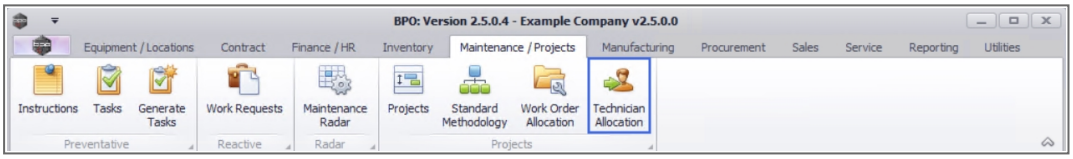
PROJECTS

TECHNICIAN ALLOCATION - TECHNICIAN PROJECTS

The Technicians' Project section lists all the technicians. Technicians are employees who are configured as technicians within the system

Ribbon Access: *Maintenance / Projects > Technician Allocation*



1. The ***Technician Allocation*** screen will be displayed.
2. The screen is divided into ***two*** panels;
    - The ***left*** panel is the ***Unallocated Projects***. A list of all the unassigned work orders is displayed in this panel.
    - The ***right*** panel is the ***Technicians' Projects***. This panel will list the and their Availability Status . Refer to Technicians - Set Up to set up the Technicians for projects.
3. Set the ***Date Range*** for the projects you wish to view.
    - Type in or click on the down ***arrow*** to set the date range using the calendar function.
4. Click on ***Refresh***.
5. The projects that fall within the selected date range will be displayed in the ***Unallocated Projects*** frame.

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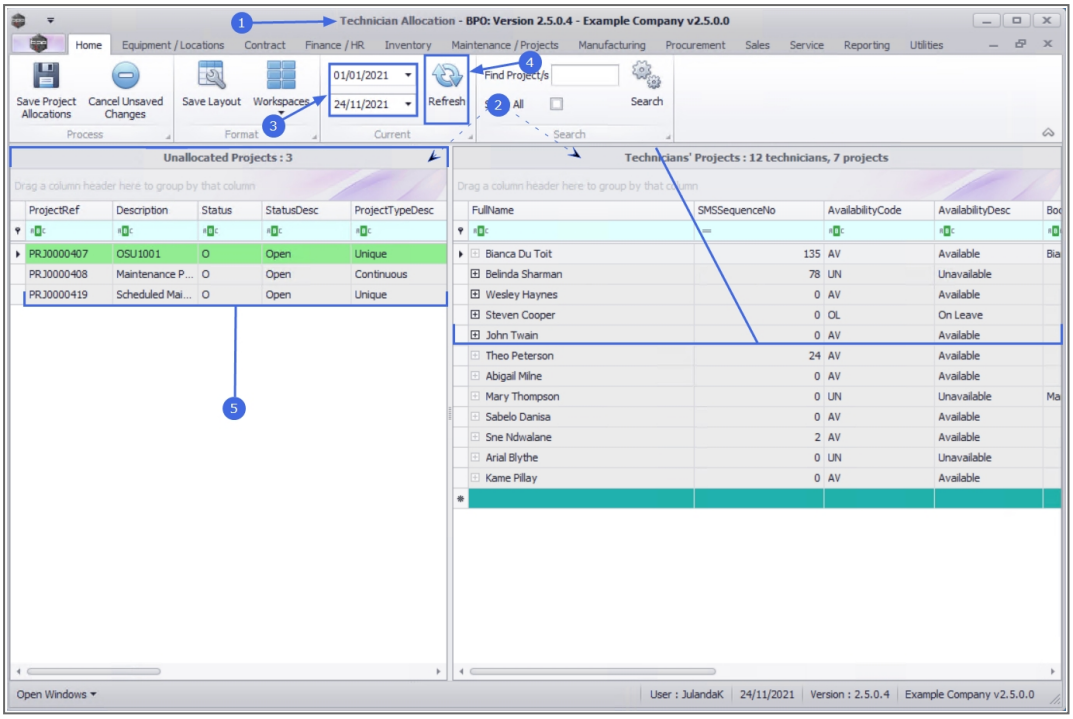

VIEW PROJECT(S) ASSIGNED

6. Click on the ***expand*** button of the Technician you wish to view.
7. The ***Assigned Projects*** sub grid will be displayed, listing the Project Reference Numbers linked to the Technician..

