

EQUIPMENT

ASSETS - PROJECT HISTORY

A **Project History** is a project history trail for a <u>serialised</u> equipment item.

Ribbon Access: Equipment/Locations > Assets

	BPO: Version 2.4.0.11 - Example Company												
	Equipment	/Locations	Contract	Finance / HR	Inventory	Maintenance / Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities	
Assets	%												
Assets	Depreciation	Functional Locations											
Equ	uipment	Locations											\Diamond

1. The *Machine List for []* screen will display.

THE SITE AND STATUS FILTERS

- This screen will open by default with the *Site* filter set to *All Sites* and the *Status* filter set to *All*.
- You do not need to select a *Site* or *Status* in this screen. However, if you wish to narrow your asset filter parameters, you can click on the *drop-down arrows* and select a particular Site and Status from the list.



; ∓	1		> Machine List for Durban									
Home Equipm	ent / Locations	Contract Fina	nce / HR Inventory Mainte	nance / Projects	Manufacturi	ing Procu	rement Sales	Service	Reporting	Utilities		5)
			All Sites 🔻	-Q- 4	6 P	1		1				
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	AssetRegNo	PartCode	Description	CategoryDesc			SerialNo	Status	StartDate	Asset	IsFixedAsset	
Functions	P #00	8 C	a 🖸 C	s 🖸 C	a B C	8 C	8 🛛 C	R C	-	R C	# 0 0	88
WO LETTIN	•	SP1919	SP1919 Sprint Colour MFC	Hardware	CTRT	1919	19-90201	A	09/04/2014	No	No	Ye:
WO History		SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	abc147c	A	07/05/2014	No	No	No
		SP19-123456	SP19-12 Colour Copier	Hardware	CTRT	SP19-12	SP19-12185274	A	13/06/2014	No	No	No
		SP19-123456	SP19-12 Colour Copier	Hardware	CTRT	SP19-12	19-12/1202	Α	17/06/2014	No	No	No
Project History		SP19-123456	SP19-12 Colour Copier	Hardware	CTRT	SP19-12	1912-102031	A	02/07/2014	No	No	No
		SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	2020-102047	A	21/06/2017	No	No	No
		SP19-123456	SP19-12 Colour Copier	Hardware	SINV	SP19-12	1912-102042	A	03/07/2014	No	No	No
Meters		SP19-123456	SP19-12 Colour Copier	Hardware	WHSE	SP19-12	1912-102043	A	03/07/2014	No	No	No
		1458-96523	K147 Kyocera Colour Copier	Kyocera Multif	CTRT	K147	SIN32413546	A	19/07/2017	No	No	No
		SP19-123456	SP19-12 Colour Copier	Hardware	SINV	SP19-12	1912-102034	A	02/07/2014	No	No	No
History		NMACH	New Machine	Hardware	CTRT		nm10301	Α	08/01/2018	No	No	No
		SP2020	SP2020 Sprint Colour MF Copier	Hardware	WHSE	SP2020	019122010101	A	11/11/2014	No	No	No
		SP204	SP204 Colour Copier	Hardware	CTRT	SP204	107	Α	18/11/2014	No	No	No
		SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	20-457896	A	07/01/2015	No	No	No
BOM		SP19-123456	SP19-12 Colour Copier	Hardware	CTRT	SP19-12	19-123456	Α	08/01/2015	No	No	No
		2020-998	Staple Unit	Accessories	SINV		998-12345	A	22/05/2017	No	No	No
		SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	147708	Α	14/05/2015	No	No	No
Warranties 1		SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	147807	Α	06/07/2015	No	No	No
	AREG000006	SP1020	Copier	Hardware	CTRT	SP1020	1020-10101	A	22/06/2015	No	No	No
	AREG000012	SP1020	Copier	Hardware	WHSE	SP1020	NEW 1234	Α	20/10/2015	No	No	No
Notes	AREG000027	2020-856	Drum	Accessories	SINV		856-14741	A	10/11/2015	No	No	No
	AREG000028	2020-856	Drum	Accessories	SINV		856-25852	A	10/11/2015	No	No	No

SELECT EQUIPMENT ITEM TO VIEW

- 1. In this example, the *Durban* Site has been selected and the Status is set to *Internal Assets*.
- 2. Click in the *row* of the equipment item (machine) where you wish to view the Project History. The selected row will highlight.
- 3. Click on the *Project History* tile in the *Links* docking panel.



