



PROJECTS

WORK ORDER ALLOCATION – LINK TO CURRENT PROJECT

1. The 'work order allocation to a current project(s)' process involves allocating **unassigned** work orders to **specific** current projects.

Ribbon Access: Maintenance / Projects > Work Order Allocation



- 1. The *Work Order Allocation* listing screen will be displayed.
- 2. This screen is divided into **2** frames:
 - **Unassigned Work Orders**: This frame lists all the unassigned work orders.
 - **Project Work Orders**: This frame lists the projects with linked work orders.



Work Order Allocation - Link to Current Project

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	WO0006242	1MMS - 1 Month Machine Service	Durban	SERV	0	Open	PRJ0000415	SP240 New Deal	0	Open	
	WO0006241	WS - Weekly Service	Durban	SM	0	Open	PRJ0000414	Sprint SP1912 New Deal Sale	0	Open	
	WO0006240	WS - Weekly Service	Durban	SM	0	Open	PRJ0000413	PRJ408/BS001	0	Open	
	WO0006238	Test PQ Source Type Work Order	Durban	PR	0	Open	PRJ0000412	Install Machines	0	Open	
	WO0006237	WS - Weekly Service	Durban	SM	0	Open	PRJ0000411	Site Inspection	0	Open	
	WO0006236	WS - Weekly Service	Durban	SM	0	Open	E PRJ0000410	New machine installation	0	Open	
	WO0006235	Tier - Commercial Tier Test	Durban	INST	0	Open		Maintenance Project - SP400	0	Open	
	WO0006233	BathBinMaint - Bathroom Bin Maintenance	Durban	SM	0	Open	PRJ0000407	OSU1001	0	Open	
	WO0006232	WS - Weekly Service	Durban	SM	0	Open		B60004	0	Open	
	WO0006231	WS - Weekly Service	Durban	SM	0	Open		8601010202	0	Open	
	WO0006230	AirMaint - Airfreshner Maintenance	Durban	SM	0	Open		TT041 - Bi-annually, Mono 1000 - Generate	. 0	Open	
	WO0006228	1MMS - 1 Month Machine Service	Durban	SERV	0	Open	PR30000402	test	0	Open	
	WO0006227	AirMaint - Airfreshner Maintenance	Durban	SM	0	Open		Implementation BPO2	0	Open	
	WO0006226	BathBinMaint - Bathroom Bin Maintenance	Durban	SM	0	Open		Testing BPO2	0	Open	
	WO0006225	WS - Weekly Service	Durban	SM	0	Open		Developmennt BPO2	0	Open	
	WO0006223	1MMS - 1 Month Machine Service	Durban	SERV	0	Open		Design BPO2	0	Open	
	WO0006222	WS - Weekly Service	Durban	SM	0	Open		Specification BPO2	0	Open	
	WO0006221	1MMS - 1 Month Machine Service	Durban	SERV	0	Open	PRJ0000396	Test BPO2	0	Open	
	WO0006219	BathBinMaint - Bathroom Bin Maintenance	Durban	SM	0	Open	PRJ0000395	BPO v2.2.0.1 Test Cycle	0	Open	
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SELECTING WORK ORDERS

You can select a *single* or *multiple* work orders to link to a current project.

- 1. In the *Unassigned Work Orders* frame, click on the *row* of the unassigned work order (for a single work order) you wish to allocate to a project, or
- 2. To select multiple work orders,
 - Hold down the *Ctrl* key on your keyboard, then use your mouse to click on each *unassigned work order* you wish to allocate to a project, or
 - Hold down the *Shift* key on your keyboard, then use the *up* and *down* arrows on your keyboard to select all the required *unassigned* work orders.



- Click anywhere on the selected line(s) then drag the work order(s) you want to allocate to a project from the *Unassigned Work Orders* frame,
- 4. and drop on the correct project in the *Project Work Orders* frame.

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	WO0006232	32 WS - Weekly Service	Durban	SM	0	Open		PRJ0000400	Testing BPO2	0	Open	
	WO0006231	81 WS - Weekly Service	Durban	SM	0	Open			Developmemnt BPO2	0	Open	
	WO0006230	30 AirMaint - Airfreshner Maintenance	Durban	SM	0	Open			Design BPO2	0	Open	
	WO0006228	28 1MMS - 1 Month Machine Service	Durban	SERV	0	Open		PRJ0000397	Specification BPO2	0	Open	
	WO0006227	27 AirMaint - Airfreshner Maintenance	Durban	SM	0	Open			Default for HOP001 on 08 Feb 2017	0	Open	
	WO0006226	26 BathBinMaint - Bathroom Bin Maintenance	Durban	SM	0	Open			1234 - Test ctrt request create pr	0	Open	
	WO0006225	25 WS - Weekly Service	Durban	SM	0	Open		➡ PRJ0000393	NDS Project	0	Open	
	WO0006223	23 1MMS - 1 Month Machine Service	Durban	SERV	0	Open			credit validation check	0	Open	
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	WO0006221	21 1MMS - 1 Month Machine Service	Durban	SERV	0	Open			Approval	0	Open	
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Any of the above selection processes will result in:

- 5. The *Assigned Work Orders* sub grid being *expanded* for the selected project line.
- 6. where you can now *view* the selected work orders in this frame.

