

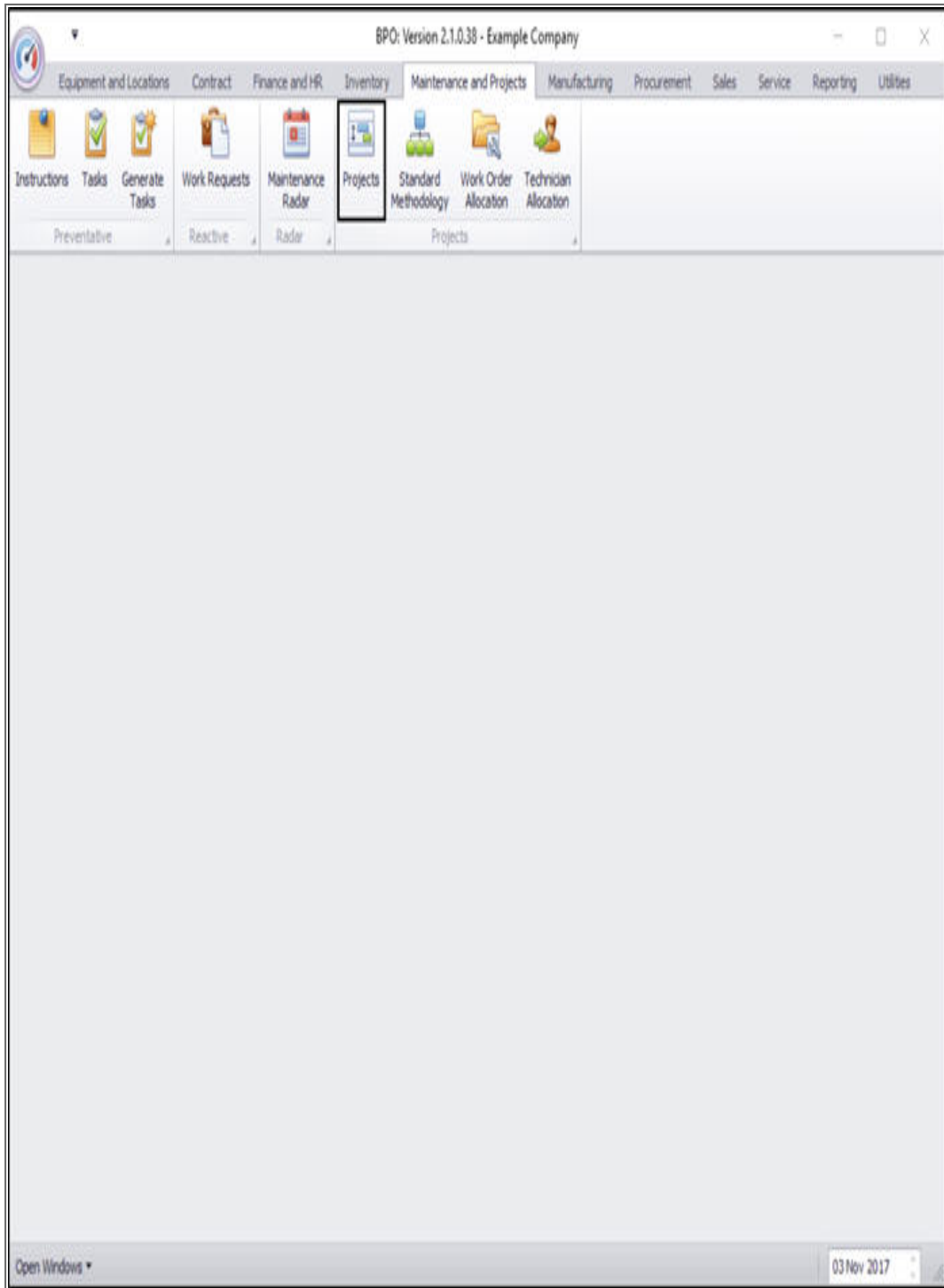
PROJECTS

PROJECTS – REQUEST PARTS FROM STORE

A part request must be logged from the project in order for stores to issue the stock required.

