ***Customer Info*** tab to expand the ***Customer Info*** docking panel.
13. From here you can view additional information for the ***customer*** linked to this work order as well as the Customer Notes, if any has been created.



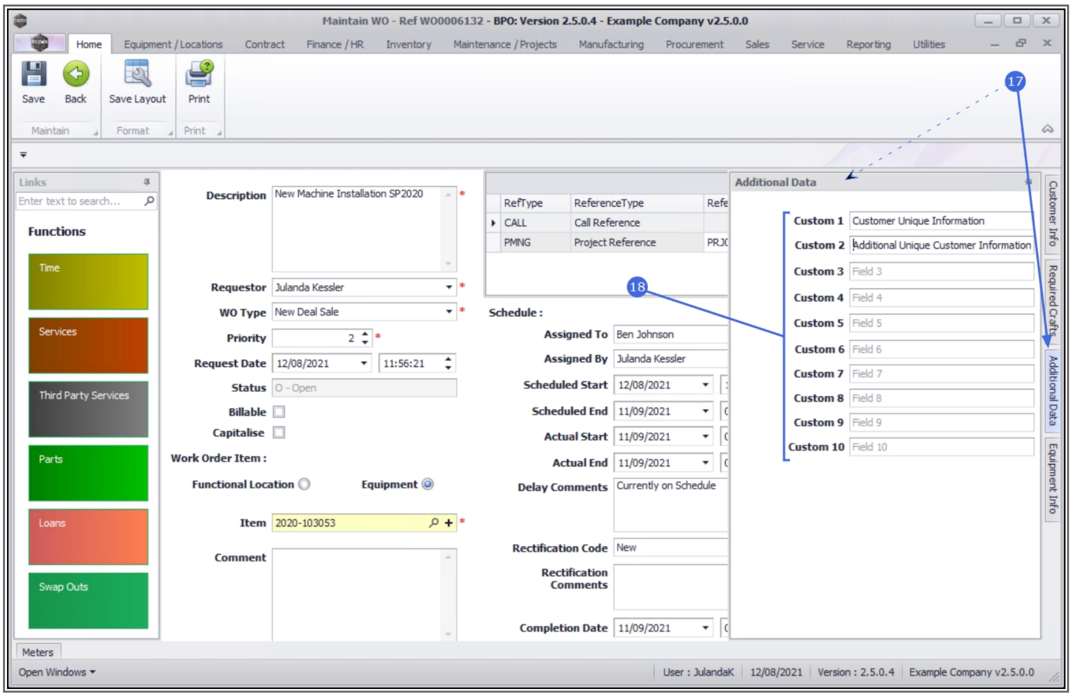
REQUIRED CRAFTS TAB

14. Click on the ***Required Crafts*** tab to expand the Required Crafts docking panel.
15. Crafts that have already been identified for the work order will be listed.
16. ***Right click*** on the next active row in the ***Craft Name*** field to Add a New Craft for carrying out this Work Order.



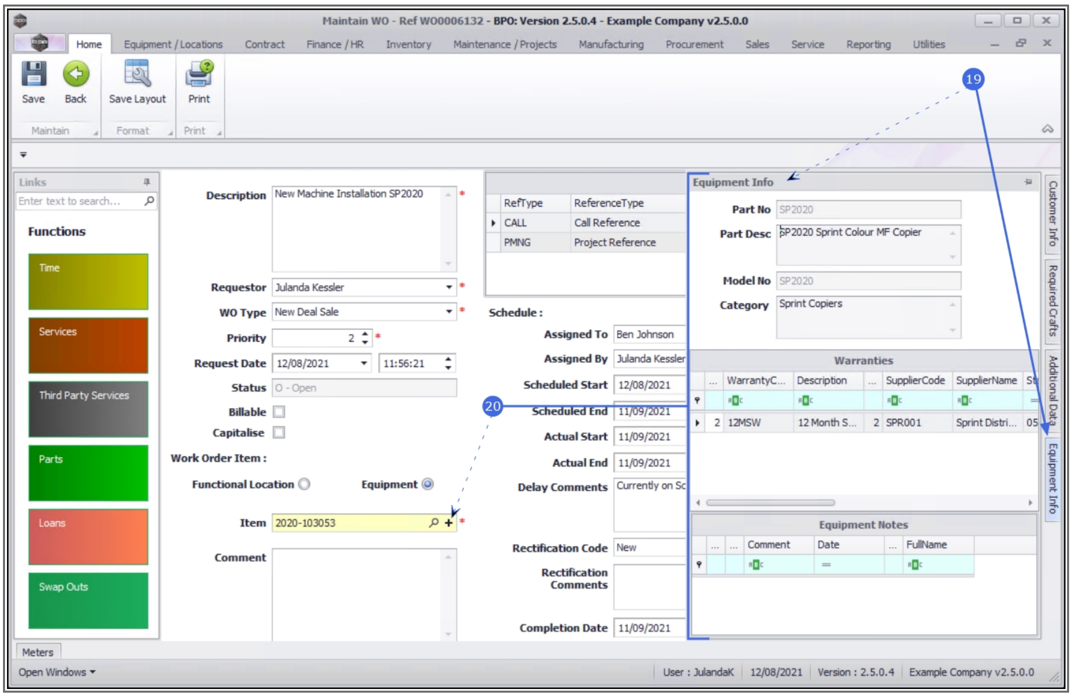
ADDITIONAL DATA TAB

17. Click on the ***Additional Data*** tab to expand the ***Additional Data*** docking panel.
18. You can view and rename the ***Custom*** fields ***1 - 10***, that can be utilised for additional information required for this Work Order that is not covered on the Work Order screen. Rename the field labels to suit your company requirements.



EQUIPMENT INFO TAB

19. Click on the ***Equipment Info*** tab to expand the ***Equipment Info*** docking panel.
20. When addressing the **[+]** icon in the **Item** field, this panel can be viewed for additional information about the selected ***equipment item***, including any warranties and/or equipment notes if applicable.



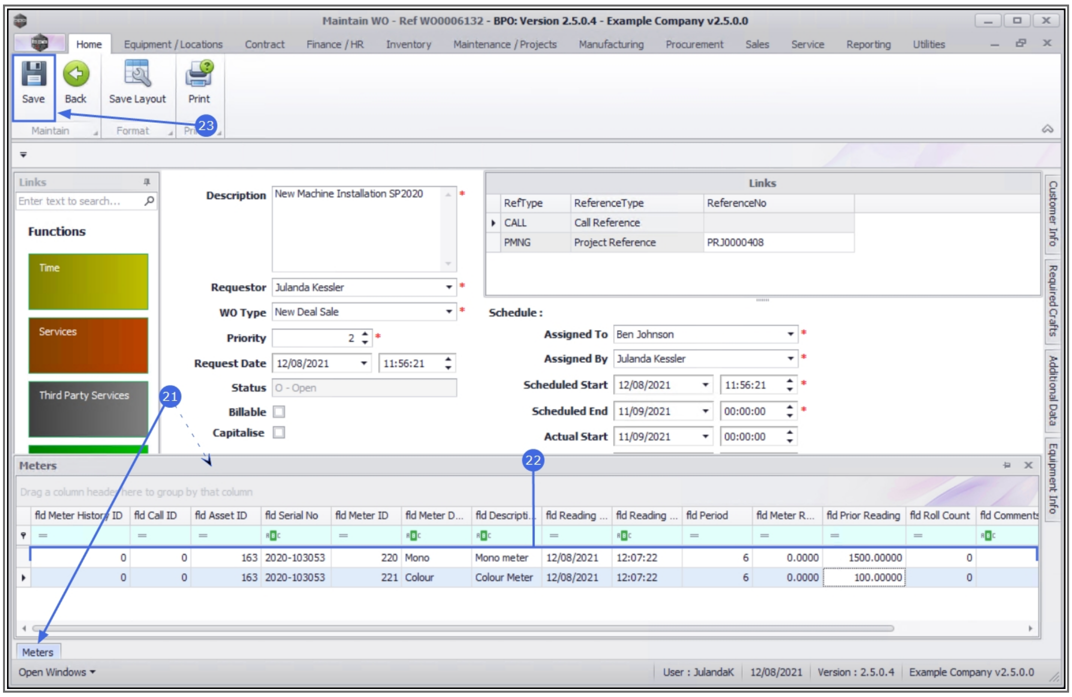
METERS TAB

21. Click on the Meters tab to expand the ***Meters*** docking panel.
22. You will be able to view the meter history information for the Item referencing on the Work Order, if applicable.