SAVE WORK ORDER ALLOCATION

7. Click on Save Work Order to Projects.



Work Order Allocation - Link to Current Project

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	WO0006240	WS - Weekly Service	Durban	SM	0	Open	E PRJ0	000415	SP240 Nev	v Deal		0	Open	
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	WO0006232	WS - Weekly Service	Durban	SM	0	Open		WO00062	43 !	SM	WS - Weekly Se	rvice		
	WO0006231	WS - Weekly Service	Durban	SM	0	Open 6		WO00062	42 !	SERV	1MMS - 1 Month	Machine Se	ervice	
	WO0006230	AirMaint - Airfreshner Maintenance	Durban	SM	0	Open	1 ALL ALL ALL ALL ALL ALL ALL ALL ALL AL	WO00062	41 :	SM	WS - Weekly Se	rvice		
	WO0006228	1MMS - 1 Month Machine Service	Durban	SERV	0	Open	4							F
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	WO0006226	BathBinMaint - Bathroom Bin Maintenance	Durban	SM	0	Open	E PRJ0	000411	Site Inspe	ction		0	Open	
	WO0006225	WS - Weekly Service	Durban	SM	0	Open	E PRJ0	000410	New mach	ine installation		0	Open	
	WO0006223	1MMS - 1 Month Machine Service	Durban	SERV	0	Open	E PRJO	000408	Maintenan	ce Project - SP	400	0	Open	
	WO0006222	WS - Weekly Service	Durban	SM	0	Open	🗉 PRJO	000407	OSU1001			0	Open	
	WO0006221	1MMS - 1 Month Machine Service	Durban	SERV	0	Open	E PRJ0	000406	B60004			0	Open	
	WO0006219	BathBinMaint - Bathroom Bin Maintenance	Durban	SM	0	Open	E PRJ0	000405	86010102	02		0	Open	
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	WO0006217	WS - Weekly Service	Durban	SM	0	Open	B PRJ0	000402	test			0	Open	
	WO0006216	AirMaint - Airfreshner Maintenance	Durban	SM	0	Open	E PRJ0	000401	Implement	ation BPO2		0	Open	
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8. The selected work order allocations will be *linked* to the selected project and the *Assigned Work Orders* sub grid will close.

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	WO000623	37	WS - Weekly Service				Durban	± PF	30000413	PRJ408/BS00	1					
	WO000623	36	WS - Weekly Service				Durban	🗉 PF	30000412	Install Machin	nes					
	WO000623	35	Tier - Commercial Tier Te	est			Durban	🗉 PF	RJ0000411	Site Inspectio	n					
	WO000623	33	BathBinMaint - Bathroom	n Bin Maintenance			Durban	E PF	230000410	New machine	installatio	n				
	WO000623	32	WS - Weekly Service				Durban	E PF	30000408	Maintenance	Project - S	SP400				
	WO000623	31	WS - Weekly Service				Durban	e PF	30000407	OSU1001						
	WO000623	30	AirMaint - Airfreshner Ma	laintenance			Durban	E PF	30000406	B60004						
	WO000622	28	1MMS - 1 Month Machine	e Service			Durban	± PF	30000405	8601010202						
	WO000622	27	AirMaint - Airfreshner Ma	laintenance			Durban	± PF	230000404	TT041 - Bi-an	nually, Mo	ono 1000 - G	enerate Projec	t		
	WO000622	26	BathBinMaint - Bathroom	n Bin Maintenance			Durban	🖭 PF	30000402	test						
	WO000622	25	WS - Weekly Service				Durban	E PF	RJ0000401	Implementati	on BPO2					
	WO000622	23	1MMS - 1 Month Machine	e Service			Durban	± PF	30000400	Testing BPO2	2					
	WO000622	22	WS - Weekly Service				Durban	± PF	10000399	Development	nt BPO2					
	WO000622	21	1MMS - 1 Month Machine	e Service			Durban	± PF	10000398	Design BPO2						
	WO000621	19	BathBinMaint - Bathroom	n Bin Maintenance			Durban	± PF	30000397	Specification	BPO2					
	WO000621	18	WS - Weekly Service				Durban	🗉 PF	230000396	Test BPO2						
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CANCEL A WORK ORDER ALLOCATION

A Work Order allocation can only be cancelled when it has <u>not yet</u> been saved.