Depending on your company's configuration, you may need to authorise the part request before the stock can be issued.

Ribbon Access: *Maintenance/ Projects > Projects*



The ***Project Listing*** screen will be displayed.

- Select the **site**.
 - In this image, **Durban** has been selected.

The screenshot shows the 'Project Listing' window in BPO Version 2.1.0.38 for 'Example Company'. The interface includes a menu bar with options like Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. A ribbon contains various project management tools such as 'Add', 'Edit', 'Save Layout', 'Apply Project Methodology', 'Adjust Project Baseline', 'Close Project', 'Employee Time', 'Project Time', 'Progress Report', 'Print Delivery Note', 'Export', 'My Projects', 'Refresh', and 'Reports'. A dropdown menu for site selection is open, showing 'Durban' as the selected option. Below the ribbon is a search bar and a 'Functions' sidebar with categories like Work Orders, Work In Progress, Documents, Notes, Assignment History, Progress Chart, and Baseline. The main area displays a table of project listings.

ProjectRef	Description	Status	StatusDesc	StartDate	EndDate	CustomerName	CustomerCode	ManagerName
PRJ0000267	New Machine Installation	0	Open	03 Nov 2017	03 Dec 2017	Office Supplies Unli...	OFF001	Ben Johns
PRJ0000266	Sprint SP1912 New Deal Sale	0	Open	22 Jun 2017	24 Jun 2017	Big Bargains	BIG0001	Susan Du
PRJ0000265	Test Project Methodology	0	Open	22 Jun 2017	29 Jun 2017	Big Bargains	BIG0001	Susan Du
PRJ0000264	Apple Juice Project Methodology New ...	0	Open	20 Jun 2017	27 Jun 2017	Apple Juice Inc	APP0001	Susan Du
PRJ0000263	Project with work order linked to asse...	0	Open	20 Jun 2017	20 Jul 2017	Hope Works	HOP001	Belinda St
PRJ0000262	TT026 - Monthly - Generate Project	0	Open	19 Jun 2017	20 Jun 2017	Hope Works	HOP001	Susan Du
PRJ0000261	Test NDP Methodology	0	Open	15 Jun 2017	22 Jun 2017	Big Bargains	BIG0001	Susan Du
PRJ0000260	test	0	Open	14 Jun 2017	21 Jun 2017	Apple Juice Inc	APP0001	Susan Du
PRJ0000259	SP240 New Deal	0	Open	07 Jun 2017	10 Jun 2017	Hope Works	HOP001	Susan Du
PRJ0000258	Sprint SP1912 New Deal Sale	0	Open	07 Jun 2017	09 Jun 2017	Hope Works	HOP001	Susan Du
PRJ0000257	st methodology	0	Open	07 Jun 2017	14 Jun 2017	Hope Works	HOP001	Susan Du
PRJ0000256	v2.1.0.7 - My work order linked to a ...	0	Open	02 Jun 2017	02 Jul 2017	Hope Works	HOP001	Mark Mud
PRJ0000255	Loan unit part request B class	0	Open	01 Jun 2017	01 Jul 2017	Hope Works	HOP001	Mark Mud
PRJ0000254	Loan unit part request A class	0	Open	01 Jun 2017	01 Jul 2017	Hope Works	HOP001	Mark Mud
PRJ0000253	New Deal Rental	0	Open	01 Jun 2017	08 Jun 2017	Hope Works	HOP001	Mark Mud
PRJ0000252	Quick Part Return v2.1.0.7	0	Open	31 May 2017	30 Jun 2017	Hope Works	HOP001	Mark Mud
PRJ0000251	Sprint SP1912 New Deal Sale	0	Open	29 May 2017	31 May 2017	Hope Works	HOP001	Mark Mud
PRJ0000250	Project Invoices	0	Open	26 May 2017	25 Jun 2017	Hope Works	HOP001	Mark Mud
PRJ0000249	Orders - PRJ	0	Open	25 May 2017	01 Jun 2017	Hope Works	HOP001	Susan Du
PRJ0000247	Projects - Quotes v2.1.0.6	0	Open	25 May 2017	24 Jun 2017	Hope Works	HOP001	Mark Mud
PRJ0000246	Project Assignment Test v2.0.5	0	Open	25 May 2017	24 Jun 2017	Hope Works	HOP001	Mark Mud
PRJ0000245	Swap Outs p rojects v2.1.0.5	0	Open	25 May 2017	24 Jun 2017	Hope Works	HOP001	Mark Mud

