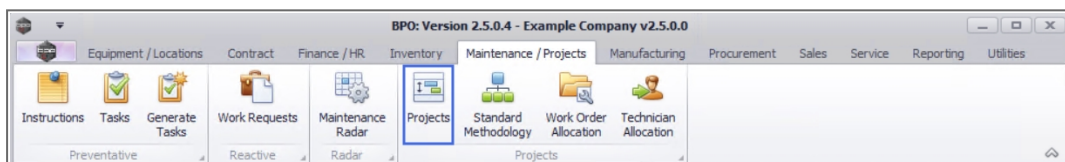


PROJECTS

PROJECTS - ASSIGNMENT HISTORY

In BPO2 v2.5.0.8 (or higher) the first assignee is no longer required to accept the assignment before subsequent assignments on the same project with different work orders can be made.

Ribbon Access: *Maintenance / Projects > Projects*

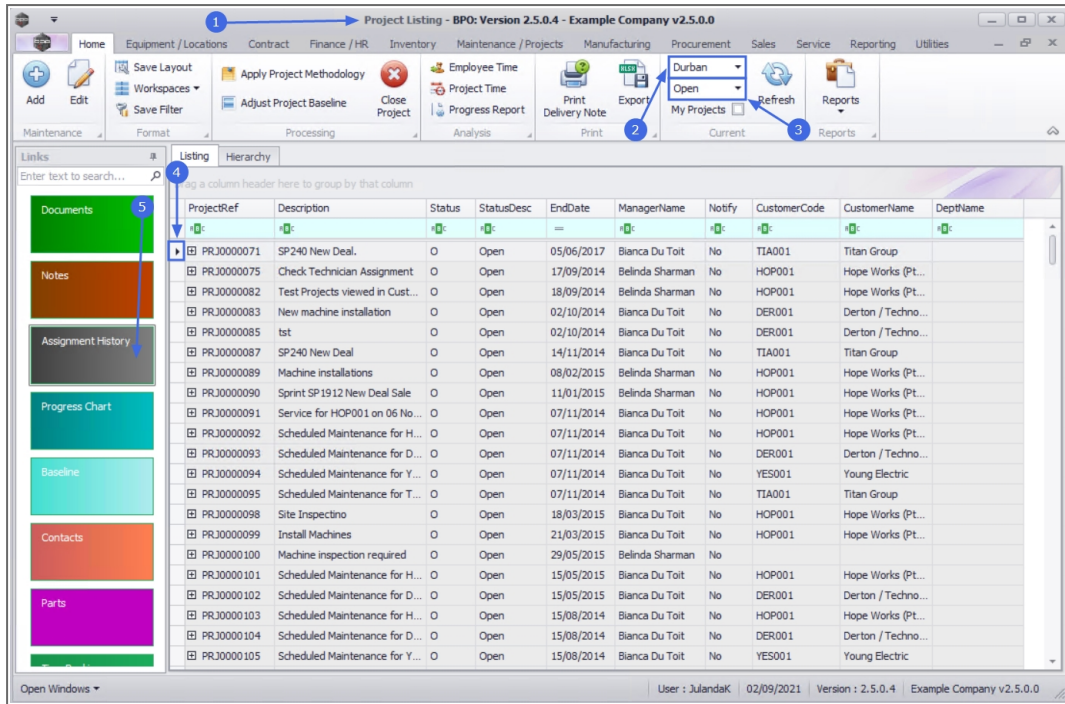


1. The **Project Listing** screen will be displayed.
2. Select the **Site** where the project can be located.
 - The example has **Durban** selected.
3. Ensure that the **Status** has been set to **Open**.



Note that you cannot assign resources to a Closed project.

