

SERVICE

WORK MANAGEMENT – ASSIGN OR RE-ASSIGN A WORK ORDER

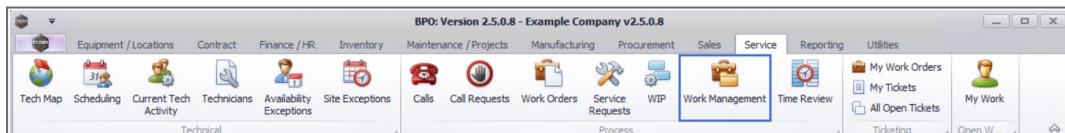
Unassigned, open Work Orders can be assigned to a technician from the **Work Management** screen.

The Work Orders listed are only for technicians that have labour time booked.

A work order may be listed more than once. A separate line is allocated for each employee that has time recorded against that Work Order.

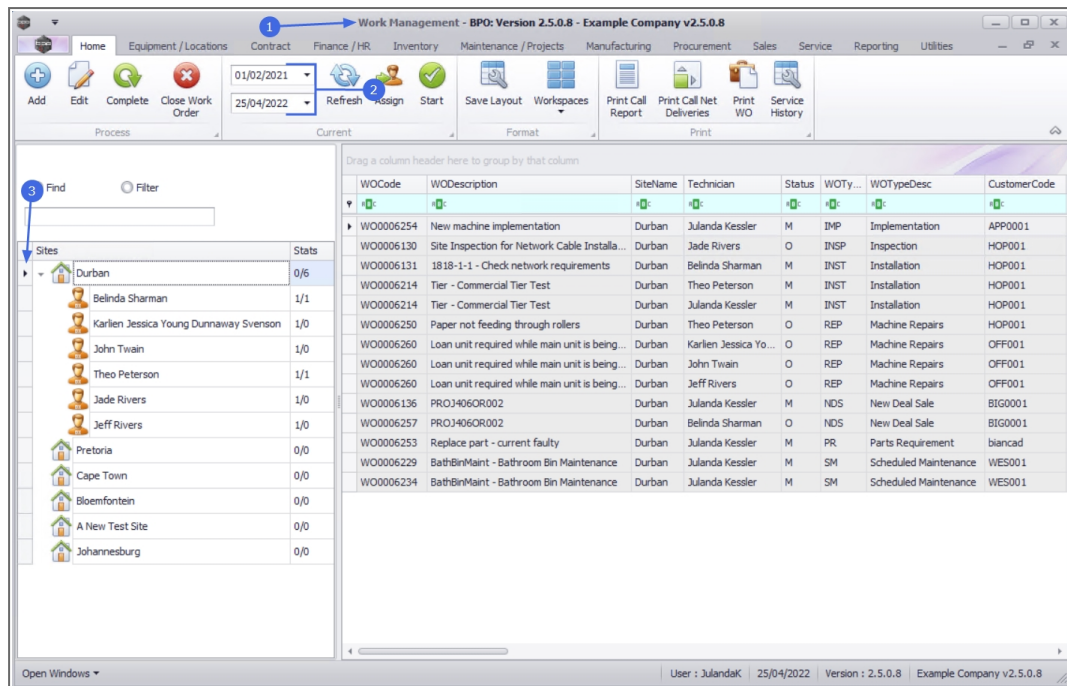
The Technician column in the data grid is not the Assigned to person but the employee that has a labour / time record linked.

Ribbon Access: *Service > Work Management*



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

Click on the **Refresh** button  to update the screen.



