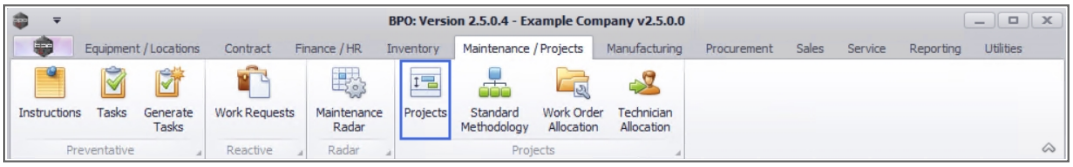
PROJECTS

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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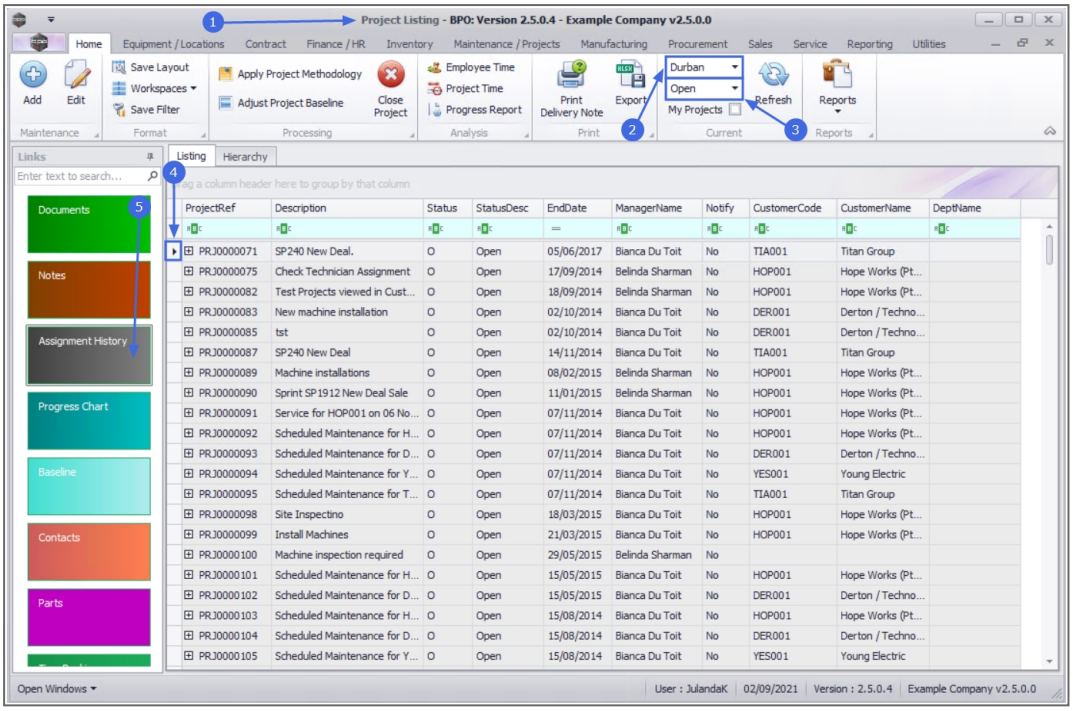

6. The ***Assignment Listing for Project: [****project ref number****]*** screen will be displayed.
7. A list of the assignment details for the Technician(s) that have been assigned to this Project with their Work Order Codes can be viewed from this screen.

