

# PROJECTS

## WORK ORDER ALLOCATION – AUTO CREATE PROJECTS

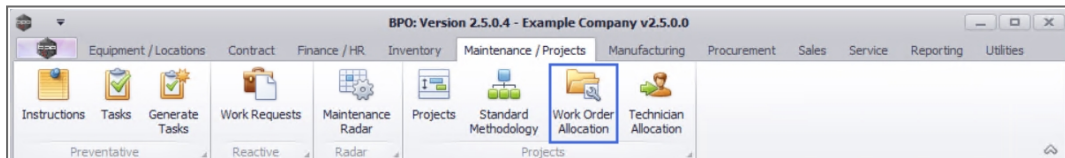
The **Auto Create Projects** process creates projects from work orders with matching parameters.

### Important Notes

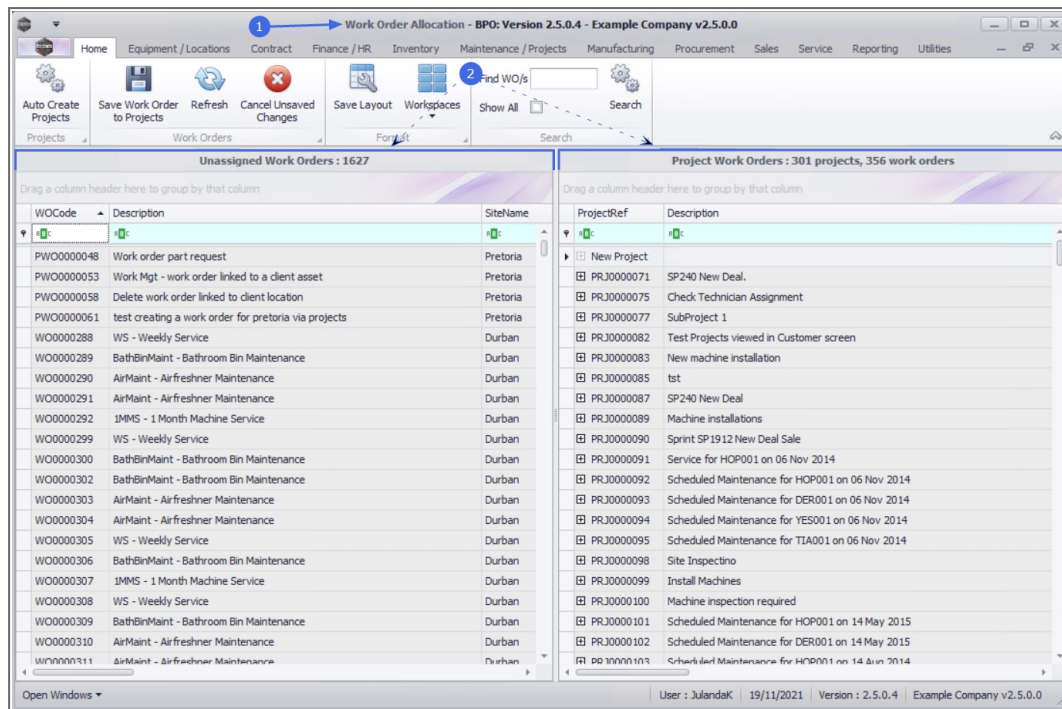
The *default* Project Manager for Auto Created Projects will use the *Site Task Manager* set up in the **company site configuration**

