Expense Management

Work Order

User Guide

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Introduction

Chapter Topic   • *Expense Management Work Order Overview*

The *Expense Management Work Order User Guide* explains how to configure and use the Expense Management Work Order application.

Expense Management provides an integrated, scalable IT management solution for businesses of almost every size and market segment. Organizations can become more productive using its tools to effectively manage IT operations and services while controlling IT-related expenses.

Expense Management Work Order Overview

Every organization has many work processes, such as trouble tickets or work orders. These are routinely accomplished procedures, which may involve many stages, employees, forms, instruments, etc. It is easy to lose track of the numerous processes. The Work Order Application enables your organization to follow up on any type of process defined in the application.

In the Work Order application, the term:

• **Process** refers to a type of process
• **Ticket** refers to an instance of any of the process types

Every process consists of at least 2 **stages**. The ticket begins with the **Initial** stage, can progress through none or many **Inner** stages, and then terminates in a **Completion** stage.

Stages are initially assigned to an **Organizational Unit**. Authorized users can **reassign** the ticket to an individual technician or to another organizational Unit (depending on the process definition).

Technicians can either accept a ticket assigned to their Organization Unit, or reject a ticket individually assigned to them or to their Organizational Unit.

• If a technician accepts a ticket, he or she becomes the assigned ticket technician.

- If they reject a ticket assigned individually to them, the ticket returns to the default assignment, which usually is an Organization Unit.

The process definition holds the default definitions for every ticket of that process.

NOTE

Process definition is done by the System Administrator of the MA4000 Expense Management, and is outside the scope of this User Guide.
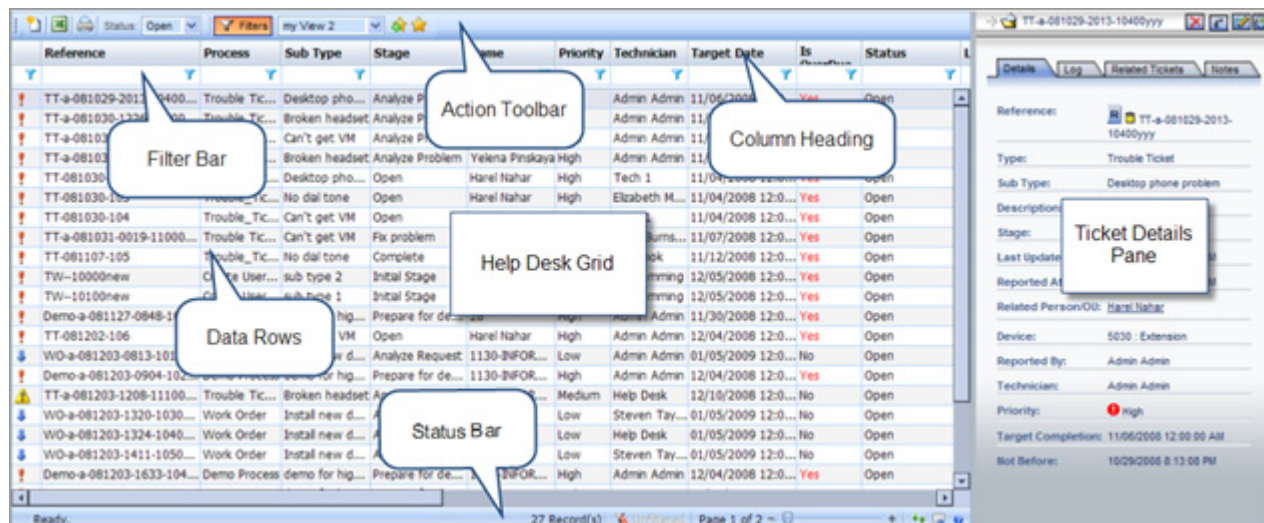
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Using Work Order

Work Order Main Window

The Work Order window (Figure 2-1) is the center of all Work Order actions.

Figure 2-1 *Work Order Window*

The Work Order main window has two parts:

- On the right side of the window is the **ticket details pane**. It displays the details of the currently selected ticket.
- The rest of the window is the **Work Order grid**. The grid contains the currently filtered tickets, one row per ticket in the Enhanced Grid format.

