

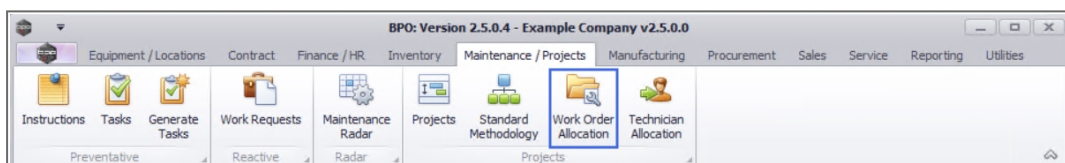
PROJECTS

WORK ORDER ALLOCATION – LINK TO NEW PROJECT

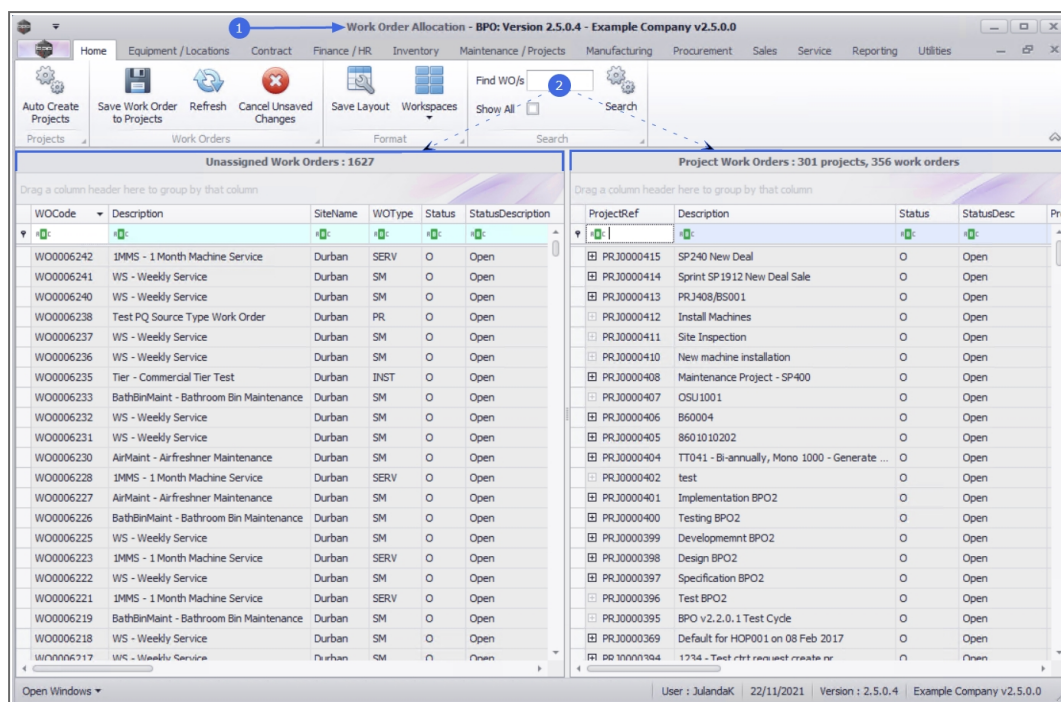
An **unassigned** work order(s) can be allocated to a **new** project.

One or multiple work orders can be linked to a **new** project.

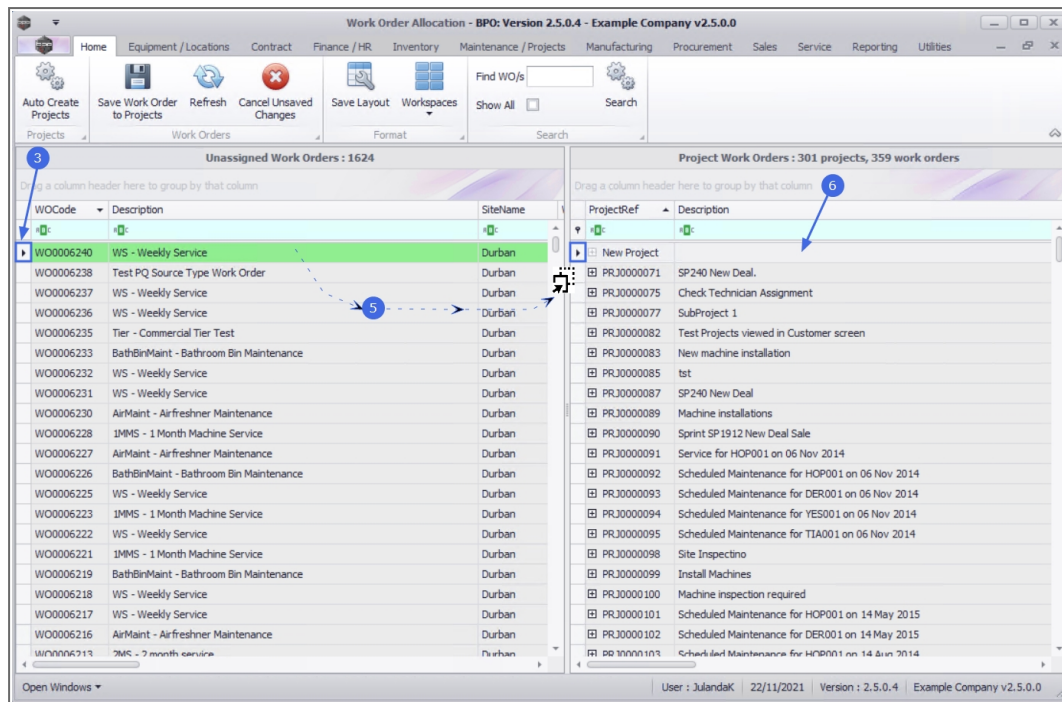
Ribbon Access: *Maintenance / Projects > Work Order Allocation*