This person should *not* be configured as a **Technician**

**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.



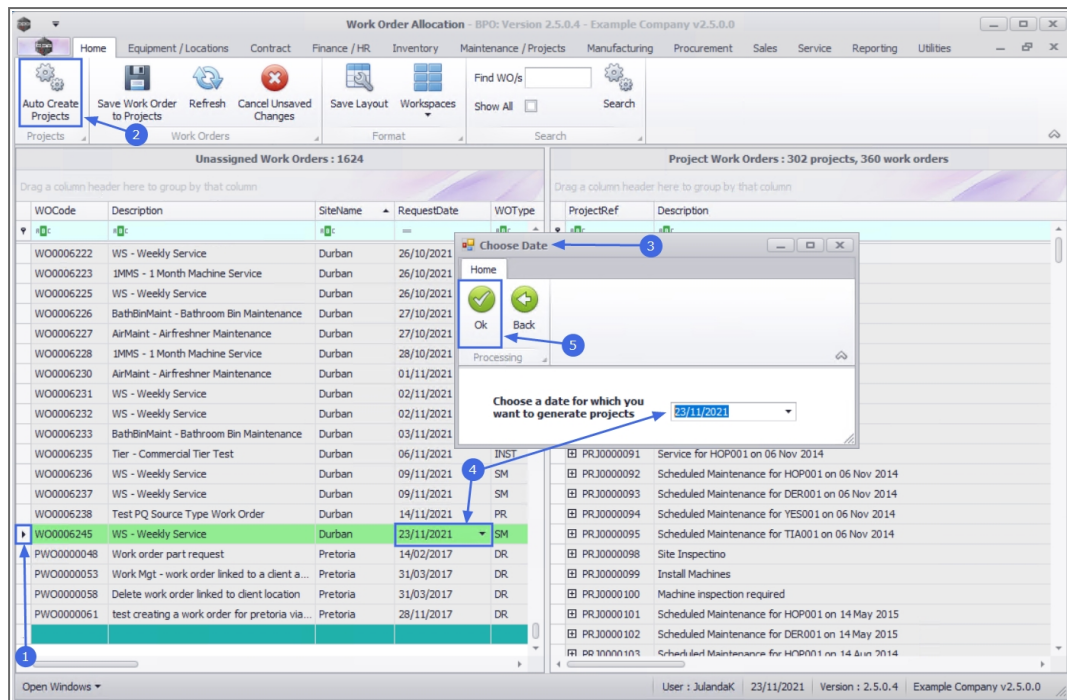
## SINGLE WORK ORDER

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.
4. 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.

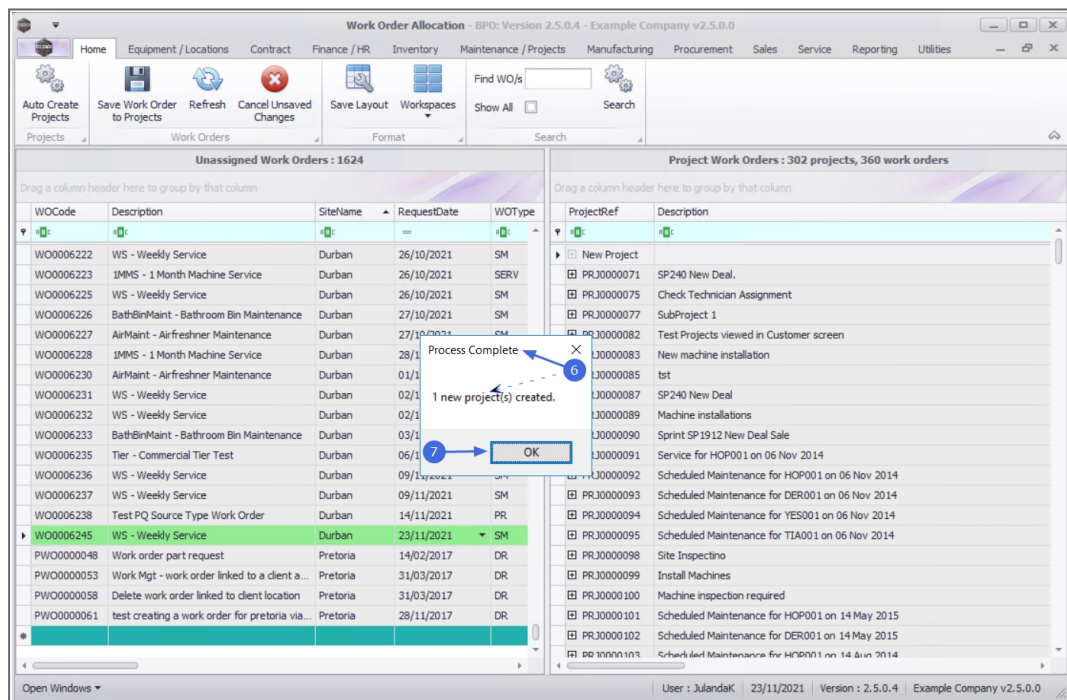
5. Click on **OK**.