The grids contain the following parts:

- The **Action toolbar** at the top contains ticket related commands and tools.
- The **Column headings** bar contains column names. Each column represents one data field.
- The **Filters bar** (may be shown or hidden) contains the current filter settings
- The **Data rows** are the body of the grid. Each row represents one ticket.
- The **Status bar** at the bottom of the grid shows grid status, paging information and additional tools.

See "Using the Work Order Grid" on page 2-13.

Opening a New Ticket

Every ticket is an instance of one of the process types (and sub types) defined in your organization. The process definition contains the stages that the ticket can be in or progress through, how the ticket can move from stage to stage, and the Organizational Unit (or technician) assignment for each stage. When you open a new ticket, these definitions are copied from the process to become the default behavior of the ticket.

Throughout the life of a ticket, it is always assigned to one, and only one, technician or Organizational Unit. When you open a new ticket, the ticket is either assigned to the Organization Unit (or technician) defined in its first stage, or you may overwrite it and assign it to a particular technician.

To open a new ticket:

Step 1   At the left side of the Action Toolbar of the Work Order window, click **New**

[icon]. Figure 2-2 displays.

Figure 2-2 *Add New Ticket*

Step 2   Enter the **Customer Name**. As you type, the drop-down list displays all matching names. You can select one of them.

Step 3   Select a **device** from the Device drop-down list, or select **None**.

Step 4   Check or enter contact information fields.

Step 5   Check the **I have confirmed the following information** check box.

Step 6   Select a **Process Type** from the drop-down list. The list contains all the processes defined in your organization.

Step 7   Select a process **Sub Type** from drop-down list. The list contains all the sub-processes defined for the selected Process type.

Step 8   Select the appropriate **Priority** from the drop-down list. Default is the process defined priority.

Step 9   Select a technician or Organizational Unit from the **Assigned to Technician** drop-down list. Default is the Organizational Unit defined for the first stage in the process.

Step 10   Enter an **Internal ID**. This is an optional field for internal use.

Step 11   The Application calculates the **Target Completion** date based on today's date and process definition. You can overwrite it. Click the calendar icon ▦ and select a date.

Step 12   You may supply a **Not Before** date. Click the calendar icon ▦ and select a date.

Step 13   You can fill in the general fields in **Work Order detail1**, **2**, and **3**, or you may leave these fields empty for now and fill them later. See "Adding Information to a Ticket" on page 2-7.

Step 14   Click **Update**   [Update].

Viewing or Printing Ticket Details

To view ticket details:

Step 1   Page or set the **Filters** of the Work Order grid to display the desired ticket. See "Using the Work Order Grid" on page 2-13.

Step 2   Select the desired ticket.

Step 3   Do one of the following:

—The right side pane of the Work Order window displays the details of the selected ticket

—For a wider view, select **Edit** 📝 from the Action bar above the right side pane to open the **Edit Ticket Details** window.

> **NOTE**   *If the **Edit** 📝 icon is not available, **Accept** 📋 the ticket.*

Step 4   From the right pane or from the **Edit Ticket Details** window, select the **History Log** tab to view the ticket history log.

Step 5   From the right pane or from the **Edit Ticket Details** window, select the **Related Tickets** tab to view the related tickets, if any.

To print ticket details:

Step 1   Page or set the **Filters** of the Work Order grid to display the desired ticket. See "Using the Work Order Grid" on page 2-13.

Step 2   Select the desired ticket. The right side pane of the Work Order window displays the details of the selected ticket

Step 3   Do one of the following:

—From the far right of the Action bar, above the ticket details, click **print** .

—From the far left of the Action bar, click **print** .

Step 4   In the **Ticket Print** dialog box, click **Print** .

Setting or Changing Technician Assignment

Throughout the life of a ticket, it is always assigned to one, and only one, technician or Organizational Unit.

• When you open a new ticket the ticket is either assigned to the Organization Unit (or technician) defined in its first stage, or you may overwrite it and assign it to a particular technician.

• When you move stage in a ticket, the ticket is automatically assigned to the Organization Unit (or technician) defined in the new stage, or you may overwrite it and assign it to a particular technician.

• When you accept a ticket, you become the assigned technician.

• When you reassign a ticket, it is assigned to the named technician or Organization Unit.

• When you reject a ticket, it is reassigned to the Organization Unit (or technician) defined in its current stage.

