

# **PROJECTS**

## **PROJECTS - ASSIGNMENT HISTORY**

In BPO2 v2.5.0.8 (or higher) the first assignee is no longer required to accept the assignment before subsequent assignments on the same project with different work orders can be made.

**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 *Status* has been set to *Open*.

**Note** that you cannot assign resources to a Closed project.

- 4. Click on the *row* of the project you wish to assign a technician to.
- 5. Click on the *Assignment History* tile.

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			Test Projects viewed in Cust	0	Open	18/09/2014	Belinda Sharman	No	HOP001	Hope Works (Pt		
			New machine installation	0	Open	02/10/2014	Bianca Du Toit	No	DER001	Derton / Techno		
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		PRJ0000099	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				
			Scheduled Maintenance for H	0	Open	15/05/2015	Bianca Du Toit	No	HOP001	Hope Works (Pt		
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		PRJ0000103	Scheduled Maintenance for H	0	Open	15/08/2014	Bianca Du Toit	No	HOP001	Hope Works (Pt		
			Scheduled Maintenance for D	0	Open	15/08/2014	Bianca Du Toit	No	DER001	Derton / Techno		
		E PRJ0000105	Scheduled Maintenance for Y	0	Open	15/08/2014	Bianca Du Toit	No	YES001	Young Electric		

- 6. The *Assignment Listing for Project: [project ref number]* screen will be displayed.
- 7. A list of the assignment details for the Technician(s) that have been assigned to this Project with their Work Order Codes can be viewed from this screen.

#### **ASSIGN TECHNICIAN**

6. Click on **Add**.

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



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Judith Mudzengi	Judith Mudzengi	12/04/2017	15:56:26	2	0.00	0.00	ĸ		3

- 9. The *Project Assignment: Reference No.: [project ref number]* screen will be displayed
  - Assigned To: Click on the down *arrow* to select the Technician you would like to assign.
  - **Detail:** This field will auto populate with the description of the project as recorded in the project listing screen. You can type in extra details, if required.
  - Assignment Date: The date and time will be auto populated with the current date and time.
    - Type in or click on the down *arrow* in the date field to use the *calendar function* to select an alternative date, if required.
    - Type in or use the *arrow indicators* to select an alternative *time*, if required.
  - Assigned By: This field will default to the user creating the assignment. Click on the down *arrow* to select an



alternative person, for example the name of the Project Manager, if required.

- Functional Location or Equipment: This shows whether the project assignment is linked to a Location or a Machine.
- **Item:** This field will auto populate with the Location or Machine linked to the project.
- Location: This field will auto populate based on the description of the item linked to the project.
- Create new Work Order: Click on the *check box* to create a new work order.

If the technician needs to follow up on the same project, but for a different task, then make sure you also change the assignment detail accordingly.

- Open Work Orders: From here you can view the list of all the Open Work Orders linked to this project.
   Select to link the technician to one of the open work orders.
- 10. When you have finished adding the technician assignment details, click on *Save*.



<b>\$</b> =	9	Project Assign	nent : Reference	No.: PRJ0000071 - BPO	: Version 2.5.0.4	- Example Com	pany v2.	5.0.0			_	x
Home E	quipment / Locations	Contract Finance	HR Inventory	Maintenance / Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities	_ 8	х
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Assigned To	Mary Thompson	•										
Detail	SP240 New Deal.											
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Assignment Date	03/09/2021 -	11:27:49										
-	Julanda Kessler	•										
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- 11. When you receive the *Project Processing* message to confirm that; *Project No: [project ref number] has been assigned.*
- 12. Click on *OK*.