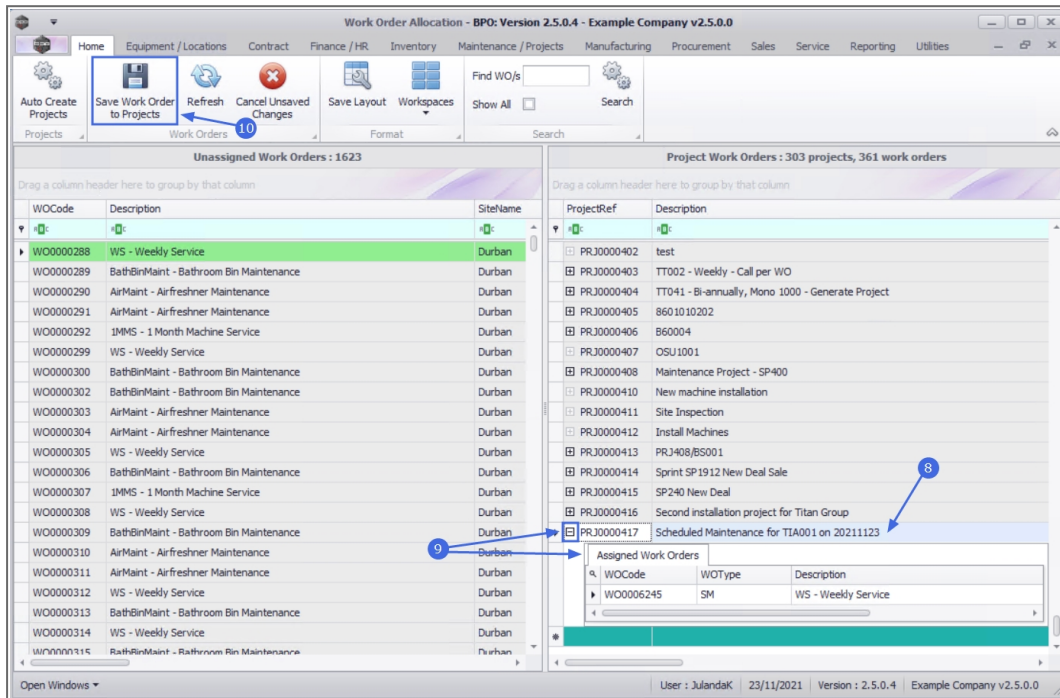
6. When you receive the **Process Complete** message to confirm that;

- **1 new project(s) created.**

7. Click on **OK**.



8. The newly created project will be displayed in the **Project Work Orders** frame.
9. 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**.



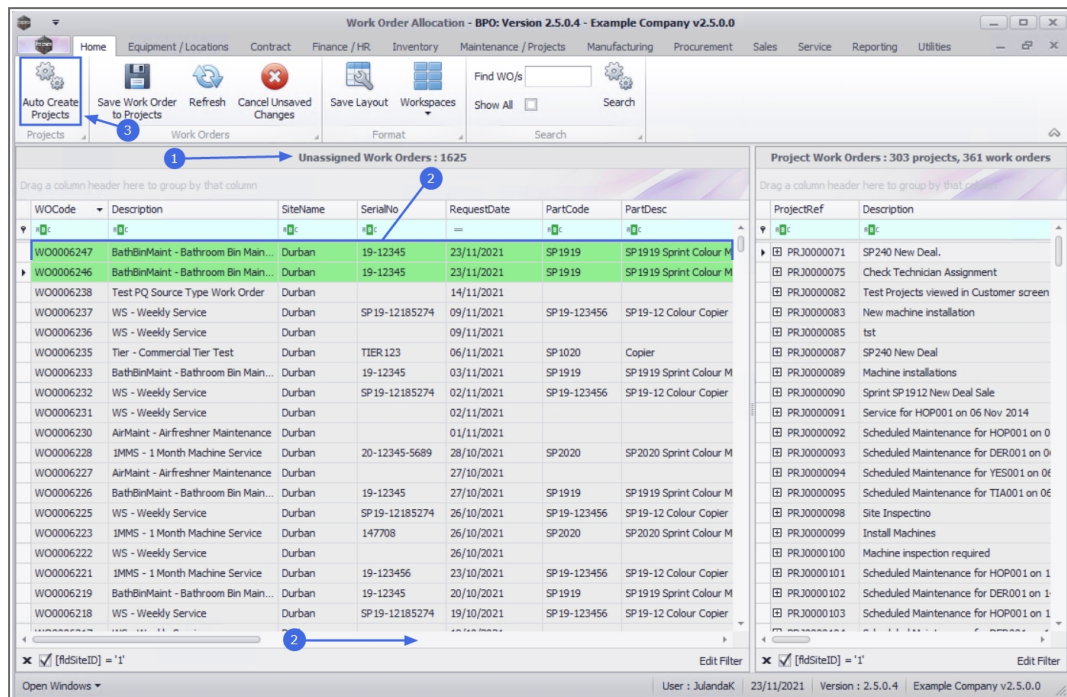
## AUTO CREATE SINGLE PROJECT WITH MULTIPLE WORK ORDERS

