

PROJECTS

PROJECTS - PROGRESS REPORT

In order to correctly track your progress via the Project Progress Report, there are a few things to consider and keep track of:

• <u>Work Order Required Craft</u> details need to be configured on each work order within the project.

Ribbon Access: Maintenance / Projects > Projects

\$ =	BPO: Version 2.5.0.4 - Example Company v2.5.0.0									0	_		
	Equipment	t / Locations	Contract F	Finance / HR	Inventory	Maintenance	/ Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities
-	Ì	1	1		I			2					
Instructions	Tasks	Generate Tasks	Work Requests	Maintenance Radar	Projects	Standard Methodology	Work Order Allocation	Technician Allocation					
Pre	eventative	4	Reactive	Radar		Proje	ects	4					\Diamond

- 1. The *Project Listing* screen will be displayed.
- 2. Select the *Site* where the project can be located.
 - The example has *Durban* selected.
- 3. The Progress Report can include all projects or **Projects My Projects** only.
- 4. Click on Progress Report.



\$	0	Project List	ing - BPC	: Version 2.5	.0.3 - Example	e Company v2.5.0	0.0			_	
Home Equipmer	nt / Locations Cont	ract Finance / HR Invento	ory Ma	intenance / Pro	jects Manu	facturing Procur	ement	Sales Service	Reporting Ut	lities —	₽ ×
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Functions	ProjectRef	Description	Status	StatusDesc	EndDate	ManagerName	Notify	CustomerCode	CustomerName	DeptName	
	9 nDc		n C	ROC	=		ROC	RDC	*D:	n C	*
Gantt	PRJ0000071	SP240 New Deal.	0	Open	05/06/2017	Bianca Du Toit	No	TIA001	Titan Group	-	- n
	▶ PRJ0000075	Check Technician Assignment	0	Open	17/09/2014	Belinda Sharman	No	HOP001	Hope Works (Pt		-
		Test Projects viewed in Cust	0	Open	18/09/2014	Belinda Sharman	No	HOP001	Hope Works (Pt		
Work Orders	PRJ0000083	New machine installation	0	Open	02/10/2014	Bianca Du Toit	No	DER001	Derton / Techno		
	PRJ0000085	tst	0	Open	02/10/2014	Bianca Du Toit	No	DER001	Derton / Techno		
	PRJ0000087	SP240 New Deal	0	Open	14/11/2014	Bianca Du Toit	No	TIA001	Titan Group		
Work In Progress	PRJ0000089	Machine installations	0	Open	08/02/2015	Belinda Sharman	No	HOP001	Hope Works (Pt		
		Sprint SP 1912 New Deal Sale	0	Open	11/01/2015	Belinda Sharman	No	HOP001	Hope Works (Pt		
		Service for HOP001 on 06 No	0	Open	07/11/2014	Bianca Du Toit	No	HOP001	Hope Works (Pt		
Documents		Scheduled Maintenance for H	0	Open	07/11/2014	Bianca Du Toit	No	HOP001	Hope Works (Pt		
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		Scheduled Maintenance for Y	0	Open	07/11/2014	Bianca Du Toit	No	YES001	Young Electric		
		Scheduled Maintenance for T	0	Open	07/11/2014	Bianca Du Toit	No	TIA001	Titan Group		
Notes		Site Inspectino	0	Open	18/03/2015	Bianca Du Toit	No	HOP001	Hope Works (Pt		
		Install Machines	0	Open	21/03/2015	Bianca Du Toit	No	HOP001	Hope Works (Pt		
		Machine inspection required	0	Open	29/05/2015	Belinda Sharman	No				
Assignment History		Scheduled Maintenance for H	0	Open	15/05/2015	Bianca Du Toit	No	HOP001	Hope Works (Pt		
		Scheduled Maintenance for D	0	Open	15/05/2015	Bianca Du Toit	No	DER001	Derton / Techno		
		Scheduled Maintenance for H	0	Open	15/08/2014	Bianca Du Toit	No	HOP001	Hope Works (Pt		
Dregress Chart	PRJ0000104	Scheduled Maintenance for D	0	Open	15/08/2014	Bianca Du Toit	No	DER001	Derton / Techno		-
Open Windows 🕶		Scheduled Main	tenance f	or DER001 on 1	4 Aug 2014	User : Jul	andaK	11/08/2021 Ver	sion: 2.5.0.3 Exa	mple Company v2	.5.0.0

