



# **PROJECTS**

# WORK ORDER ALLOCATION – AUTO CREATE PROJECTS

The **Auto Create Projects** process creates projects from work orders with matching parameters.



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.



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	PWO0000048	Work order part request	Pretoria		New Project		
	PWO0000053	Work Mgt - work order linked to a client asset	Pretoria		E PRJ0000071	SP240 New Deal.	
	PWO0000058	Delete work order linked to client location	Pretoria		PRJ0000075	Check Technician Assignment	
	PWO0000061	test creating a work order for pretoria via projects	Pretoria		PRJ0000077	SubProject 1	
	WO0000288	WS - Weekly Service	Durban		PRJ0000082	Test Projects viewed in Customer screen	
	WO0000289	BathBinMaint - Bathroom Bin Maintenance	Durban			New machine installation	
	WO0000290	AirMaint - Airfreshner Maintenance	Durban		PRJ0000085	tst	
	WO0000291	AirMaint - Airfreshner Maintenance	Durban			SP240 New Deal	
	WO0000292	1MMS - 1 Month Machine Service	Durban		PRJ0000089	Machine installations	
	WO0000299	WS - Weekly Service	Durban			Sprint SP1912 New Deal Sale	
	WO0000300	BathBinMaint - Bathroom Bin Maintenance	Durban			Service for HOP001 on 06 Nov 2014	
	WO0000302	BathBinMaint - Bathroom Bin Maintenance	Durban		PR30000092	Scheduled Maintenance for HOP001 on 06 Nov 2014	
	WO0000303	AirMaint - Airfreshner Maintenance	Durban			Scheduled Maintenance for DER001 on 06 Nov 2014	
	WO0000304	AirMaint - Airfreshner Maintenance	Durban		PRJ0000094	Scheduled Maintenance for YES001 on 06 Nov 2014	
	WO0000305	WS - Weekly Service	Durban			Scheduled Maintenance for TIA001 on 06 Nov 2014	
	WO0000306	BathBinMaint - Bathroom Bin Maintenance	Durban			Site Inspectino	
	WO0000307	1MMS - 1 Month Machine Service	Durban			Install Machines	
	WO0000308	WS - Weekly Service	Durban			Machine inspection required	
	WO0000309	BathBinMaint - Bathroom Bin Maintenance	Durban			Scheduled Maintenance for HOP001 on 14 May 2015	
	WO0000310	AirMaint - Airfreshner Maintenance	Durban		➡ PRJ0000102	Scheduled Maintenance for DER001 on 14 May 2015	
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#### **SINGLE WORK ORDER**

- 1. In the *Unassigned Work Orders* frame, click in the *row* of the work order you wish to create a project for.
- 2. Click on Auto Create Projects.
- 3. The *Choose Date* screen will display.
- The *date field* will display the current date. Type in or click on the down *arrow* to use the calendar function to select the date to generate the project for.

Note that the date for the Project has to match the Request Date of the work order.

5. Click on OK.



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	WO0006227	AirMaint - Airfreshner Maintenance	Durban	27/10/2021	Ok	Back							
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	WO0006233	BathBinMaint - Bathroom Bin Maintenance	Durban	03/11/2021									
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	WO0006236	WS - Weekly Service	Durban	09/11/2021	4 5	M	PRJ000092	Scheduled Mainten	ance for HOP001 on	06 Nov 2014			
	WO0006237	WS - Weekly Service	Durban	09/11/2021	S	M	PRJ0000093	Scheduled Mainten	ance for DER001 on	06 Nov 2014			
	WO0006238	Test PQ Source Type Work Order	Durban	14/11/2021	P	R	PRJ0000094	Scheduled Mainten	ance for YES001 on	06 Nov 2014			
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- 6. When you receive the *Process Complete* message to confirm that; *1 new project(s) created*.
- 7. Click on OK.