ASSIGN TECHNICIAN

6. Click on ***Add***.

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

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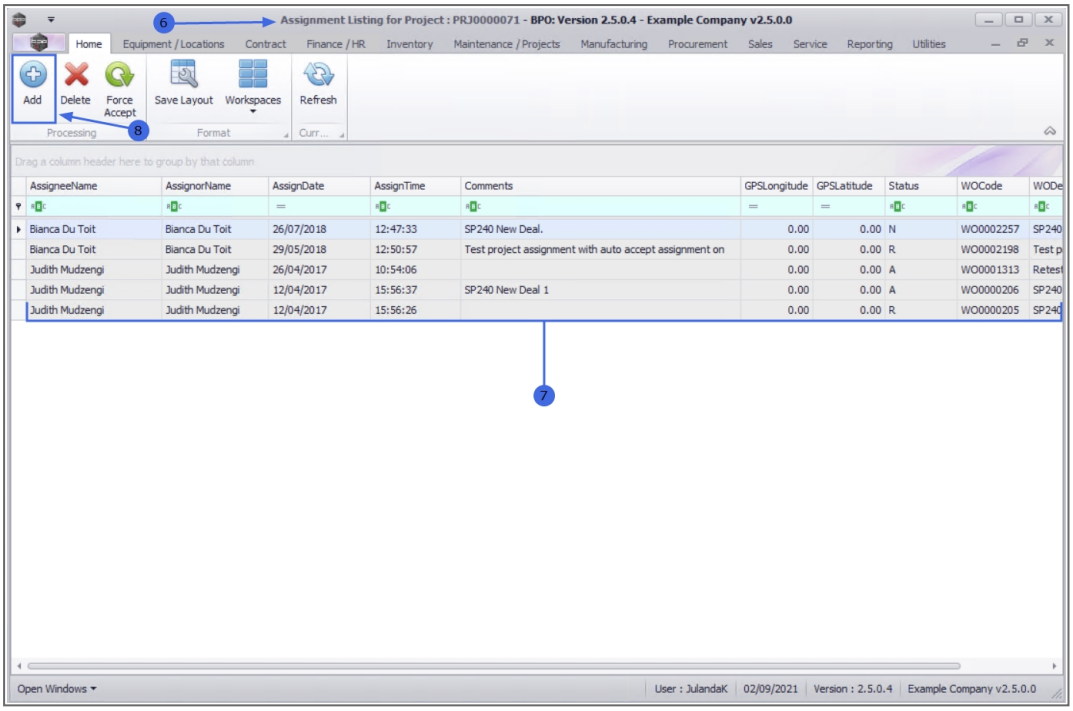

9. The ***Project Assignment: Reference No.: [****project ref number****]*** screen will be displayed

    - **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

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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***.