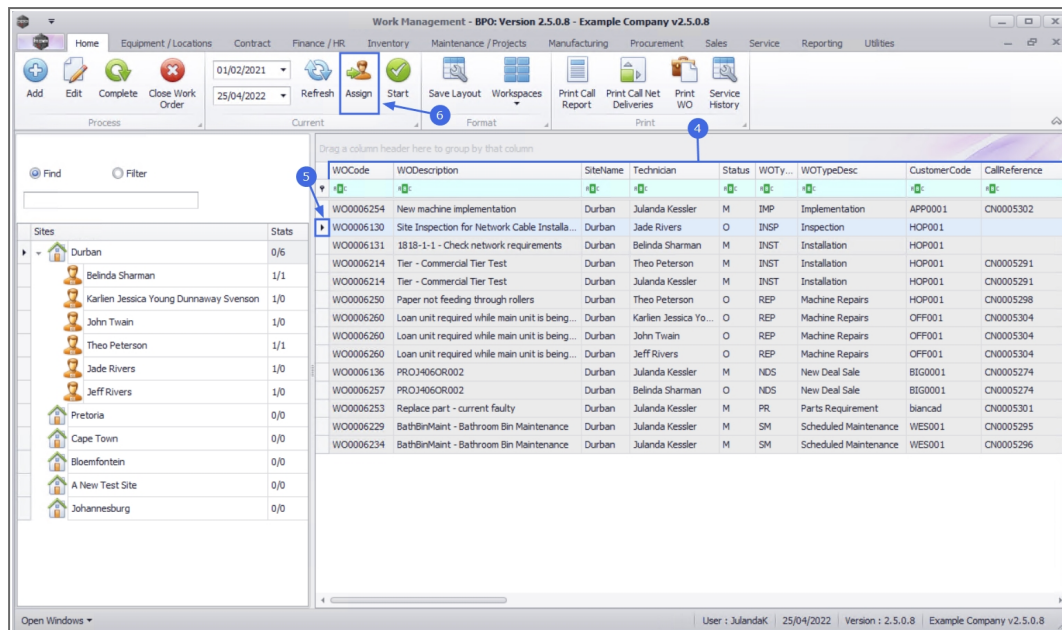
4. The **Work Orders** frame will be populated with all the work orders in the specified date range.

ASSIGN WORK ORDER LINKED TO A PROJECT

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



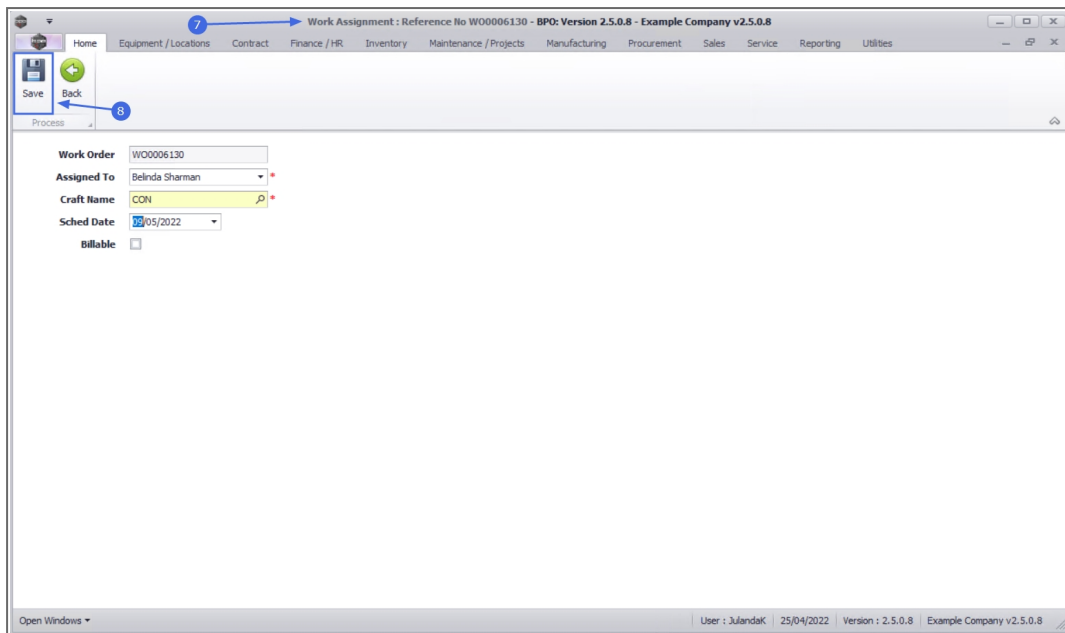
Short cut key: **Right click** to display the **Process** menu list. Click on **Assign**.