	Assignment Listing	for Project : PRJ0000	0071 - BPO: Versio	n 2.5.0.4 - Example Compa	ny v2.5.0.0		
Home Equipment / Locations Cont	tract Finance / HR	Inventory Maintena	nce / Projects Ma	nufacturing Procurement	Sales Service Reporting	Utilities	- 8 >
Add Delete Force Accept Processing	ces Refresh						6
AssigneeName	AssignorName	AssignDate	AssignTime	Comments		GPSLongitude	GPSLatitude
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Mary Thompson	Julanda Kessler	03/09/2021	11:27:49	SP240 New Deal.		0.00	0.00
Bianca Du Toit	Bianca Du Toit	26/07/2018	12:47:33	SP240 New Deal.		0.00	0.00
Bianca Du Toit	Bianca Du Toit	29/05/2018	12:50:57	Test project assignment	with auto accept assignment on	0.00	0.00
Judith Mudzengi	Judith Mudzengi	26/04/2017	10:54:06			0.00	0.00
Judith Mudzengi	Judith Mudzengi	12/04/2017	15:56:37	SP240 New Deal 1		0.00	0.00
Judith Mudzengi	Judith Mudzengi	12/04/2017	15:56:26			0.00	0.00
		Project No : PRJ	00000071 has been a	OK			
Copen Windows 🔻				User : JulandaK	03/09/2021 Version : 2.5.0.4	Example Comp	any v2.5.0.0



- 13. You will return to the *Assignment Listing for Project* screen where you can *view* the details of the *technician(s) assigned* to this project.
- 14. Click on *Close* to return to the *Project Listing* Screen.

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#### **UNASSIGN TECHNICIAN**

- 1. From the Assignment Listing for Project: [project ref number] screen,
- Click on the *row* of the technician and the *correct Work Order* the technician is linked to.
- 3. Click on *Delete*.

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



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Mary Thompson	Julanda Kessler	03/09/2021	11:27:49	SP240 New Deal.	0.00	0.00		WO0002336	Rollers need replacing
Bianca Du Toit	Bianca Du Toit	26/07/2018	12:47:33	SP240 New Deal.	0.00	0.00	N	WO0002257	SP240 New Deal.
Bianca Du Toit	Bianca Du Toit	29/05/2018	12:50:57	Test project assignment with auto acce	0.00	0.00	R	WO0002198	Test project assignmen
Judith Mudzengi	Judith Mudzengi	26/04/2017	10:54:06		0.00	0.00	A	WO0001313	Retest issue with chan
Judith Mudzengi	Judith Mudzengi	12/04/2017	15:56:37	SP240 New Deal 1	0.00	0.00	A	WO0000206	SP240-2 - Network set
Judith Mudzengi	Judith Mudzengi	12/04/2017	15:56:26		0.00	0.00	R	WO0000205	SP240-1 - Machine Ins
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- 4. When you receive the *Delete Note* message to confirm;
  - Are you sure you want to delete this assignment from the project [project ref number]?
- 5. Click on Yes.



Degine interchanter       Assigned time       Assigned time       Official       Of
Mary Thompson         Advects Kassler         O3(05)(2021         11:27-49         97-96 New Deal         0.00         0.00         N         N00002235         Raiders meet ref           Banca Du Tist         Belon Du Tist
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Judith Hudering     Judith Hudering     1204/2017     15 56:37     97-96 Here: Deal 1     6.00 A     1000000205     97-96-1 Here: Deal 1       Judith Hudering     Judith Hudering     1204/2017     15 56:35     0.00 A     1000000205     97-96-1 Here: Deal 1       Delete Note     4     4     4     4     4     100000225     97-96-1 Here: Deal 1       Delete Note     4     4     4     4     4     4       Are you sure you want to delete this assignment from the project     4     4     4
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Delete Note   Are you sure you want to delete this assignment from the project
Are you sure you want to delete this assignment from the project
5 <u>Y</u> es <u>N</u> o

- 6. The *Rejection Comments* text box will display.
- 7. Type in the rejection comments for the assignment removal and click on *Save*.

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Mary Thompson	Julanda Kessler	03/09/2021	11:27:49	SP240 New Deal.		0.00	0.00	N	W00002336	Rollers need replacing
Bianca Du Toit	Bianca Du Toit	26/0 20010	12.02.22					N	WO0002257	SP240 New Deal.
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Judith Mudzengi	Judith Mudzengi	12/0	<b>(</b>				30	A	W00000206	SP240-2 - Network setu
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- 8. The *Assignment Listing for Project* screen has been updated with the assignment comments.
- 9. Click on *Close* to return to the *Project Listing* screen.
- 10. You can now "Assign Technician " on page 2 to this Work Order, if required.