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.



3. 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 new project, or
4. 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 new 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.
5. Click anywhere on the selected line(s) then drag the work order(s) you want to allocate, from the **Unassigned Work Orders** frame,
6. and drop on the New Project in the **Project Work Orders** frame.

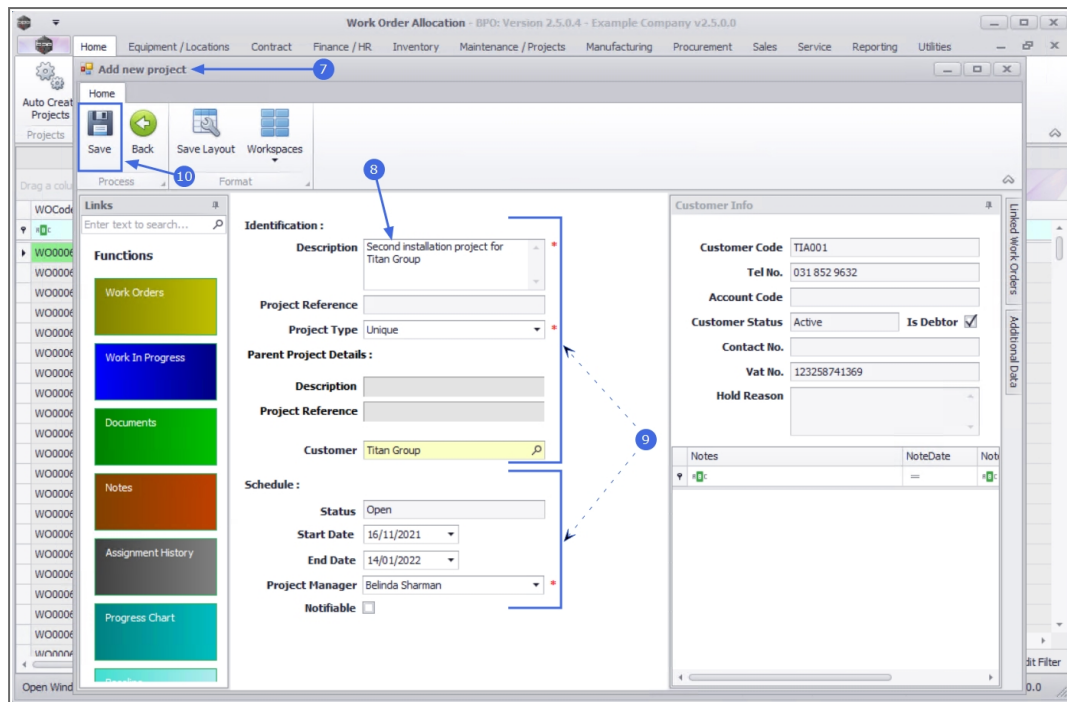


7. The **Add a new project** screen will display.
8. Click in the **Description** text box to type in a description for the project.
9. Confirm the editable project **Identification** and **Schedule** details, for example: Project Type, Start and End Dates.