7. The **Work Assignment: Reference No [work order number]** screen will be displayed.

- **Work Order:** The Work Order number you have selected will populate this field.
- **Assigned To:** Click on the down **arrow** to select the name of the Technician you wish to assign the work order to from the drop-down list.
- **Craft Name:** Click on the **search** button to select the required craft from the **Select the craft** screen.
- **Sched Date:** This field will display the **current** date. Click to type in or click on the down **arrow** to select the scheduled date for the work order using the calendar function.
- **Billable:** Click to select the check box if the Work Order assignment should be billed.

8. When you have finished editing the work assignment details, click on **Save**.



Work Assignment : Reference No WO0006130 - BPO: Version 2.5.0.8 - Example Company v2.5.0.8

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

Save Back

Process

Work Order: WO0006130

Assigned To: Belinda Sharman

Craft Name: CON

Sched Date: 09/05/2022

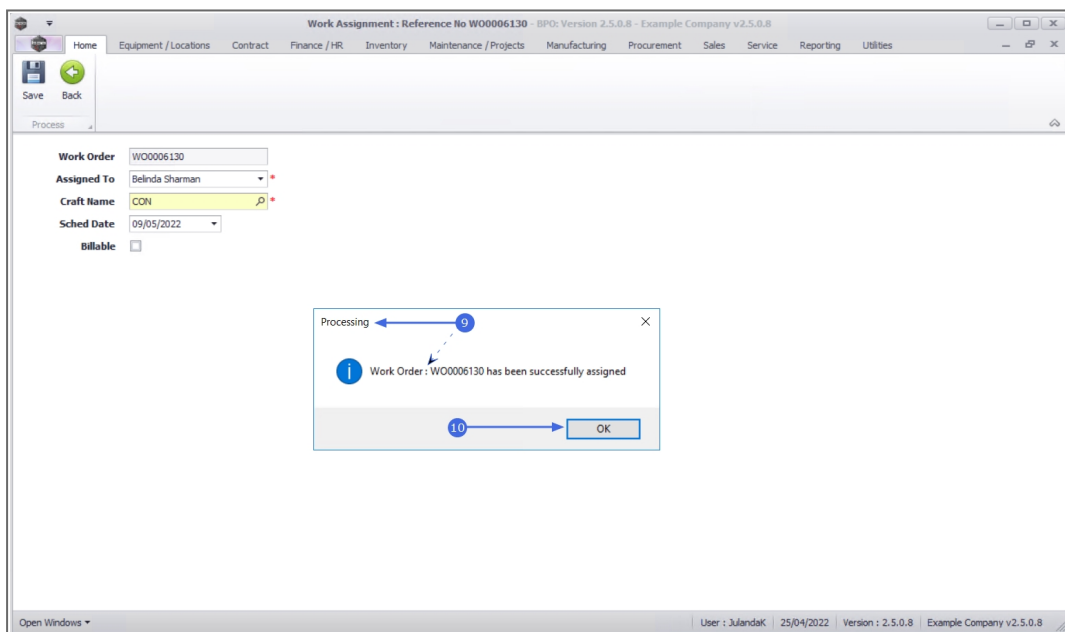
Billable: ☐

Open Windows User : JlandaK 25/04/2022 Version : 2.5.0.8 Example Company v2.5.0.8

9. When you receive the **Processing** message to confirm that;

- **Work Order: [work order number] has been successfully assigned.**

10. Click on **OK**.



Work Assignment : Reference No WO0006130 - BPO: Version 2.5.0.8 - Example Company v2.5.0.8

