

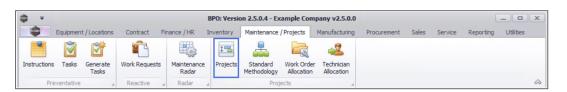


# **PROJECTS**

## WORK ORDER ALLOCATION – LINK TO CURRENT PROJECT

1. The 'work order allocation to a current project(s)' process involves allocating **unassigned** work orders to **specific** current projects.

**Ribbon Access:** Maintenance / Projects > Work Order Allocation



- 1. The *Work Order Allocation* listing screen will be displayed.
- 2. This screen is divided into **2** frames:
  - Unassigned Work Orders: This frame lists all the unassigned work orders.
  - **Project Work Orders**: This frame lists the projects with linked work orders.



#### Work Order Allocation - Link to Current Project

Home	e Equipment / Locations Contract	Finance / H	R Inven	itory I	Maintenance / Project	Manufacturing	Procurement Sales Service Reportir	ng Utiliti	es — 🗗	×
Auto Create S Projects	iave Work Order to Projects Refresh Cancel Unsave Changes	d Save Li	ayout Wo	rkspaces	Find WO/s 2	Search				
Projects 4	Work Orders		Format	1	Searc	h 🖌	1			2
	Unassigned Work (	Orders : 162	27				Project Work Orders : 301 projects, 356	work ord	lers	
WOCode 👻	Description	SiteName	WOType	Status	StatusDescription	ProjectRef	Description	Status	StatusDesc	Pr
a 🖬 c	A 🗖 c	R <b>O</b> C	R C	в∎с	NDC Ô	<b>♀</b> # <b>□</b> ⊂	* <b>0</b> ¢	R <b>O</b> C	R C	
WO0006242	1MMS - 1 Month Machine Service	Durban	SERV	0	Open		SP240 New Deal	0	Open	
WO0006241	WS - Weekly Service	Durban	SM	0	Open	PRJ0000414	Sprint SP1912 New Deal Sale	0	Open	
WO0006240	WS - Weekly Service	Durban	SM	0	Open		PRJ408/BS001	0	Open	
WO0006238	Test PQ Source Type Work Order	Durban	PR	0	Open	PRJ0000412	Install Machines	0	Open	
WO0006237	WS - Weekly Service	Durban	SM	0	Open	PRJ0000411	Site Inspection	0	Open	
WO0006236	WS - Weekly Service	Durban	SM	0	Open	B PRJ0000410	New machine installation	0	Open	
WO0006235	Tier - Commercial Tier Test	Durban	INST	0	Open		Maintenance Project - SP400	0	Open	
WO0006233	BathBinMaint - Bathroom Bin Maintenance	Durban	SM	0	Open	PRJ0000407	OSU1001	0	Open	
WO0006232	WS - Weekly Service	Durban	SM	0	Open	I PRJ0000406	B60004	0	Open	
WO0006231	WS - Weekly Service	Durban	SM	0	Open		8601010202	0	Open	
WO0006230	AirMaint - Airfreshner Maintenance	Durban	SM	0	Open		TT041 - Bi-annually, Mono 1000 - Generate	0	Open	
WO0006228	1MMS - 1 Month Machine Service	Durban	SERV	0	Open	PRJ0000402	test	0	Open	
WO0006227	AirMaint - Airfreshner Maintenance	Durban	SM	0	Open	PRJ0000401	Implementation BPO2	0	Open	
WO0006226	BathBinMaint - Bathroom Bin Maintenance	Durban	SM	0	Open	PRJ0000400	Testing BPO2	0	Open	
WO0006225	WS - Weekly Service	Durban	SM	0	Open		Developmemnt BPO2	0	Open	
WO0006223	1MMS - 1 Month Machine Service	Durban	SERV	0	Open		Design BPO2	0	Open	
WO0006222	WS - Weekly Service	Durban	SM	0	Open		Specification BPO2	0	Open	
WO0006221	1MMS - 1 Month Machine Service	Durban	SERV	0	Open	PRJ0000396	Test BPO2	0	Open	
WO0006219	BathBinMaint - Bathroom Bin Maintenance	Durban	SM	0	Open	PRJ0000395	BPO v2.2.0.1 Test Cycle	0	Open	
WO0006218	WS - Weekly Service	Durban	SM	0	Open		Default for HOP001 on 08 Feb 2017	0	Open	
W00006217	WS - Weekly Service	Durhan	SM	0	Onen	FI PR 1000394	1234 - Test ctrt request create pr	0	Onen	

