

1. General – Q & A

1.1

Reference	Column Changes and Saving Layouts
Question	Can Columns be set on a per User basis?
Answer	Setting Column sizes, ordering, etc is set by installation, therefore one User logging into the same machine will always see the same layout they set on that particular machine. If that User uses multiple machines then they will need to configure the layout on each machine separately.

1.2

Reference	Work Orders
Question	Can you resize the areas of the Work Order Helpdesk Page screen?
Answer	No, but you are able to hide specific sections if desired. Click the <input type="checkbox"/> buttons to do this.

1.3

Reference	Work Orders
Question	Are the Statuses of Work Orders User defined?
Answer	No, they are defined by the system.

2. Procurement - Q & A

2.1

Reference	Resources/Contractors
Question	Is deactivating a Resource profile driven?
Answer	Yes, it is driven by the permissions set on the profile. If you can edit a resource then you can deactivate it.

2.2

Reference	Resources/Contractors
Question	How do you see deactivated resources?
Answer	Click the “Is Active?” column and select “No” to view them. Only active resources are shown by default.

2.3

Reference	Resources/Contractors
Question	Can you allocate Work Orders to a resource if it is PQQ unapproved?

Answer	No, a resource needs to be approved and active to receive a Work Order. You can also add the resource to the PQQ Exceptions list to enable this.
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2.4

Reference	Resources/Contractors
Question	If a contractor (resource) type is “Is Supplier?” can it receive Reactive Work Orders?
Answer	Only contractors that have a type of “Is Contractor” can be assigned Reactive Work Orders.

2.5

Reference	Work Order Types/Core data
Question	Can you determine what Work Order Types are for which client when selecting Work Order Types against a resource?
Answer	No, the Procurement team should use reports to find this information out when creating and editing Resources.

2.6

Reference	Work Order Types
Question	Is there any harm in selecting all the Work Order Types that are associated with different clients?
Answer	Associating all Work Order Types would mean the User could then manually assign any Work Order to the Resource regardless of Work Order Type. Ideally you should assign only the relevant Work Order Types to the right Resources.

2.7

Reference	Resources/Contractors
Question	Is VAT entry mandatory for a resource?
Answer	Yes it is but the field accepts any alphanumeric characters, so if the VAT code is not known initially a temporary code can be entered until the information is provided.

2.8

Reference	Resources/Contractors
Question	Since different Currencies have been added, will the Currency field be set already for previous contractors?
Answer	Yes it will. This field is a mandatory field. For Buildings, the default currency is Great British Pounds (£).

2.9

Reference	Resources/Contractors/Core Data
Question	Are the Contact Types in a Contact customisable?
Answer	Yes and these can be added/edited in Core Data > Contact Types.

2.10

Reference	Reports
Question	Can you view when emails have failed or not been sent?
Answer	Yes, these can be viewed in the Reports module. Reports are profile specific.

2.11

Reference	Resources/Contractors
Question	In Rates & Availability, does the Date Range you are adding need to cover a whole year?
Answer	No, this can be set to any length you like.

2.12

Reference	Contracts
Question	What appears on the History tab of a contract?
Answer	Any changes that have been made to that contract where you are requested to provide a reason for the change, are recorded on the History tab.

2.13

Reference	Contracts
Question	Can we re-instate a cancelled PPM?
Answer	No, PPMs are handled via Contracts and as such the re-instate Agent Action will not function against PPM Work Orders.

2.14

Reference	Resource/Contractors
Question	Does an Internal resource have to have a PQQ?
Answer	No, only an External resource does in order to be able to raise a Work Order for them.

2.15

Reference	Resource/Contractors
Question	If a contractor (resource) type is "Is Supplier?" Is it available to select on an SRA?
Answer	Only contractors that have a type of "Is Contractor" can be assigned to an SRA.

2.16

Reference	Resource/Contractors/Asset
Question	Why is there an "Is Manufacturer" available to select if this is also available from the Asset screen?
Answer	A Resource can be multiple types. If a Manufacturer is created via the Asset screen, then it will not be possible to use this resource as a Contractor or Supplier. Should a Resource be a Contractor as well as a Manufacturer, the Resource should be created via the Resource module and not the Asset Module.

2.17

Reference	Resource/Contractors
Question	Is there any duplicate checking on creation of a Resource?
Answer	Yes.

2.18

Reference	Resource/Contractors
Question	Can't seem to create a Branch?
Answer	This is permission based. Please see your System Administrator if you need this to be available to your profile.