4. Click on the **row** of the project you wish to assign a technician to.
5. Click on the **Assignment History** tile.



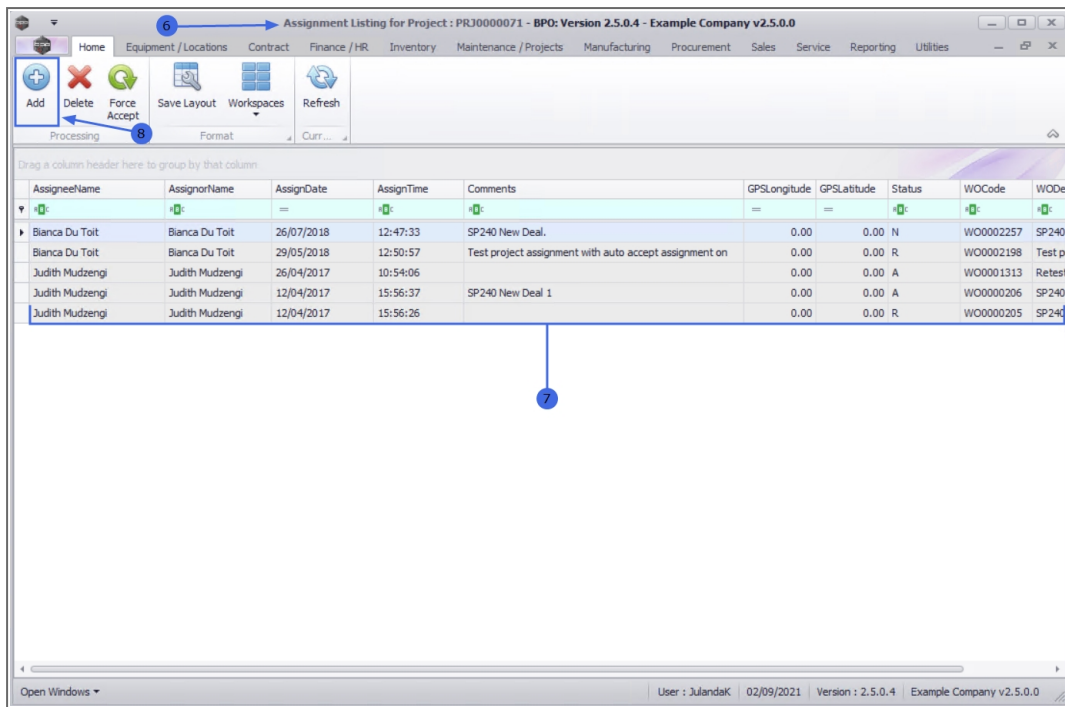
- The **Assignment Listing for Project: [project ref number]** screen will be displayed.
- A list of the assignment details for the Technician(s) that have been assigned to this Project with their Work Order Codes can be viewed from this screen.

ASSIGN TECHNICIAN

- Click on **Add**.



Short cut key: **Right click** to display the **Process** menu list. Click on **Add**.



9. The **Project Assignment: Reference No.:** [project ref number] screen will be displayed

- **Assigned To:** Click on the down **arrow** to select the Technician you would like to assign.
- **Detail:** This field will auto populate with the description of the project as recorded in the project listing screen. You can type in extra details, if required.
- **Assignment Date:** The date and time will be auto populated with the current date and time.
 - Type in or click on the down **arrow** in the date field to use the **calendar function** to select an alternative date, if required.
 - Type in or use the **arrow indicators** to select an alternative **time**, if required.
- **Assigned By:** This field will default to the user creating the assignment. Click on the down **arrow** to select an

alternative person, for example the name of the Project Manager, if required.