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WO0006236 WS	VS - Weekly Service	Durban	09/1-1/2021	514		L 10000092	Scheduled Maintenance for HOP001 on 06 Nov 2014
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PWO000058 De	elete work order linked to client location	Pretoria	31/03/2017	DR		PRJ0000100	Machine inspection required
PWO0000061 tes	est creating a work order for pretoria via	. Pretoria	28/11/2017	DR		PRJ0000101	Scheduled Maintenance for HOP001 on 14 May 2015
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- The newly created project will be displayed in the *Project Work Orders* frame.
- Click on the *expand* button in the row of the new project to display the Assigned Work Orders frame.
- 10. Click on Save Work Order to Projects.

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	WO0000289	BathBinMaint - Bathroom Bin Maintenance		Durban			TT002	- Weekly - Call per	WO				
	WO0000290	AirMaint - Airfreshner Maintenance		Durban		PRJ0000404	TT041	- Bi-annually, Mon	o 1000 - Genera	te Project			
	WO0000291	AirMaint - Airfreshner Maintenance		Durban			86010	10202					
	WO0000292	1MMS - 1 Month Machine Service		Durban		PRJ0000406	B6000	4					
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	WO0000300	BathBinMaint - Bathroom Bin Maintenance		Durban			Mainte	nance Project - SP	400				
	WO0000302	BathBinMaint - Bathroom Bin Maintenance		Durban		PRJ0000410	New m	achine installation					
	WO0000303	AirMaint - Airfreshner Maintenance		Durban		PRJ0000411	Site In	spection					
	WO0000304	AirMaint - Airfreshner Maintenance		Durban		PRJ0000412	Install	Machines					
	WO0000305	WS - Weekly Service		Durban		➡ PRJ0000413	PR.340	8/BS001					
	WO0000306	BathBinMaint - Bathroom Bin Maintenance		Durban			Sprint	SP1912 New Deal	Sale		8		
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# AUTO CREATE SINGLE PROJECT WITH MULTIPLE WORK ORDERS

**Important Note** To create a single project from multiple work orders, the work order *parameters* have to be the *same*.

- 1. In the *Unassigned Work Order* frame, select the Work orders you wish to allocate to a project.
  - To select multiple work orders, hold down the *Ctrl* key on the keyboard and use your *mouse* to click on the relevant work orders to select.



- 2. *Scroll right* in this frame until you can view the parameters for the work orders to ensure that they are the same.
- 3. Click on *Auto Create Projects*.

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	WO0006246	BathBinMaint - Bathroom Bin Main	Durban	19-12345	23/11/2021	SP1919	SP 19 19 Sprint Colour M		PRJ0000075	Check Technician Assignment
	WO0006238	Test PQ Source Type Work Order	Durban		14/11/2021				PRJ000082	Test Projects viewed in Customer scree
	WO0006237	WS - Weekly Service	Durban	SP19-12185274	09/11/2021	SP19-123456	SP19-12 Colour Copier			New machine installation
	WO0006236	WS - Weekly Service	Durban		09/11/2021				PRJ000085	tst
	WO0006235	Tier - Commercial Tier Test	Durban	TIER 123	06/11/2021	SP1020	Copier		PR3000087	SP240 New Deal
	WO0006233	BathBinMaint - Bathroom Bin Main	Durban	19-12345	03/11/2021	SP1919	SP 19 19 Sprint Colour M		PRJ000089	Machine installations
	WO0006232	WS - Weekly Service	Durban	SP19-12185274	02/11/2021	SP19-123456	SP19-12 Colour Copier		PR3000090	Sprint SP1912 New Deal Sale
	WO0006231	WS - Weekly Service	Durban		02/11/2021				PRJ0000091	Service for HOP001 on 06 Nov 2014
	WO0006230	AirMaint - Airfreshner Maintenance	Durban		01/11/2021				PRJ000092	Scheduled Maintenance for HOP001 on
	WO0006228	1MMS - 1 Month Machine Service	Durban	20-12345-5689	28/10/2021	SP2020	SP2020 Sprint Colour M		PRJ000093	Scheduled Maintenance for DER001 on
	WO0006227	AirMaint - Airfreshner Maintenance	Durban		27/10/2021				PRJ000094	Scheduled Maintenance for YES001 on
	WO0006226	BathBinMaint - Bathroom Bin Main	Durban	19-12345	27/10/2021	SP1919	SP 19 19 Sprint Colour M		PRJ0000095	Scheduled Maintenance for TIA001 on 0
	WO0006225	WS - Weekly Service	Durban	SP19-12185274	26/10/2021	SP19-123456	SP 19-12 Colour Copier		PRJ0000098	Site Inspectino
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	WO0006222	WS - Weekly Service	Durban		26/10/2021				PRJ0000100	Machine inspection required
	WO0006221	1MMS - 1 Month Machine Service	Durban	19-123456	23/10/2021	SP19-123456	SP 19-12 Colour Copier		PRJ0000101	Scheduled Maintenance for HOP001 on
	WO0006219	BathBinMaint - Bathroom Bin Main	Durban	19-12345	20/10/2021	SP1919	SP 19 19 Sprint Colour M		PRJ0000102	Scheduled Maintenance for DER001 on
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- 4. The *Choose Date* screen will display.
- 5. The *date field* will auto populate with the current date. Type in or click on the down *arrow* to use the calendar function to select an alternative date, if required.