- Click on the ***row selector*** in front of the ***project*** for which you wish to ***request parts***.
- Click on the ***Work Orders*** tile.

ProjectRef	Description	Status	StatusDesc	StartDate	EndDate	CustomerName	CustomerCode	ManagerName
PRJ0000187	Standard Methodology	O	Open	17 Feb 2017	19 Mar 2017	Hope Works	HOP001	Belinda Sl
PRJ0000186	Project linked to a client asset	O	Open	16 Feb 2017	18 Mar 2017	Hope Works	HOP001	Belinda Sl
PRJ0000184	Loan unit with auto approval on project	O	Open	16 Feb 2017	18 Mar 2017	Hope Works	HOP001	Belinda Sl
PRJ0000183	Auto approve off	O	Open	16 Feb 2017	18 Mar 2017	Hope Works	HOP001	Belinda Sl
PRJ0000182	Project linked to part parent not BOM	O	Open	16 Feb 2017	18 Mar 2017	Hope Works	HOP001	Susan Co
PRJ0000181	Project linked to a BOM parent	O	Open	16 Feb 2017	18 Mar 2017	Hope Works	HOP001	Mark Mud
PRJ0000180	B project part request decline	O	Open	15 Feb 2017	22 Feb 2017	Hope Works	HOP001	Susan Du
PRJ0000179	A part request project decline	O	Open	15 Feb 2017	22 Feb 2017	Hope Works	HOP001	Susan Du
PRJ0000178	B project part request approval	O	Open	15 Feb 2017	22 Feb 2017	Hope Works	HOP001	Susan Du
PRJ0000177	A, project part approval	O	Open	15 Feb 2017	22 Feb 2017	Hope Works	HOP001	Susan Du
PRJ0000176	A,B,C project part request approval	O	Open	15 Feb 2017	17 Mar 2017	Hope Works	HOP001	Mark Mud
PRJ0000175	Project part request approval	O	Open	14 Feb 2017	16 Mar 2017	Hope Works	HOP001	Belinda Sl
PRJ0000174	Project linked to a part with a BOM BPO2	O	Open	14 Feb 2017	16 Mar 2017	Hope Works	HOP001	Belinda Sl
PRJ0000172	Project linked to a client asset Pretori...	O	Open	14 Feb 2017	16 Mar 2017	Westwood Dynamic	WES001	Susan Du
PRJ0000166	BPO2 Testing at Hope Works	O	Open	27 Jan 2017	26 Feb 2017	Hope Works	HOP001	Mark Mud
PRJ0000165	12345 - New machine installation	O	Open	08 Nov 2016	15 Nov 2016	Hope Works	HOP001	Susan Du
PRJ0000164	forex tests project inv	O	Open	25 Oct 2016	01 Nov 2016	Bothas Networking inc	BOT0001	Susan Du
PRJ0000163	test	O	Open	23 Jun 2016	30 Jun 2016	Derton Technologies	DER001	Susan Du
PRJ0000161	test	O	Open	09 Jun 2016	16 Jun 2016	Hope Works	HOP001	Susan Du
PRJ0000160	Test address	O	Open	09 Jun 2016	09 Jul 2016	Hope Works	HOP001	Susan Du
PRJ0000159	SP240 New Deal	O	Open	27 May 2016	30 May 2016	Hope Works	HOP001	Susan Du
PRJ0000158	sub test	O	Open	03 May 2016	02 Jun 2016	Hope Works	HOP001	Susan Du
PRJ0000157	test	O	Open	03 May 2016	02 Jun 2016	Hope Works	HOP001	Susan Du
PRJ0000156	test auto apply task	O	Open	29 Mar 2016	05 Apr 2016	Derton Technologies	DER001	Susan Du

The **Work Orders for Project Ref []** listing screen will be displayed.

