



PROJECTS

WORK ORDER ALLOCATION - LINK TO NEW PROJECT

An **unassigned** work order(s) can be allocated to a **new** project.

One or multiple work orders can be linked to a **new** project.

Ribbon Access: Maintenance / Projects > Work Order Allocation

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Instructions	Tasks	Generate Tasks	Work Requests	Maintenanc Radar	e Projects	Standard Methodology	Work Orde Allocation						
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- 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.



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	WO0006242	1MMS - 1 Month Machine Service	Durban	SERV	0	Open	ιŀ		SP240 New Deal	0	Open	
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	WO0006241	WS - Weekly Service	Durban	SM	0	Open			PRJ408/BS001	0	Open	
	WO0006238	Test PQ Source Type Work Order	Durban	PR	0	Open		PR30000412	Instal Machines	0	Open	
	WO0006237	WS - Weekly Service	Durban	SM	0	Open		PR30000411	Site Inspection	0	Open	
	WO0006236	WS - Weekly Service	Durban	SM	0	Open		PR 10000410	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		PR 10000407	OSU 1001	0	Open	
	WO0006233	WS - Weekly Service	Durban	SM	0	Open	-		B60004	0	Open	
	WO0006231	WS - Weekly Service	Durban	SM	0	Open	i-		8601010202	0	Open	
	WO0006230	AirMaint - Airfreshner Maintenance	Durban	SM	0	Open		E PR30000404	TT041 - Bi-annually, Mono 1000 - Generate	0	Open	
	WO0006228	1MMS - 1 Month Machine Service	Durban	SERV	0	Open		PR30000402	test	0	Open	
	WO0006227	AirMaint - Airfreshner Maintenance	Durban	SM	0	Open			Implementation BPO2	0	Open	
	WO0006226	BathBinMaint - Bathroom Bin Maintenance	Durban	SM	0	Open			Testing BPO2	0	Open	
	WO0006225	WS - Weekly Service	Durban	SM	0	Open			Developmennt 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	Durban	SM	0	Open		FFI PR 10000394	1734 - Test ctrt request create or	0	Onen	
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- 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 new project, or
- 4. 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 new 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.
- 5. Click anywhere on the selected line(s) then drag the work order(s) you want to allocate, from the *Unassigned Work Orders* frame,
- 6. and drop on the New Project in the *Project Work Orders* frame.



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WO0006236	WS - Weekly Service	³ ×5>	Dürban 1		SubProject 1	
WO0006235	Tier - Commercial Tier Test		Durban		Test Projects viewed in Customer screen	
WO0006233	BathBinMaint - Bathroom Bin Maintenance		Durban		New machine installation	
WO0006232	WS - Weekly Service		Durban		tst	
WO0006231	WS - Weekly Service		Durban		SP240 New Deal	
WO0006230	AirMaint - Airfreshner Maintenance		Durban		Machine installations	
WO0006228	1MMS - 1 Month Machine Service		Durban		Sprint SP1912 New Deal Sale	
WO0006227	AirMaint - Airfreshner Maintenance		Durban		Service for HOP001 on 06 Nov 2014	
WO0006226	BathBinMaint - Bathroom Bin Maintenance		Durban		Scheduled Maintenance for HOP001 on 06 Nov 2014	
WO0006225	WS - Weekly Service		Durban		Scheduled Maintenance for DER001 on 06 Nov 2014	
WO0006223	1MMS - 1 Month Machine Service		Durban		Scheduled Maintenance for YES001 on 06 Nov 2014	
WO0006222	WS - Weekly Service		Durban		Scheduled Maintenance for TIA001 on 06 Nov 2014	
WO0006221	1MMS - 1 Month Machine Service		Durban		Site Inspectino	
WO0006219	BathBinMaint - Bathroom Bin Maintenance		Durban		Install Machines	
WO0006218	WS - Weekly Service		Durban		Machine inspection required	
WO0006217	WS - Weekly Service		Durban		Scheduled Maintenance for HOP001 on 14 May 2015	
WO0006216	AirMaint - Airfreshner Maintenance		Durban		Scheduled Maintenance for DER001 on 14 May 2015	
W/0006213	2MS - 2 month service		Durhan	FT PR 10000 103	Scheduled Maintenance for HOP001 on 14 Aug 2014	
Open Windows			-		User : JulandaK 22/11/2021 Version : 2.5.0.4 Example Company	

- 7. The *Add a new project* screen will display.
- 8. Click in the *Description* text box to type in a description for the project.
- Confirm the editable project *Identification* and *Schedule* details, for example: Project Type, Start and End Dates.