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

Save Back

Process

Work Order: WO0006130

Assigned To: Belinda Sharman

Craft Name: CON

Sched Date: 09/05/2022

Billable: ☐

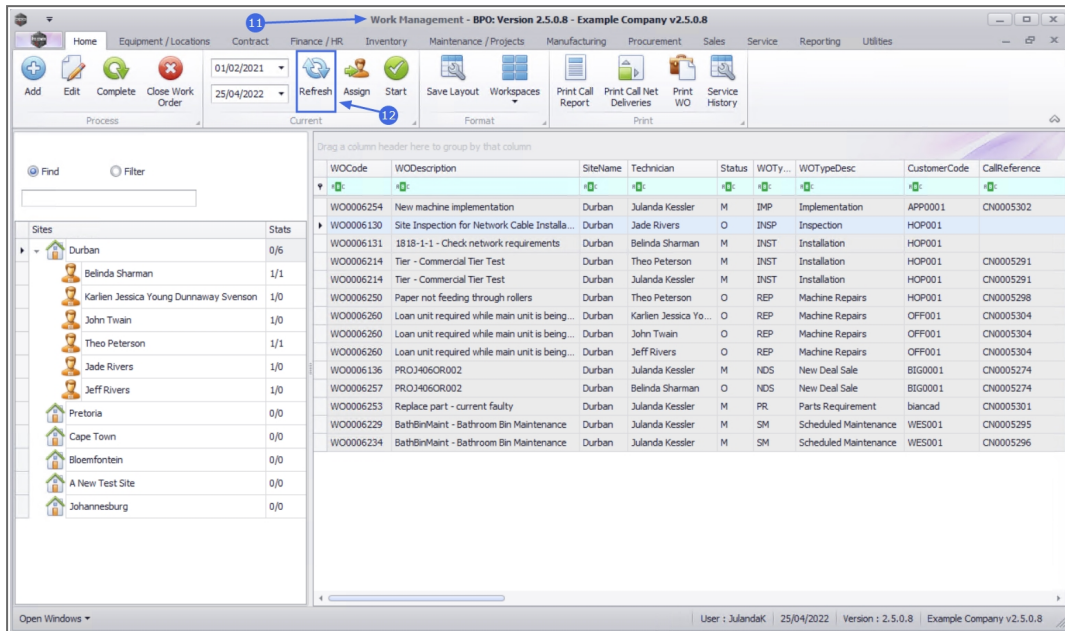
Processing

Work Order: WO0006130 has been successfully assigned

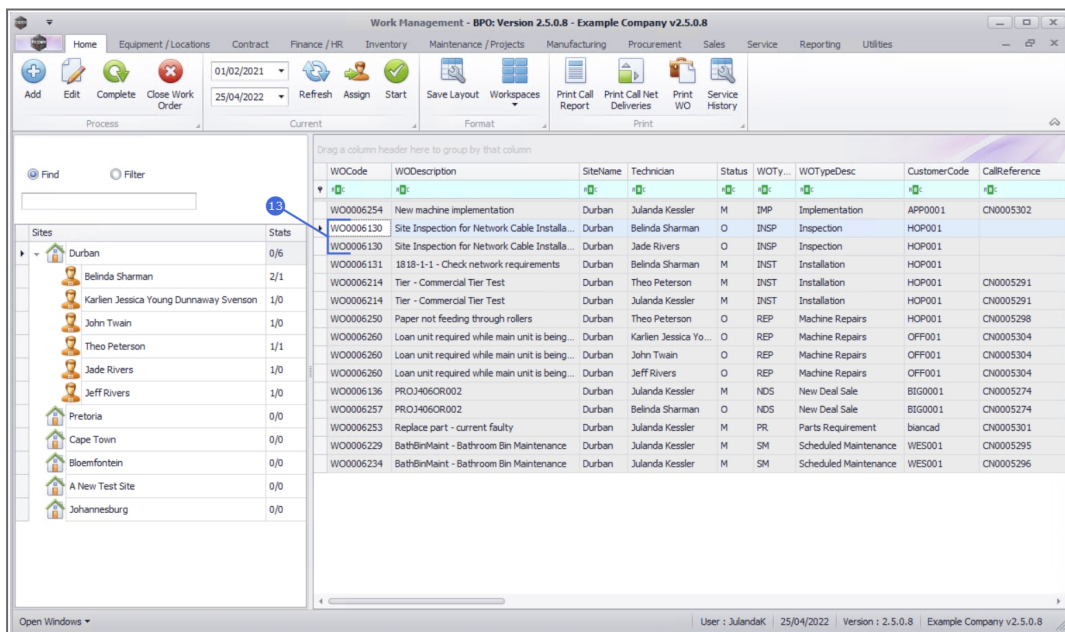
OK

Open Windows User : JlandaK 25/04/2022 Version : 2.5.0.8 Example Company v2.5.0.8