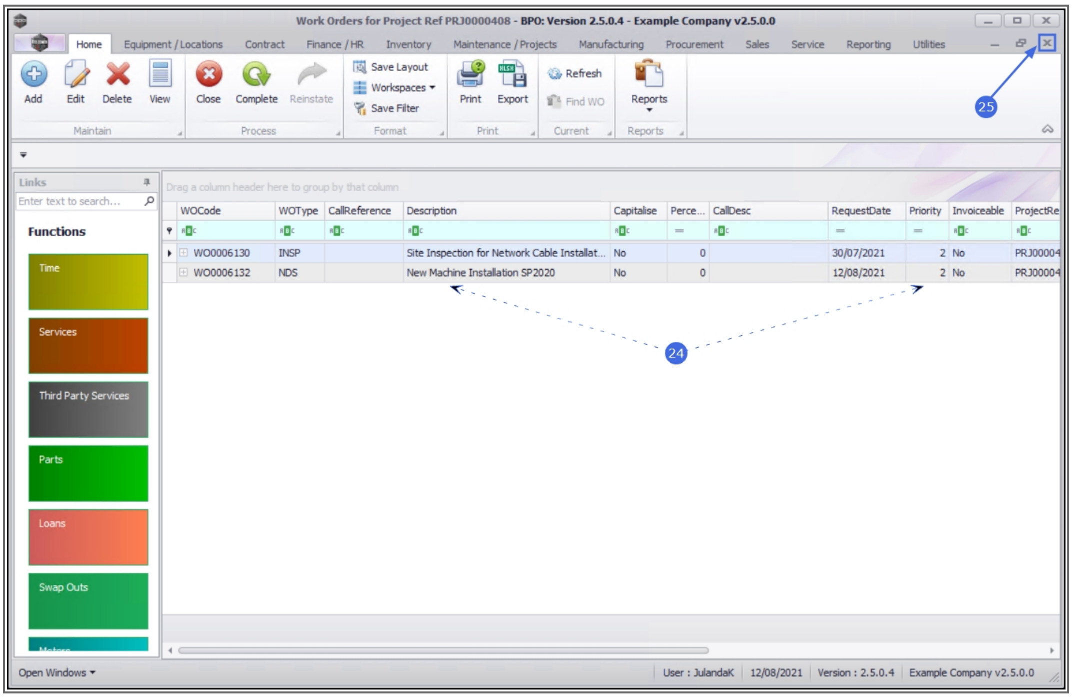
For a detailed handling of this topic refer to Work Orders - Add a Work Order

SAVE WORK ORDER

23. When you have finished adding details to the screen, click on ***Save***.



24. You will return to the ***Work Orders for Project Ref*** screen where you can view the linked work order
25. ***Close*** the screen to return to the ***Project*** listing screen.

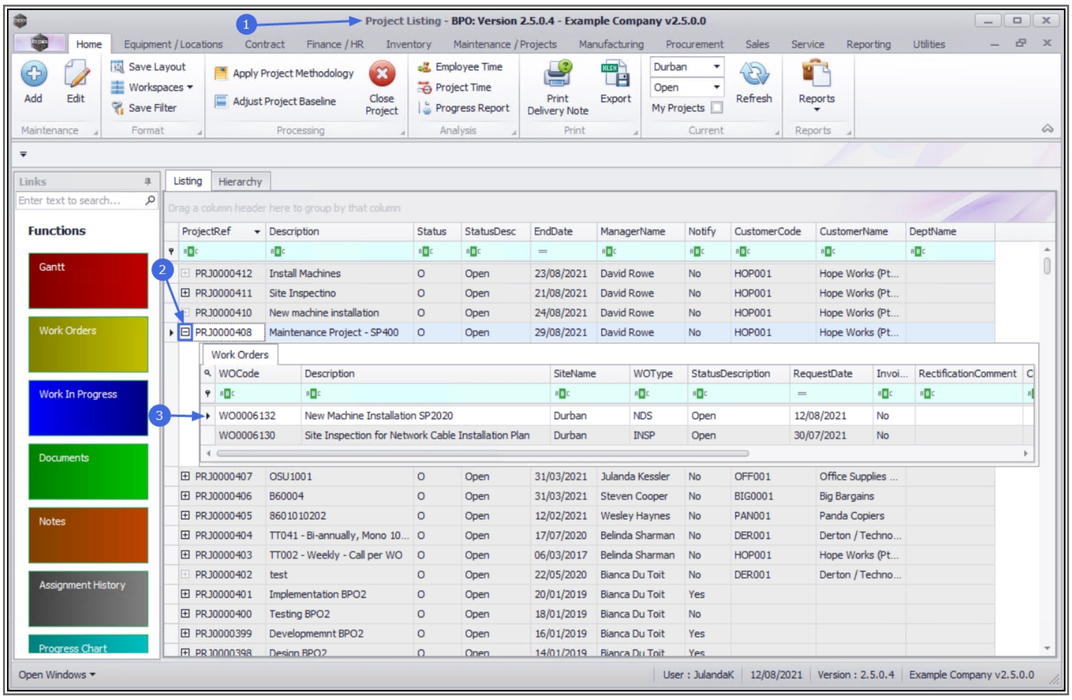


EDIT WORK ORDER

From the project listing screen you can access the Maintain WO screen to edit a Work Order using View Work Order from the project list screen, or by clicking on the Work Order tile on the Work Orders for project screen.

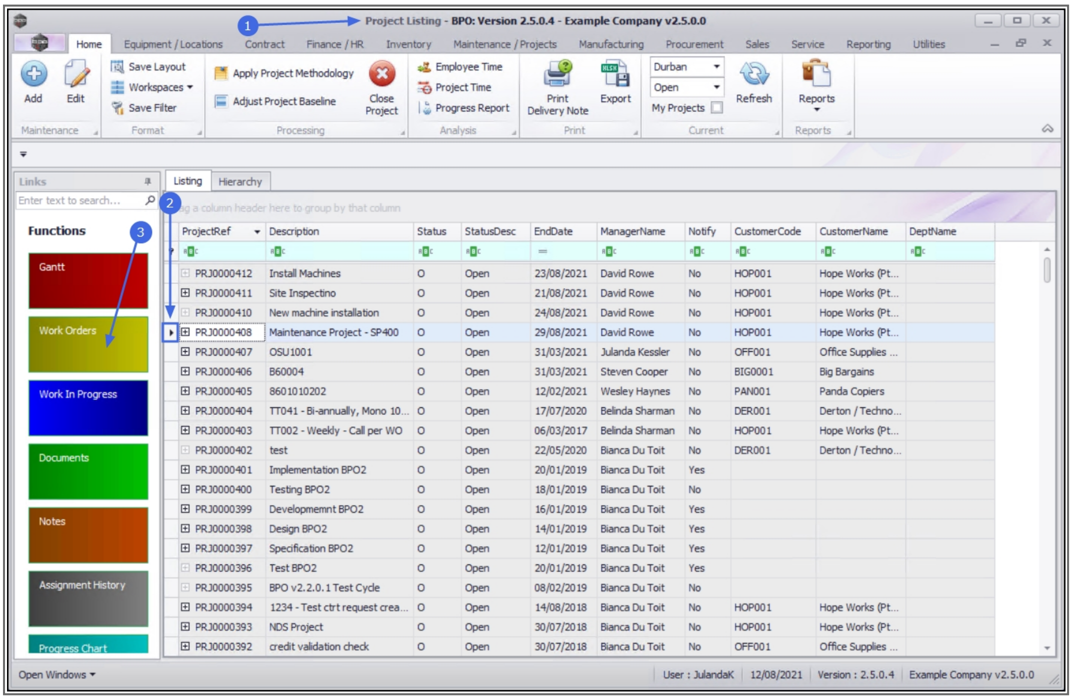
EDIT USING WORK ORDER VIEW

1. From the ***Project Listing*** screen,
2. Click on the ***expand*** button in the ***row*** of the project you wish to edit the linked work order for.
3. ***Double click*** on the ***row*** of the work order you wish to edit to display the ***Maintain WO*** screen.