	Home Equipment / Locations Cont	-		nce / Projects Ma	n 2.5.0.4 - Example Company v2.5.0.0 nufacturing Procurement Sales Service Report	ing Utilities	_ • ×
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	ianca Du Toit	Bianca Du Toit	26/07/2018	11:27:49	SP240 New Deal.	0.00	
	ianca Du Toit	Bianca Du Toit	29/05/2018	12:50:57	Test project assignment with auto accept assignment on		
	udith Mudzengi	Judith Mudzengi	26/04/2017	10:54:06	rest project assignment with auto accept assignment on	0.00	
	udith Mudzengi	Judith Mudzengi	12/04/2017	15:56:37	SP240 New Deal 1	0.00	
-	udith Mudzengi	Judith Mudzengi	12/04/2017	15:56:26	Work Order not required on Project. Incorrectly assigned		
				8			
				3			

### FORCE ACCEPT

- 1. From the Assignment Listing for Project: [project ref number] screen,
- 2. Click on the *row* of the technician you wish to Accept the Work Order assignment for.

Note that the *Status* for the Technician selected in the Status Column is *N* - *New*.

3. Click on *Force Accept*.

Short cut key: Right click to display the Process menu list. Click on Force Accept.



Ad       Deter Accept       Ford       Save Layout Workspaces Ford       Refresh Curr.         Processing       Ford       Curr.       Curr.       Status       Ford       Curr.       Status       Ford       Status       Ford       Status       Ford       Status       Ford       Status       Ford       Status       Ford       Status       WOCode       WODec       Status       WOCode       WODec       Status       WOCode       WODec       Status       Ford       Status       WOCode       WODec       Status       Status       WOCode       WODec       Status       WOCo		Home	Equipment / Locatio			ventory Maintenance / Projects Manufacturing Procu	rement Sales	Service	Reporting		
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Ariał Błythe         Jadnak Kessler         03/09/2021         13:24:11         SP240 New Deal.         0.00         0.00         N         WO0000205         SP240-1-M           Mary Thompson         Jadnak Kessler         03/09/2021         11:27:49         SP240 New Deal.         0.00         0.00         N         W0000205         SP240 New           Bianca Du Toit         Bianca Du Toit         26/07/2018         12:47:33         SP240 New Deal.         0.00         0.00         N         W0000225         SP240 New           Bianca Du Toit         Bianca Du Toit         26/07/2018         12:57:57         Test project assignment on         0.00         0.00         R         W0000218         Test project           Judith Muzengi         Judith Muzengi         26/04/2017         15:56:37         SP240 New Deal 1         0.00         0.00         A         W0000218         Test project           Judith Muzengi         Judit/Audrengi         12/04/2017         15:56:37         SP240 New Deal 1         0.00         0.00         A         W00000206         SP240 - New	Ass	signeeName		AssignDate			GPSLongitude	GPSLatitude			
Mary Thompson         Julanda Kessler         03/09/2021         11:27:49         SP240 New Deal.         0.00         0.00         N         W0000233         Rollers need           Bianca Du Toit         Bianca Du Toit         26/07/2018         12:47:33         SP240 New Deal.         0.00         0.00         N         W0000225         SP240 New           Bianca Du Toit         Bianca Du Toit         26/07/2018         12:50:57         Test project assignment with auto accept assignment on         0.00         0.00         R         W0000218         Test project           Judith Muzengi         Judith Muzengi         26/04/2017         10:56:37         SP240 New Deal 1         0.00         0.00         R         W0000218         Test project           Judith Muzengi         Judith Muzengi         12/04/2017         15:537         SP240 New Deal 1         0.00         0.00         A         W0000218         Restriguest           Judith Muzengi         Judith Muzengi         12/04/2017         15:537         SP240 New Deal 1         0.00         0.00         A         W00000205         SP240 New	* <b>D</b> C	¢	* <b>0</b> ¢	-	* C	N D C	=	-	10:	N C	N C
Bianca Du Tolt         Bianca Du Tolt         26/07/2018         12:47:33         SP240 New Deal.         0.00         0.00         N         WO000227         SP240 New           Bianca Du Tolt         Bianca Du Tolt         29/05/2018         12:50:57         Test project assignment with auto accept assignment on         0.00         0.00         R         WO000219         Test project           Judith Mudzengi         Judith Mudzengi         26/04/2017         10:54:06         0.00         0.00         A         WO000131         Retest issue           Judith Mudzengi         Judith Mudzengi         12/04/2017         15:56:37         SP240 New Deal 1         0.00         0.00         A         WO0000205         SP240 New	Aria	ial Blythe	Julanda Kessler	03/09/2021	13:24:11	SP240 New Deal.	0.00	0.00	N	WO0000205	SP240-1 - Ma
Bianca Du Toit         Bianca Du Toit         29/05/2018         12:50:57         Test project assignment with auto accept assignment on         0.00         0.00         R         W0000198         Test project           Judith Mudzengi         Judith Mudzengi         26/04/2017         10:54:06         0.00         0.00         A         W00001031         Retest issue           Judith Mudzengi         Judith Mudzengi         12/04/2017         15:56:37         SP240 New Deal 1         0.00         0.00         A         W00000205         SP240 -> N	Mar	ry Thompson	Julanda Kessler	03/09/2021	11:27:49	SP240 New Deal.	0.00	0.00	N	WO0002336	Rollers need
Judith Mudzengi         Judith Mudzengi         26/04/2017         10:54:06         0.00         0.00         A         WO0001313         Retest issue           Judith Mudzengi         Judith Mudzengi         12/04/2017         15:56:37         SP240 New Deal 1         0.00         0.00         A         WO0000205         SP240 - N	Biar	inca Du Toit	Bianca Du Toit	26/07/2018	12:47:33	SP240 New Deal.	0.00	0.00	N	WO0002257	SP240 New D
Judith Mudzengi Judith Mudzengi 12/04/2017 15:56:37 SP240 New Deal 1 0.00 0.00 A WO000020 SP240-2-N	Biar	inca Du Toit	Bianca Du Toit	29/05/2018	12:50:57	Test project assignment with auto accept assignment on	0.00	0.00	R	WO0002198	Test project
		ball and showed	Judith Mudzengi	26/04/2017	10:54:06		0.00	0.00	A	WO0001313	Retest issue
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		-	-	12/04/2017	15:56:37	SP240 New Deal 1	0.00	0.00	A	WO0000206	SP240-2 - Ne
	Jud	dith Mudzengi	Judith Mudzengi								SP240-2 - Ne SP240-1 - Ma