**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**.



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**.

**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

Unassigned Work Orders: 1625

WCode	Description	SiteName	SerialNo	RequestDate	PartCode	PartDesc
WO0006247	BathBinMaint - Bathroom Bin Main...	Durban	19-12345	23/11/2021	SP1919	SP1919 Sprint Colour M
WO0006246	BathBinMaint - Bathroom Bin Main...	Durban	19-12345	23/11/2021	SP1919	SP1919 Sprint Colour M
WO0006238	Test PQ Source Type Work Order	Durban		14/11/2021		
WO0006237	WS - Weekly Service	Durban	SP19-12185274	09/11/2021	SP19-123456	SP19-12 Colour Copier
WO0006236	WS - Weekly Service	Durban		09/11/2021		
WO0006235	Tier - Commercial Tier Test	Durban	TIER 123	06/11/2021		
WO0006233	BathBinMaint - Bathroom Bin Main...	Durban	19-12345	03/11/2021		
WO0006232	WS - Weekly Service	Durban	SP19-12185274	02/11/2021		
WO0006231	WS - Weekly Service	Durban		02/11/2021		
WO0006230	AirMaint - Airfreshner Maintenance	Durban		01/11/2021		
WO0006228	IMMS - 1 Month Machine Service	Durban	20-12345-5689	28/10/2021		
WO0006227	AirMaint - Airfreshner Maintenance	Durban		27/10/2021		
WO0006226	BathBinMaint - Bathroom Bin Main...	Durban	19-12345	27/10/2021		
WO0006225	WS - Weekly Service	Durban	SP19-12185274	26/10/2021	SP19-123456	SP19-12 Colour Copier
WO0006223	IMMS - 1 Month Machine Service	Durban	147708	26/10/2021	SP2020	SP2020 Sprint Colour M
WO0006222	WS - Weekly Service	Durban		26/10/2021		
WO0006221	IMMS - 1 Month Machine Service	Durban	19-123456	23/10/2021	SP19-123456	SP19-12 Colour Copier
WO0006219	BathBinMaint - Bathroom Bin Main...	Durban	19-12345	20/10/2021	SP1919	SP1919 Sprint Colour M
WO0006218	WS - Weekly Service	Durban	SP19-12185274	19/10/2021	SP19-123456	SP19-12 Colour Copier

Project Work Orders: 303 projects, 361 work orders

ProjectRef	Description
PRJ0000071	SP240 New Deal.
PRJ0000075	Check Technician Assignment
PRJ0000098	Site Inspectio
PRJ0000099	Install Machines
PRJ0000100	Machine inspection required
PRJ0000101	Scheduled Maintenance for HOP001 on 1
PRJ0000102	Scheduled Maintenance for DER001 on 1
PRJ0000103	Scheduled Maintenance for HOP001 on 1

Choose Date

Home

Ok Back

Processing

Choose a date for which you want to generate projects

23/11/2021

Filter [fldSiteID] = '1'

User: JulandaK 23/11/2021 Version: 2.5.0.4 Example Company v2.5.0.0

7. When you receive the **Process Complete** message to confirm that;
  - **1 new project(s) created.**
8. Click on **OK**.