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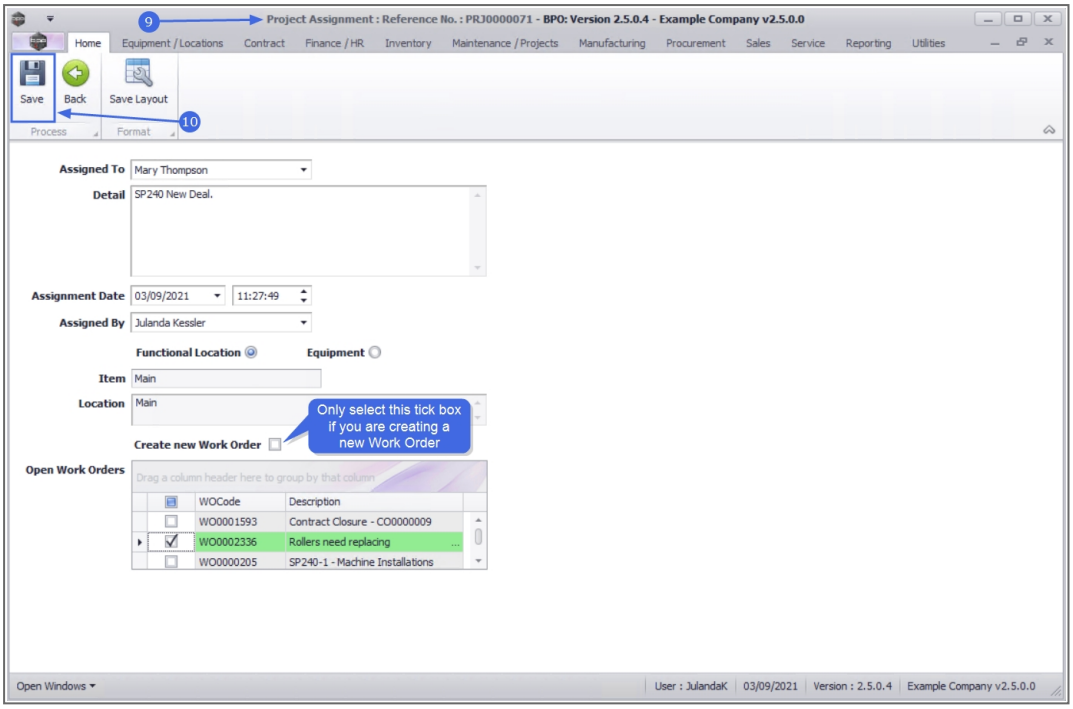
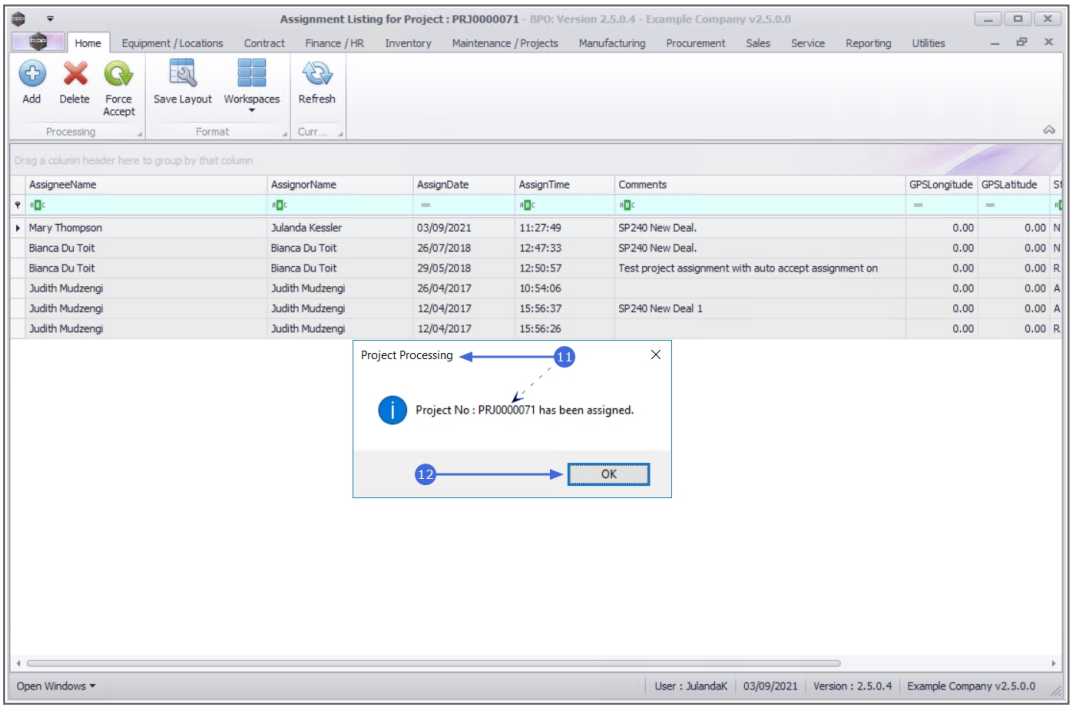


11. When you receive the ***Project Processing*** message to confirm that;
    - ***Project No:*** *[project ref number]* ***has been assigned.***
12. Click on ***OK***.



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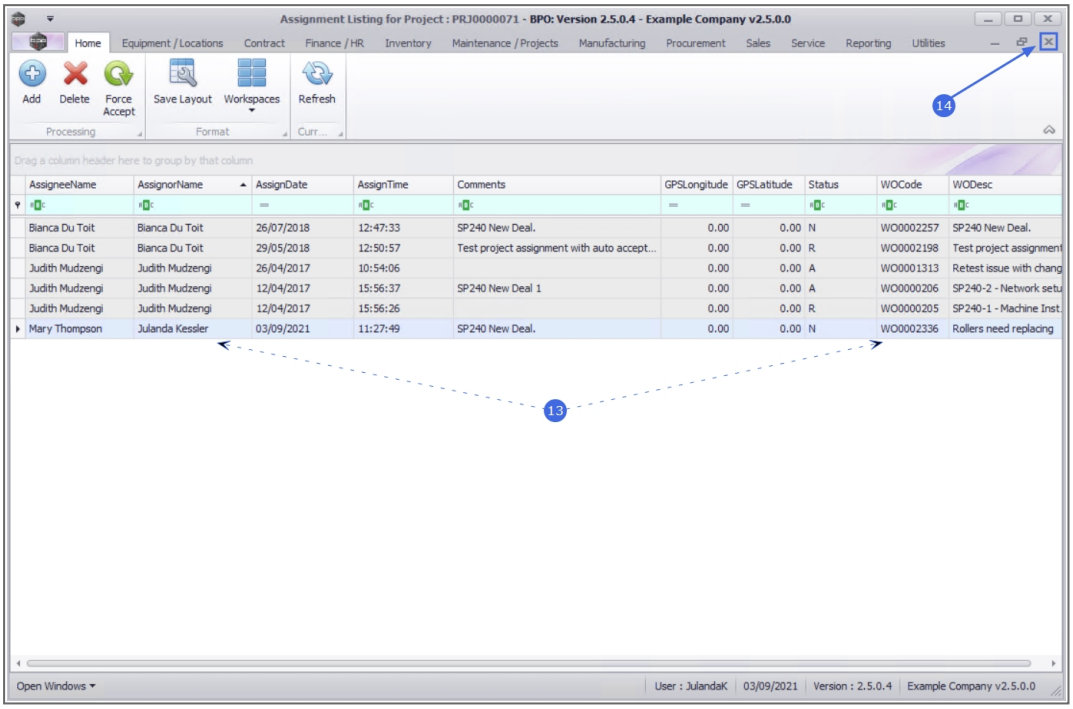
13. You will return to the ***Assignment Listing for Project*** screen where you can ***view*** the details of the ***technician(s) assigned*** to this project.
14. Click on ***Close*** to return to the ***Project Listing*** Screen.