**Note** that the date for the Project has to match the Request Date of the work order.

6. Click on OK.



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	WO0006223	1MMS - 1 Month Machine Service	Durban	147708	26/10/2021	SP2020	SP2020 Sprint Colour M		PRJ0000099	Install Machines		
	WO0006222	WS - Weekly Service	Durban		26/10/2021				PRJ0000100	Machine inspectio	on required	
	WO0006221	1MMS - 1 Month Machine Service	Durban	19-123456	23/10/2021	SP19-123456	SP19-12 Colour Copier		PRJ0000101	Scheduled Mainte	enance for HOP001	on :
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- 7. When you receive the *Process Complete* message to confirm that; *1 new project(s) created*.
- 8. Click on OK.

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WO0006247	BathBinMaint - Bathroom Bin Main	Durban	19-12345	23/11/2021	SP 19 19	SP1919 Sprint Colour M	•	E PRJ0000071	SP240 New Deal.
WO0006246	BathBinMaint - Bathroom Bin Main	Durban	19-12345	23/11/2021	SP 19 19	SP1919 Sprint Colour M	E	∄ PRJ0000075	Check Technician Assignment
WO0006238	Test PQ Source Type Work Order	Durban		14/11/2021			E	∄ PRJ000082	Test Projects viewed in Customer scree
WO0006237	WS - Weekly Service	Durban	SP19-12185274	09/11/2021	SP19-123456	SP19-12 Colour Copier	E	∄ PRJ0000083	New machine installation
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WO0006232	WS - Weekly Service	Durban	1 new project(s) creat	ed. 21	SP19-123456	SP19-12 Colour Copier	E	E PRJ0000090	Sprint SP1912 New Deal Sale
WO0006231	WS - Weekly Service	Durban		21			1	E PRJ0000091	Service for HOP001 on 06 Nov 2014
WO0006230	AirMaint - Airfreshner Maintenance	Durban		21			E	E PRJ0000092	Scheduled Maintenance for HOP001 on
WO0006228	1MMS - 1 Month Machine Service	Durban	8 — OK	21	SP2020	SP2020 Sprint Colour M	E	E PRJ0000093	Scheduled Maintenance for DER001 on
WO0006227	AirMaint - Airfreshner Maintenance	Durban		27/10/2021			E	E PRJ0000094	Scheduled Maintenance for YES001 on
WO0006226	BathBinMaint - Bathroom Bin Main	Durban	19-12345	27/10/2021	SP 19 19	SP 19 19 Sprint Colour M	E	± PRJ0000095	Scheduled Maintenance for TIA001 on 0
WO0006225	WS - Weekly Service	Durban	SP19-12185274	26/10/2021	SP19-123456	SP19-12 Colour Copier	E		Site Inspectino
WO0006223	1MMS - 1 Month Machine Service	Durban	147708	26/10/2021	SP2020	SP2020 Sprint Colour M	6	E PRJ0000099	Install Machines
WO0006222	WS - Weekly Service	Durban		26/10/2021			[	E PRJ0000100	Machine inspection required
WO0006221	1MMS - 1 Month Machine Service	Durban	19-123456	23/10/2021	SP19-123456	SP19-12 Colour Copier	6	E PRJ0000101	Scheduled Maintenance for HOP001 on
WO0006219	BathBinMaint - Bathroom Bin Main	Durban	19-12345	20/10/2021	SP 19 19	SP1919 Sprint Colour M	E	E PRJ0000102	Scheduled Maintenance for DER001 on
WO0006218	WS - Weekly Service	Durban	SP19-12185274	19/10/2021	SP19-123456	SP19-12 Colour Copier	E	E PRJ0000103	Scheduled Maintenance for HOP001 on
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- The newly created project will be displayed in the *Project Work Orders* frame.
- 10. Click on the *Expand* button of the new project, to view the linked work orders.