- If you have multiple work orders in this screen, click on the **row selector** in front of the **work order** you wish to assign parts to.
- Click on the **Parts** tile.

Work Orders for Project Ref PRJ0000174 - BPO: Version 2.1.0.38 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete View Close Complete Reinstate Save Layout Workspaces Print Export Durban Open Find WO Refresh Reports

Links: Enter text to search... Drag a column header here to group by that column

fdWOCCode	fdDescription	fdRequestDate	fdStatus	fdProjectRef	fdProjectD...	fdWOType	fdPriority	fdInvoiceable	fdBatc
WO0000990	Part request linked to BOM BPOv2 test	07 Feb 2017	0	PRJ0000174	Project link...	REP	2	No	

Functions: Time, Services, Third Party Services, **Parts**, Loans, Swap Outs, Meters, Expenses

Open Windows 03 Nov 2017

- The *Part Requests for WO Code []* listing screen will be displayed.
- Click on **Add**.

Part Requests for WO Code W00000990 - BPO: Version 2.1.0.38 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete Back Save Layout Workspaces Requisition Issue Transfer Note Change What Remap Part Create Part

Durban [EditValue is ...] Refresh Print Export

Maintenance Format Process Current Print

Drag a column header here to group by that column:

DodNo	SourceType	State	P...	...	CallRef...	CallDesc	Customer...	Reference	Pri...	PartCode	PartDesc	PartType	Quantity	RequiredDate
PQ00001097	WKOR	N	P...	...	CH0000...	Part re...	Hope Works	W00000...	2	2020-1...	Cyan toner S...	C	1.00	07 Feb 2017

Notes

Drag a column header here:

StateDesc	FullName

New Request Theo Pete

Purchase Orders

Drag a column header here:

POCode	Status	Su
P00000335	N	SP
P00000338	P	SP
P00000363	P	SP
P00000378	N	SP

Open Windows

03 Nov 2017

REQUEST FROM BILL OF MATERIAL

- The *Part Requests* screen will be displayed.

With the **(BOM)** selection:

When you search for the part number, the system will only bring up a list of parts that belong to this machine. For this process, a Part List BOM must be set up. View [Bill of Materials](#) for more details.

- Click on the **BOM** radio button.
- **Work Order:** This will be auto populated with the number of the Work Order you initially selected.
- **Part:** Click on the search button and select the part required.
 - **Note:** Only the parts connected to the BOM will be listed for selection.
- **Description:** This will auto populate when the part has been selected.
- **Quantity:** Type in the quantity required.
- **Warehouse:** Click on the search button and select the warehouse.
- **Required Date:** Set the date required.
- **Assigned To:** Click on the search button and search for the person who should be assigned to this request.
- **Requested By:** Click on the search button and search for the person responsible for the part request.
- **Comments:** Type in any comments required.
- **Billable:** Select this option if the part is billable.

- This will be set to billable by default, unless the part is linked to the contract as an inclusion.
- Only stock items can be marked as billable, asset and loan requests will not be billable.
- **Under Warranty:** Click on this checkbox in order to note whether the item replaced is under warranty. This does not process the item as a warranty claim part. View [Warranty Claims](#) for more information.

Part Requests - BPO: Version 2.1.0.38 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Process

BOH Parts

Work Order W00000990

Part

Description

Quantity

Warehouse

Required Date 06 Nov 2017

Assigned To Sarah Milder

Requested By Belinda Sharman

Comment

Billable Is Loan Under Warranty

Open Windows 03 Nov 2017

- When you have finished adding the details, click on **Save**.