UNASSIGN TECHNICIAN

1. From the ***Assignment Listing for Project:*** *[project ref number]* screen,
2. 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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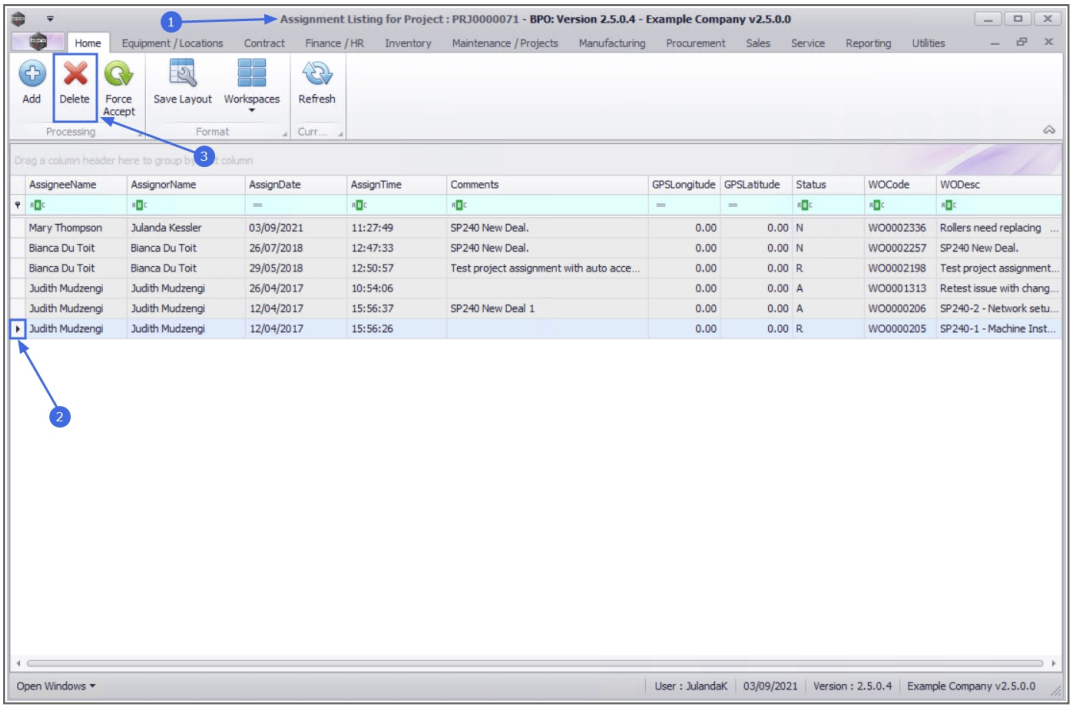

4. When you receive the ***Delete Note*** message to confirm;
    - ***Are you sure you want to delete this assignment from the project [****project ref number****]?***
5. Click on ***Yes***.