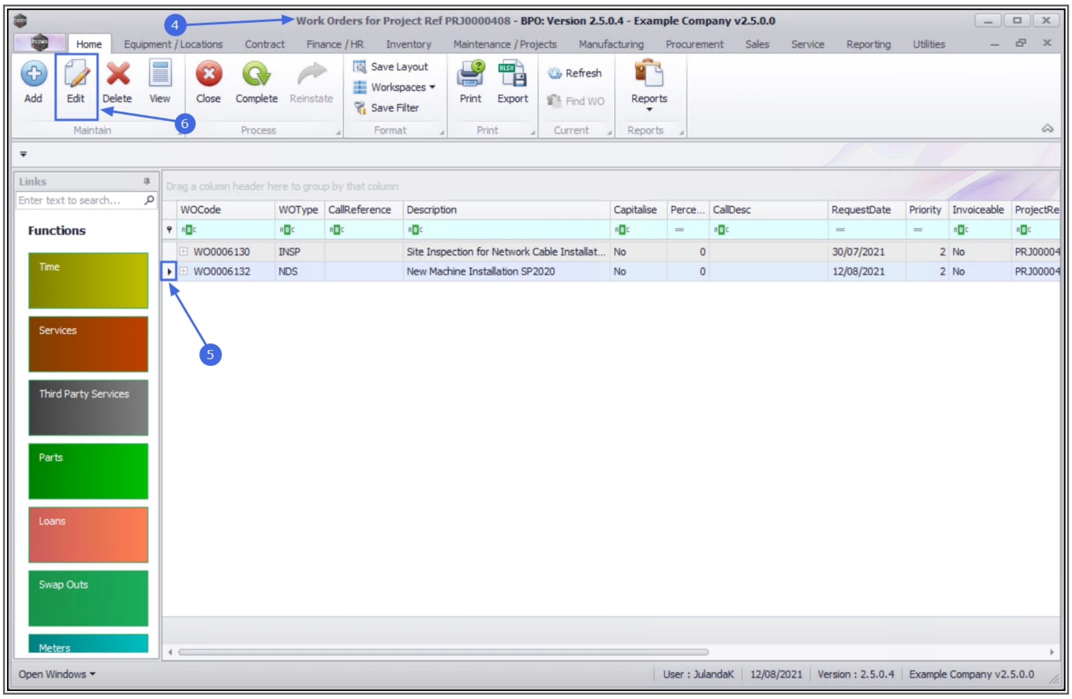
EDIT USING WORK ORDER TILE

1. From the ***Project Listing*** screen,
2. Click on the ***row*** of the project or sub-project you wish to edit the linked work order for.
3. Click on the ***Work Orders*** tile.



4. From the ***Work Orders for Project Ref [****project ref number****]*** screen,
5. Click on the ***row*** of the work order you wish to edit.
6. Click on ***Edit*** to display the ***Maintain WO*** screen.

Short cut key: ***Right click*** to display the ***All groups*** menu list. Click on ***Edit***.

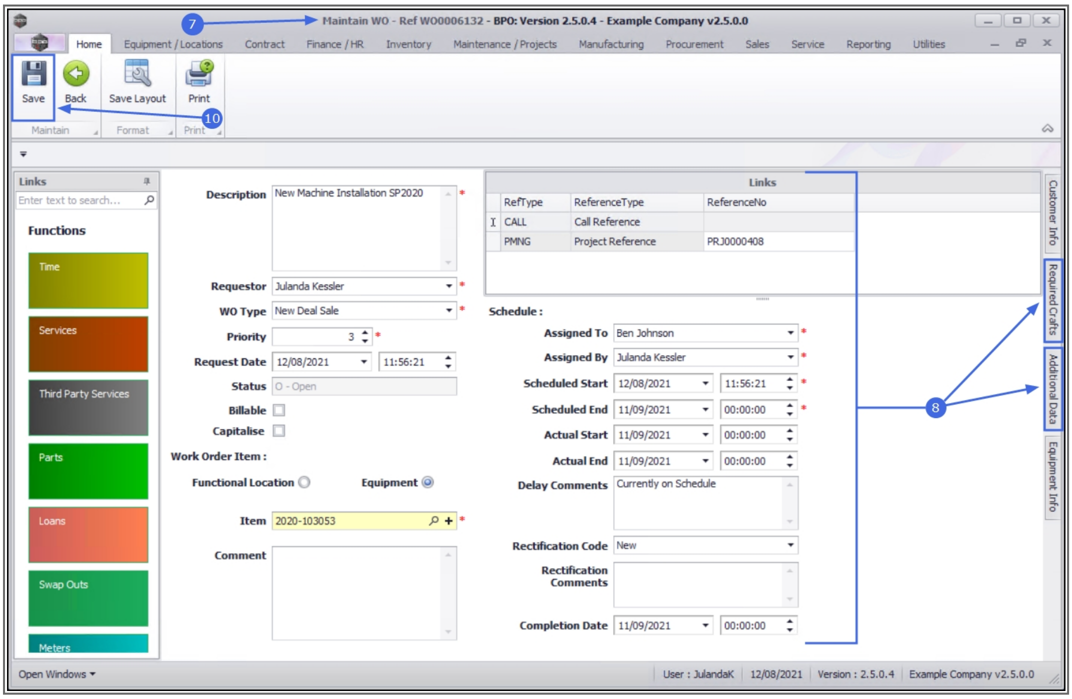


MAINTAIN WORK ORDER

7. The ***Maintain WO - Ref [****work order number****]*** screen will be displayed.
8. You can make the changes to the ***Work Order information*** screen, ***Required Crafts*** tab or ***Additional Data*** tab as required.
9. You can add information to the Maintain WO screen.

For a detailed handling of this topic refer to Work Orders - Add a Work Order

7. When you have made the necessary changes, click on ***Save***.



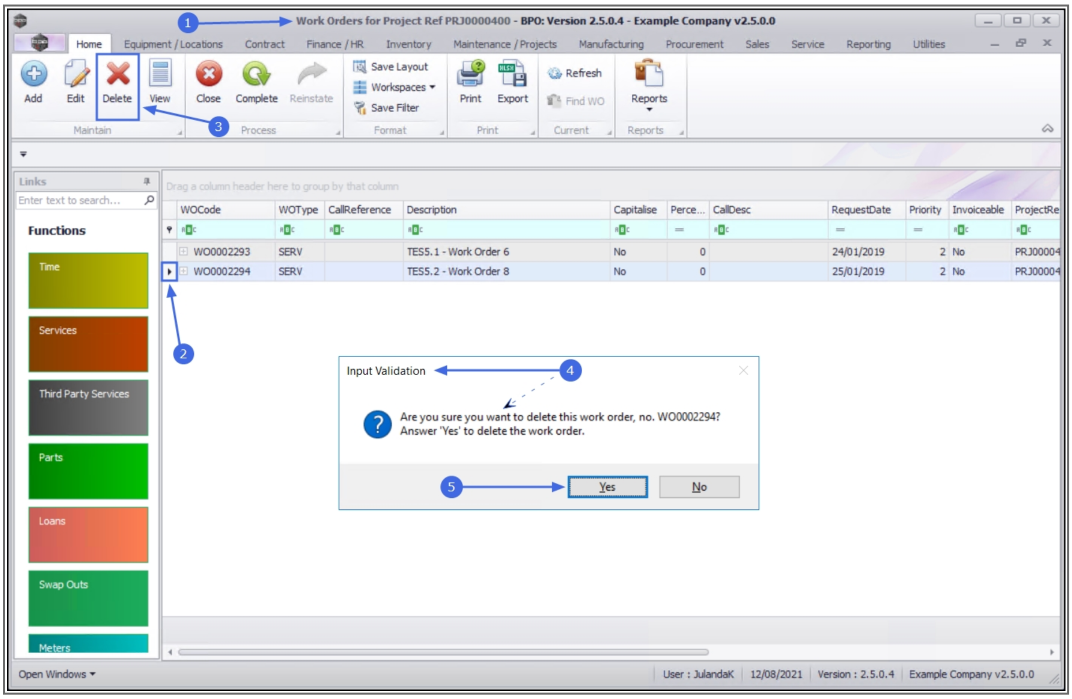
DELETE WORK ORDER

When applying a Project Methodology to your project, you may wish to remove the work orders that will not be required for the project you are working in.