This section provides information about:

• Accepting a ticket
• Rejecting a ticket
• Reassigning a ticket
• Opening a new ticket
• Moving stage in a ticket

To accept a ticket:

Step 1   Page or set the **Filters** of the Work Order grid to display the desired ticket. See .

Step 2   Select the desired ticket. The ticket details open in the right pane of the Work Order Window

Step 3   From the Action bar above the ticket details, click **Accept** .

Step 4   Click **OK** to Accept the Task. You are now the responsible technician.

To reject a ticket:

Step 1   Page the grid or set the **Filters** to display the desired ticket. See "Using the Work Order Grid" on page 2-13.

Step 2   Select the desired ticket. The ticket details open in the right pane of the Work Order Window.

Step 3   From the Action bar above the ticket details, click **Reject** ⟲ .

Step 4   In the **Task Performed** field of the **Reject Task** Dialog box, select a reason for the rejection.

Step 5   If in Step 4 you selected Other, enter your reason for rejecting the task in field Other.

Step 6   If desired, enter a note.

Step 7   Click **Update** [Update].

To reassign a ticket:

Step 1   Page the grid or set the Filters to display the desired ticket. See "Using the Work Order Grid" on page 2-13.

Step 2   Select the desired ticket. The ticket details open in the right pane of the Work Order Window

Step 3   From the Action bar above the ticket details, Click **Reassign** ⟳ .

Step 4   If in Step 3 above you selected **Other**, enter your reason for reassigning the task in field **Other**.

Step 5   If desired, enter a note.

Step 6   Click **Update** [Update].

Reporting on Ticket Progress

A ticket progresses by moving from stage to stage, until it is moved to its **Completion** stage and closes. Each stage begins with the ticket assigned to a technician or an Organization Unit, and in each stage, to edit the ticket, a technician must **Accept** the ticket. He or she then becomes the ticket technician until they move stage or reassign the ticket.

Adding Information to a Ticket

This section provides information about:

- Editing Work Order Details (General Fields)
- Changing the Priority of the Ticket
- Delaying a ticket
- Opening a new dependent/independent ticket

To edit Work Order Details (General Fields):

Step 1   Page or set the **Filters** of the Work Order grid to display the desired ticket. See "Using the Work Order Grid" on page 2-13.

Step 2   Select the desired ticket. The Ticket Details pane of the Work Order window displays the details of the selected ticket.

Step 3   From the right side of the Action bar, above the ticket details, click **Edit** . The **Edit Ticket Details** window opens.

NOTE   *If the **Edit** icon is not available, **Accept** the ticket.*

Step 4   Check the **Work Order Details** check box to show the General Fields.

Step 5   Enter the appropriate information in the appropriate fields.

Step 6   Click **Update** Update .

To change the Priority of the Ticket:

Step 1   Page or set the **Filters** of the Work Order grid to display the desired ticket. See "Using the Work Order Grid" on page 2-13.

Step 2   Select the desired ticket. The right side pane of the Work Order window displays the details of the selected ticket

Step 3   From the right side of the Action bar, above the ticket details, click **Edit** . The **Edit Ticket Details** window opens.

NOTE   *If the Edit icon is not available, Accept the ticket.*

Step 4   From the **Priority** drop-down list, select the required Priority.

Step 5   Click **Update** Update .

To delay a ticket:

Step 1   Page or set the **Filters** of the Work Order grid to display the desired ticket. See "Using the Work Order Grid" on page 2-13.

Step 2   Select the desired ticket. The right side pane of the Work Order window displays the details of the selected ticket

Step 3   From the right side of the Action bar, above the ticket details, click Edit . The **Edit Ticket Details** window opens.

NOTE   *If the Edit icon is not available, Accept the ticket.*

Step 4   From the tab bar, select **Main**.

Step 5   In the **Optional Tasks** field, select **Delay** from the drop-down list.

Step 6   From the drop-down list in the **Task Performed** field, select a reason for the delay.

Step 7   If you selected **Other**, enter the delay reason in the **Other** field.

Step 8   Enter a note in the **Note** field (optional).

Step 9   Click **Update** Update .

To open a new dependent/independent ticket:

Step 1   Page or set the **Filters** of the Work Order grid to display the desired ticket. See "Using the Work Order Grid" on page 2-13.