**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

Unassigned Work Orders: 1625

WCode	Description	SiteName	SerialNo	RequestDate	PartCode	PartDesc
WO0006247	BathBinMaint - Bathroom Bin Main...	Durban	19-12345	23/11/2021	SP1919	SP1919 Sprint Colour M
WO0006246	BathBinMaint - Bathroom Bin Main...	Durban	19-12345	23/11/2021	SP1919	SP1919 Sprint Colour M
WO0006238	Test PQ Source Type Work Order	Durban		14/11/2021		
WO0006237	WS - Weekly Service	Durban	SP19-12185274	09/11/2021	SP19-123456	SP19-12 Colour Copier
WO0006236	WS - Weekly Service	Durban		09/11/2021		
WO0006235	Tier - Commercial Tier Test	Durban		09/11/2021		
WO0006233	BathBinMaint - Bathroom Bin Main...	Durban	19-12345	03/11/2021		
WO0006232	WS - Weekly Service	Durban	SP19-12185274	02/11/2021		
WO0006231	WS - Weekly Service	Durban		02/11/2021		
WO0006230	AirMaint - Airfreshner Maintenance	Durban		01/11/2021		
WO0006228	IMMS - 1 Month Machine Service	Durban	20-12345-5689	28/10/2021		
WO0006227	AirMaint - Airfreshner Maintenance	Durban		27/10/2021		
WO0006226	BathBinMaint - Bathroom Bin Main...	Durban	19-12345	27/10/2021		
WO0006225	WS - Weekly Service	Durban	SP19-12185274	26/10/2021	SP19-123456	SP19-12 Colour Copier
WO0006223	IMMS - 1 Month Machine Service	Durban	147708	26/10/2021	SP2020	SP2020 Sprint Colour M
WO0006222	WS - Weekly Service	Durban		26/10/2021		
WO0006221	IMMS - 1 Month Machine Service	Durban	19-123456	23/10/2021	SP19-123456	SP19-12 Colour Copier
WO0006219	BathBinMaint - Bathroom Bin Main...	Durban	19-12345	20/10/2021	SP1919	SP1919 Sprint Colour M
WO0006218	WS - Weekly Service	Durban	SP19-12185274	19/10/2021	SP19-123456	SP19-12 Colour Copier

Project Work Orders: 303 projects, 361 work orders

ProjectRef	Description
PRJ0000071	SP240 New Deal.
PRJ0000075	Check Technician Assignment
PRJ0000082	Test Projects viewed in Customer screen
PRJ0000083	New machine installation
PRJ0000085	tst
PRJ0000087	SP240 New Deal
PRJ0000089	Machine installations
PRJ0000090	Sprint SP1912 New Deal Sale
PRJ0000091	Service for HOP001 on 06 Nov 2014
PRJ0000092	Scheduled Maintenance for HOP001 on 0
PRJ0000093	Scheduled Maintenance for DER001 on 0
PRJ0000094	Scheduled Maintenance for YES001 on 0
PRJ0000095	Scheduled Maintenance for TIA001 on 0
PRJ0000098	Site Inspectio
PRJ0000099	Install Machines
PRJ0000100	Machine inspection required
PRJ0000101	Scheduled Maintenance for HOP001 on 1
PRJ0000102	Scheduled Maintenance for DER001 on 1
PRJ0000103	Scheduled Maintenance for HOP001 on 1

