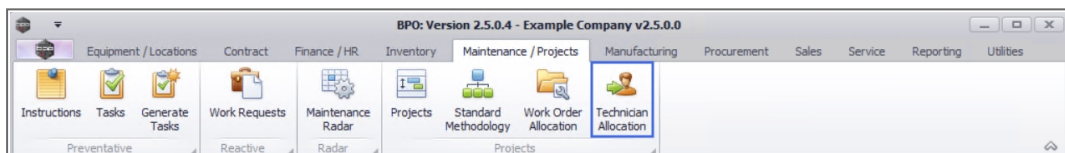


PROJECTS

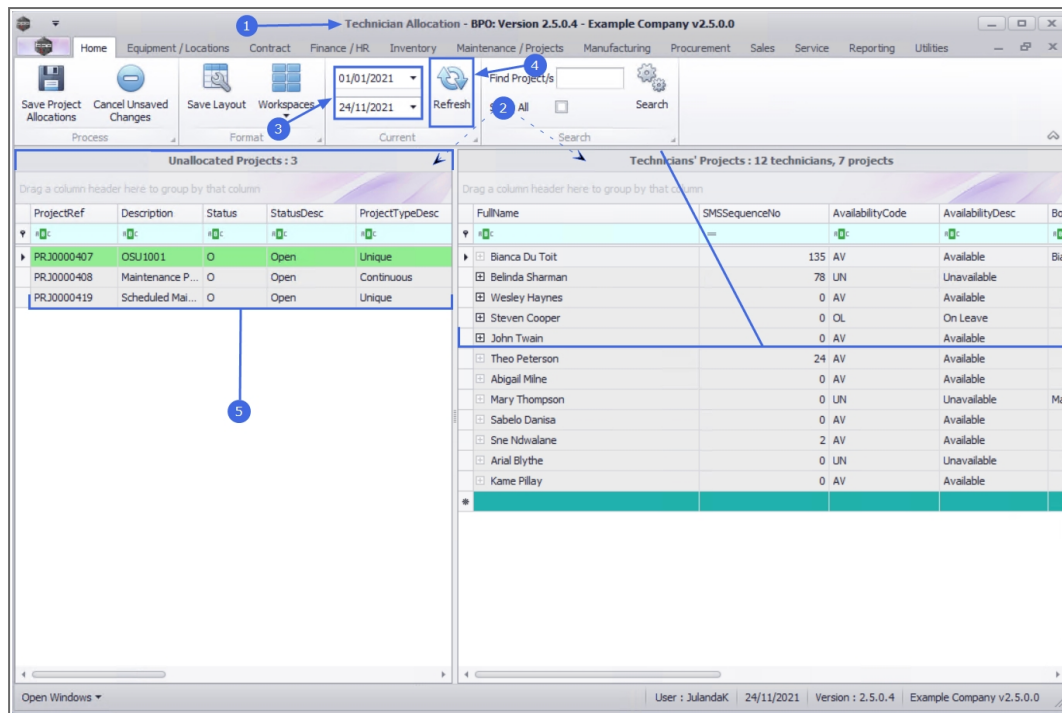
TECHNICIAN ALLOCATION – TECHNICIAN PROJECTS

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*

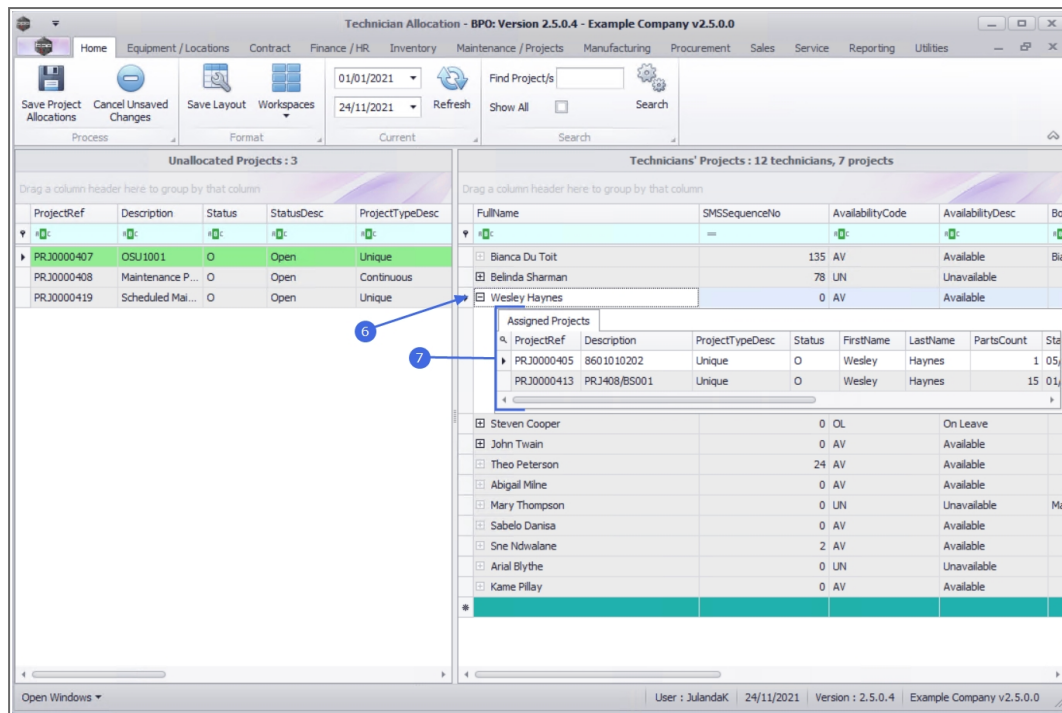


1. The **Technician Allocation** screen will be displayed.
2. The screen is divided into **two** panels;
 - The **left** panel is the **Unallocated Projects**. A list of all the unassigned work orders is displayed in this panel.
 - The **right** panel is the **Technicians' Projects**. This panel will 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.



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..



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.

Technician 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

Save Project Allocations Cancel Unsaved Changes Save Layout Workspaces 01/01/2021 24/11/2021 Refresh Find Projects Show All Search

Unallocated Projects : 3

ProjectRef	Description	Status	StatusDesc	ProjectTypeDesc
PRJ0000407	OSU1001	O	Open	Unique
PRJ0000408	Maintenance P...	O	Open	Continuous
PRJ0000419	Scheduled Mai...	O	Open	Unique

Technicians' Projects : 12 technicians, 7 projects

FullName	SMSSequenceNo	AvailabilityCode	AvailabilityDesc
Bianca Du Toit	135	AV	Available
Belinda Sharman	78	UN	Unavailable
Wesley Haynes	0	AV	Available

Assigned Projects

ProjectRef	Description	ProjectTypeDesc	PartsCount	Status	FirstName	LastName	Sta
PRJ0000405	8601010202	Unique	1	O	Wesley	Haynes	05
PRJ0000413	PRJ408/BS001	Unique	15	O	Wesley	Haynes	01

Steven Cooper 0 OL On Leave
John Twain 0 AV Available
Theo Peterson 24 AV Available
Abigail Milne 0 AV Available
Mary Thompson 0 UN Unavailable
Sabelo Danisa 0 AV Available
Sne Ndwalane 2 AV Available
Ariel Blythe 0 UN Unavailable
Kame Pillay 0 AV Available

Open Windows Capture Screenshot User : JulandaK 24/11/2021 Version : 2.5.0.4 Example Company v2.5.0.0

REASSIGN A PROJECT TO ANOTHER TECHNICIAN



UNDER CONSTRUCTION

We are currently updating our site; thank you for your patience, please check back soon.



- 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.

MNU.152.002