- 5. Give the system a few minutes to generate and exported the Progress Report to *Microsoft Excel*.
- 6. In the *Overview* tab, you will see a list of <u>all projects</u> from the project list screen, with the following information:
 - **Project:** A description of the project.
 - State: An indicator of the project progress.
 - Yellow Planned (not yet started)
 - Green In Progress
 - Red Done
 - **Progress%:** This is a percentage of the project completed, based on completed work orders within the project.
 - **Start:** Project Start Date.
 - End: Project End Date.
 - **EstDays:** Total Estimated Days based on the estimated hours for all work orders within the project, configured



on the Work Order Schedule tab > Required Crafts section.

- ActDays: Actual Days represent the total labour time as booked on underlying project work orders.
- Date Done: Completion date of the project.
- Achieved: An indicator of whether the project was completed at, or within the estimated time.
- **Status:** Determines the status for the project as still being Planned, In Progress or Done.

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1 Project	State	Progress%	Start	End	EstDays	ActDays	DateDone	Achieved	Category	Status
2 project link to a client location			12/04/20	17 12/05/2017	0	0.125	12/05/2017		• ·	Unknown
3 project linked to a non-client location			12/04/20	17 12/05/2017	0	0	12/05/2017			Unknown
4 work order linked to a location - linked to a project - start work, end work as State Resolved an			30/03/20	17 29/04/2017	0	0.00294	29/04/2017	Yes		Unknown
5 work order linked to an asset linked to a project - start work, end work as State Resolved and A	5	1	30/03/20	17 29/04/2017	0	0.00807	29/04/2017	Yes		Unknown
6 1234			17/04/20	18 07/06/2018	0	0.125	24/04/2018	No		In Progress
7 1234 - Test ctrt request create pr			07/08/20	18 14/08/2018	0	0	14/08/2018			Unknown
8 12345 - New machine installation			0 08/11/20	16 15/11/2016	0	0.125	15/11/2016			Unknown
9 2MS - 2 month service			29/06/20	15 30/06/2015	0.375	0	30/06/2015			Planned
10 8601010202			05/02/20	21 12/02/2021	0	0	12/02/2021			Unknown
11 A part request project decline			0 15/02/20	17 22/02/2017	0	0	22/02/2017			Unknown
12 A, project part approval			15/02/20	17 22/02/2017	0	0	22/02/2017			Unknown
13 A,B,C project part request approval		7.14285714	3 21/08/20	14 31/03/2017	1.75	2.82015	22/08/2014	No		In Progress
14 All open tickets			30/03/20	17 01/04/2017	0	0	29/04/2017	No		In Progress
15 Another project to test reject assignment		51	0 02/12/20	15 09/06/2016	0.75	3.40002	03/12/2015	No		In Progress
16 Apple Juice Project Methodology New Deal Sale Test			20/06/20	17 26/07/2017	0	0.0625	27/06/2017	No		In Progress
17 Approval			0 04/07/20	18 03/08/2018	0	0	03/08/2018			Unknown
18 Auto approve off			0 16/02/20	17 18/03/2017	0	0	18/03/2017			Unknown
19 B project part request approval			0 15/02/20	17 22/02/2017	0	0.5	22/02/2017			Unknown
20 B project part request decline 6			0 15/02/20	17 22/02/2017	0	0	22/02/2017			Unknown
21 B60004			24/03/20	21 31/03/2021	0	0	31/03/2021			Unknown
22 BPO2 Testing at Hope Works			27/01/20	17 31/03/2017	0	0.3759	26/02/2017	No		In Progress
23 Check Technician Assignment		-	0 01/01/19	00 19/08/2014	0.375	0	02/01/1900	No		In Progress
24 C0125		1	0 04/09/20	15 05/09/2015	0.125	0	05/09/2015			Planned
Overview TaskDetails (+)				4						Þ
Ready							H	<u> </u>	1	+ 100%

- 7. Click on the *Task Details* tab to view all the work orders within these projects.
 - The **Status** details in the report show you whether a work order is;
 - Open (O)
 - Completed (M) or
 - Closed (C)



- EstHours: (Estimated Hours) is pulled directly from the Work Order Schedule > Required Crafts details on the work order.
- Actual Hours: The total labour time booked on the work order will pull through.
- Achieved: This field will only pull through information on completed and closed work orders.
- **Days:** T his column displays the labour time as a conversion in days for longer running work orders and projects.
- **Comment:** T his column displays the rectification comment as updated on the work order when completed.