Process Complete

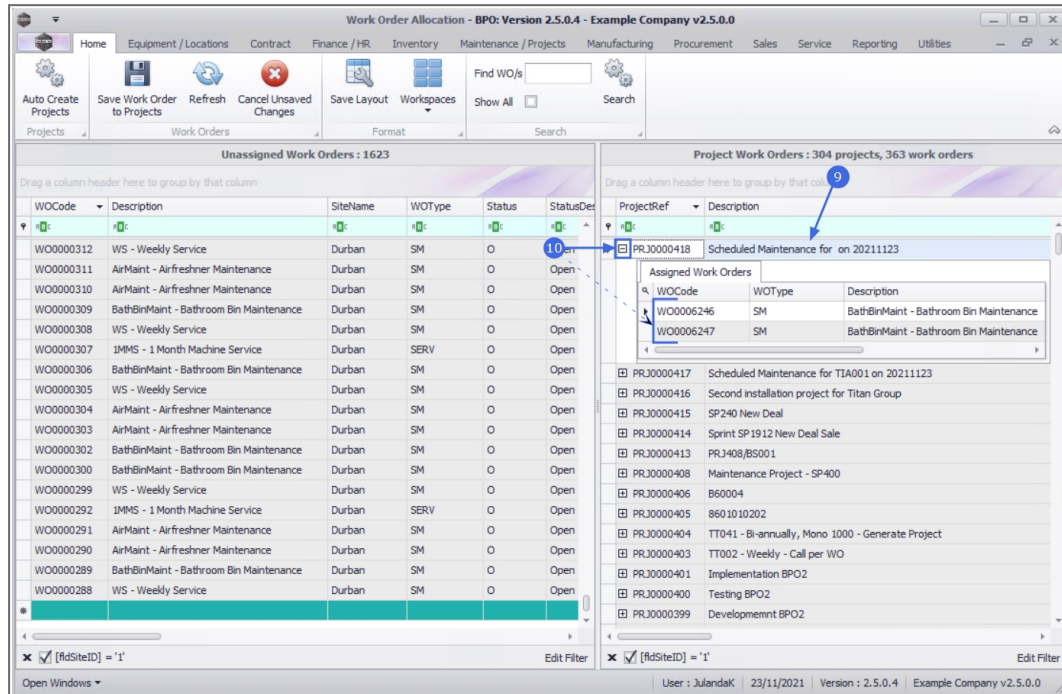
1 new project(s) created.

OK

Filter [fldSiteID] = '1'

User: JulandaK 23/11/2021 Version: 2.5.0.4 Example Company v2.5.0.0

9. 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.



## 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**.

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

1 Drag a column header here to group by that column

Unassigned Work Orders : 1625

WOCCode	Description	SiteName	RequestDate	SerialNo	PartCode	WOT
WO0006249	BathBinMaint - Bathroom Bin Maintenan...	Durban	23/11/2021	19-12345	SP1919	S
WO0006248	WS - Weekly Service	Durban	23/11/2021	SP19-12185274	SP19-123456	S
WO0006238	Test PQ Source Type Work Order	Durban	14/11/2021			F
WO0006237	WS - Weekly Service	Durban	09/11/2021	SP19-12185274	SP19-123456	S
WO0006236	WS - Weekly Service	Durban	09/11/2021			S
WO0006235	Tier - Commercial Tier Test	Durban	06/11/2021	TIER 123	SP1020	I
WO0006233	BathBinMaint - Bathroom Bin Maintenan...	Durban	03/11/2021	19-12345	SP1919	S
WO0006232	WS - Weekly Service	Durban	02/11/2021	SP19-12185274	SP19-123456	S
WO0006231	WS - Weekly Service	Durban	02/11/2021			S
WO0006230	AirMaint - Airfreshner Maintenance	Durban	01/11/2021			S
WO0006228	IMMS - 1 Month Machine Service	Durban	28/10/2021	20-12345-5689	SP2020	S
WO0006227	AirMaint - Airfreshner Maintenance	Durban	27/10/2021			S
WO0006226	BathBinMaint - Bathroom Bin Maintenan...	Durban	27/10/2021	19-12345	SP1919	S
WO0006225	WS - Weekly Service	Durban	26/10/2021	SP19-12185274	SP19-123456	S
WO0006223	IMMS - 1 Month Machine Service	Durban	26/10/2021	147708	SP2020	S
WO0006222	WS - Weekly Service	Durban	26/10/2021			S
WO0006221	IMMS - 1 Month Machine Service	Durban	23/10/2021	19-123456	SP19-123456	S
WO0006219	BathBinMaint - Bathroom Bin Maintenan...	Durban	20/10/2021	19-12345	SP1919	S
WO0006218	WS - Weekly Service	Durban	19/10/2021	SP19-12185274	SP19-123456	S