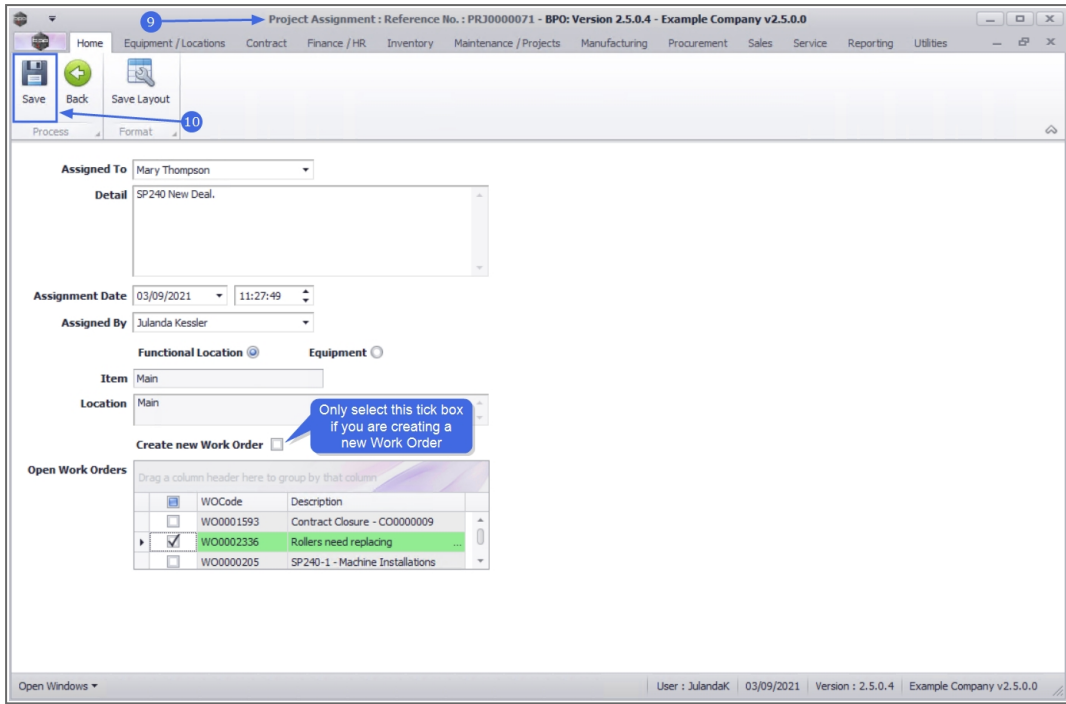
- **Functional Location or Equipment:** This shows whether the project assignment is linked to a Location or a Machine.
- **Item:** This field will auto populate with the Location or Machine linked to the project.
- **Location:** This field will auto populate based on the description of the item linked to the project.
- **Create new Work Order:** Click on the *check box* to create a new work order.



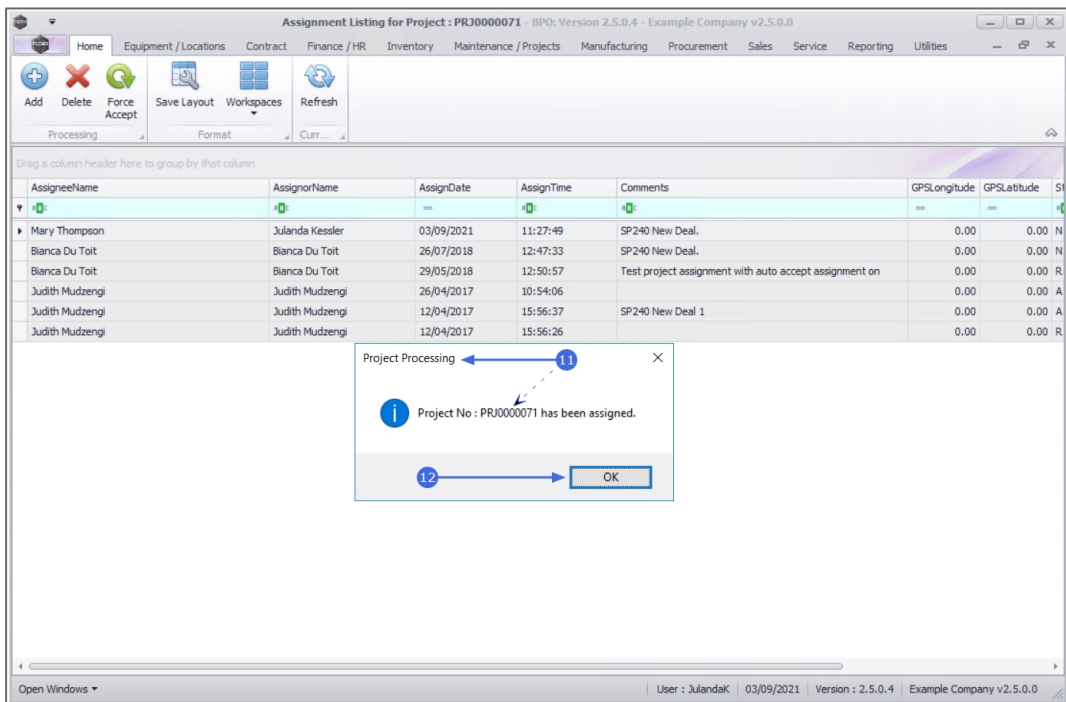
If the technician needs to follow up on the same project, but for a different task, then make sure you also change the assignment detail accordingly.

- **Open Work Orders:** From here you can view the list of all the Open Work Orders linked to this project. Select to link the technician to one of the open work orders.