This action will result in:

- *All* the unsaved work order allocations being *removed* from the selected project(s) and *returned* to the *Unassigned Work Orders* frame.
- ii. This will be applied across <u>all</u> projects with unsaved work order allocations.
- 1. The example, has *WO0006240* allocated to *PRJ0000412* but the change has not yet been saved.
- 2. Click on Cancel Unsaved Changes.

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WO0006237	WS - Weekly Service	Durban			00414	Sprint SP 191	2 New Deal S	Sale					
WO0006236	WS - Weekly Service	Durban			00413	PR.J408/BS00	01						
WO0006235	Tier - Commercial Tier Test	Durban		PR.3000	00412	Install Machin	nes						
WO0006233	BathBinMaint - Bathroom Bin Maintenance	Durban		Ass	signed W	ork Orders							
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WO0006231	WS - Weekly Service	Durban		► V	VO00062	40 SM		WS -	Weekly Service				
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WO0006228	1MMS - 1 Month Machine Service	Durban		PR.300	00411	Site Inspectio	n						
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WO0006226	BathBinMaint - Bathroom Bin Maintenance	Durban		E PR.300	00408	Maintenance	Project - SP	400					
WO0006225	WS - Weekly Service	Durban		. PR.300	00407	OSU1001							
WO0006223	1MMS - 1 Month Machine Service	Durban		E PR.300	00406	B60004							
WO0006222	WS - Weekly Service	Durban		E PR.300	00405	8601010202							
WO0006221	1MMS - 1 Month Machine Service	Durban	PRJ0000404 TT041 - Bi-annually, Mono 1000 - Generate Project										
WO0006219	BathBinMaint - Bathroom Bin Maintenance	Durban		B PR.300	00402	test							
WO0006218	WS - Weekly Service	Durban		E PR.300	00401	Implementati	on BPO2						
WO0006217	WS - Weekly Service	Durban		E PR.300	00400	Testing BPO2	2						
WO0006216	AirMaint - Airfreshner Maintenance	Durban			00399	Developmem	nt BPO2						
WO0006213	2MS - 2 month service	Durban			00398	Design BPO2							
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3. The recently allocated work order(s) will be *removed* from the project and the *Assigned Work Orders* frame will be *closed*.

Note that the *expand* button for project *PRJ0000412* has been greyed out because there was only 1 work order allocated to this project which was removed when the change was cancelled.

4. The work order(s) will be *returned* to the *Unassigned Work Orders* frame.

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WO0006238	Test PQ Source Type Work Order		Durban	PRJ0000414	Sprint SP1912	lew Deal Sale				
WO0006237	WS - Weekly Service		Durban	PRJ0000413	PRJ408/BS001					
WO0006236	WS - Weekly Service		Durban	PRJ0000412	Install Machines	;				
WO0006235	Tier - Commercial Tier Test		Durban	PRJ0000411	Site Inspection					
WO0006233	BathBinMaint - Bathroom Bin Maintenance		Durban	PRJ0000410	New machine in	stallation				
WO0006232	WS - Weekly Service		Durban		Maintenance Pr	oject - SP400				
WO0006231	WS - Weekly Service		Durban	PRJ0000407	OSU 100 1					
WO0006230	AirMaint - Airfreshner Maintenance		Durban		B60004					
WO0006228	1MMS - 1 Month Machine Service		Durban		8601010202					
WO0006227	AirMaint - Airfreshner Maintenance		Durban		TT041 - Bi-annu	ally, Mono 1000 -	Generate Projec	t		
WO0006226	BathBinMaint - Bathroom Bin Maintenance		Durban	PRJ0000402	test					
WO0006225	WS - Weekly Service		Durban		Implementation	BPO2				
WO0006223	1MMS - 1 Month Machine Service		Durban		Testing BPO2					
WO0006222	WS - Weekly Service		Durban		Developmemnt	BPO2				
WO0006221	1MMS - 1 Month Machine Service		Durban		Design BPO2					
WO0006219	BathBinMaint - Bathroom Bin Maintenance		Durban		Specification BP	02				
WO0006218	WS - Weekly Service		Durban	PRJ0000396	Test BPO2					
WO0006217	WS - Weekly Service		Durban	PRJ0000395	BPO v2.2.0.1 T	est Cycle				
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