Step 2   Select the desired ticket. The right side pane of the Work Order window displays the details of the selected ticket

Step 3   From the right side of the Action bar, above the ticket details, click **Edit** . The **Edit Ticket Details** window opens.

NOTE   *If the Edit icon is not available, Accept the ticket.*

Step 4   From the tab bar, select **Main**.

Step 5 In the **Optional Tasks** field, select **Open New Ticket** from the drop-down list.

Step 6 In the **Constraint type** field, select **Dependent** or **None** from the drop-down list.

NOTE

Dependent means that the current ticket is dependent on the new ticket. That is, you can not close the current ticket without closing first the new ticket.

None means that the two tickets continue separately with no dependency between them.

Step 7 Click **Open** Open , the Add New Ticket window opens.

Step 8 Open the new ticket. See "Opening a New Ticket" on page 2-2.

Reporting on Tasks and Stages

This section provides information about:

• Filling information form
• Moving stage
• Reporting on tasks

To fill information form:

Step 1 Page or set the **Filters** of the Work Order grid to display the desired ticket. See "Using the Work Order Grid" on page 2-13.

Step 2 Select the desired ticket. The right side pane of the Work Order window displays the details of the selected ticket. See Figure 2-3.

Step 3   From the right side of the Action bar, above the ticket details pane, click **Edit** ✍. The **Edit Ticket Details** window opens.

> **NOTE**
> *If the Edit ✍ icon is not available, Accept ⌧ the ticket.*

Step 4   From the tab bar, select **Main**.

Step 5   In the **Optional Tasks** field, select **Fill Information Form** from the drop-down list.

Step 6   Fill in the Form.

Step 7   Click **Update** Update .

> **NOTE**
> *The **Fill Information Form** option appears only if there is an Information Form attached to the current stage.*
>
> *You cannot move stage from a stage that has Information Form attached without filling the form first.*

To move stage:

Step 1 Page or set the **Filters** of the Work Order grid to display the desired ticket. See "Using the Work Order Grid" on page 2-13.

Step 2 Select the desired ticket. The right side pane of the Work Order window displays the details of the selected ticket

Step 3 From the right side of the Action bar, above the ticket details, click **Edit** 📝. The **Edit Ticket Details** window opens.

NOTE *If the* **Edit** 📝 *icon is not available,* **Accept** 🗐 *the ticket.*

Step 4 From the tab bar, select **Main**.

Step 5 In the **Optional Tasks** field, select **Move Stage** from the drop-down list.

Step 6 In the **Select Stage** list, select the next stage. The **Stage Instructions** field displays the instructions for the selected stage and the **Assign To** field displays the default technician (or Organizational Unit) defined for the selected stage.

Step 7 Leave the **Assigned To** field as it is or select another technician (or Organization Unit) from the drop-down list.

Step 8 Click **Update** Update .

Step 9 One of the following dialog boxes may appear:

—If the selected **Stage** is the **Completion** stage of the process, a dialog box will open with a warning that the ticket is about to be closed. Select **OK** to proceed or **Cancel** to select another stage.

—If the current stage has an Information Form attached, a dialog box will open with the message that you cannot move to the next stage unless you **fill the Information Form** first.

To report on tasks:

Step 1 Page or set the **Filters** of the Work Order grid to display the desired ticket. See "Using the Work Order Grid" on page 2-13.

Step 2 Select the desired ticket. The right side pane of the Work Order window displays the details of the selected ticket

Step 3 From the right side of the Action bar, above the ticket details, click **Edit** 📝. The **Edit Ticket Details** window opens.

NOTE *If the* **Edit** 📝 *icon is not available,* **Accept** 🗐 *the ticket.*

Step 4 From the tab bar, select **Main**.

Step 5 In the **Optional Tasks** field, select **Report Tasks** from the drop-down list. The reported tasks grid opens.

NOTE   *The **Report Tasks** option appears only if it is enabled for the current stage.*

Step 6 Do one of the following:

—To delete an existing task, select the task and click **Delete** ☒ and proceed to Step 7.

—To report a new task, click **New** 📝. The **Report of task made** window opens.

—To edit an existing task, select the task and click **Edit** 📝. The **Report of task made** window opens.

Step 7 In the **Report of task made** window:

—From the **Task Performed** drop-down list, select an option.