2

Project Work Orders : 304 projects, 363 work orders

Drag a column header here to group by that column

ProjectRef	Description
PRJ0000071	SP240 New Deal.
PRJ0000075	Check Technician Assignment
PRJ0000082	Test Projects viewed in Customer screen
PRJ0000083	New machine installation
PRJ0000085	tst
PRJ0000087	SP240 New Deal
PRJ0000089	Machine installations
PRJ0000090	Sprint SP1912 New Deal Sale
PRJ0000091	Service for HOP001 on 06 Nov 2014
PRJ0000092	Scheduled Maintenance for HOP001 on 06 Nov 2014
PRJ0000093	Scheduled Maintenance for DER001 on 06 Nov 2014
PRJ0000094	Scheduled Maintenance for YES001 on 06 Nov 2014
PRJ0000095	Scheduled Maintenance for TIA001 on 06 Nov 2014
PRJ0000098	Site Inspectio
PRJ0000099	Install Machines
PRJ0000100	Machine inspection required
PRJ0000101	Scheduled Maintenance for HOP001 on 14 May 2015
PRJ0000102	Scheduled Maintenance for DER001 on 14 May 2015
PRJ0000103	Scheduled Maintenance for HOP001 on 14 Aug 2014

✕ [fdSiteID] = '1' Edit Filter

Open Windows

User : JulandaK 23/11/2021 Version : 2.5.0.4 Example Company v2.5.0.0

- The **Choose Date** screen will display.
- 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.

- Click on **OK**.



The screenshot shows the 'Work Order Allocation' software interface. The 'Auto Create Projects' button is highlighted in the top toolbar. A 'Choose Date' dialog box is open, with the date 23/11/2021 selected. The background shows a list of work orders and project work orders.

WOCCode	Description	SiteName	RequestDate	SerialNo	PartCode	WOT
WO0006249	BathBinMaint - Bathroom Bin Maintenan...	Durban	23/11/2021	19-12345	SP1919	S
WO0006248	WS - Weekly Service	Durban	23/11/2021	SP19-12185274	SP19-123456	S
WO0006238	Test PQ Source Type Work Order	Durban	14/11/2021			F
WO0006237	WS - Weekly Service	Durban	09/11/2021	SP19-12185274	SP19-123456	S
WO0006236	WS - Weekly Service	Durban	09/11/2021			S
WO0006235	Tier - Commercial Tier Test	Durban	06/11/2021			S
WO0006233	BathBinMaint - Bathroom Bin Maintenan...	Durban	03/11/2021			S
WO0006232	WS - Weekly Service	Durban	02/11/2021			S
WO0006231	WS - Weekly Service	Durban	02/11/2021			S
WO0006230	AirMaint - Airfreshner Maintenance	Durban	01/11/2021			S
WO0006228	IMMS - 1 Month Machine Service	Durban	28/10/2021			S
WO0006227	AirMaint - Airfreshner Maintenance	Durban	27/10/2021			S
WO0006226	BathBinMaint - Bathroom Bin Maintenan...	Durban	27/10/2021			S
WO0006225	WS - Weekly Service	Durban	26/10/2021	SP19-123456	SP19-123456	S
WO0006223	IMMS - 1 Month Machine Service	Durban	26/10/2021	147708	SP2020	S
WO0006222	WS - Weekly Service	Durban	26/10/2021			S
WO0006221	IMMS - 1 Month Machine Service	Durban	23/10/2021	19-123456	SP19-123456	S
WO0006219	BathBinMaint - Bathroom Bin Maintenan...	Durban	20/10/2021	19-12345	SP1919	S
WO0006218	WS - Weekly Service	Durban	19/10/2021	SP19-12185274	SP19-123456	S