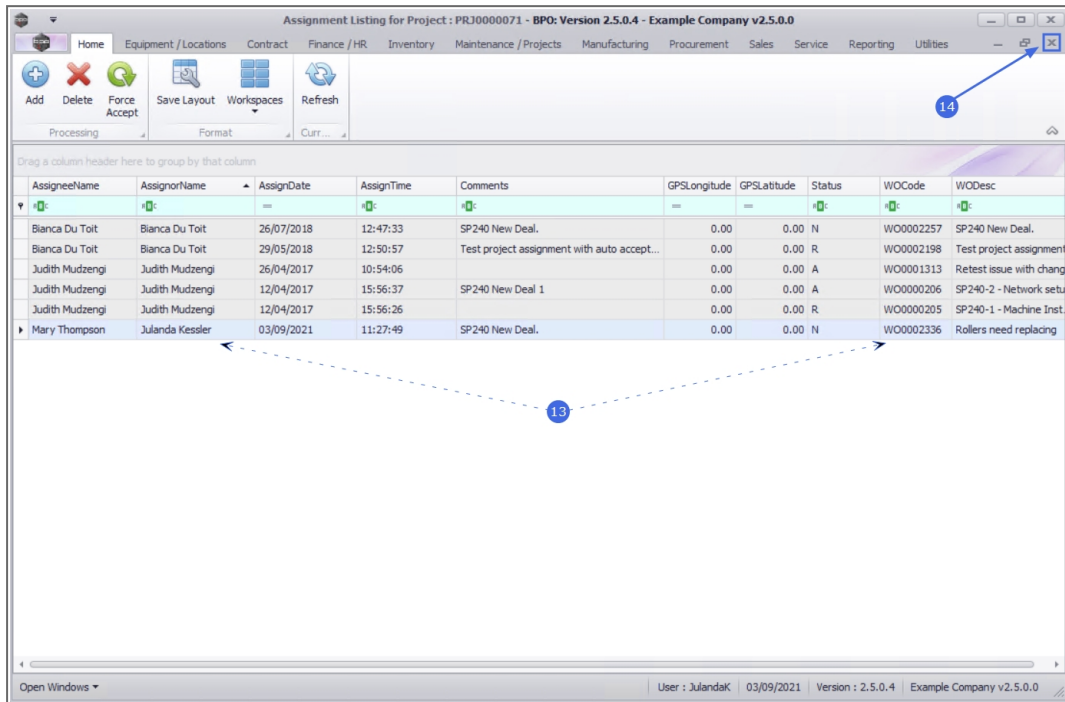
10. When you have finished adding the technician assignment details, click on **Save**.



11. When you receive the **Project Processing** message to confirm that;
 - **Project No: [project ref number] has been assigned.**
12. Click on **OK**.



13. You will return to the **Assignment Listing for Project** screen where you can **view** the details of the **technician(s) assigned** to this project.
14. Click on **Close** to return to the **Project Listing** Screen.