—From the **Tech/Vendor name** drop-down list, select a name.

—If you selected **Other** from the **Task Performed** list, enter in the **Other** field your description of the task performed.

—In the **Notes** field, enter your notes on the task.

—In the **Duration** field, enter the amount of time spent on the task.

Step 8 Click **Update** ⬚Update⬚ .

Using the Work Order Grid

The Work Order window is the center of all Work Order actions. The Work Order main window has two parts:

- On the right side of the window is the **ticket details pane**. It displays the details of the currently selected ticket.
- The rest of the window is the **Work Order grid**. The grid contains the currently filtered tickets, one row per ticket in the Enhanced Grid format.

Figure 2-4 *The Work Order Grid*

The grids contain the following parts:

- The **Action toolbar** at the top contains ticket related commands and tools.
- The **Column headings** bar contains column names. Each column represents one data field.
- The **Filters bar** (may be shown or hidden) contains the current filter settings
- The **Data rows** are the body of the grid. Each row represents one ticket.
- The **Status bar** at the bottom of the grid shows grid status, paging information and additional tools.
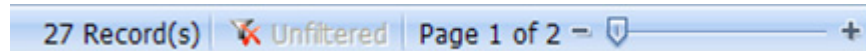

Basic Work Order Grid Operations

This section provides information about:

- Paging in the ticket grid
- Sorting the grid data
- Refreshing the grid data

Paging

If the number of currently selected records exceeds the number of tickets in the grid, the tickets are spread among more "pages". See figure.

Figure 2-5 *Paging*

Paging status information includes:

- Number of currently selected records.
- An indication whether the records are Filtered or not.
- Current page number
- Number of pages for current selection

Use the paging tools as follows:

- To move to the next page, click the plus sign.
- To move to the previous page, click the minus sign.
- To move to a specific page, press and hold the slider and slide it until you see the desired page number.

Sorting

You can sort the records by one of the columns.

An arrow in the column heading indicates that the records are sorted by that column. An arrow pointing up or down indicates ascending or descending order correspondingly.

For example **Reference** ▼ indicates that the tickets are sorted by descending order of Reference Number.

*To sort the records***:**

- Right click in the column heading and select the required sort order from the drop-down menu.
- Or click in a column heading to sort by that column.
- **To reverse the sort order**, click in the column heading again.

For each component you can sort by one column only at a time.

Refreshing

To manually refresh the view, click **Refresh** in the Status bar.
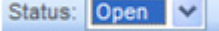
Using Work Order Grid Filters

This section contains information on:

- Setting filters
- Clearing filters
- Activating filters
- Saving Filter as favorites
- Organizing favorites

Set, Clear and Activate Filters

Use filtering to display only the required tickets. You can apply filters to more than one column at a time. When multiple filters are applied, the logical relation between the filtering conditions is AND, that is, only records that meet all of the conditions will be included in the selection.

*To filter by status***:**

Step   In the Action toolbar **status** drop-down list , select the desired status: **Open**, **Closed** or **All**. (The default is **Open**).

To set and activate filters:

Step 1   If the filters bar is not shown, right click any of the column headings and select **Filter bar**, or click **Filters** in the Action toolbar.

Step 2   In a column to which you wish to apply a filter, click the filter icon and select from the drop-down menu the appropriate relation for the filter.

Step 3   Click in the filter cell (not on the icon), a value entering text box opens . Enter the appropriate value.

Step 4   To activate all currently set filters now, press **Enter**, or wait until all filters are set and then activate all set filters at once in Step 6.

Step 5   Repeat steps 2 to 4 for each column to which you wish to apply a filter.

Step 6   To activate all set filters, click any of the filter icons in the filters bar and select **Apply All Filters**, or click the **Enter** key on the last filter.

*To clear a filter***:**

Step 1   If the filters bar is hidden, right click any of the column headings and select **Filter bar**.

Step 2   Click the filter icon 🔽 of the filter you wish to clear and select **Clear This Filter**.

*To clear all filters***:**

Step 1   If the filters bar is hidden, right click any of the column headings and select **Filter bar**.

Step 2   Click the filter icon 🔽 of the filter you wish to clear and select **Clear All Filters**.

Saving and Using Filter Favorites

The **Favorites** feature enables you to save the current filter settings in the **Favorite** filters list.