	Home	Equipment / Locations Contract	Finance / HR	Inventory I	Maintenance / P	Projects M	lanu	ufacturing	Procure	ement	Sales	Service	Reporting	Utilities	-	8	
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	WO0000308	WS - Weekly Service	Durban	SM	0	Open		W	0000624	17	SM		BathBinMaint	t - Bathroom B	Bin Mainter	nanc	e
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1	WO0000306	BathBinMaint - Bathroom Bin Maintenance	Durban	SM	0	Open		E PR3000	0417	Schedule	ed Mainte	nance for	TIA001 on 202	11123			
	WO0000305	WS - Weekly Service	Durban	SM	0	Open		E PR.3000	0416	Second in	nstallatio	n project fi	or Titan Group				
1	WO0000304	AirMaint - Airfreshner Maintenance	Durban	SM	0	Open		E PR.3000	0415	SP240 N	ew Deal						
	WO0000303	AirMaint - Airfreshner Maintenance	Durban	SM	0	Open			0414	Sprint SP	91912 Ne	w Deal Sale					
1	WO0000302	BathBinMaint - Bathroom Bin Maintenance	Durban	SM	0	Open			0413	PRJ408/	BS001						
1	WO0000300	BathBinMaint - Bathroom Bin Maintenance	Durban	SM	0	Open		E PR3000	0408	Maintena	ance Proj	ect - SP400	)				
1	WO0000299	WS - Weekly Service	Durban	SM	0	Open		E PR.3000	0406	B60004							
1	WO0000292	1MMS - 1 Month Machine Service	Durban	SERV	0	Open		E PR.3000	0405	8601010	202						
1	WO0000291	AirMaint - Airfreshner Maintenance	Durban	SM	0	Open			0404	TT041 - I	Bi-annual	ly, Mono 1	000 - Generate	Project			
1	WO0000290	AirMaint - Airfreshner Maintenance	Durban	SM	0	Open			0403	TT002 -	Weekly -	Call per W	0				
1	WO0000289	BathBinMaint - Bathroom Bin Maintenance	Durban	SM	0	Open		E PR.3000	0401	Implement	ntation B	PO2					
1	WO0000288	WS - Weekly Service	Durban	SM	0	Open			0400	Testing E	BPO2						
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## AUTO CREATE PROJECT FROM MULTIPLE WORK ORDERS

Note that when selecting Work Orders with different parameters, a separate project will be created for each work order.

- 1. In the *Unassigned Work Order* frame, select the Work orders you wish to allocate to a project.
  - To select multiple work orders, hold down the *Ctrl* key on the keyboard and use your *mouse* to click on the relevant work orders to select.
- 2. Click on *Auto Create Projects*.