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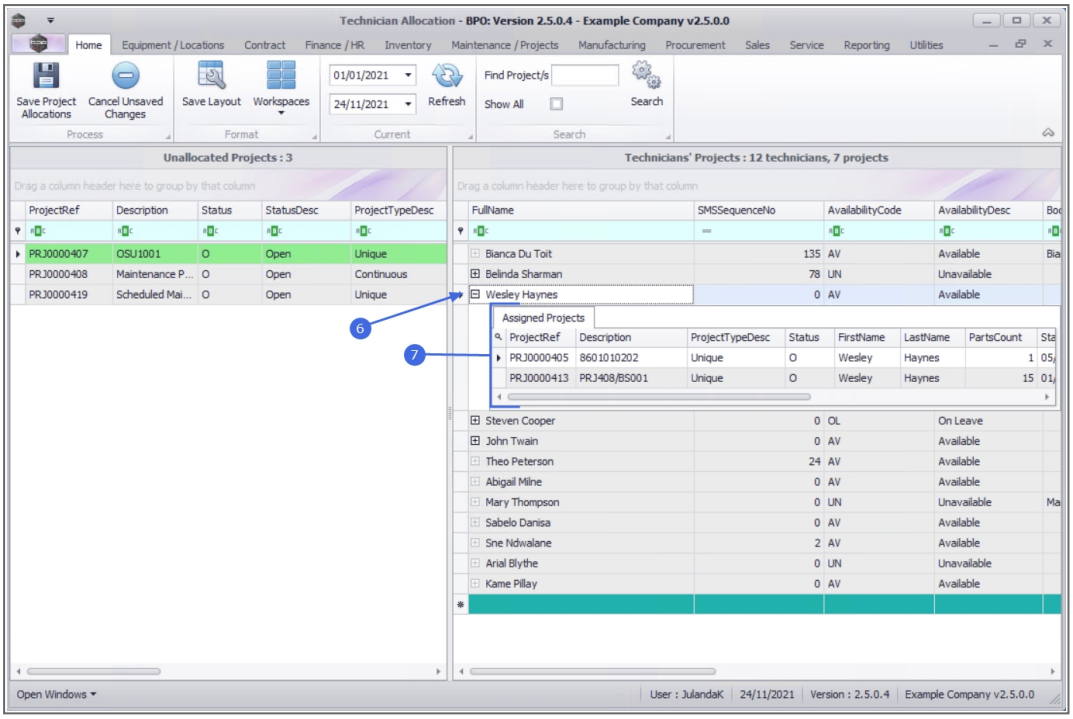

VIEW TOTAL QUANTITY OF PARTS REQUESTED PER PROJECT

1. Use the ***scroll bar*** at the bottom of the Assigned Projects sub grid to scroll until you can view the ***Parts Count*** column.
2. Here you can view the quantity of individual parts/items requested for all the underlying work orders linked to a project.