*To save filters settings as favorite***:**

Step 1   Set and activate a filters setting.

Step 2   In the Actions toolbar, click **Add to Favorites** ⭐ .

Step 3   In the **Save As** dialog box, type a name for this favorite filters setting.

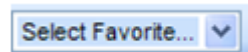*Step 4*   If you wish to make it your default filters setting, check the **Set as Default** check box.

Step 5   Click **Save**.

       The new setting is added to your favorites list.

*To use a favorite filter setting***:**

Step 1   In the Actions toolbar, open the **Select Favorite...** `Select Favorite... ▾` drop-down list.

Step 2   Select the desired filters setting.

       The selected setting is applied.

To organize your favorites list:

Step 1   In the Actions toolbar, click **Organize Favorites** ⭐ .

Step 2   In the **Organize Favorites** dialog box:

—To delete a favorite, click in the favorite row to select it, then click **delete** ❌ .

—To edit a favorite, click in the favorite row to select it, then click **Edit** ✏️ .

—To change the default favorite, select or clear the default check box. There can be only one default favorite.

Step 3   Close the Organize Favorites dialog box.

Exporting Work Order Data

You can export the selected data from the grid into various file formats on your local workstation

To be able to open and handle these files on your computer, the appropriate file types must be recognized and the appropriate programs to open these files must be installed.

The available file types are:

- **HTML** - Contains the data in a print ready format that can be opened for display by any browser program, e.g., Microsoft Internet Explorer, and can be edited by any HTML editing program, such as RoboHelp.
- **PDF** - Closed picture files that can be read by Adobe Acrobat Reader, but cannot be opened for editing.
- **XML** - Data files containing both the data and the data description. Suitable to be imported to certain programs.
- **EXCEL** - Excel files are spreadsheet files that can be opened and edited by Microsoft Excel.
- **TIFF** - Graphics file that can be opened and edited by most graphics programs, e.g. Microsoft Paint.
- **RTF** - Contains the data in a print ready format. These are word processing files that can be opened and edited by most word processing programs, e.g. Microsoft Word
- **TEXT** - Comma separated text files. i.e. the file contains the data, but no data description. Can be opened and edited by any text editor, such as Notepad. These files can be used to import the data into customized programs.

To export data to a file - all formats:

Step 1   Set the filters so that the grid selection contains the data records you wish to export in the desired order.

Step 2   Click 🖳 at the right side of the status bar.

Step 3   From the drop-down list, select the desired file type.

Step 4   From the drop-down list, select the desired page layout: **Portrait** or **Landscape**.

Step 5   In the drop-down list, click **Export Now**.

—The exported file is created and displayed on your screen.

Step 6   Save the file.

To export data to an Excel file:

Step 1   In the grid from which you wish to export data, set the filters and the sort order so that the grid will contain the data you wish to export in the desired order.

Step 2   In the Actions toolbar, click the **Excel** icon . The exported file is created and displayed on your screen.

Step 3   Save the file.

Manage Grid Layout

This section provides information about:

- Setting columns visibility
- Setting columns width
- Setting columns order

Setting Columns Visibility

You can select which columns will display in the grid:

To de-select one column:

Step 1   Right-click in the column heading you wish to de-select.

Step 2   From the drop-down menu, select **Remove This Column**.

To select or de-select columns:

Step 1   Right-click any column heading.

Step 2   From the drop-down menu, click **Select Columns**.

Step 3   In the drop-down menu, select or clear the field names.

Step 4   In the drop-down menu, click **Apply Changes**.

To reset columns visibility:

Step 1   Right-click any column heading.

Step 2   From the drop-down menu, click **Select Columns**.

Step 3   In the drop-down menu, click **Reset**.

Setting Column Width

You can change the width allocated to each column:

To change column width:

Step 1   In the columns heading bar, move the cursor over the line between two columns heading until you see a small horizontal double headed arrow appears.

Step 2   Left-click and hold the mouse, and drag the separating line to the required place.

Setting Columns Order

You can change the order of column headings:

To change a column place:

Step   In the columns heading bar, click and hold the column heading you wish to move and drag it to the desired place.

For additional information or support on this NEC Corporation product, contact your NEC Corporation representative.

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Expense Management Work Order User Guide

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