Part Requests - BPO: Version 2.1.0.38 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Save | Back

Process

BOM | **Parts**

Work Order: WO0000990

Part: 2020-147C

Description: Cyan toner SP2020

Quantity: 2

Warehouse: George_Whse

Required Date: 08 Nov 2017

Assigned To: Sarah Milder

Requested By: Belinda Sharman

Comment:

Billable | Is Loan

Under Warranty

Open Windows | 03 Nov 2017

- A **Part Request Processing** message box will pop up informing you that;
 - *The part request for part [] has been added successfully to WO: [].*
- Click on **OK**.

Part Requests for WO Code W00000990 - BPO: Version 2.1.0.38 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete Back Save Layout Workspaces Requisition Issue Transfer Note Change Whse Remap Part Create Part

Durban [EditValue is ...] Refresh Print Export

Maintenance Format Process Current Print

Drag a column header here to group by that column

DocNo	SourceType	State	P...	...	CallRef...	CallDesc	Customer...	Reference	Pri...	PartCode	PartDesc	PartType	Quantity	RequiredDate
PQ00001097	WKOR	N	P...	...	CH0000...	Part re...	Hope Works	W00000...	2	2020-1...	Cyan toner S...	C	1.00	07 Feb 2017
PQ00001780	WKOR	N	P...	...	CH0000...	Part re...	Hope Works	W00000...	2	2020-1...	Cyan toner S...	C	2.00	08 Nov 2017

Notes

Drag a column header here

StateDesc FullName

New Request Theo Pete

Part Request Processing

The part request for part 2020-147C has been added successfully to WO : W00000990.

OK

Purchase Orders

Drag a column header here

POCode	Status	Su
PQ0000335	N	SP
PQ0000338	P	SP
PQ0000363	P	SP
PQ0000378	N	SP

Open Windows

03 Nov 2017

- You will return to the **Part Requests for WO Code []** listing screen where you can now view the added part request details.

Part Requests for WO Code W00000990 - BPO: Version 2.1.0.38 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete Back Save Layout Workspaces Requisition Issue Transfer Note Change Whse Remap Part Create Part

Durban [EditValue is ...] Refresh Print Export

Maintenance Format Process Current Print

Drag a column header here to group by that column

DodNo	SourceType	State	ProjectRef	ProjectDesc	RequiredDate	CallReference	CallDesc	CustomerName
PQ00001097	WKOR	N	PR0000174	Project linked to a part with a BOM BPO2	07 Feb 2017	CN0000393	Part request linked to BOM BPOv2 test	Hope Works
PQ00001780	WKOR	N	PR0000174	Project linked to a part with a BOM BPO2	08 Nov 2017	CN0000393	Part request linked to BOM BPOv2 test	Hope Works

Notes

Drag a column header here to group by that column

StateDesc

New Request

Purchas...

Drag a column header here to group by that column

POCode

P00000335

P00000338

P00000363

P00000378

Open Windows

03 Nov 2017

REQUEST FROM FULL PART LIST

- In the *Part Requests* screen,

With the **(Parts)** selection,

When you search for the part number, the system will bring up all part numbers.
 - Click on the **Parts** radio button.
 - **Work Order:** This will be auto populated with the number of the Work Order you initially selected.
 - **Part:** Click on the search button and select the part required.
 - **Description:** This will auto populate when the part has been selected.
 - **Quantity:** Type in the quantity required.
 - **Warehouse:** Click on the search button and select the warehouse.
 - **Required Date:** Set the date required.
 - **Assigned To:** Click on the search button and search for the person responsible for the part request.
 - **Comments:** Type in any comments required.
 - **Billable:** Select this option if the part is billable.
 - This will be set to billable by default, unless the part is linked to the contract as an inclusion.
 - Only stock items can be marked as billable, asset and loan requests will not be billable
 - **Under Warranty:** Click on this checkbox in order to note whether the item replaced is under warranty.