#### **SELECTING WORK ORDERS**

You can select a *single* or *multiple* work orders to link to a current project.

- 1. In the *Unassigned Work Orders* frame, click on the *row* of the unassigned work order (for a single work order) you wish to allocate to a project, or
- 2. To select multiple work orders,
  - Hold down the *Ctrl* key on your keyboard, then use your mouse to click on each *unassigned work order* you wish to allocate to a project, or
  - Hold down the *Shift* key on your keyboard, then use the *up* and *down* arrows on your keyboard to select all the required *unassigned* work orders.



- Click anywhere on the selected line(s) then drag the work order(s) you want to allocate to a project from the *Unassigned Work Orders* frame,
- 4. and drop on the correct project in the *Project Work Orders* frame.

• •		Wo	rk Order A	llocation	- BPO: Version 2.5	.0.4 - Example Con	npany v2.5.0.0			
Hom	e Equipment / Locations Contract	Finance / H	R Inven	ntory I	Maintenance / Project	s Manufacturing	Procurement Sales Service Report	ting Utilitie	es — d	5 )
(i);	💾 🚷 🔞	2	8		Find WO/s	(i)				
Auto Create S Projects	Save Work Order Refresh Cancel Unsave to Projects Changes	d Save Li	ayout Wo	rkspaces	Show All	Search				
Projects	Work Orders		Format		Searc	th				
Projects a										
	Unassigned Work (	orders: 16					Project Work Orders : 301 projects, 35	6 WORK OF	ers	
WOCode •	Description	SiteName	WOType	Status	StatusDescription	ProjectRef	Description	Status	StatusDesc	
a 🗖 c	4 <b>0</b> 4	# <b>D</b> C	* <b>0</b> 0	в∎с	HOC _	9 # <b>1</b> 0	*D:	R <b>O</b> C	a 🗖 c	
NO0006242	1MMS - 1 Month Machine Service	Durban	SERV	0	Open		SP240 New Deal	0	Open	
WO0006241	WS - Weekly Service	Durban	SM	0	Open		Sprint SP 1912 New Deal Sale	0	Open	
WO0006240	WS - Weekly Service	Durban	SM	0	Open		PRJ408/BS001	0	Open	
WO0006238	Test PQ Source Type Work Order	Durban	PR	0	Open		Maintenance Project - SP400	0	Open	
WO0006237	WS - Weekly Service	Durban -	SM	0.>	_ Open >		B60004	0	Open	
WO0006236	WS - Weekly Service	Durban	SM	0	Open	E PRJ0000405	8601010202	0	Open	
WO0006235	Tier - Commercial Tier Test	Durban	INST	0	Open	E PR30000404	TT041 - Bi-annually, Mono 1000 - Generate	0	Open	
WO0006233	BathBinMaint - Bathroom Bin Maintenance	Durban	SM	0	Open		Implementation BPO2	0	Open	
WO0006232	WS - Weekly Service	Durban	SM	0	Open	■ PRJ0000400	Testing BPO2	0	Open	
WO0006231	WS - Weekly Service	Durban	SM	0	Open		Developmemnt BPO2	0	Open	
WO0006230	AirMaint - Airfreshner Maintenance	Durban	SM	0	Open	PRJ0000398	Design BPO2	0	Open	
WO0006228	1MMS - 1 Month Machine Service	Durban	SERV	0	Open		Specification BPO2	0	Open	
WO0006227	AirMaint - Airfreshner Maintenance	Durban	SM	0	Open		Default for HOP001 on 08 Feb 2017	0	Open	
WO0006226	BathBinMaint - Bathroom Bin Maintenance	Durban	SM	0	Open		1234 - Test ctrt request create pr	0	Open	
WO0006225	WS - Weekly Service	Durban	SM	0	Open		NDS Project	0	Open	
WO0006223	1MMS - 1 Month Machine Service	Durban	SERV	0	Open		credit validation check	0	Open	
WO0006222	WS - Weekly Service	Durban	SM	0	Open		Site Inspectino	0	Open	
WO0006221	1MMS - 1 Month Machine Service	Durban	SERV	0	Open		Approval	0	Open	
WO0006219	BathBinMaint - Bathroom Bin Maintenance	Durban	SM	0	Open		Documentation	0	Open	
		2.1	~	-	· · ·	4		2	-	Þ
(fldSiteID	] = '1'				Edit Filter	× V [fldSiteID]	= '1'		Ec	dit Filt
Doen Windows •	-						User : JulandaK 22/11/2021 Version : 2.5.			