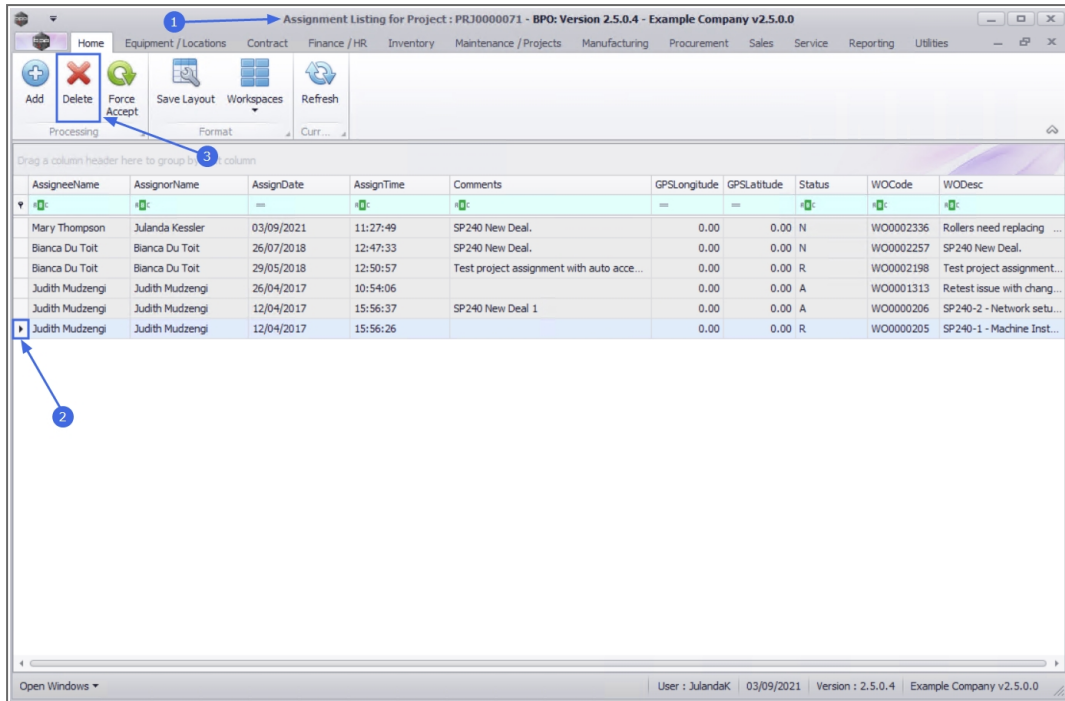


UNASSIGN TECHNICIAN

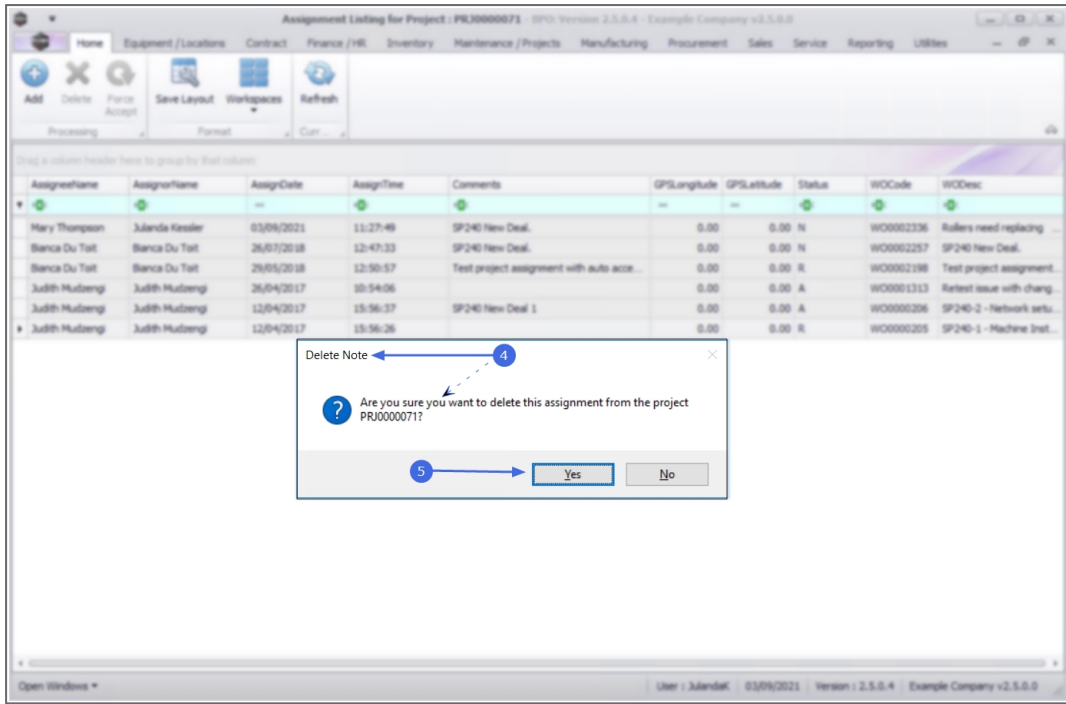
1. From the **Assignment Listing for Project: [project ref number]** screen,
2. Click on the **row** of the technician and the **correct Work Order** the technician is linked to.
3. Click on **Delete**.