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1 fldStartDate fldEndDate fldProjectDesc	fldWorkDescription	fldStatus	fldEstHo fldA	ctualH fldAch	e\ fldDays	fldComment	
2 18/08/2014 19/08/2014 Check Technician Assignment	WO0000230 - Check technician assignment	0	1	0	0.125		
3 01/01/1900 02/01/1900 Check Technician Assignment	WO0000231 -	0	2	0	0.25		
4 08/02/2017 10/03/2017 SubProject 1	PWO0000033 - Add B class part from boot stock BPO2 Pretoria	0	0	0	0		
5 23/03/2017 22/04/2017 Test Projects viewed in Customer screen	WO0001156 - Work order linked to customer project	0	0	0	0		
6 25/09/2014 26/09/2014 New machine installation	WO0000248 - New machine installation	0	1	0	0.125		
7 16/11/2017 16/12/2017 New machine installation	WO0001609 - test part requests without prior requests	0	0	0	0		
8 11/11/2014 12/11/2014 SP240 New Deal	WO0000267 - SP240-1 - Machine Installation	0	5	0	0.625		
9 13/11/2014 14/11/2014 SP240 New Deal	WO0000268 - SP240-2 - Network setup	0	1	0	0.125		
10 13/11/2014 14/11/2014 SP240 New Deal	WO0000269 - SP240-3 - Documentation	0	1	0	0.125		
11 05/08/2014 06/08/2014 SP240 New Deal.	WO0000205 - SP240-1 - Machine Installations	0	5	13	0.625		
12 07/08/2014 08/08/2014 SP240 New Deal.	WO0000206 - SP240-2 - Network setup - test edi work order from project	0	2	5.131	0.25		
13 21/08/2014 22/08/2014 SP240 New Deal.	WO0000286 - WS - Weekly Service	M	1	2	0 0.125		
14 26/04/2017 28/04/2017 SP240 New Deal.	WO0001313 - Retest issue with changing the assigned to person	0	0	0	0		
15 19/10/2017 20/10/2017 SP240 New Deal.	WO0001593 - Contract Closure - CO0000009	C	0	0	0 0		
16 29/05/2018 31/05/2018 SP240 New Deal.	WO0002198 - Test project assignment with auto accept assignment on	M	0 0	0.0468	0 0	stuff is pear	
17 29/05/2018 29/05/2018 SP240 New Deal.	WO0002201 - Testing projects	0	0	0	0		
18 30/05/2018 29/06/2018 SP240 New Deal.	WO0002205 - Test creating new work order via the project screen.	0	0	0	0		
19 26/07/2018 28/07/2018 SP240 New Deal.	WO0002257 - SP240 New Deal.	0	0	0	0		
20 17/04/2020 17/04/2020 SP240 New Deal.	WO0002350 - Kollers need replacing	0	1 0	50538	2 0 125	test see al des	
22 22/04/2020 22/04/2020 tet	W/0000230 - to:	0	1 0.	0	2 0.125	rescresolving	
23 09/01/2015 10/01/2015 Machine installations	W00000433 - Review release notes - identify hasic process flows	0	1	0	0 125		
24 09/01/2015 10/01/2015 Sprint SP1912 New Deal Sale -7	WQ0000434 - SP1912 NDS 1 - Machine installation	0	3	0	0.375		
Overview TaskDetails (+)		•	3	v	5.575		
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FILTER BY PROJECT

- 8. Insert a *filter* to view specific project information.
- 9. Click on *Save* to save a copy of the report to the Server.
- 10. *Close* Microsoft Excel to return to BPO.



Projects - Progress Report

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130 29/03/2017 31/03/201	W00000287 - BathBinMaint - BathBohn Bin Maintenance	13 2.0612 1.625
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Related Topics

• Projects - My Projects

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