Any of the above selection processes will result in:

- 5. The *Assigned Work Orders* sub grid being *expanded* for the selected project line.
- 6. where you can now *view* the selected work orders in this frame.

#### SAVE WORK ORDER ALLOCATION

7. Click on Save Work Order to Projects.



### Work Order Allocation - Link to Current Project

P ∓ mana Hom						.0.4 - Example Comp						
Hom	e Equipment / Locations Contract	Finance / H		itory	Maintenance / Project		Procurement	Sales S	Service Reporti	ng Utiliti	es — 6	P . A
100 E		2			Find WO/s	(i)						
	Save Work Order Refresh Cancel Unsave	d Save L	ayout Wo	rkspaces	Show All	Search						
Projects	to Projects Changes				Sear							6
Projects 🔒			Format		a Sear	n						~
	Unassigned Work (	Orders : 16	24				Project W	ork Orders : 3	301 projects, 359	9 work ord	ers	
WOCode -	Description	SiteName	WOType	Status	StatusDescription	ProjectRef	Description			Status	StatusDesc	P
8 a 🛛 c	A D C	# <b>I</b> C	8 <b>0</b> 0	я∎с	8 <b>0</b> 0	9 x0c	a 🗖 c			# <b>D</b> c	R C	
WO0006240	WS - Weekly Service	Durban	SM	0	Open		SP240 New	Deal		0	Open	
WO0006238	Test PQ Source Type Work Order	Durban	PR	0	Open		Sprint SP 19	12 New Deal Sa	le	0	Open	
WO0006237	WS - Weekly Service	Durban	SM	0	Open 5	► PRJ0000413	PRJ408/BS0	001		0	Open	
WO0006236	WS - Weekly Service	Durban	SM	0	Open	Assigned W	/ork Orders					-
WO0006235	Tier - Commercial Tier Test	Durban	INST	0	Open	9 WOCode	W	OType	Description			
WO0006233	BathBinMaint - Bathroom Bin Maintenance	Durban	SM	0	Open	> WO0006	137 N	DS	PRJ408/BS001			
WO0006232	WS - Weekly Service	Durban	SM	0	Open	WO0006	243 SI	м	WS - Weekly Se	ervice		
WO0006231	WS - Weekly Service	Durban	SM	0	Open (	WO00063	242 58	ERV	1MMS - 1 Mont	h Machine S	ervice	
WO0006230	AirMaint - Airfreshner Maintenance	Durban	SM	0	Open	WO00063	241 SI	м	WS - Weekly Se	ervice		
WO0006228	1MMS - 1 Month Machine Service	Durban	SERV	0	Open	- C						÷.
WO0006227	AirMaint - Airfreshner Maintenance	Durban	SM	0	Open	PRJ0000412	Install Mach	ines		0	Open	
WO0006226	BathBinMaint - Bathroom Bin Maintenance	Durban	SM	0	Open	PRJ0000411	Site Inspect	tion		0	Open	
WO0006225	WS - Weekly Service	Durban	SM	0	Open	PRJ0000410	New machin	e installation		0	Open	
WO0006223	1MMS - 1 Month Machine Service	Durban	SERV	0	Open		Maintenanc	e Project - SP4	00	0	Open	
WO0006222	WS - Weekly Service	Durban	SM	0	Open	PRJ0000407	OSU1001			0	Open	
WO0006221	1MMS - 1 Month Machine Service	Durban	SERV	0	Open	PRJ0000406	B60004			0	Open	
WO0006219	BathBinMaint - Bathroom Bin Maintenance	Durban	SM	0	Open		860101020	2		0	Open	
WO0006218	WS - Weekly Service	Durban	SM	0	Open	PRJ0000404	TT041 - Bi-a	annually, Mono	1000 - Generate	0	Open	
WO0006217	WS - Weekly Service	Durban	SM	0	Open	PRJ0000402	test			0	Open	
WO0006216	AirMaint - Airfreshner Maintenance	Durban	SM	0	Open		Implementa	tion BPO2		0	Open	
W00006213	2MS - 2 month service	Durhan	SM	0	Onen					-	-	