Request Parts from Store

This does not process the item as a warranty claim part. View [Warranty Claims](#) for more information.

Part Requests - BPO: Version 2.1.0.38 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back

Process

BOM **Parts**

Work Order: W00001501

Part: [Yellow field] *

Description: [Text area] *

Quantity: [Number field] 1 *

Warehouse: [Yellow field] *

Required Date: 07 Nov 2017

Assigned To: Sarah Milder

Requested By: Sarah Milder

Comment: [Text area] *

Billable Is Loan

Under Warranty

Open Windows 06 Nov 2017

- When you have finished adding the details, click on **Save** .

The screenshot shows a web application window titled "Part Requests - BPO: Version 2.1.0.38 - Example Company". The navigation menu includes: Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. A toolbar on the left contains "Save" and "Back" buttons. The main content area displays a form for requesting parts, with a "Process" button at the bottom left. The form fields are as follows:

Field	Value
Work Order	W00001501
Part	123452N
Description	ZN Paper
Quantity	8
Warehouse	JohnS_Boot
Required Date	06 Nov 2017
Assigned To	Joseph Timber
Requested By	Sarah Milder
Comment	
Billable	<input checked="" type="checkbox"/>
Is Loan	<input type="checkbox"/>
Under Warranty	<input type="checkbox"/>

At the bottom of the window, there is an "Open Windows" dropdown and a system clock showing "06 Nov 2017".

- A ***Part Request Processing*** message box will pop up informing you that;
 - ***The part request for part [] has been added successfully to WO: [].***
- Click on **OK**.

Part Requests for WO Code W00001501 - BPO: Version 2.1.0.38 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete Back Save Layout Workspaces Requisition Issue Transfer Note Change Whole Remap Part Create Part

Durban [EditValue is ...] Refresh Print Export

Maintenance Format Process Current Print

Drag a column header here to group by that column

DodNo	SourceType	State	ProjectRef	ProjectDesc	CallReference	CallDesc	CustomerName	Reference	Priority	PartCode	PartDesc
PQ00001757	WKOR	N	PRJ0000266	Sprint SP1912 New Deal Sale			Big Bargains	W00001501	2	12-098765	SP19-12.8
PQ00001758	WKOR	N	PRJ0000266	Sprint SP1912 New Deal Sale			Big Bargains	W00001501	2	SP19-123456	SP19-12.C
PQ00001782	WKOR	N	PRJ0000266	Sprint SP1912 New Deal Sale			Big Bargains	W00001501	2	12345ZN	ZN Paper

Notes

Purchas...

POCode

Part Request Processing

The part request for part 12345ZN has been added successfully to WO: W00001501.

OK

Open Windows

06 Nov 2017

- You will return to the **Part Requests for WO Code []** listing screen where you can now view the added part request details.

Part Requests for WO Code W00001501 - BPO: Version 2.1.0.38 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete Back Save Layout Workspaces Requisition Issue Transfer Note Change Whse Remap Part Create Part

Durban [EditValue is ...] Refresh Print Export

Maintenance Format Process Current Print

Drag a column header here to group by that column

DocNo	SourceType	State	ProjectRef	ProjectDesc	CustomerName	Reference	Priority	PartCode	PartDesc	PartType	Quantity	RequiredDate	Re
PQ00001757	WKOR	N	PR30000266	Sprint SP1912 New Deal Sale	Big Bargains	W00001501	2	12-098765	SP19-12 Black Toner	C	1.00	22 Jun 2017	Sl
PQ00001758	WKOR	N	PR30000266	Sprint SP1912 New Deal Sale	Big Bargains	W00001501	2	SP19-123456	SP19-12 Colour Copier	A	1.00	22 Jun 2017	Sl
PQ00001782	WKOR	N	PR30000266	Sprint SP1912 New Deal Sale	Big Bargains	W00001501	2	123452N	ZN Paper	C	8.00	06 Nov 2017	Sl

Open Windows ▾ 06 Nov 2017

MNU.058.004