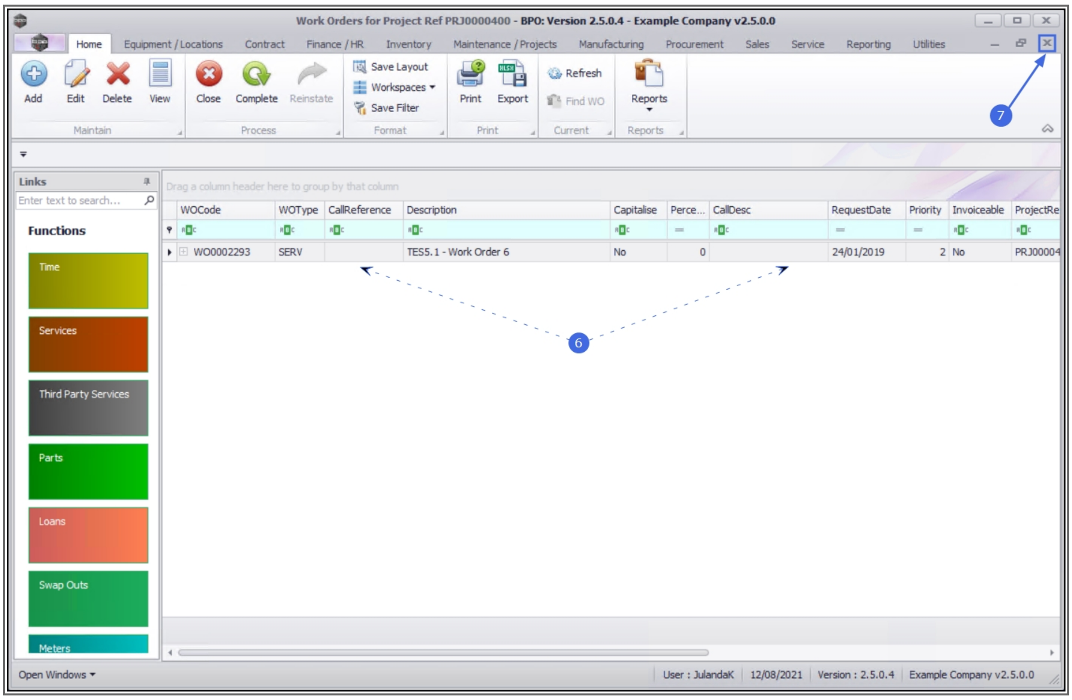
1. From the ***Work Orders for Project Ref [****project ref number****]*** screen,
2. Click on the ***row*** of the work order you wish to remove.
3. Click on ***Delete***.

Short cut key: ***Right click*** to display the ***All groups*** menu list. Click on ***Delete***.

4. When you receive the ***Input Validation*** message to confirm;
   - ***Are you sure you want to delete this work order, no. [****work order number****]? Answer 'Yes' to delete the work order.***
5. Click on ***Yes***.

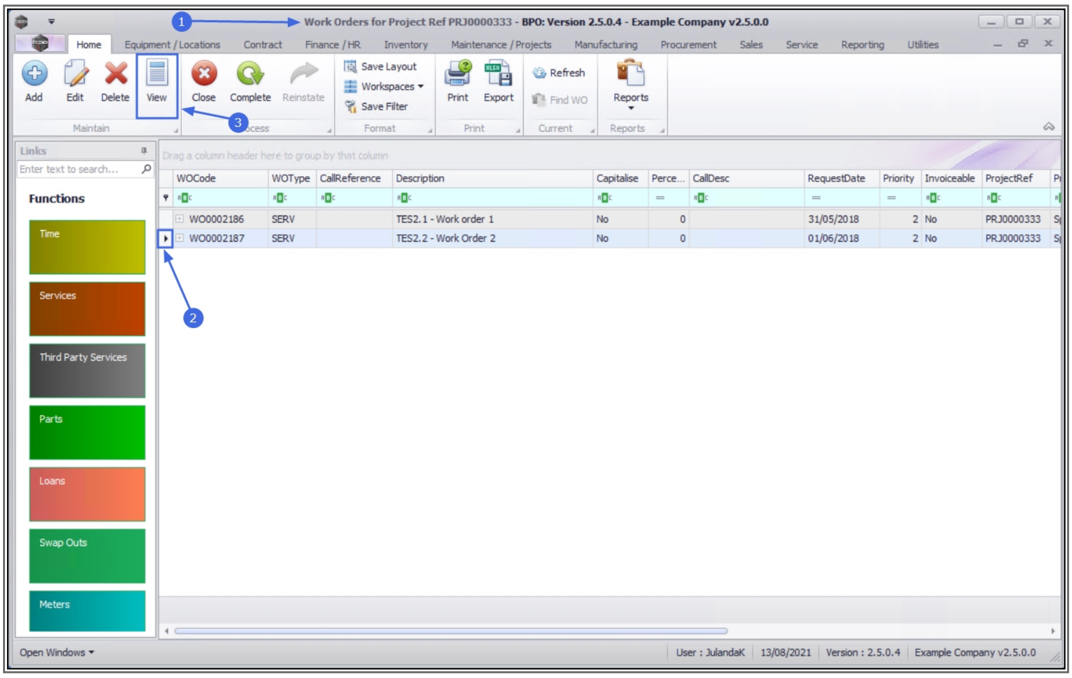


6. The work order has been removed from the ***Work Orders for Project*** screen.
7. Click on the ***Close*** button to return to the Project listing screen.



VIEW WORK ORDER

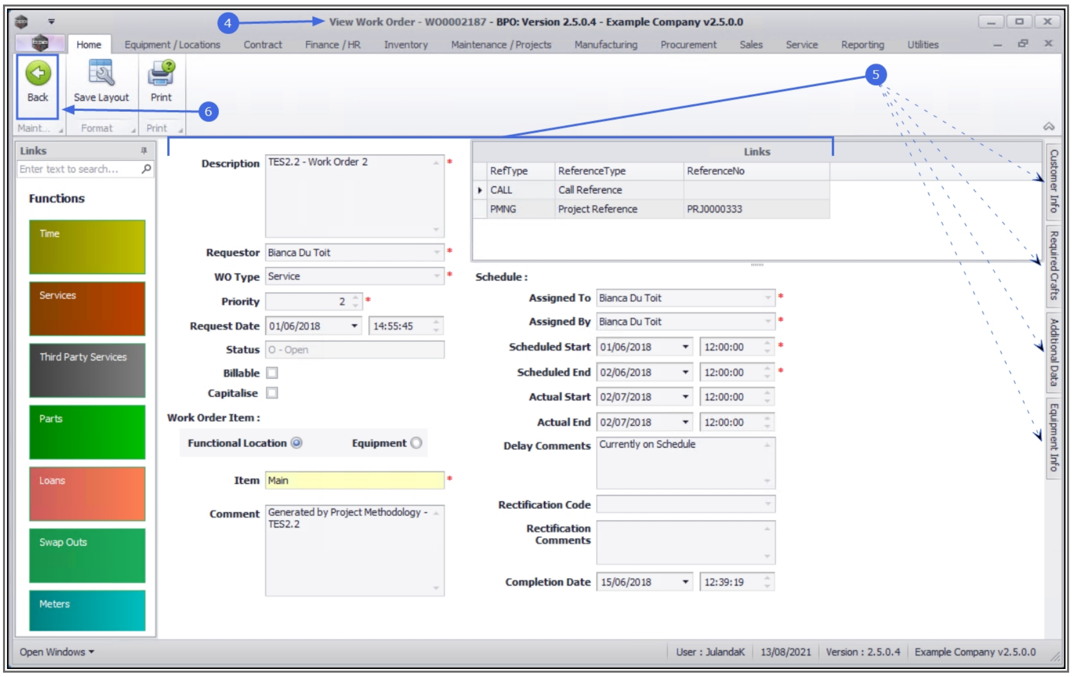
1. From the ***Work Orders for Project Ref [****project ref number****]*** screen will be displayed.
2. Click on the ***row*** of the work order you wish to view.
3. Click on ***View***.



4. The ***View Work Order - [****work order number****]*** screen will be displayed.

> Note that only the *Back* button is available on this screen as this screen is view only.

5. From here you can view the ***Work Order details***, ***Customer Info***, the ***Required Crafts***, ***Additional Data*** or the ***Equipment Info*** for the work order.
6. Click on ***Back*** to return to the Work Order.



CLOSE WORK ORDER

> All work order transactions must be completed, for instance issuing parts, invoicing etc., before a work order can be closed. The system will prevent you from closing the work order if a transaction still needs to be processed on the work order.
>
> You must have successfully completed the work order, before it can be closed.