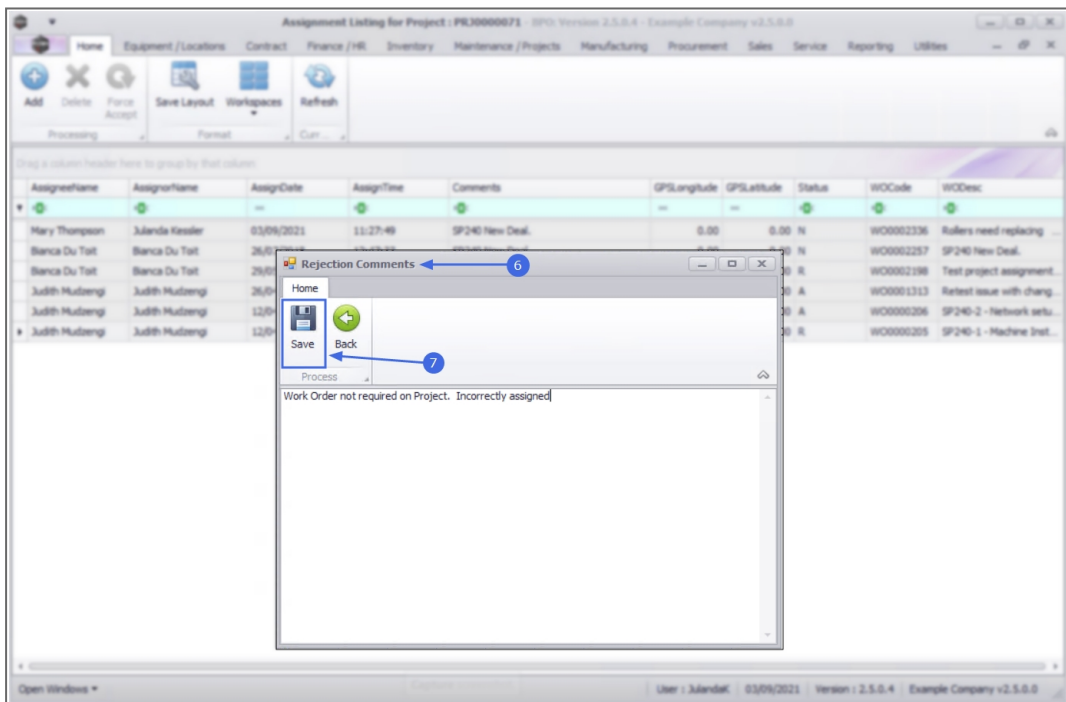
Short cut key: **Right click** to display the **Process** menu list. Click on **Delete**.



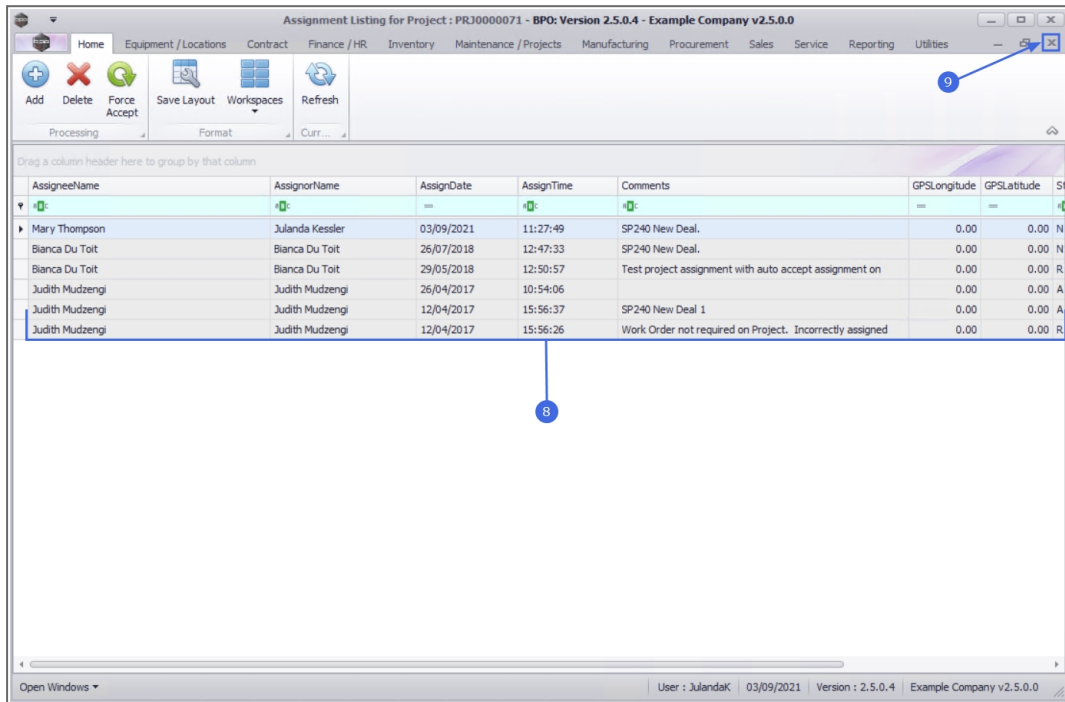
4. When you receive the **Delete Note** message to confirm;
 - **Are you sure you want to delete this assignment from the project [project ref number]?**
5. Click on **Yes**.