For a detailed handling of this topic refer to Projects - Add Main Project

10. When you have finished adding the relevant details, click on **Save**.



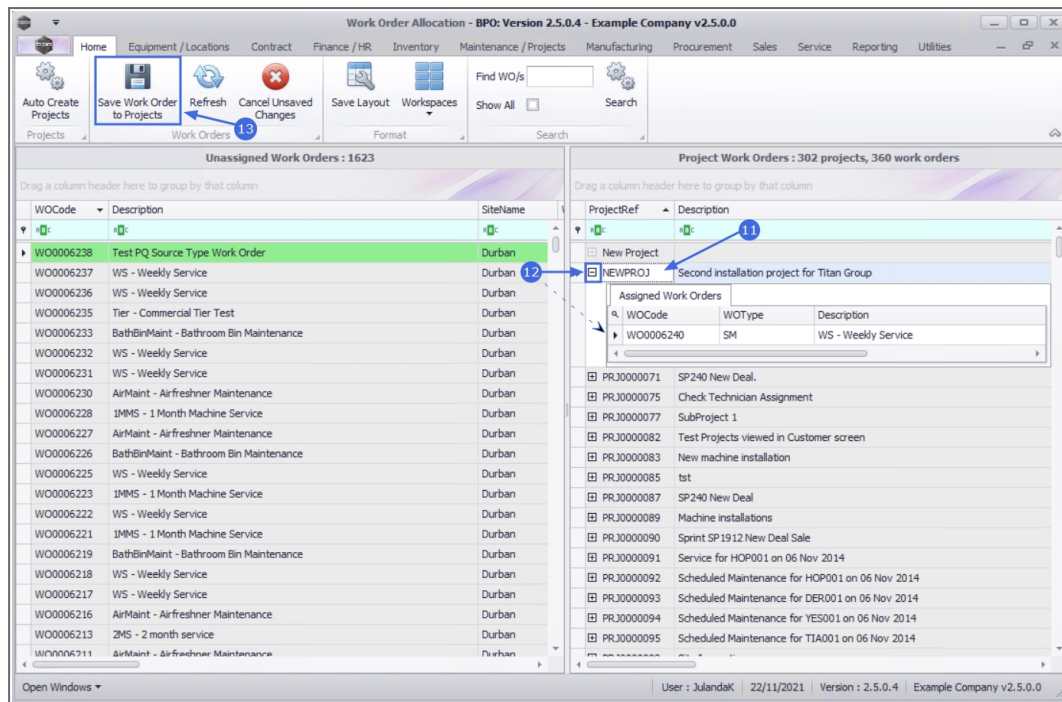
VIEW NEW PROJECT

11. The new project will be displayed in the **Project Work Orders** data grid as **NEWPROJ**.
12. Click on the **Expand** button in the row of the **New Project** to view the linked work order detail.



Remember that if you have assigned the wrong work order(s), click on **Cancel Unsaved Changes** to cancel the assignment.

13. Click on **Save Work Order to Projects**.



ASSIGN PROJECT NUMBER

14. The newly created project will now be assigned a **Project Reference Number**.

- The example project has been assigned project number **PRJ0000416**.

15. Click on **Close** to exit this screen.

Work Order Allocation - BPO: Version 2.5.0.4 - Example Company v2.5.0.0

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Auto Create Projects Save Work Order to Projects Refresh Cancel Unsaved Changes Save Layout Workspaces Find WO/s Show All Search

Projects Work Orders Format Search

Unassigned Work Orders : 1623

Drag a column header here to group by that column

WOCCode	Description	SiteName
WO0006238	Test PQ Source Type Work Order	Durban
WO0006237	WS - Weekly Service	Durban
WO0006236	WS - Weekly Service	Durban
WO0006235	Tier - Commercial Tier Test	Durban
WO0006233	BathBinMaint - Bathroom Bin Maintenance	Durban
WO0006232	WS - Weekly Service	Durban
WO0006231	WS - Weekly Service	Durban
WO0006230	AirMaint - Airfreshner Maintenance	Durban
WO0006228	IMMS - 1 Month Machine Service	Durban
WO0006227	AirMaint - Airfreshner Maintenance	Durban
WO0006226	BathBinMaint - Bathroom Bin Maintenance	Durban
WO0006225	WS - Weekly Service	Durban
WO0006223	IMMS - 1 Month Machine Service	Durban
WO0006222	WS - Weekly Service	Durban
WO0006221	IMMS - 1 Month Machine Service	Durban
WO0006219	BathBinMaint - Bathroom Bin Maintenance	Durban
WO0006218	WS - Weekly Service	Durban
WO0006217	WS - Weekly Service	Durban
WO0006216	AirMaint - Airfreshner Maintenance	Durban
WO0006213	ZMS - 2 month service	Durban
WO0006211	AirMaint - Airfreshner Maintenance	Durban

Project Work Orders : 302 projects, 360 work orders

Drag a column header here to group by that column

ProjectRef	Description
PRJ0000416	Second installation project for Titan Group
PRJ0000415	SP240 New Deal
PRJ0000414	Sprint SP1912 New Deal Sale
PRJ0000413	PRJ408/BS001
PRJ0000412	Install Machines
PRJ0000411	Site Inspection
PRJ0000410	New machine installation
PRJ0000408	Maintenance Project - SP400
PRJ0000407	OSU1001
PRJ0000406	B60004
PRJ0000405	8601010202
PRJ0000404	TT041 - Bi-annually, Mono 1000 - Generate Project
PRJ0000403	TT002 - Weekly - Call per WO
PRJ0000402	test
PRJ0000401	Implementation BPO2
PRJ0000400	Testing BPO2
PRJ0000399	Development BPO2
PRJ0000398	Design BPO2
PRJ0000397	Specification BPO2
PRJ0000396	Test BPO2
PRJ0000395	Test BPO2

Open Windows

User : JulandaK 22/11/2021 Version : 2.5.0.4 Example Company v2.5.0.0

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