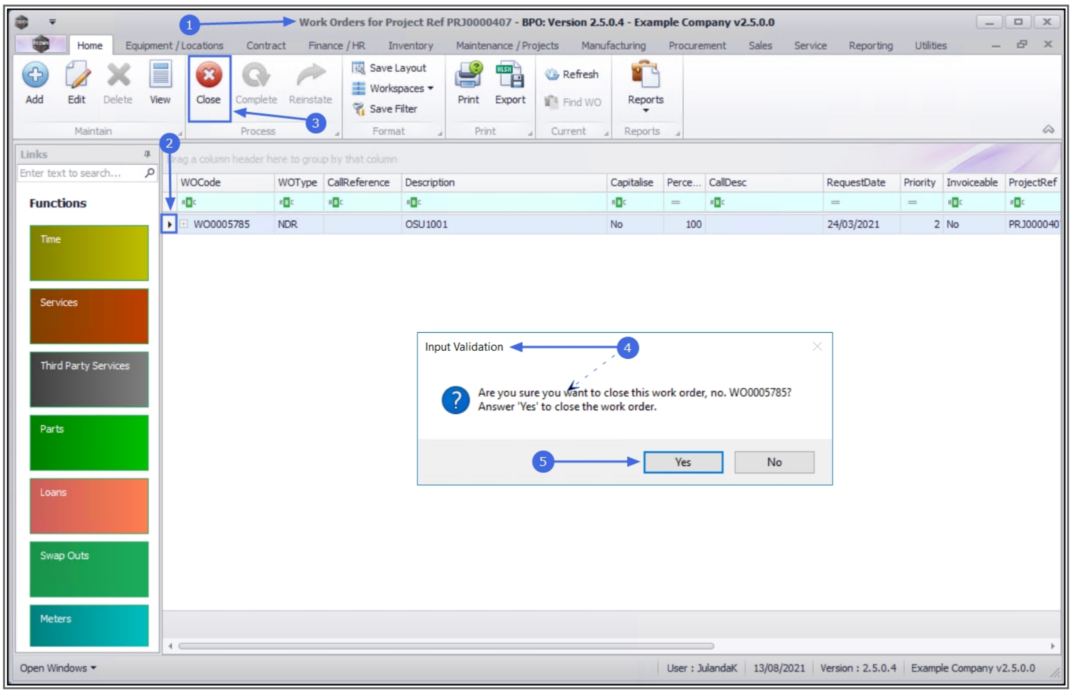
1. From the ***Work Orders for Project Ref [****project ref number****]*** screen will be displayed.
2. Click on the ***row*** of the work order that needs to be closed.

> Note that you will only be able to close a work order that has been completed.

3. Click on ***Close***.

Short cut key: ***Right click*** to display the ***All groups*** menu list. Click on ***Close***.

4. When you receive the ***Input Validation*** message to confirm;
   - ***Are you sure you want to close this work order, no. [****work order number****]? Answer 'Yes' to close the work order.***
5. Click on ***Yes***.



Scroll to view the ***Status*** for the Work Order in the Status column.

The Status has changed to ***C - Closed***.

COMPLETE WORK ORDER

Work orders linked to a project should be completed when the work required has been done.

1. The ***Work Orders for Project Ref [****project ref number****]*** screen will be displayed.

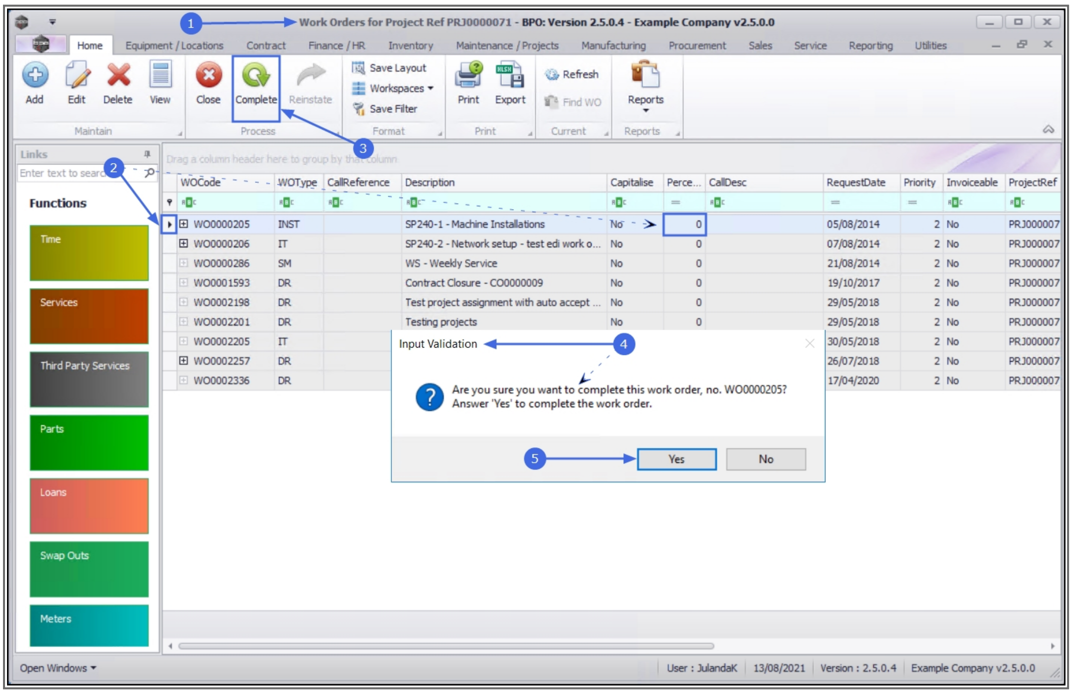
2. Click on the ***row*** of the Work Order you wish to complete.

> Note the *Percentage Complete* status field. If it has not been updated during the project, the status will be changed to 100 when completed.

3. Click on ***Complete***.

> **Short cut key:** ***Right click*** to display the ***All groups*** menu list. Click on ***Complete***.

4. When you receive the ***Input Validation*** to confirm;
   - ***Are you sure you want to complete this work order, no. [work order number]? Answer 'Yes' to complete the work order.***
5. Click on ***Yes***.