6. The **Process Complete** message will display informing you that;

- **2 new project(s) created.**

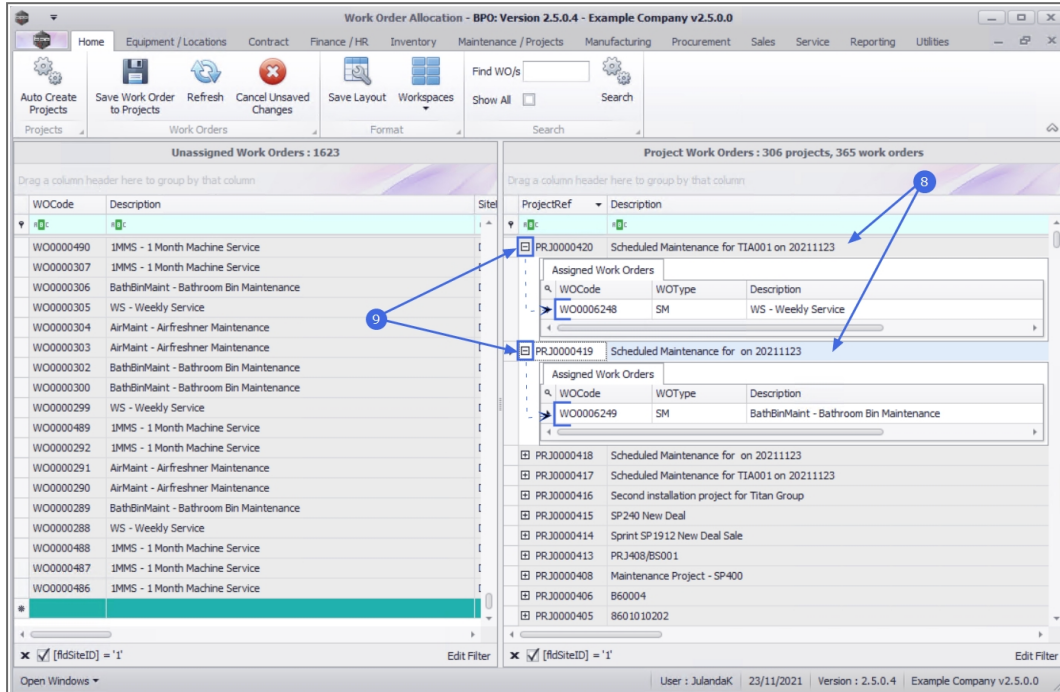
7. Click on **OK**.

The screenshot shows the 'Work Order Allocation' software interface. A 'Process Complete' message box is displayed, stating '2 new project(s) created.' and an 'OK' button is visible. The background shows the same list of work orders and project work orders as the previous screenshot.

ProjectRef	Description
PRJ0000071	SP240 New Deal.
PRJ0000075	Check Technician Assignment
PRJ0000082	Test Projects viewed in Customer screen
PRJ0000083	New machine installation
PRJ0000085	tst
PRJ0000087	SP240 New Deal
PRJ0000089	Machine installations
PRJ0000090	Sprint SP1912 New Deal Sale
PRJ0000091	Service for HOP001 on 06 Nov 2014
PRJ0000092	Scheduled Maintenance for HOP001 on 06 Nov 2014
PRJ0000093	Scheduled Maintenance for DER001 on 06 Nov 2014
PRJ0000094	Scheduled Maintenance for YES001 on 06 Nov 2014
PRJ0000095	Scheduled Maintenance for TIA001 on 06 Nov 2014
PRJ0000098	Site Inspectino
PRJ0000099	Install Machines
PRJ0000100	Machine inspection required
PRJ0000101	Scheduled Maintenance for HOP001 on 14 May 2015
PRJ0000102	Scheduled Maintenance for DER001 on 14 May 2015
PRJ0000103	Scheduled Maintenance for HOP001 on 14 Aug 2014



8. The newly created projects will be displayed in the **Project Work Orders** frame.
9. Click on the **Expand** icon of the new projects to view the **Assigned Work Orders** frames.



The screenshot displays the 'Work Order Allocation' software interface. The top menu bar includes options like Home, Equipment / Locations, Contract, Finance / HR, Inventory, Maintenance / Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the menu, there are buttons for 'Auto Create Projects', 'Save Work Order to Projects', 'Refresh', 'Cancel Unsaved Changes', 'Save Layout', and 'Workspaces'. The main area is divided into two panes. The left pane, titled 'Unassigned Work Orders: 1623', contains a table with columns 'WOCCode', 'Description', and 'Site'. The right pane, titled 'Project Work Orders: 306 projects, 365 work orders', contains a table with columns 'ProjectRef' and 'Description'. A blue arrow labeled '9' points to the 'Expand' icon (a small square with a plus sign) next to a project entry in the right pane. Another blue arrow labeled '8' points to the 'Assigned Work Orders' section within the right pane, which displays a table of work orders assigned to the selected project.

MNU.151.006