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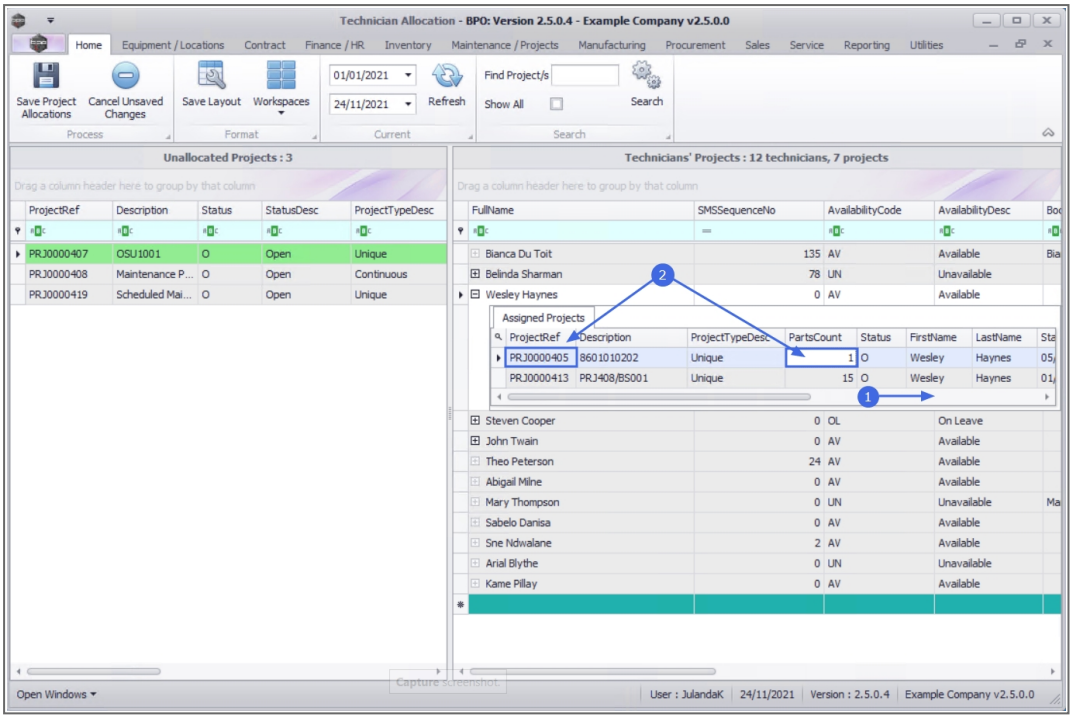
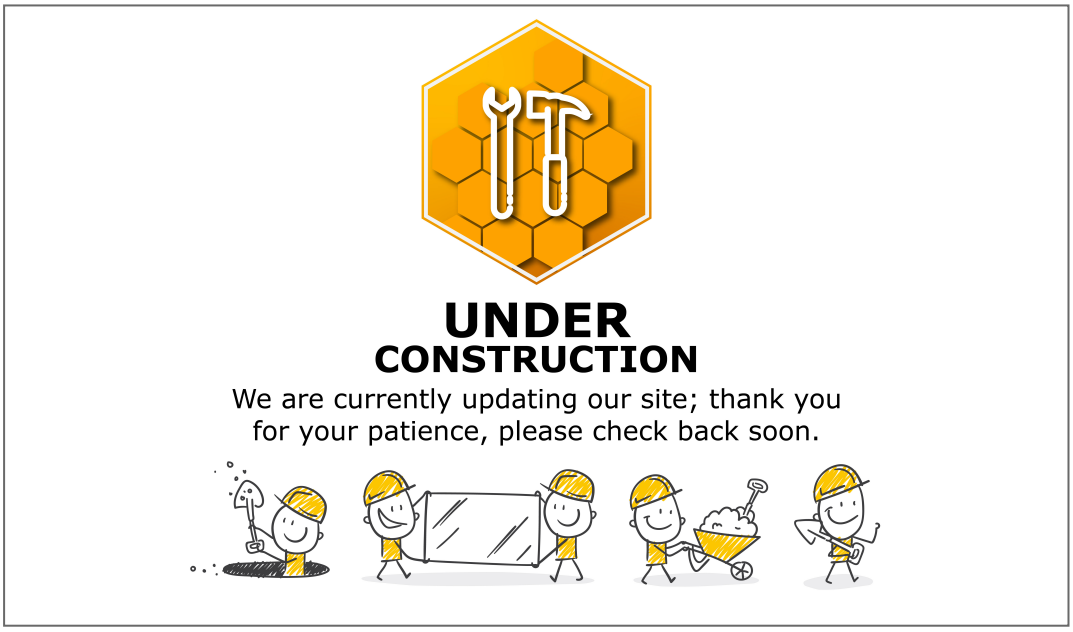


REASSIGN A PROJECT TO ANOTHER TECHNICIAN



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- Select the technician you want the project to be reassigned from.
- Click on the ***Expand*** icon.

Image to be inserted

- The ***Assigned Projects*** screen will be displayed.
- Select the project(s) you want to reassign in the ***Assigned Projects*** sub grid.
    1. Click anywhere on the selected line(s), ***drag*** the project(s) and
    2. ***drop*** to the technician you want the project(s) reassigned to.

Image to be inserted

- The ***Assigned Projects*** sub grid will close.

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