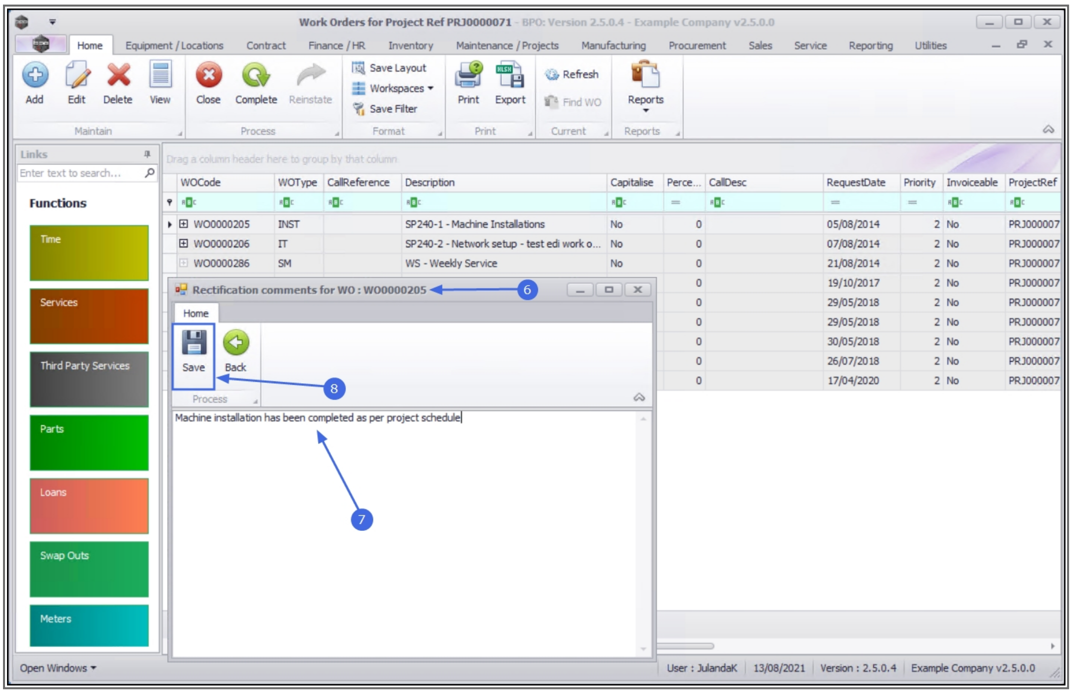


6. Next, you will receive the ***Rectification commands for WO: [work order number]*** screen.

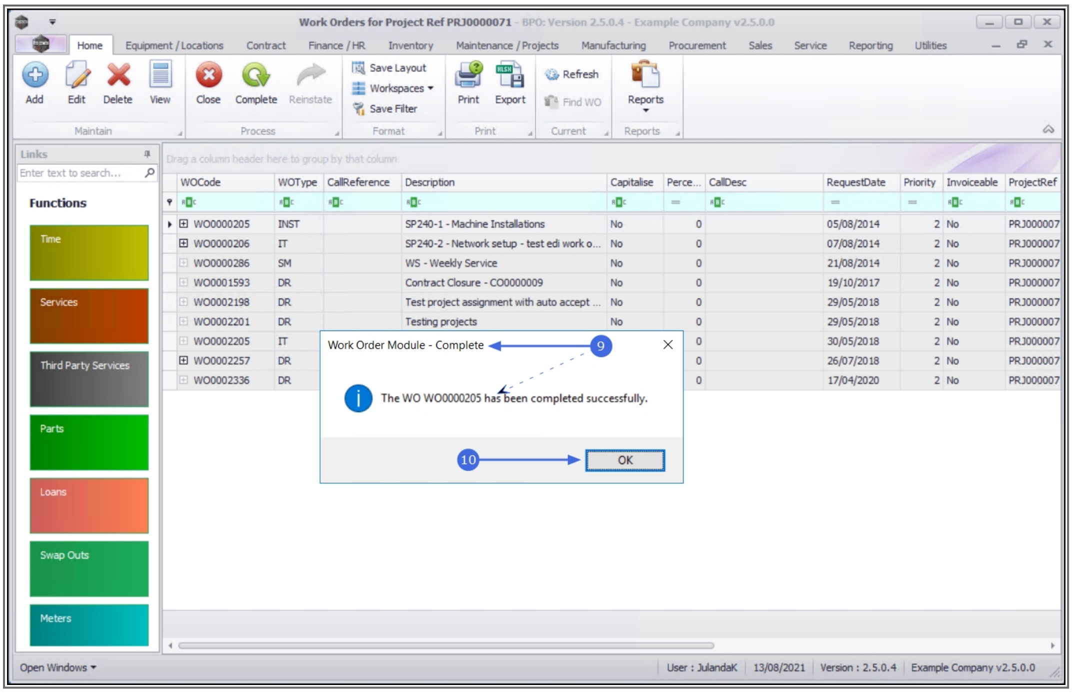
7. Type in the work order rectification ***comments***.

> Note that the comment needs to be at least 20 characters long.

8. When you have finished typing the comments, click on ***Save***.

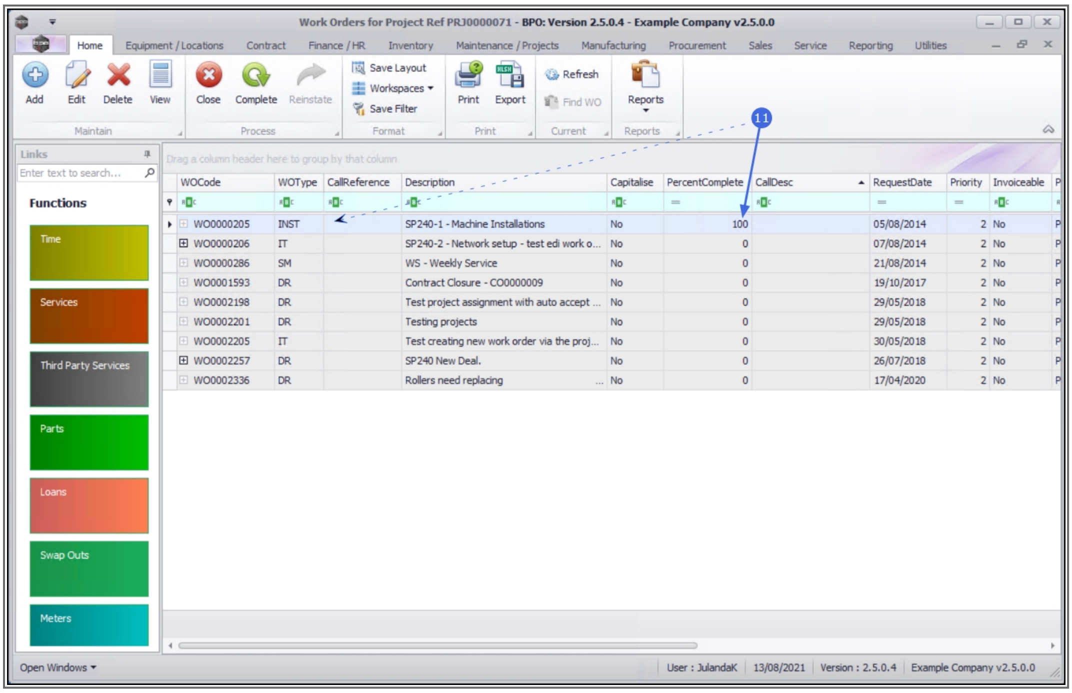


9. When you receive the ***Work Order Module - Complete*** message confirming that;
    - ***The WO [*work order number*] has been completed successfully.***
10. Click on ***OK***.



11. The ***Work Orders for Project*** screen has been updated with the ***completed*** work order.

    Note that the *Percent Completed* status has been updated to 100 to indicate completion.



REINSTATE WORK ORDER

If you need to process or change something on a closed work order, you will need to **reinstate the work order**, add or edit the details as required, then close it again when done.

Some of the reasons for reinstating a work order are:

- To credit a cancelled order.
- To credit incorrect stock and re-invoice correct stock.
- To credit over supply.
- To credit and re-invoice correct selling price.

Only closed work orders can be reinstated.

1. From the ***Work Orders for Project Ref [****project ref number****]*** screen will be displayed.

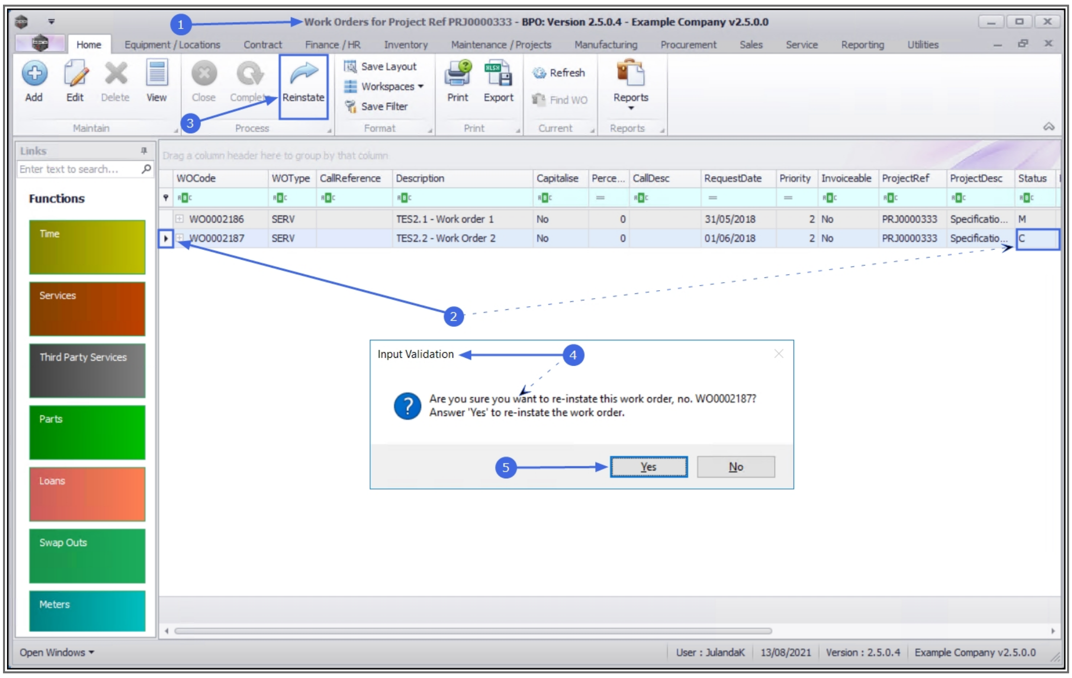
2. Click on the ***row*** of the closed work order that needs to be reinstated.