2.19

Reference	Resource/Contractors
Question	When adding an address to a Resource is the "County" field pre-populated?
Answer	No this is a free form text field, however a number of Counties are present in the system, so the system will suggest Counties when you start to enter them.

2.20

Reference	SRA/Contracts
Question	"Temp Fix" on a Work Order – does this relate to "Op Fix SLR" and "Temp Fix SLR"?
Answer	No. Temp Fix on the Work Order relates to whether a temporary fix is in place at point of call logging from the Client. The SLR values relate to the time taken for the Resource to apply a Fix.

2.21

Reference	SRA/Contracts
Question	If you set an SRA as "PPM Only" do you get "reactive" to choose from in the Contract – "Contract Type" field?
Answer	No, this will not be an option from the drop down selection.

2.22

Reference	SRA/Contracts
Question	"Reactive Parts" value. Does this get calculated in invoicing?
Answer	No. This is for information only and can be reported upon if requested. This is a 'ceiling' value that should be used for comparison to parts charges on Work Orders.

2.23

Reference	SRA/Contracts
Question	Will the "History" tab be back dated?
Answer	Yes, Contract changes are available on the "History" tab.

2.24

Reference	SRA/Contracts
Question	Can you change visit dates for PPM's on a contract?
Answer	Yes, providing the PPM's haven't already been generated.

2.25

Reference	SRA/Contracts
Question	Can you change visit dates for PPM's on a contract?
Answer	Yes, providing the PPM's haven't already been generated.

3. Call Centre – Q & A

3.1

Reference	Filters
Question	What is the difference between "Select All" and "Select All Filter"?
Answer	"Select All" selects everything that is populated in the list whilst "Select All Filter" selects all the items that appeared after you filtered the list.

3.2

Reference	Work Orders
Question	Does the "Current User?" function on the Work Order Query Definition screen search for Work Orders that the current User has affected or changed?
Answer	No, it only searches for Work Orders created by the current User.

3.3

Reference	Work Orders
Question	Do Public Lists provide information as to what client the list contains?
Answer	No, client information should be entered into the list name or description if this is a requirement.

3.4

Reference	Work Orders
Question	Are the locations that appear when creating Work Orders related to Equipment Types?
Answer	Locations are only associated to Buildings, not Equipment Types.

3.5

Reference	Work Orders
Question	Work Order Filter – The copy to clipboard feature, does it copy everything in the filtered list or just the items highlighted?
Answer	This will copy everything that has been brought back by your query.

3.6

Reference	Work Orders
Question	I cannot delete a query from a Public Work Order Filter list. Why?

Answer	This is a permission based option. Please speak to your System Administrator.
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3.7

Reference	Work Orders
Question	Duplicate checking of a Work Order – How many days does it go back to?
Answer	15 days is the standard setting. This can be amended if necessary.

3.8

Reference	Work Orders
Question	Building Events – Does a message pop up as well as being visible on the Work Order?
Answer	The Building event appears on the Verification page. On attempting to save the Work Order, the User is asked to accept that the Building Events have been read. Clicking on OK to accept that the Building Events have been reviewed will then add this to the events log.

3.9

Reference	Work Orders
Question	Agent Actions – Is changing Caller, Reason, Assets, etc permission based?
Answer	Currently amending these is dealt with using the one permission “Can Edit Work Orders”.

3.10

Reference	Work Orders
Question	When re-instating a Work Order, does this then send an email out to the resource?
Answer	Not at this time. However, the User is notified on screen that the resource should be contacted to advise them of the re-instate activity.

3.11

Reference	Work Orders/Quotes
Question	Quotes in authorisation – Why can the authoriser see the Mark Up?
Answer	This is permission based. Please speak to your System Administrator.

3.12

Reference	Work Orders/Quotes
Question	After a quote has been authorised does it then automatically assign?
Answer	No, not for quotes.

4. Finance – Q & A

4.1

Reference	Invoices
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Question	Are scanned invoices kept on the system?
Answer	No, only the details of the invoice are kept on the system. However, there is the ability to add a document to the invoice entry, so a scanned copy could be added if required.

4.2

Reference	Work Orders
Question	On the Work Order query screen, does Resource refer to contractors?
Answer	Yes, Resource refers to contractors.

4.3

Reference	Budgets
Question	Can Capital Budgets be imported from Excel?
Answer	Not at this time.

4.4

Reference	Resources/Contractors
Question	If a resource has more than one currency, do you have to make copies of that resource to apply different currencies?
Answer	Yes. You assign one Currency per Resource.