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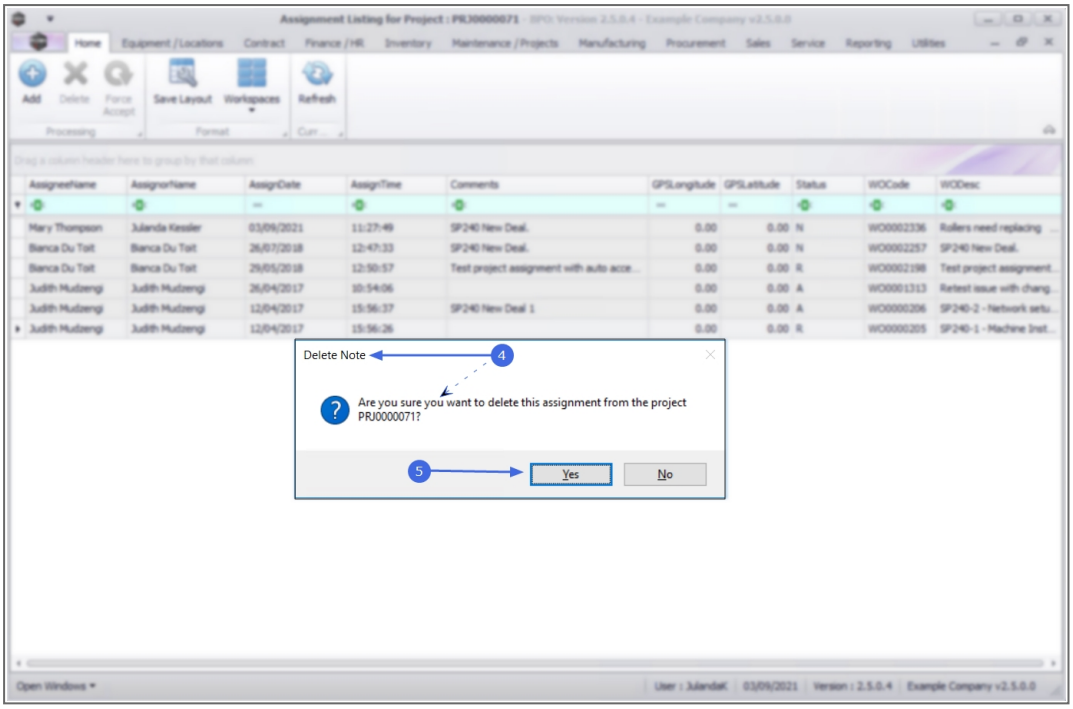
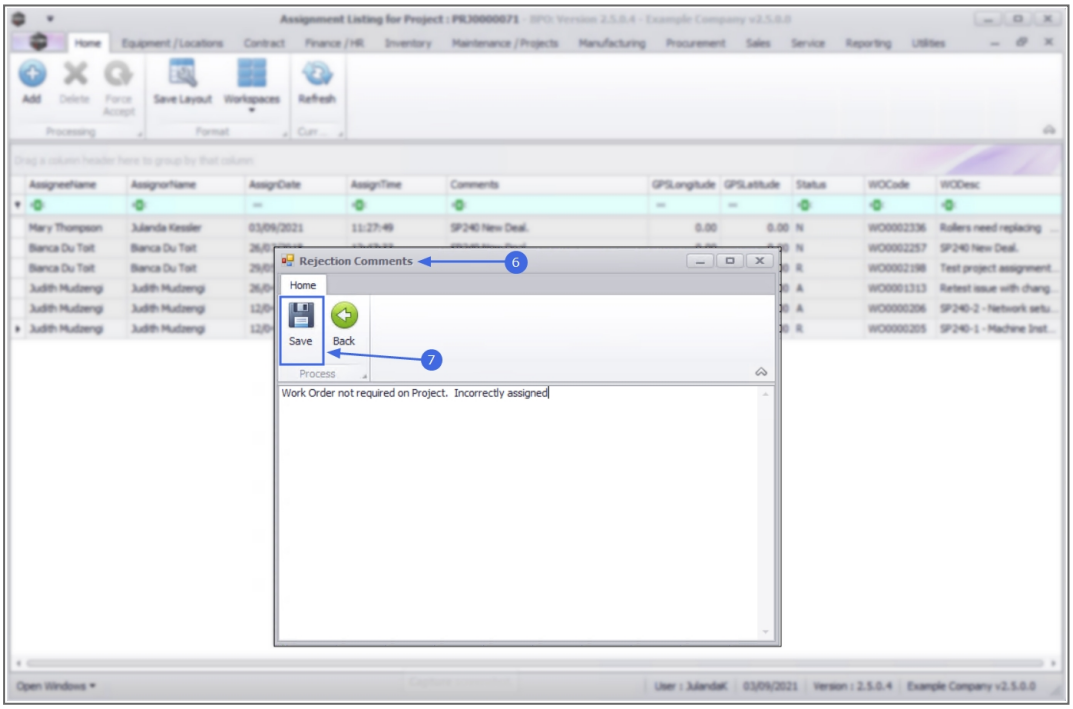