6. The **Rejection Comments** text box will display.
7. Type in the rejection comments for the assignment removal and click on **Save**.



8. The **Assignment Listing for Project** screen has been updated with the assignment comments.
9. Click on **Close** to return to the **Project Listing** screen.
10. You can now "**Assign Technician**" on page 2 to this Work Order, if required.



FORCE ACCEPT

1. From the **Assignment Listing for Project: [project ref number]** screen,
2. Click on the **row** of the technician you wish to Accept the Work Order assignment for.



Note that the **Status** for the Technician selected in the Status Column is **N - New**.

3. Click on **Force Accept**.



Short cut key: **Right click** to display the **Process** menu list. Click on **Force Accept**.

AssigneeName	AssignorName	AssignDate	AssignTime	Comments	GPSLongitude	GPSLatitude	Status	WOCCode	WODesc
Arial Blythe	Julanda Kessler	03/09/2021	13:24:11	SP240 New Deal.	0.00	0.00	N	W0000205	SP240-1 - Mach
Mary Thompson	Julanda Kessler	03/09/2021	11:27:49	SP240 New Deal.	0.00	0.00	N	W00002336	Rollers need req
Bianca Du Toit	Bianca Du Toit	26/07/2018	12:47:33	SP240 New Deal.	0.00	0.00	N	W00002257	SP240 New Deal
Bianca Du Toit	Bianca Du Toit	29/05/2018	12:50:57	Test project assignment with auto accept assignment on	0.00	0.00	R	W00002198	Test project ass
Judith Mudzengi	Judith Mudzengi	26/04/2017	10:54:06		0.00	0.00	A	W00001313	Retest issue wif
Judith Mudzengi	Judith Mudzengi	12/04/2017	15:56:37	SP240 New Deal 1	0.00	0.00	A	W00000206	SP240-2 - Netw
Judith Mudzengi	Judith Mudzengi	12/04/2017	15:56:26	Work order no longer required for the project. Incorrectly ...	0.00	0.00	R	W00000205	SP240-1 - Mach

4. The **Assignment Listing for Project** screen has been updated.



Note that the **Status** for the Technician that was selected in the Status Column has changed to **A - Accept**.

5. **Close** the screen to return to the **Project Listing** screen.

Assignment Listing for Project : PRJ0000071 - 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

Add | Delete | Force Accept | Save Layout | Workspaces | Refresh

Processing | Format | Curr...

Drag a column header here to group by that column

AssigneeName	AssignorName	AssignDate	AssignTime	Comments	GPSLongitude	GPSLatitude	Status	WOCCode	WODesc
▶ Arial Blythe	Julanda Kessler	03/09/2021	13:24:11		0.00	0.00	A	WO0000205	SP240-1 - Ma
Mary Thompson	Julanda Kessler	03/09/2021	11:27:49	SP240 New Deal.	0.00	0.00	N	WO0002336	Rollers need r
Bianca Du Toit	Bianca Du Toit	26/07/2018	12:47:33	SP240 New Deal.	0.00	0.00	N	WO0002257	SP240 New D
Bianca Du Toit	Bianca Du Toit	29/05/2018	12:50:57	Test project assignment with auto accept assignment on	0.00	0.00	R	WO0002198	Test project e
Judith Mudzengi	Judith Mudzengi	26/04/2017	10:54:06		0.00	0.00	A	WO0001313	Retest issue v
Judith Mudzengi	Judith Mudzengi	12/04/2017	15:56:37	SP240 New Deal 1	0.00	0.00	A	WO0000206	SP240-2 - Ne
Judith Mudzengi	Judith Mudzengi	12/04/2017	15:56:26	Work order no longer required for the project. Incorre...	0.00	0.00	R	WO0000205	SP240-1 - Ma

Note the Status for the Technician is A - Accept

Open Windows | User : JulandaK | 06/09/2021 | Version : 2.5.0.4 | Example Company v2.5.0.0

MNU.058.020