4. The *Assignment Listing for Project* screen has been updated.

Note that the *Status* for the Technician that was selected in the Status Column has changed to *A - Accept*.

5. *Close* the screen to return to the *Project Listing* screen.



## Projects - Assignment History

Add Delete For Acc	cept	+						5 ne Status Technician	
Processing	_ Format	Curr a						Accept	~
AssigneeName	AssignorName	AssignDate	AssignTime	Comments	GPSLongitude	GPSLatitude	Status	WOCode	WODesc
* # <b>0</b> 0	ADC .	-	n 🗖 c	4 <b>0</b> :	-	-	10:	*Oc	n 🖬 c
Arial Blythe	Julanda Kessler	03/09/2021	13:24:11		0.00	0.00	A //	WO0000205	SP240-1 - N
Mary Thompson	Julanda Kessler	03/09/2021	11:27:49	SP240 New Deal.	0.00	0.00	N	WO0002336	Rollers nee
Bianca Du Toit	Bianca Du Toit	26/07/2018	12:47:33	SP240 New Deal.	0.00	0.00	N	WO0002257	SP240 New
Bianca Du Toit	Bianca Du Toit	29/05/2018	12:50:57	Test project assignment with auto accept assignment on	0.00	0.00	R	WO0002198	Test projec
Judith Mudzengi	Judith Mudzengi	26/04/2017	10:54:06		0.00	0.00	A	WO0001313	Retest issu
Judith Mudzengi	Judith Mudzengi	12/04/2017	15:56:37	SP240 New Deal 1	0.00	0.00	A	WO0000206	SP240-2 - M
Judith Mudzengi	Judith Mudzengi	12/04/2017	15:56:26	Work order no longer required for the project. Incorrec	0.00	0.00	R	WO0000205	SP240-1 - M
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