> Note the status for the work order as *C - Closed*.

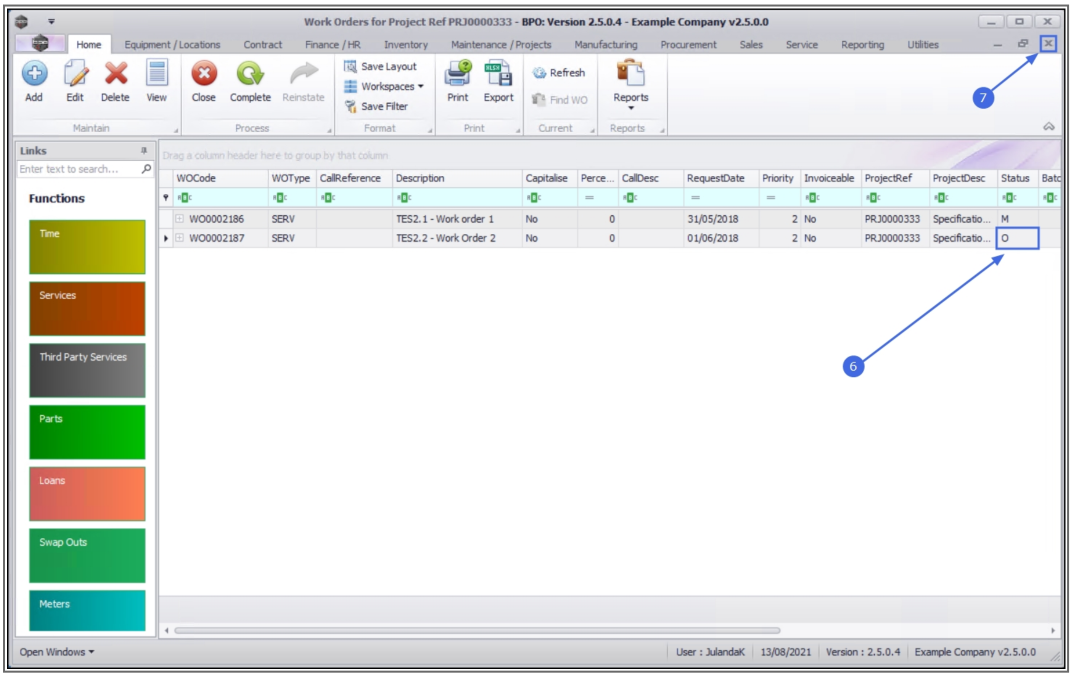
3. Click on ***Reinstate***.

Short cut key: ***Right click*** to display the ***All groups*** menu list. Click on ***Reinstate***.

4. When you receive the ***Input Validation*** message to confirm;
   - ***Are you sure you want to re-instate this work order, no.*** *[work order number]****? Answer 'Yes' to re-instate the work order.***
5. Click on ***Yes***.

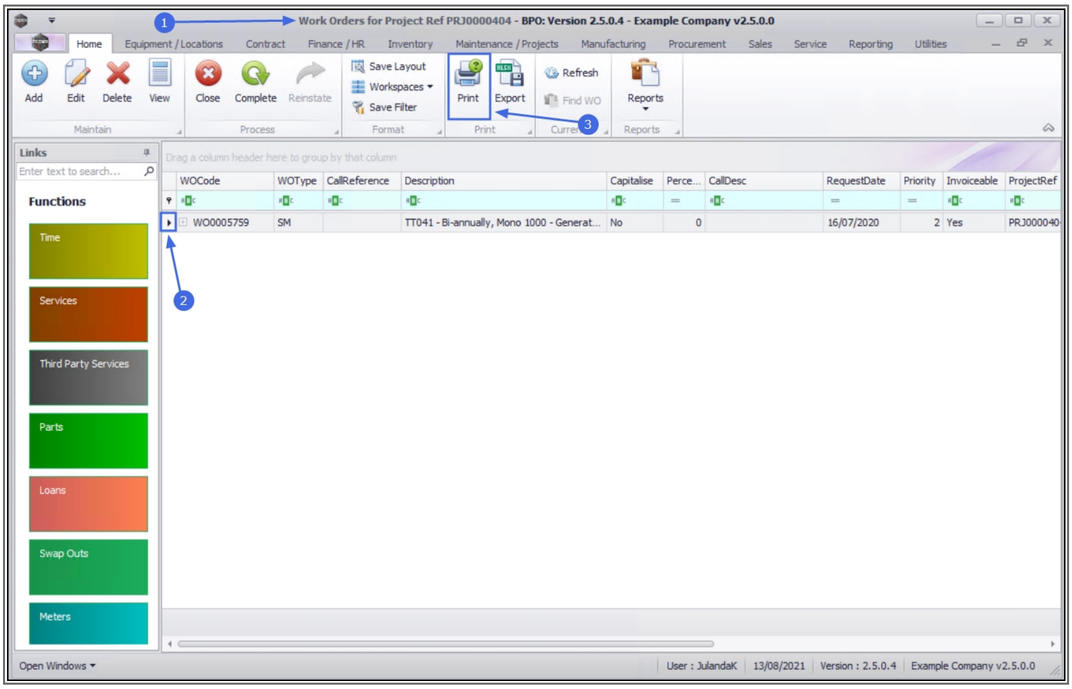


6. The work order ***Status*** has changed to ***O - Open***.
7. ***Close*** the screen to return to the ***Project Listing*** screen.