6. The ***Rejection Comments*** text box will display.
7. Type in the rejection comments for the assignment removal and click on ***Save***.



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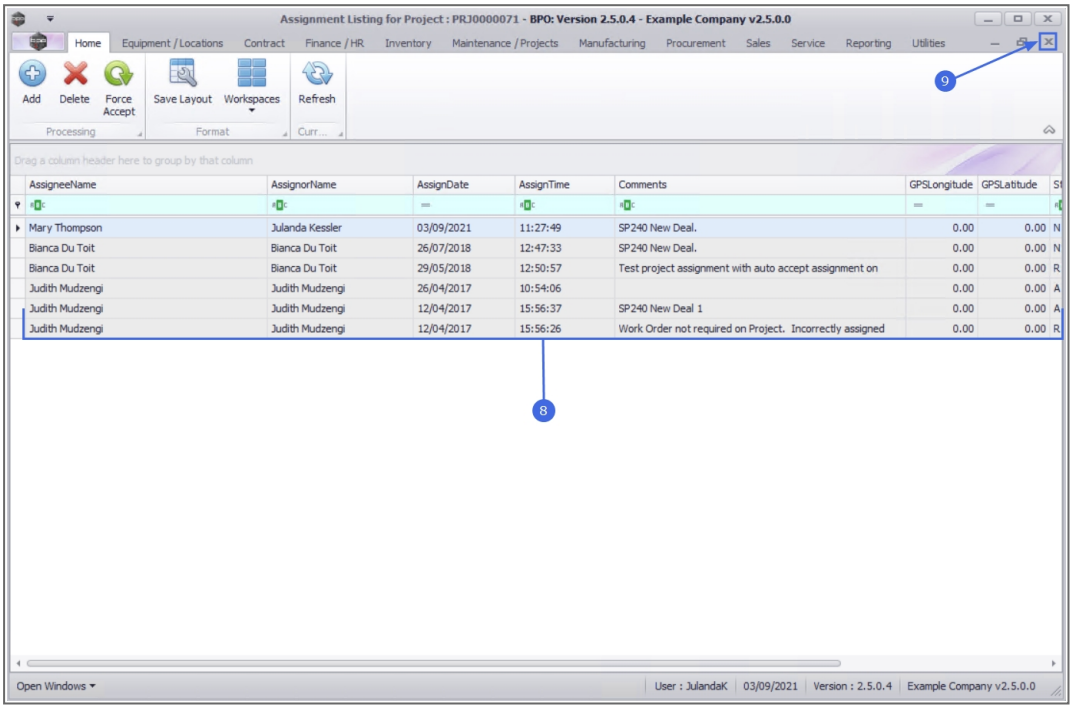
8. The ***Assignment Listing for Project*** screen has been updated with the assignment comments.
9. Click on ***Close*** to return to the ***Project Listing*** screen.
10. You can now "Assign Technician " on page 2 to this Work Order, if required.



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***.