8. The selected work order allocations will be *linked* to the selected project and the *Assigned Work Orders* sub grid will close.

<b>₽</b> =		Work Order Allocation	n - BPO: Version 2.5.0.	.4 - Example Com	pany v2.5.0.0	
Hon	ne Equipment / Locations Contract Fi	inance / HR Inventory	Maintenance / Projects	Manufacturing	Procurement Sales Service Reporting Utilities -	. 8
(i);	💾 🚯 🔞	2	Find WO/s	(i)		
Auto Create Projects	Save Work Order Refresh Cancel Unsaved to Projects Changes	Save Layout Workspaces	Show All	Search		
Projects 4	Work Orders	Format	Search	_		
	Unassigned Work Ord	lers : 1624			Project Work Orders : 301 projects, 359 work orders	
			8			
WOCode	✓ Description		SiteName	ProjectRef	Description	
9 A 🛛 C	R C		10°	9 R.C.	4 <b>0</b> ¢	
WO0006240	WS - Weekly Service		Durban	▶   PRJ0000415	SP240 New Deal	
WO0006238	Test PQ Source Type Work Order		Durban		Sprint SP1912 New Deal Sale	
WO0006237	WS - Weekly Service		Durban		PRJ408/BS001	
WO0006236	WS - Weekly Service		Durban	PRJ0000412	Install Machines	
WO0006235	Tier - Commercial Tier Test		Durban	PRJ0000411	Site Inspection	
WO0006233	BathBinMaint - Bathroom Bin Maintenance		Durban	PRJ0000410	New machine installation	
WO0006232	WS - Weekly Service		Durban		Maintenance Project - SP400	
WO0006231	WS - Weekly Service		Durban	PRJ0000407	OSU 100 1	
WO0006230	AirMaint - Airfreshner Maintenance		Durban		B60004	
WO0006228	1MMS - 1 Month Machine Service		Durban		8601010202	
WO0006227	AirMaint - Airfreshner Maintenance		Durban		TT041 - Bi-annually, Mono 1000 - Generate Project	
WO0006226	BathBinMaint - Bathroom Bin Maintenance		Durban	PRJ0000402	test	
WO0006225	WS - Weekly Service		Durban		Implementation BPO2	
WO0006223	1MMS - 1 Month Machine Service		Durban		Testing BPO2	
WO0006222	WS - Weekly Service		Durban		Developmemnt BPO2	
WO0006221	1MMS - 1 Month Machine Service		Durban		Design BPO2	
WO0006219	BathBinMaint - Bathroom Bin Maintenance		Durban		Specification BPO2	
WO0006218	WS - Weekly Service		Durban	PRJ0000396	Test BPO2	
WO0006217	WS - Weekly Service		Durban	PRJ0000395	BPO v2.2.0.1 Test Cycle	
WO0006216	AirMaint - Airfreshner Maintenance		Durban		Default for HOP001 on 08 Feb 2017	
W00006213	2MS - 2 month service		Durhan	FT PR 1000394	1234 - Test ctrt request create or	