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

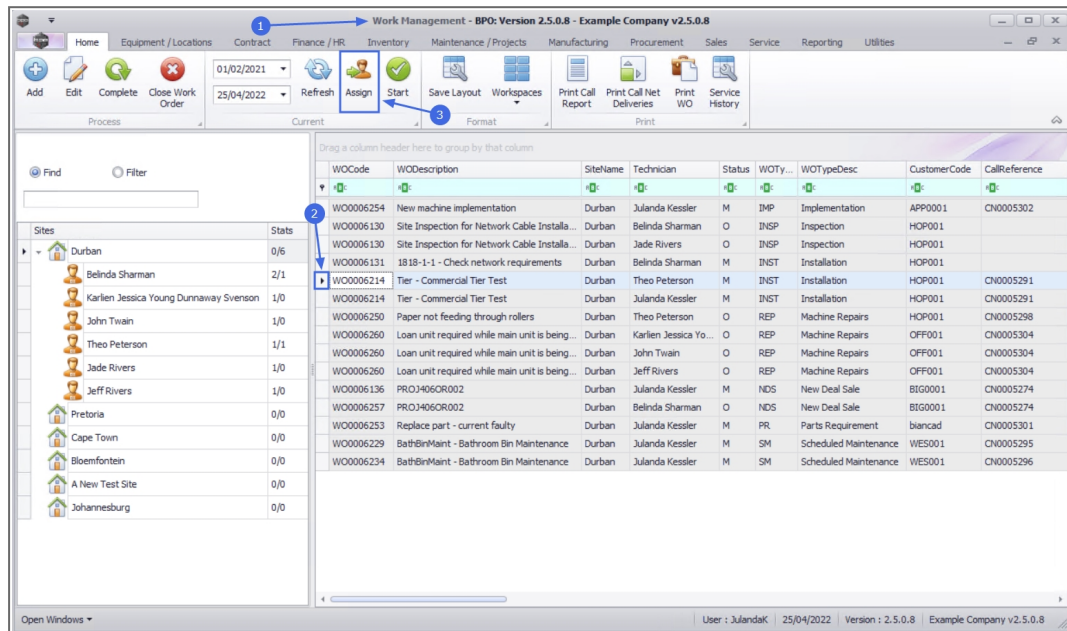


13. The work order will now appear twice on the screen, as a **separate line** has now been allocated for each employee that has a **time record** booked against a Work Order.



ASSIGN A WORK ORDER LINKED TO A CALL

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



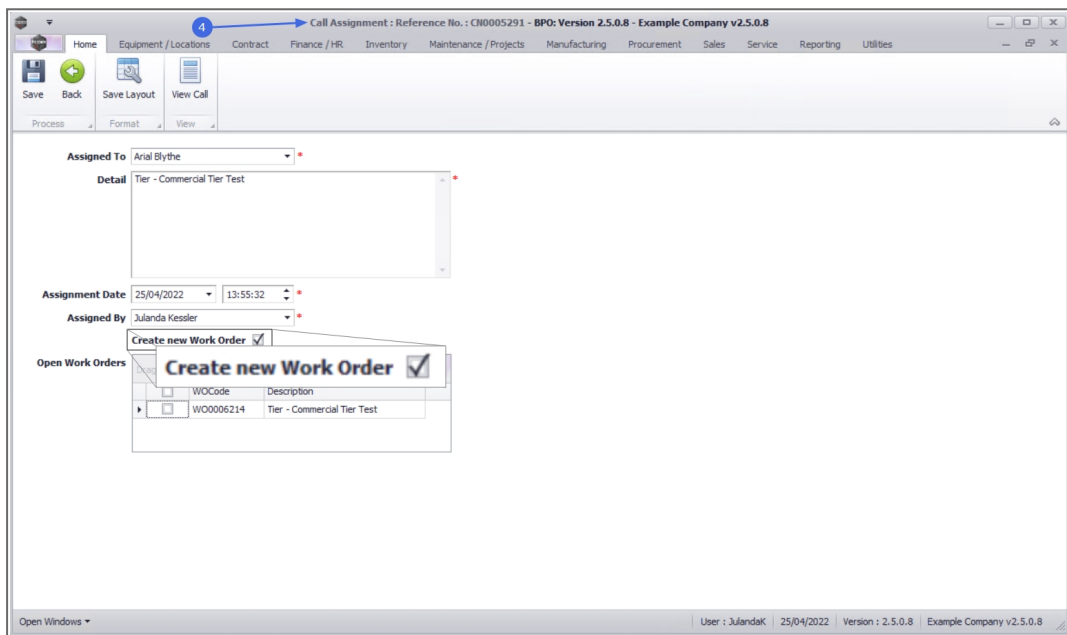
4. "The Call Assignment: Reference No: [call ref number] screen will be displayed." on page 4
 - **Assigned To:** Click on the down **arrow** to select the name of the Technician you wish to assign the work order to from the drop-down list.
 - **Detail:** The **call reference description** for the call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

