

# **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 | <b>%</b>                                |                         |          |              |           |                        |               |             |       |         |           |           |            |
| Assets | Depreciation                            | Functional<br>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.



| ; <b>∓</b>             | 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       |            |           |              |     |
| Add Edit Delete Vi     | ew Save Layout  | Workspaces    | Save Filter All                | Refresh Rev      | alue Conver  | t Buy Back | Print Export  | Rep     | orts       |           |              |     |
| Maintenance            |                 | Format 2      | Current                        | - 1              | 3 Process    |            | Print         | Repo    | rts 🖌      |           |              | 6   |
| inks #                 |                 |               |                                |                  |              |            |               |         |            |           |              |     |
| inter text to search P |                 |               |                                |                  |              |            |               |         |            |           |              |     |
|                        | AssetRegNo      | PartCode      | Description                    | CategoryDesc     |              |            | SerialNo      | Status  | StartDate  | Asset     | IsFixedAsset |     |
| Functions              | P #00           | 8 C           | a 🖸 C                          | s 🖸 C            | a <b>B</b> C | 8 C        | 8 🛛 C         | R C     | -          | R C       | # <b>0</b> 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.



| <b>=</b>                |                       |                | 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)  |
| Add Edit Delete         | View Save Layout      | : Workspaces S | Save Filter Internal Assets •  | Refresh 1        | 100          | t Buy Back | Print Export  | Rep     |            |           |              |     |
| Maintenance             |                       | Format         | Current                        |                  | Process      |            | Print         | Repo    | rte .      |           |              | 6   |
| inks 🗲 3                |                       |                |                                | 4                | FIUCESS      | 2          | a Princ       | a Repu  |            |           | 11           |     |
| nter text to search     | Drag a column head    |                |                                |                  |              |            |               |         |            |           |              |     |
| inter text to search, > | AssetRegNo            | PartCode       | Description                    | CategoryDesc     | ParentType   | ModelNo    | SerialNo      | Status  | StartDate  | Asset     | IsFixedAsset | WC  |
| Functions               | <b>₽</b> 8 <b>0</b> 0 | a 🗖 c          | a 🖬 c                          | a 🖬 c            | R <b>I</b> C | a 🖬 c      | 8 <b>0</b> 0  | REC     | -          | R C       | # <b>1</b> C | 88  |
| 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.



| <b>⊕ ∓</b>                        |   | 1                   | Project Listing for eq  | uipment       | : 20-12345-5                                     | 689 - <b>BPO: V</b> 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<br>Worksp<br>G Save Fi<br>Forma | ilter               | Project Methodology<br>Project Baseline Close<br>Project I Baseline 2 Close<br>Processing 4 | Proje         | loyee Time<br>ect Time<br>gress Report<br>alysis | Print<br>Delivery Note<br>Print | Export All Sit      |           | Refresh        | Reports<br>Reports |   | 3               | \$    |
| Links<br>Enter text to search.    | #<br>م                                      | Listing             |   |               |  |                                 |                     |           |                |                    |   |                 |       |
|                                   |   | Drag a column heade | r here to group by that column  | Status        | StatusDesc                                       | EndDate                         |                     | Notify    | CustomerCo     | de CustomerN       | ame DeptNa                              |                 |       |
| Functions <b>F</b>                |   |                     | Description   | status<br>set | 8 EC   | =                               | ManagerName         | REC       | REC            | REC                | sare Depuval                            | ne              |       |
| Gantt                             | 1   | ▶ 	 PRJ0000075      | Check Technician Assignment   | 0             | Open   | 17/09/2014                      |                     | No        | HOP001         | Hope Work          |   |                 |       |
|                                   |   |                     | Project with serial number  | 0             | Open   | 01/01/2016                      | Bianca Du Toit      | No        | HOP001         | Hope Work          | <s (pt<="" td=""><td></td><td></td></s> |                 |       |
|                                   |   |                     | Default for HOP001 on 08 Fe   | 0             | Open   | 11/01/2019                      | Ben Johnson         | No        | HOP001         | Hope Work          | cs (Pt                                  |                 |       |
| Work Orders                       |   | ×                   |   |               |  |                                 |                     |           |                |                    |   |                 |       |
| Work In Progres                   | ss  | <                   | 4   |               | 2  |                                 |                     |           |                |                    |   |                 |       |
| Notes                             |   |                     |   |               |  |                                 |                     |           |                |                    |   |                 |       |
| Assignment Hist<br>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

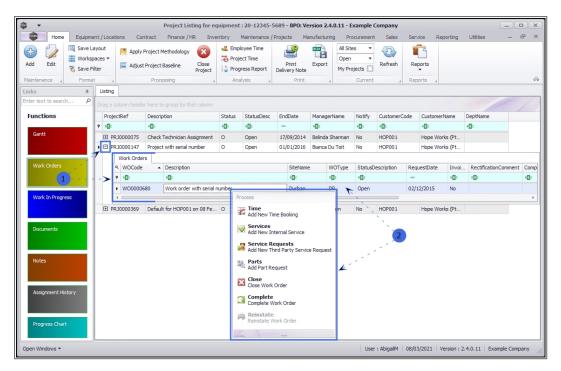
2. *Right click* in the row of a selected Work Order to display the work order *Process* menu.

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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