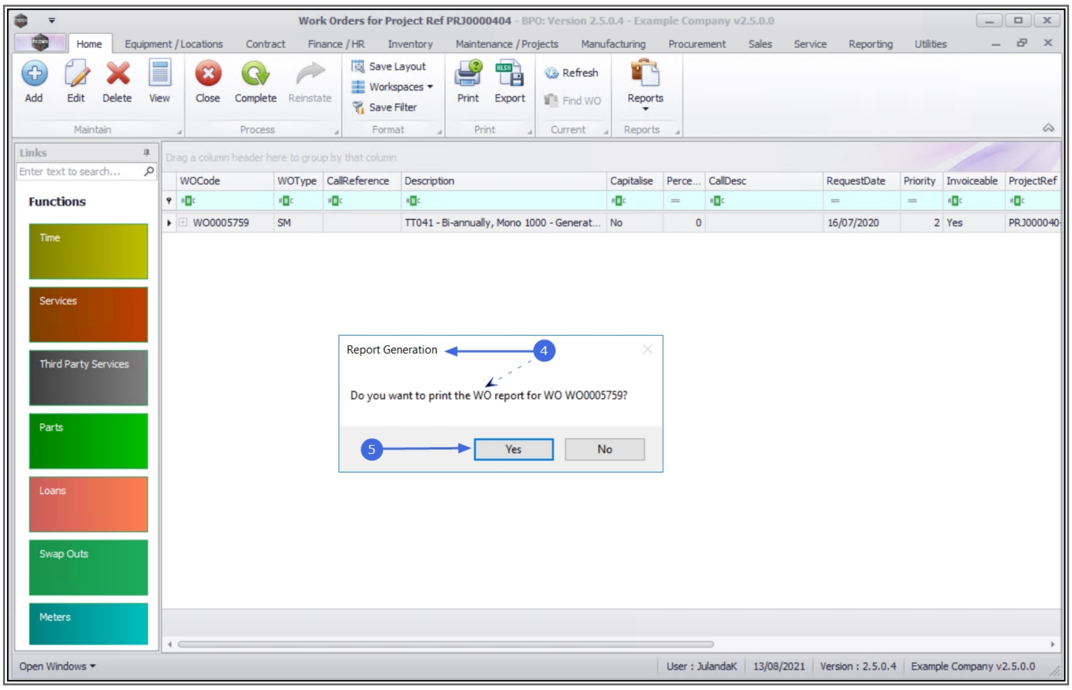


PRINT WORK ORDER

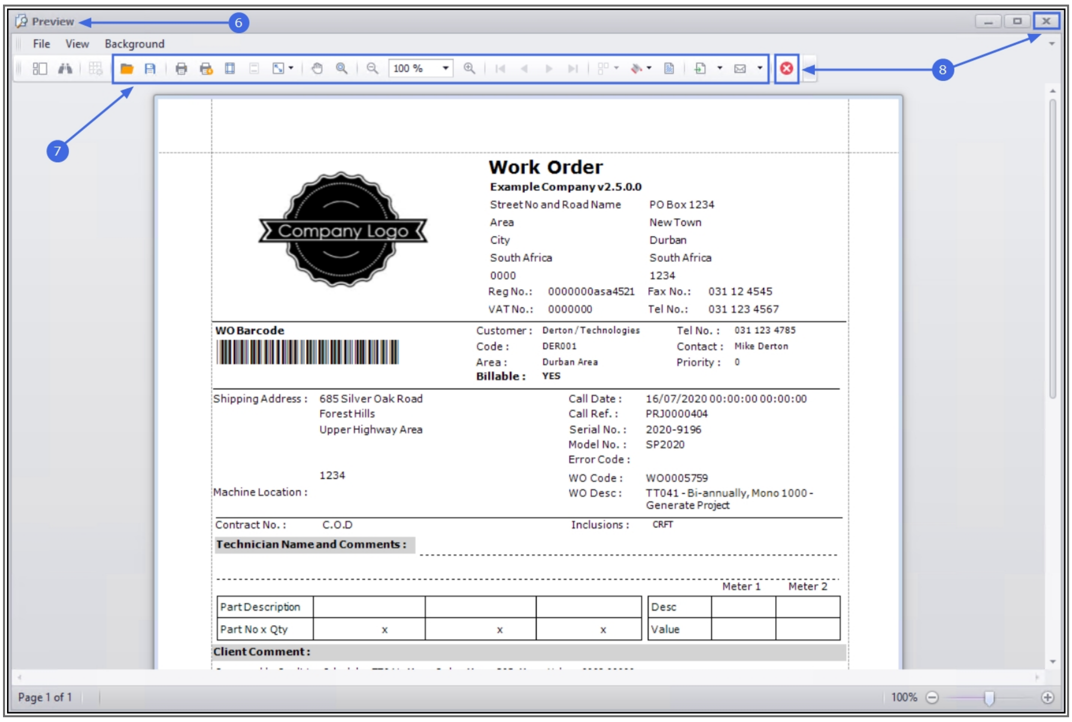
1. The ***Work Orders for Project Ref [****project ref. number****]*** screen will be displayed.
2. Click on the ***row*** of the Work Order you need to print the Work Order report for.
3. Click on ***Print***.



4. When you receive the ***Report Generation*** message;
   - ***Do you want to print the WO report for [****work order number****]?***
5. Click on ***Yes***.

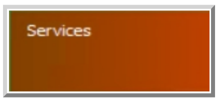


6. The ***Preview*** screen will be displayed.
7. From here you can make cosmetic changes to the document as well as ***Zoom***, ***View***, ***Print***, ***Export*** or ***Email*** the Work Order.
8. ***Close*** the Report Preview screen when done.

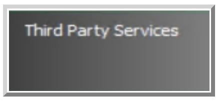


FUNCTION TILES

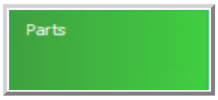
The Times tile will direct you to the ***Time booking for Work Order*** screen where you can ***Add***, ***Edit*** and ***Delete*** Labour Time for a Work Order linked to a Project. Refer to Work Orders - Time Booking



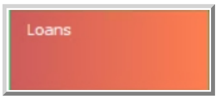
The Services tile will direct you to the ***Internal services for WO Code*** screen where you can ***Add***, ***Edit*** and ***Remove*** an Internal Service from the Work Order. Refer to Work Orders - Internal Services



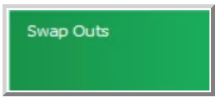
The Third Party Services tile will direct you to the ***Service Request for WO Code*** screen where you can ***Add***, ***Edit***, ***Delete***, issue a ***Requisition*** and do ***Billing*** for the Work Order. Refer to Work Orders - Third Party Service Request



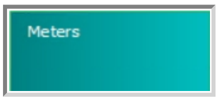
The Parts tile will direct you to the ***Service Request for WO Code*** screen where you can, ***Add***, ***Edit***, ***Remove*** an Internal Service to a Work Order, as well as view ***Requisitions***, ***Issues*** and ***Transfers***, maintain ***Notes***, ***Change the Warehouse***, ***Remap a Part*** or ***Create a Part*** on the Work Order. Refer to Work Orders - Part Requests



The Loans tile will direct you to the ***Loan Requests for WO Code*** screen where you can ***Add***, ***Edit***, ***Delete*** and view ***Returns*** on a loan request linked to the Work Order. Refer to Work Orders - Loans



The Swap Outs tile will direct you to the ***Swap Outs for WO Code*** screen where you can ***Add*** swap outs on a Work Order. Refer to Work Orders - Swap Outs

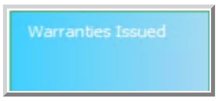


The Meters tile will direct you to the ***Meters for WO Code*** screen where you can view the list of meter readings against the work order. Refer to Work Orders - Meters

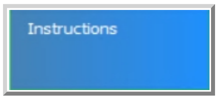
The Equipment tile will direct you to the ***Expense Claims for WO Code*** screen where you can ***Add***, ***Edit*** and ***Delete*** and expense claim from the Work Order. Refer to Work Orders - Expenses

The Travel tile will direct you to the ***Travel Claims for WO Code*** screen where you can ***Add***, ***Edit*** and ***Delete*** a travel claim from the Work Order. Refer to Work Orders - Travel

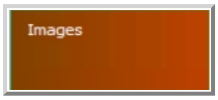
The Documents tile will direct you to the ***Documents for Work Order*** screen where you can ***Add***, ***Edit***, ***Delete*** and ***View*** a digital documents linked to a work order. Refer to Work Orders - Documents



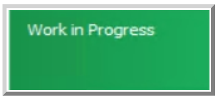
The functions tile will direct you to the ***Issued Warranties for WO Code*** screen where you can, ***Add***, ***Edit*** and ***Delete*** a warranty linked to a work order. Work Orders - Warranties Issued



The functions tile will direct you to the ***Instructions for WO Code*** screen where you can ***Add***, ***Edit***, ***Delete*** and ***Complete*** an instruction for a Work Order. Refer to Work Orders - Task Instructions



The functions tile will direct you to the ***Images for WO Code*** screen where you can view and ***Print*** the images linked to the Work Order. Refer to Work Orders - Images

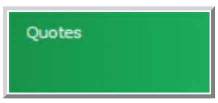


The functions tile will direct you to the ***Work in Progress for WO Code*** screen where you can***Return***, ***Invoice WO*** and ***Invoice Call***(s) linked to the Work Order. Refer to Work Orders - Work in Progress (WIP)

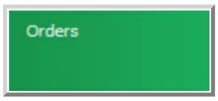
The functions tile will direct you to the ***Maintenance Methodology for location*** screen where you can ***Add***, ***Edit*** and ***Delete*** a maintenance methodology from a Work Order. Refer to Work Orders - Maintenance

The functions tile will direct you to the ***Time Not Billed for Work Order Code*** screen where you can ***Invoice WO***, ***Invoice Project***, ***Flag Reviewed*** and set ***SLA Time*** linked to the Work Order. Refer to Work Orders - Time Review

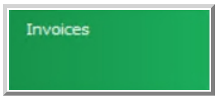
PROCESSING TILES



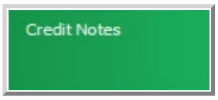
The Quotes functions tile will direct you to the ***Sales Quotes for Work Order*** screen where you can ***Add***, ***Edit***, ***Delete***, ***View***, ***Accept***, ***Reject***, ***Covert*** and ***Clone a Quote*** linked to a Work Order. Refer to Work Orders - Sales Quotes



The Orders functions tile will direct you to the ***Sales Orders for Work Order*** screen where you can ***Add***, ***Edit***, ***Delete***, ***View***, ***Create Invoice***, ***Create New Deal***, ***Add Items to WO***, ***New Deal Project***, ***Print Sales Order*** and ***Print a Proforma Invoice***. Work Orders - Orders



The Invoices functions tile will direct you to the ***Sales Invoices for Work Order*** screen where you can ***Add***, ***Edit***, add a ***Comment and Reference***, ***Print*** and ***Send Invoices to Print Queue***. Refer to Work Orders - Invoices



The Credit Notes functions tile will direct you to the ***Sales Credit Notes for Work Order*** screen where you can ***Add***, ***Edit***, ***Delete***, ***View***, ***Release for Approval***, ***Remove from Approval***, ***Approve Cr Note*** and ***Send Cr Notes to Print Queue***. Refer to Work Orders - Credit Notes

MNU.058.003