CREATE NEW WORK ORDER

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



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



OPEN WORK ORDERS

- You may wish to create a new Work Order by selecting an existing **Open Work Order**.

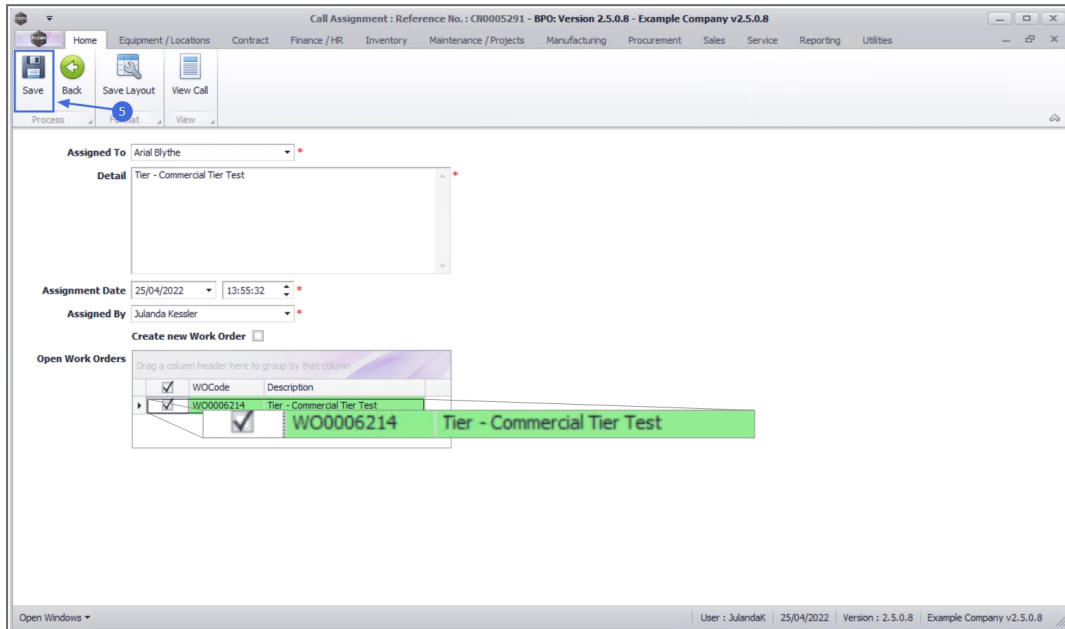


Note that you cannot choose a Work Order that was previously assigned to someone.



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

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



Call Assignment : Reference No. : CN0005291 - BPO: Version 2.5.0.8 - Example Company v2.5.0.8