#### CANCEL A WORK ORDER ALLOCATION

A Work Order allocation can only be cancelled when it has <u>not yet</u> been saved.

This action will result in:

- *All* the unsaved work order allocations being *removed* from the selected project(s) and *returned* to the *Unassigned Work Orders* frame.
- ii. This will be applied across <u>all</u> projects with unsaved work order allocations.
- 1. The example, has *WO0006240* allocated to *PRJ0000412* but the change has not yet been saved.
- 2. Click on Cancel Unsaved Changes.

	Home	Equipment / Locations Contract Finance / HR Inventory	Maintenance /	Project	s	Manu	facturing	Procuremen	t Sales	Service	Reporting	Utilities	-	8	3
	i i i i i i i i i i i i i i i i i i i		Find WO/s			٤	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~								
		ave Work Order Refresh Cancel Unsaved Save Layout Workspace	es Show All				learch								
	Projects	to Projects Changes		Searc											
	rojects 🔺	Unassigned Work Orders : 1623	4	Jean			4	Project W	ork Orders	: 301 n	ojects, 360 w	orkorders			
		der here to group by that column						er here to gro			ojecc <i>i,</i> 500 il	or a crocro			
		Description	SiteName				ectRef	Description						1	
P	a 🗖 c	·0:	×0×	*		9 10:		a 🛛 c							
Ĵ	WO0006238	Test PQ Source Type Work Order	Durban	0	lŀ	▶ 🕀 PF	RJ0000415	SP240 New	Deal						
	WO0006237	WS - Weekly Service	Durban			E PF	RJ0000414	Sprint SP 19	12 New Dea	Sale					
	WO0006236	WS - Weekly Service	Durban			⊞ PF	RJ0000413	PRJ408/BS	001						
	WO0006235	Tier - Commercial Tier Test	Durban			E PF	RJ0000412	Install Mad	nines						
	WO0006233	BathBinMaint - Bathroom Bin Maintenance	Durban				Assigned V	Vork Orders							
	WO0006232	WS - Weekly Service	Durban	0	1	- ľ	۹ WOCode	V	/OType	De	scription				
	WO0006231	WS - Weekly Service	Durban	-			WO0006:	240 S	м	WS	- Weekly Servi	ce			
	WO0006230	AirMaint - Airfreshner Maintenance	Durban				•								Þ
	WO0006228	1MMS - 1 Month Machine Service	Durban		-	E PF	RJ0000411	Site Inspec	tion						
	WO0006227	AirMaint - Airfreshner Maintenance	Durban			• PF	RJ0000410	New machin	ne installation	1					
	WO0006226	BathBinMaint - Bathroom Bin Maintenance	Durban			E PF	30000408	Maintenand	e Project - S	P400					
	WO0006225	WS - Weekly Service	Durban			D PF	RJ0000407	OSU1001							
	WO0006223	1MMS - 1 Month Machine Service	Durban		lŀ	E PF	RJ0000406	B60004							
	WO0006222	WS - Weekly Service	Durban			E PF	RJ0000405	860101020	2						
	WO0006221	1MMS - 1 Month Machine Service	Durban			⊞ PF	RJ0000404	TT041 - Bi-	annually, Mo	no 1000 -	Generate Proje	ct			
	WO0006219	BathBinMaint - Bathroom Bin Maintenance	Durban			E PF	RJ0000402	test							
	WO0006218	WS - Weekly Service	Durban			E PF	RJ0000401	Implementa	tion BPO2						
	WO0006217	WS - Weekly Service	Durban			E PF	RJ0000400	Testing BPG	02						
	WO0006216	AirMaint - Airfreshner Maintenance	Durban			E PF	RJ0000399	Developme	mnt BPO2						
	WO0006213	2MS - 2 month service	Durban			E PF	RJ0000398	Design BPC	2						
	W00006211	AirMaint - Airfreshner Maintenance	Durhan	*	II.			0.00							