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WO0006249	BathBinMaint - Bathroom Bin Maintenan	Durban	23/11/2021	19-12345	SP1919	5	▶ E PRJ0000071	SP240 New Deal.
WO0006248	WS - Weekly Service	Durban	23/11/2021	SP19-12185274	SP19-123456	S		Check Technician Assignment
WO0006238	Test PQ Source Type Work Order	Durban	14/11/2021			P		Test Projects viewed in Customer screen
WO0006237	WS - Weekly Service	Durban	09/11/2021	SP19-12185274	SP19-123456	S		New machine installation
WO0006236	WS - Weekly Service	Durban	09/11/2021			S		tst
WO0006235	Tier - Commercial Tier Test	Durban	06/11/2021	TIER 123	SP1020	I		SP240 New Deal
WO0006233	BathBinMaint - Bathroom Bin Maintenan	Durban	03/11/2021	19-12345	SP1919	5		Machine installations
WO0006232	WS - Weekly Service	Durban	02/11/2021	SP19-12185274	SP19-123456	S		Sprint SP1912 New Deal Sale
WO0006231	WS - Weekly Service	Durban	02/11/2021			S		Service for HOP001 on 06 Nov 2014
WO0006230	AirMaint - Airfreshner Maintenance	Durban	01/11/2021			S		Scheduled Maintenance for HOP001 on 06 Nov 20
WO0006228	1MMS - 1 Month Machine Service	Durban	28/10/2021	20-12345-5689	SP2020	S		Scheduled Maintenance for DER001 on 06 Nov 20
WO0006227	AirMaint - Airfreshner Maintenance	Durban	27/10/2021			S		Scheduled Maintenance for YES001 on 06 Nov 201
WO0006226	BathBinMaint - Bathroom Bin Maintenan	Durban	27/10/2021	19-12345	SP1919	S		Scheduled Maintenance for TIA001 on 06 Nov 201
WO0006225	WS - Weekly Service	Durban	26/10/2021	SP19-12185274	SP19-123456	5		Site Inspectino
WO0006223	1MMS - 1 Month Machine Service	Durban	26/10/2021	147708	SP2020	5		Install Machines
WO0006222	WS - Weekly Service	Durban	26/10/2021			5		Machine inspection required
WO0006221	1MMS - 1 Month Machine Service	Durban	23/10/2021	19-123456	SP19-123456	S		Scheduled Maintenance for HOP001 on 14 May 20
WO0006219	BathBinMaint - Bathroom Bin Maintenan	Durban	20/10/2021	19-12345	SP1919	5	➡ PRJ0000102	Scheduled Maintenance for DER001 on 14 May 20
WO0006218	WS - Weekly Service	Durban	19/10/2021	SP19-12185274	SP19-123456	5		Scheduled Maintenance for HOP001 on 14 Aug 20
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- 3. The *Choose Date* screen will display.
- 4. The *date field* will auto populate with the current date. Type in or click on the down *arrow* to use the calendar function to select an alternative date, if required.

Note that the date for the Project has to match the Request Date of the work order.

5. Click on **OK**.



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	WO0006249	BathBinMaint - Bathroom Bin Maintenan	Durban	23/11/2021	19	9-12345	SP 19 19	5	▶   PRJ0000071	SP240 New Deal.		
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	WO0006238	Test PQ Source Type Work Order	Durban	14/11/2021				P	PRJ0000082	Test Projects view	ed in Customer screen	
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	WO0006231	WS - Weekly Service	Durban	02/11/2021	-		5			6	on 06 Nov 2014	
	WO0006230	AirMaint - Airfreshner Maintenance	Durban	01/11/2021		Processing				~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	ance for HOP001 on 06 Nov 201	14
	WO0006228	1MMS - 1 Month Machine Service	Durban	28/10/2021	20						ance for DER001 on 06 Nov 201	14
	WO0006227	AirMaint - Airfreshner Maintenance	Durban	27/10/2021			date for which y enerate project		23/11/2021	•	ance for YES001 on 06 Nov 201	4
	WO0006226	BathBinMaint - Bathroom Bin Maintenan	Durban	27/10/2021	19		cherace project				ance for TIA001 on 06 Nov 2014	4
	WO0006225	WS - Weekly Service	Durban	26/10/2021	SF	17-121032/1	31.13.153.130	4	E1 PR30000000	ане впаресоно		
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	WO0006221	1MMS - 1 Month Machine Service	Durban	23/10/2021	19	9-123456	SP19-123456	5		Scheduled Mainter	nance for HOP001 on 14 May 201	15
	WO0006219	BathBinMaint - Bathroom Bin Maintenan	Durban	20/10/2021	19	9-12345	SP 19 19	5		Scheduled Mainter	nance for DER001 on 14 May 201	15
	WO0006218	WS - Weekly Service	Durban	19/10/2021	SF	19-12185274	SP19-123456	S		Scheduled Mainter	nance for HOP001 on 14 Aug 201	14
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- 6. The *Process Complete* message will display informing you that;
  2 new project(s) created.
- 7. Click on OK.

