



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

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1	Equipment	t/Locations	Contract F	nance / HR.	Inventory	Maintenance / F	Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities
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Instructions	Tasks	Generate Tasks	Work Requests	Maintenanc Radar	e Projects	Standard Methodology	Work Orde Allocation						
Prev	ventative	4	Reactive	Radar	4	Proje	ects	4					6

- 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.



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F	Projects	ave Work Order to Projects Refresh Cancel Unsave Changes	d Save La	ayout Wo	rkspaces	Find WO/s	Search				
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		Unassigned Work C)rders : 167	27			Drag a column head	Project Work Orders : 301 projects, 356 er here to group by that column	work ord	ers	
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	WO0006242	1MMS - 1 Month Machine Service	Durban	SERV	0	Open		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		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	B PRJ0000410	New machine installation	0	Open	
	WO0006235	Tier - Commercial Tier Test	Durban	INST	0	Open	PRJ0000408	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	PRJ0000401	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		Developmemnt 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	PR30000395	BPO v2.2.0.1 Test Cycle	0	Open	
	WO0006218	WS - Weekly Service	Durban	SM	0	Open		Default for HOP001 on 08 Feb 2017	0	Open	
	W/00006217	WS - Weekly Service	Durhan	SM	0	Onen	FT PR 10001394	1734 - Test ctrt request create pr	0	Onen	

- 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.



P ∓ thor	me Equipment / Locations Contract Fi	Work Order Allocation	Maintenance / Projects	Manufacturing	Procurement Sales Service Reporting Utilities -	- 2
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Egg			Find WO/s	(i)		
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Projects 4	Work Orders	Format	Search			
3	Unassigned Work Ord				Project Work Orders : 301 projects, 359 work orders	
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WO0006240	WS - Weekly Service		Durban	New Project	,	
WO0006238	Test PQ Source Type Work Order		Durban	➡ PRJ0000071	SP240 New Deal.	
WO0006237	WS - Weekly Service	1	Durban 7		Check Technician Assignment	
WO0006236	WS - Weekly Service	³ ×5>	Dürban 1		SubProject 1	
WO0006235	Tier - Commercial Tier Test		Durban		Test Projects viewed in Customer screen	
WO0006233	BathBinMaint - Bathroom Bin Maintenance		Durban		New machine installation	
WO0006232	WS - Weekly Service		Durban		tst	
WO0006231	WS - Weekly Service		Durban		SP240 New Deal	
WO0006230	AirMaint - Airfreshner Maintenance		Durban		Machine installations	
WO0006228	1MMS - 1 Month Machine Service		Durban		Sprint SP1912 New Deal Sale	
WO0006227	AirMaint - Airfreshner Maintenance		Durban		Service for HOP001 on 06 Nov 2014	
WO0006226	BathBinMaint - Bathroom Bin Maintenance		Durban		Scheduled Maintenance for HOP001 on 06 Nov 2014	
WO0006225	WS - Weekly Service		Durban		Scheduled Maintenance for DER001 on 06 Nov 2014	
WO0006223	1MMS - 1 Month Machine Service		Durban		Scheduled Maintenance for YES001 on 06 Nov 2014	
WO0006222	WS - Weekly Service		Durban		Scheduled Maintenance for TIA001 on 06 Nov 2014	
WO0006221	1MMS - 1 Month Machine Service		Durban		Site Inspectino	
WO0006219	BathBinMaint - Bathroom Bin Maintenance		Durban		Install Machines	
WO0006218	WS - Weekly Service		Durban		Machine inspection required	
WO0006217	WS - Weekly Service		Durban		Scheduled Maintenance for HOP001 on 14 May 2015	
WO0006216	AirMaint - Airfreshner Maintenance		Durban		Scheduled Maintenance for DER001 on 14 May 2015	
W/0006213	2MS - 2 month service		Durhan	FT PR 10000 103	Scheduled Maintenance for HOP001 on 14 Aug 2014	
Open Windows			-		User : JulandaK 22/11/2021 Version : 2.5.0.4 Example Company	

- 7. The *Add a new project* screen will display.
- 8. Click in the *Description* text box to type in a description for the project.
- 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*.



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► W00006	Functions	Description	Second installation p Titan Group	project for	'	Customer Code	TIA001			Linked Work Orders	J
WO0006				-		Tel No.	031 852 9632			Orde	
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WO0006		Status	Open		1						
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WO0006		End Date	14/01/2022 -								
WO0006		Project Manager	Belinda Sharman	· •							
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Open Wind						1				0.0	

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.