3. The recently allocated work order(s) will be *removed* from the project and the *Assigned Work Orders* frame will be *closed*.

Note that the *expand* button for project *PRJ0000412* has been greyed out because there was only 1 work order allocated to this project which was removed when the change was cancelled.

4. The work order(s) will be *returned* to the *Unassigned Work Orders* frame.

♥ ▼ Hom	e Equipment / Locations Contract Fi	Work Order Allocation	n - BPO: Version 2.5.0 Maintenance / Projects	A - Example Com	pany v2.5.0.0 Procurement Sales Service Reporting Utilities	&
(i)			Find WO/s	- <sup>(2)</sup>	Theorem and the second reporting another	
	Save Work Order Refresh Cancel Unsaved	Save Layout Workspaces	Show All	Search		
Projects	to Projects Changes	÷				
Projects 🖌	Work Orders	Format	4 Search			
	Unassigned Work Ord	lers : 1624			Project Work Orders : 301 projects, 359 work orders	
	ader here to group by that column		3			
WOCode -	Description		SiteName	ProjectRef	Description	
9 A.C.	* <b>0</b> ¢		×0: -	Y 10:	4 <b>0</b> ¢	
WO0006240	WS - Weekly Service		Durban	PRJ0000415	SP240 New Deal	
WO0006238	Test PQ Source Type Work Order		Durban	PRJ0000414	Sprint SP 1912 New Deal Sale	
WO0006237	WS - Weekly Service		Durban	E PRJ0000413	PRJ408/BS001	
WO0006236	WS - Weekly Service		Durban	PRJ0000412	Install Machines	
WO0006235	Tier - Commercial Tier Test		Durban	PRJ0000411	Site Inspection	
WO0006233	BathBinMaint - Bathroom Bin Maintenance		Durban	B PRJ0000410	New machine installation	
WO0006232	WS - Weekly Service		Durban		Maintenance Project - SP400	
WO0006231	WS - Weekly Service		Durban	PRJ0000407	OSU1001	
WO0006230	AirMaint - Airfreshner Maintenance		Durban		B60004	
WO0006228	1MMS - 1 Month Machine Service		Durban		8601010202	
WO0006227	AirMaint - Airfreshner Maintenance		Durban		TT041 - Bi-annually, Mono 1000 - Generate Project	
WO0006226	BathBinMaint - Bathroom Bin Maintenance		Durban	PRJ0000402	test	
WO0006225	WS - Weekly Service		Durban		Implementation BPO2	
WO0006223	1MMS - 1 Month Machine Service		Durban		Testing BPO2	
WO0006222	WS - Weekly Service		Durban		Developmemnt BPO2	
WO0006221	1MMS - 1 Month Machine Service		Durban		Design BPO2	
WO0006219	BathBinMaint - Bathroom Bin Maintenance		Durban		Specification BPO2	
WO0006218	WS - Weekly Service		Durban	PRJ0000396	Test BPO2	
WO0006217	WS - Weekly Service		Durban	PRJ0000395	BPO v2.2.0.1 Test Cycle	
WO0006216	AirMaint - Airfreshner Maintenance		Durban		Default for HOP001 on 08 Feb 2017	
W/0006213	2MS - 2 month service		Durhan	FT PR 1000394	1234 - Test ctrt request create or	

MNU.151.002