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

Save Back Save Layout View Call

Assigned To Ariel Blythe

Detail Tier - Commercial Tier Test

Assignment Date 25/04/2022 13:55:32

Assigned By Julanda Kessler

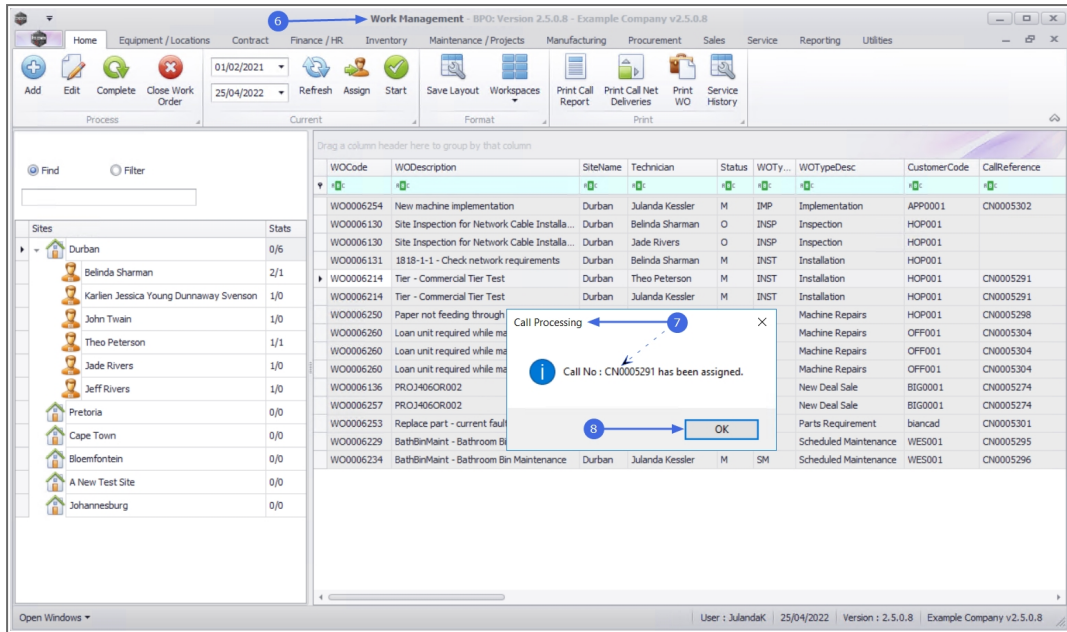
Create new Work Order ☐

Open Work Orders

WOCCode	Description
WO0006214	Tier - Commercial Tier Test

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

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



The screenshot displays the CO3 Work Management interface. On the left, there is a sidebar with a 'Find' and 'Filter' section, and a list of sites including Durban, Belinda Sharman, Karlén Jessica Young Dunnaway Svenson, John Twain, Theo Peterson, Jade Rivers, Jeff Rivers, Pretoria, Cape Town, Bloemfontein, A New Test Site, and Johannesburg. The main area shows a table of work orders with columns: WOCode, WODescription, SiteName, Technician, Status, WOTy..., WOTypeDesc, CustomerCode, and CallReference. A confirmation dialog box is open in the center, titled 'Call Processing', with the message 'Call No : CN0005291 has been assigned.' and an 'OK' button. The status bar at the bottom indicates 'User : JulandaK', '25/04/2022', 'Version : 2.5.0.8', and 'Example Company v2.5.0.8'.

WOCode	WODescription	SiteName	Technician	Status	WOTy...	WOTypeDesc	CustomerCode	CallReference
WO0006254	New machine implementation	Durban	Julanda Kessler	M	IMP	Implementation	APP0001	CN0005302
WO0006130	Site Inspection for Network Cable Installa...	Durban	Belinda Sharman	O	INSP	Inspection	HOP001	
WO0006130	Site Inspection for Network Cable Installa...	Durban	Jade Rivers	O	INSP	Inspection	HOP001	
WO0006131	1818-1-1 - Check network requirements	Durban	Belinda Sharman	M	INST	Installation	HOP001	
WO0006214	Tier - Commercial Tier Test	Durban	Theo Peterson	M	INST	Installation	HOP001	CN0005291
WO0006214	Tier - Commercial Tier Test	Durban	Julanda Kessler	M	INST	Installation	HOP001	CN0005291
WO0006250	Paper not feeding through					Machine Repairs	HOP001	CN0005298
WO0006260	Loan unit required while me					Machine Repairs	OFF001	CN0005304
WO0006260	Loan unit required while me					Machine Repairs	OFF001	CN0005304
WO0006260	Loan unit required while me					Machine Repairs	OFF001	CN0005304
WO0006136	PROJ406OR002					New Deal Sale	BTG0001	CN0005274
WO0006257	PROJ406OR002					New Deal Sale	BTG0001	CN0005274
WO0006253	Replace part - current fault					Parts Requirement	biancad	CN0005301
WO0006229	BathBinMaint - Bathroom B					Scheduled Maintenance	WES001	CN0005295
WO0006234	BathBinMaint - Bathroom Bin Maintenance	Durban	Julanda Kessler	M	SM	Scheduled Maintenance	WES001	CN0005296

Related References

- "View Work Order Details" on page 25

MNU.074.003