=			Machine List for Durban	- BPO: Version 2			any					
Home Equip	ment / Locations	Contract Finar		nance / Projects	Manufacturi	ing Procu	rement Sales	Service	Reporting	Utilities	- 6	5)
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nter text to search	Drag a column head											
inter text to search, >	AssetRegNo	PartCode	Description	CategoryDesc	ParentType	ModelNo	SerialNo	Status	StartDate	Asset	IsFixedAsset	WC
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1	123	SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	20-12345-5689	Α	03/05/2019	Yes	Yes	No
WO History		SP1919	SP1919 Sprint Colour MFC	Hardware	CTRT	1919	19-12345	A	16/04/2018	No	Yes	No
ý.	$\mathbf{\lambda}$	SP1818	Sprint copier	Hardware	CTRT		18-30200	A	16/03/2015	No	Yes	No
		SP1919	SP1919 Sprint Colour MFC	Hardware	WKOR	1919	20-857485	Α	02/05/2017	Yes	Yes	Ye:
Project History		SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	abc147a	A	08/01/2018	No	Yes	No
		SP1919	SP1919 Sprint Colour MFC	Hardware	WKOR	1919	cvb123	Α	07/05/2014	No	Yes	No
		SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	2020-102040	A	30/10/2017	No	Yes	No
Meters		SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	2020-102041	Α	17/11/2017	No	Yes	No
		SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	2020-102042	A	03/07/2014	Yes	Yes	No
		SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	2020-102043	A	06/07/2015	Yes	Yes	No
History		SP2020	SP2020 Sprint Colour MF Copier	Hardware	WKOR	SP2020	2020-102044	Α	03/07/2014	No	Yes	No
,		SP2020	SP2020 Sprint Colour MF Copier	Hardware	WKOR	SP2020	2020-102045	A	03/07/2014	No	Yes	No
		SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	2020-102046	A	03/07/2014	No	Yes	No
вом		SP2020	SP2020 Sprint Colour MF Copier	Hardware	CTRT	SP2020	2020-102048	A	03/07/2014	Yes	Yes	No
BOM		SP19-123456	SP19-12 Colour Copier	Hardware	CTRT	SP19-12	1912-102045	Α	03/07/2014	No	Yes	No
		SP19-123456	SP19-12 Colour Copier	Hardware	CTRT	SP19-12	1912-102046	A	03/07/2014	No	Yes	No
		SP19-123456	SP19-12 Colour Copier	Hardware	CTRT	SP19-12	1912-102047	A	03/07/2014	No	Yes	No
Warranties 1		SP19-123456	SP19-12 Colour Copier	Hardware	CTRT	SP19-12	1912-102048	A	03/07/2014	No	Yes	No
		SP19-123456	SP19-12 Colour Copier	Hardware	CTRT	SP19-12	1912-10702	A	05/12/2017	No	Yes	No
		TMACH	Test Machine	Hardware	CTRT		T123	A	11/08/2014	No	Yes	No
Notes		TMACH	Test Machine	Hardware	CTRT		test987654	A	11/08/2014	No	Yes	No
		NMACH	New Machine	Hardware	WKOR		NMACH123	A	11/08/2014	Yes	Yes	No

- 1. The *Project Listing for equipment: []* screen will display.
- 2. Here you can view a list of <u>all</u> the projects to which this equipment item has been linked.

PROJECT RIBBON ACTION BUTTONS

3. From here you can utilise the **Project Listing screen Action buttons**.

PROJECT FUNCTIONS TILES

4. Select any of the <u>Project Functions tiles</u> to direct you to further information regarding a selected project.



⊕ ∓		1	Project Listing for eq	uipment	: 20-12345-5	689 - BPO: V e	ersion 2.4.0.11 - F	xample	Company				x
Home	Equipme	ent / Locations Co	ntract Finance / HR Inve	ntory	Maintenance /	Projects Ma	anufacturing Pr	ocurement	t Sales	Service Rep	orting Utilitie:	s – P	х
Add Edit	III Save Li Worksp G Save Fi Forma	ilter	Project Methodology Project Baseline Close Project I Baseline 2 Close Processing 4	Proje	loyee Time ect Time gress Report alysis	Print Delivery Note Print	Export All Sit		Refresh	Reports Reports		3	\$
Links Enter text to search.	# م	Listing											
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Work Orders		×											
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Notes													
Assignment Hist Progress Chart													
Open Windows 🕶								User	r : AbigailM (08/03/2021 Ve	ersion : 2.4.0.11	Example Company	ıy //

QUICK VIEW LINKED WORK ORDERS

 Click on the *expand* button in the row of a selected Project to view the *Work Orders* linked to that project.

LINKED WORK ORDER PROCESSING

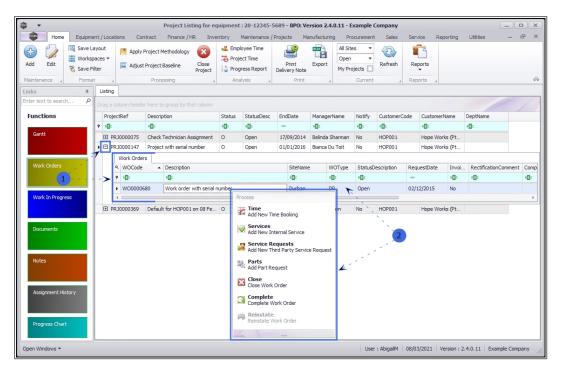
2. *Right click* in the row of a selected Work Order to display the work order *Process* menu.

From this menu you can action the following:

- Add a new Time Booking for the selected Work Order.
- Add a new Internal Service to the selected Work Order.
- Add a New Third Party Service Request to the selected Work Order.
- Add a Part Request to the selected Work Order.



- <u>Close</u> the selected Work Order.
- <u>Complete</u> the selected Work Order.



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