4.5

Reference	Work Orders
Question	Should cancelled Work Orders set the Accrual to zero?
Answer	No and for two reasons. Firstly, the Financial reports exclude cancelled Work Orders so report figures aren't affected and secondly, the Re-instate Work Order function has been added so the accrual would also be reinstated should a cancelled Work Order be restored.

4.6

Reference	Invoices
Question	Does ticking the "No Further Invoice Expected?" box add a Work Order event?
Answer	No, no event is generated.

4.7

Reference	Invoices
Question	Is the feature of not being able to approve your own invoices (segregation of duties) hard coded or by User?
Answer	That feature is hard coded.

4.8

Reference	Invoices
Question	Do you have to allocate a Building when creating a new, unallocated invoice?
Answer	No you do not have to but you do have the option to select one.

4.9

Reference	Invoices
Question	When an invoice is submitted for payment, does the accrual value set to zero?
Answer	Yes, once all invoices on a Work Order have been set to Payment Submission (and no further invoices expected is set), the accrual sets to zero.

4.10

Reference	Invoices
Question	If you invalidate an invoice, does it then change the invoice to unapproved?
Answer	No, if an invoice has been invalidated then it needs to be moved to unapproved manually.

4.11

Reference	Invoices
Question	How does the Work Order know that no invoice is expected? (Moving to Status 5.02 Job Completed – no invoice expected)
Answer	Only Work Orders generated from a particular type of Contract would reach the status where no invoice is expected.

4.12

Reference	Resources/Contactors
Question	Can contractors add certificates to Work Orders?
Answer	Yes, this can be done through the system or Portal.

4.13

Reference	Resources/Contactors
Question	If a contractor uploads a certificate via the Portal, is an event created?
Answer	Yes and it specifically states that it was done using the Portal.

4.14

Reference	Resources/Contactors
Question	Do Payment Terms on a resource affect any parts of the system?
Answer	No, these are just for reference but they are User defined.

4.15

Reference	Resources/Contactors
Question	Can you view Work Orders by specific dates?
Answer	Yes, this is possible by using the Dates tab of the Work Order Query Definition screen.

5. Business – Q & A

5.1

Reference	Core Data
Question	Does copying clients copy across all the resources associated with that client?
Answer	No, copied clients do not automatically inherit all resources.

5.2

Reference	Core Data
Question	Are Levels auto-associated by default?
Answer	No, the “Auto-association?” field is un-ticked by default.

5.3

Reference	Core Data
Question	When removing types from Core Data, such as Contact Types, does the system inform the User that an item can't be removed if it is in use?
Answer	Yes, a warning message is displayed informing the User.

5.4

Reference	Core Data
Question	Can you tick or un-tick Equipment/Service types?
Answer	Yes. This is achieved in the Core Data module.

5.5

Reference	Core Data
Question	Are Authorisation Reasons Capital or Revenue?
Answer	Authorisation Reasons are not related to Capital or Revenue Codes. Assuming the permissions are set, they appear when Approving or Rejecting Work Orders.

5.6

Reference	Core Data
Question	Are Standards & Legislations User defined?
Answer	Yes, these can be defined in Core Data > Standards & Legislations.

5.7

Reference	Core Data
Question	When starting a job without accepting it, do the events update with an acceptance event?
Answer	No, only the Job Started event is displayed.

5.8

Reference	Core Data
Question	Can we collapse and expand Equipment/Service Types in Equipment/Service Types screen?

Answer	Yes and this can be done by double-clicking the type to either expand it or collapse it.
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5.9

Reference	Assets
Question	Should the Warranty Resource field on an Asset show both manufacturers and resource?
Answer	No.

6. Portal – Q & A

6.1

Reference	Portal - Client
Question	When a Client raises a job does it duplicate check?
Answer	No.

6.2

Reference	Portal - Client
Question	When a job is raised by the Client does it show that the Client raised it on the Work Order?
Answer	Yes it does. It shows as Web or Agent on the events.

6.3

Reference	Portal - Client
Question	Does the Portal automatically log the User out?
Answer	Yes, after 30 minutes of no activity.

6.4

Reference	Portal - Contractor
Question	Can contractors do asset tagging and upload certificates from a hand held device?
Answer	Not currently but will be in a future iteration.

6.5

Reference	Portal - Contractor
Question	View Building Notes – Can this be turned off for contractors?
Answer	Yes, this is permission based.