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1	WO0006249	BathBinMaint - Bathroom Bin Maintenan	Durban	23/11/2021	19-12345	SP1919	5	▶   PRJ0000071	SP240 New Deal.
	WO0006248	WS - Weekly Service	Durban	23/11/2021	SP19-12185274	SP19-123456	5		Check Technician Assignment
ľ	WO0006238	Test PQ Source Type Work Order	Durban	14/11/2021			P		Test Projects viewed in Customer screen
1	WO0006237	WS - Weekly Service	Durban	09/11/2021	SP19-12185274	SP19-123456	S		New machine installation
1	WO0006236	WS - Weekly Service	Durban	09/11/2021		-	S	PRJ0000085	tst
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1	WO0006233	BathBinMaint - Bathroom Bin Maintenan	Durban	03/11/	6	SP1919	S	PRJ0000089	Machine installations
1	WO0006232	WS - Weekly Service	Durban	02/11/ 2 new	project(s) created.	SP19-123456	S		Sprint SP1912 New Deal Sale
1	WO0006231	WS - Weekly Service	Durban	02/11/			S		Service for HOP001 on 06 Nov 2014
1	WO0006230	AirMaint - Airfreshner Maintenance	Durban	01/11/			S	PRJ0000092	Scheduled Maintenance for HOP001 on 06 Nov 201
1	WO0006228	1MMS - 1 Month Machine Service	Durban	28/10/ 7	ОК	SP2020	S		Scheduled Maintenance for DER001 on 06 Nov 201
1	WO0006227	AirMaint - Airfreshner Maintenance	Durban	27/10/2021			S	PRJ0000094	Scheduled Maintenance for YES001 on 06 Nov 2014
1	WO0006226	BathBinMaint - Bathroom Bin Maintenan	Durban	27/10/2021	19-12345	SP1919	5		Scheduled Maintenance for TIA001 on 06 Nov 2014
1	WO0006225	WS - Weekly Service	Durban	26/10/2021	SP19-12185274	SP19-123456	S		Site Inspectino
1	WO0006223	1MMS - 1 Month Machine Service	Durban	26/10/2021	147708	SP2020	S		Install Machines
1	WO0006222	WS - Weekly Service	Durban	26/10/2021			5	➡ PRJ0000100	Machine inspection required
1	WO0006221	1MMS - 1 Month Machine Service	Durban	23/10/2021	19-123456	SP19-123456	5		Scheduled Maintenance for HOP001 on 14 May 201
1	WO0006219	BathBinMaint - Bathroom Bin Maintenan	Durban	20/10/2021	19-12345	SP1919	5		Scheduled Maintenance for DER001 on 14 May 201
1	WO0006218	WS - Weekly Service	Durban	19/10/2021	SP19-12185274	SP19-123456	S		Scheduled Maintenance for HOP001 on 14 Aug 2014
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- The newly created projects will be displayed in the *Project Work Orders* frame.
- Click on the *Expand* icon of the new projects to view the *Assigned Work Orders* frames.

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