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		Unassigned Work Orders : 1623					Proj	ject Wo	rk Order	s: 302 p	orojects,	360 wo	ork orders		
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	WO0006238	Test PQ Source Type Work Order	Durban	IF	E N	lew Projec	t	/	-						
	WO0006237	WS - Weekly Service	Durban 12		-	EWPROJ		nd instal	lation pro	ect for T	itan Group				
	WO0006236	WS - Weekly Service	Durban	. IF			d Work Or								٦
	WO0006235	Tier - Commercial Tier Test	Durban	1.		A WOC			Type	D	escription				
	WO0006233	BathBinMaint - Bathroom Bin Maintenance	Durban		7	WOOD		SM	- /ps		/S - Weekl	v Servic	e		
	WO0006232	WS - Weekly Service	Durban			4						,	-		F
	WO0006231	WS - Weekly Service	Durban		FT P	RJ000007	1 SP74	10 New D	eal.						
	WO0006230	AirMaint - Airfreshner Maintenance	Durban			RJ000007			cian Assig	nment					
	WO0006228	1MMS - 1 Month Machine Service	Durban			R 1000007		Project 1							
	WO0006227	AirMaint - Airfreshner Maintenance	Durban		E P	RJ000008			viewed in	Custome	er screen				
	WO0006226	BathBinMaint - Bathroom Bin Maintenance	Durban		⊕ P	RJ000008			installatio						
	WO0006225	WS - Weekly Service	Durban	⊞ PRJ0000085 tst											
	WO0006223	1MMS - 1 Month Machine Service	Durban		Đ P	RJ000008	7 SP24	10 New D	eal						
	WO0006222	WS - Weekly Service	Durban		E P	RJ000008	9 Mad	nine insta	llations						
	WO0006221	1MMS - 1 Month Machine Service	Durban		±Ρ	RJ000009	0 Sprin	nt SP 191	2 New Dea	al Sale					
	WO0006219	BathBinMaint - Bathroom Bin Maintenance	Durban		⊕ P	RJ000009	1 Serv	ice for H	OP001 on	06 Nov 2	014				
	WO0006218	WS - Weekly Service	Durban		⊞ P	RJ000009	2 Sche	duled Ma	aintenance	for HOP	001 on 06	Nov 20	14		
	WO0006217	WS - Weekly Service	Durban		ΞP	RJ000009	3 Sche	duled Ma	aintenance	for DER	001 on 06	Nov 20	14		
	WO0006216	AirMaint - Airfreshner Maintenance	Durban		⊕ P	RJ000009	4 Sche	duled Ma	aintenance	for YES	001 on 06	Nov 20	14		
	WO0006213	2MS - 2 month service	Durban		€ P	RJ000009	5 Sche	duled Ma	aintenance	for TIA	001 on 06 l	Nov 201	14		
	W00006211	ΔirMaint - Δirfrechner Maintenance	Durhan		-										

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.



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	Unassigned Work Ord	ers : 1623			Project Work Orders : 302 projects, 360 work orders	
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WOCode 🔻	Description		SiteName	ProjectRef	✓ Description	
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WO0006238	Test PQ Source Type Work Order		Durban	▶ 🗄 PRJ0000416	Second installation project for Titan Group	٦
WO0006237	WS - Weekly Service		Durban		SP240 New Deal	
WO0006236	WS - Weekly Service		Durban		Sprint SP1912 New Deal Sale	
WO0006235	Tier - Commercial Tier Test		Durban		PRJ408/BS001	
WO0006233	BathBinMaint - Bathroom Bin Maintenance		Durban	PRJ0000412	Install Machines	
WO0006232	WS - Weekly Service		Durban	PRJ0000411	Site Inspection	
WO0006231	WS - Weekly Service		Durban	PRJ0000410	New machine installation	
WO0006230	AirMaint - Airfreshner Maintenance		Durban		Maintenance Project - SP400	
WO0006228	1MMS - 1 Month Machine Service		Durban	PRJ0000407	OSU1001	
WO0006227	AirMaint - Airfreshner Maintenance		Durban		B60004	
WO0006226	BathBinMaint - Bathroom Bin Maintenance		Durban		8601010202	
WO0006225	WS - Weekly Service		Durban		TT041 - Bi-annually, Mono 1000 - Generate Project	
WO0006223	1MMS - 1 Month Machine Service		Durban		TT002 - Weekly - Call per WO	
WO0006222	WS - Weekly Service		Durban	PRJ0000402	test	
WO0006221	1MMS - 1 Month Machine Service		Durban		Implementation BPO2	
WO0006219	BathBinMaint - Bathroom Bin Maintenance		Durban	PRJ0000400	Testing BPO2	
WO0006218	WS - Weekly Service		Durban		Developmemnt BPO2	
WO0006217	WS - Weekly Service		Durban		Design BPO2	
WO0006216	AirMaint - Airfreshner Maintenance		Durban		Specification BPO2	
WO0006213	2MS - 2 month service		Durban	PRJ0000396	Test BPO2	
W00006211	ΔirMaint - Δirfreshner Maintenance		Durhan	PR 1000395	RPO v2 2 0 1 Test Cycle	

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