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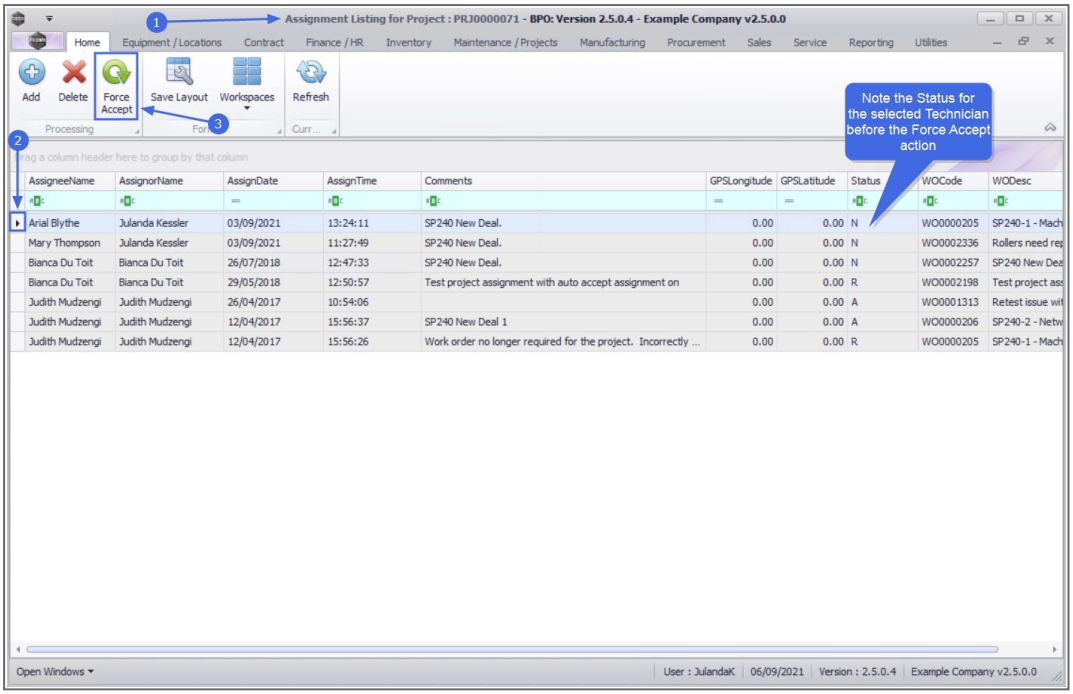

4. The ***Assignment Listing for Project*** screen has been updated.

> 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.

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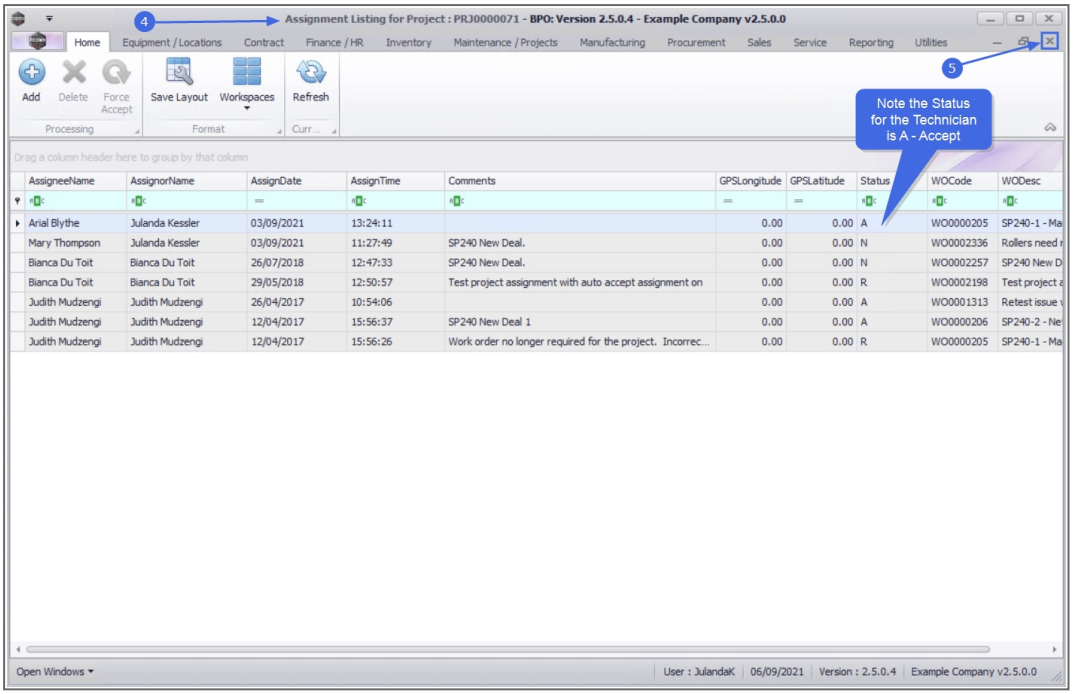

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