For a detailed handling of this topic refer to Projects - Add Main Project

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



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VIEW NEW PROJECT

- 11. The new project will be displayed in the *Project Work Orders* data grid as *NEWPROJ*.
- 12. Click on the *Expand* button in the row of the *New Project* to view the linked work order detail .

Remember that if you have assigned the wrong work order(s), click on *Cancel Unsaved Changes* to cancel the assignment.

13. Click on Save Work Order to Projects.



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	WO0006226	BathBinMaint - Bathroom Bin Maintenance	Durban		⊕ P	RJ000008			installatio						
	WO0006225	WS - Weekly Service	Durban		⊕ P	RJ000008	5 tst								
	WO0006223	1MMS - 1 Month Machine Service	Durban		Đ P	RJ000008	7 SP24	10 New D	eal						
	WO0006222	WS - Weekly Service	Durban		E P	RJ000008	9 Mad	nine insta	llations						
	WO0006221	1MMS - 1 Month Machine Service	Durban		±Ρ	RJ000009	0 Sprin	nt SP 191	2 New Dea	al Sale					
	WO0006219	BathBinMaint - Bathroom Bin Maintenance	Durban		⊕ P	RJ000009	1 Serv	ice for H	OP001 on	06 Nov 2	014				
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	WO0006216	AirMaint - Airfreshner Maintenance	Durban		⊕ P	RJ000009	4 Sche	duled Ma	aintenance	for YES	001 on 06	Nov 20	14		
	WO0006213	2MS - 2 month service	Durban		€ P	RJ000009	5 Sche	duled Ma	aintenance	for TIA	001 on 06 l	Nov 201	14		
	W00006211	ΔirMaint - Δirfrechner Maintenance	Durhan		-										

ASSIGN PROJECT NUMBER

14. The newly created project will now be assigned a *Project Reference*

Number.

- The example project has been assigned project number *PRJ0000416*.
- 15. Click on *Close* to exit this screen.



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WOCode 🔻	Description		SiteName	ProjectRef	Description
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WO0006238	Test PQ Source Type Work Order		Durban	▶ 🖽 PRJ0000416	Second installation project for Titan Group
WO0006237	WS - Weekly Service		Durban		SP240 New Deal
WO0006236	WS - Weekly Service		Durban		Sprint SP1912 New Deal Sale
WO0006235	Tier - Commercial Tier Test		Durban		PRJ408/BS001
WO0006233	BathBinMaint - Bathroom Bin Maintenance		Durban	PRJ0000412	Install Machines
WO0006232	WS - Weekly Service		Durban	E PRJ0000411	Site Inspection
WO0006231	WS - Weekly Service		Durban	PRJ0000410	New machine installation
WO0006230	AirMaint - Airfreshner Maintenance		Durban		Maintenance Project - SP400
WO0006228	1MMS - 1 Month Machine Service		Durban	PR30000407	OSU1001
WO0006227	AirMaint - Airfreshner Maintenance		Durban		B60004
WO0006226	BathBinMaint - Bathroom Bin Maintenance		Durban		8601010202
WO0006225	WS - Weekly Service		Durban		TT041 - Bi-annually, Mono 1000 - Generate Project
WO0006223	1MMS - 1 Month Machine Service		Durban		TT002 - Weekly - Call per WO
WO0006222	WS - Weekly Service		Durban	PRJ0000402	test
WO0006221	1MMS - 1 Month Machine Service		Durban		Implementation BPO2
WO0006219	BathBinMaint - Bathroom Bin Maintenance		Durban		Testing BPO2
WO0006218	WS - Weekly Service		Durban		Developmemnt BPO2
WO0006217	WS - Weekly Service		Durban		Design BPO2
WO0006216	AirMaint - Airfreshner Maintenance		Durban		Specification BPO2
WO0006213	2MS - 2 month service		Durban	PRJ0000396	Test BPO2
W00006211	ΔirMaint - Δirfreshner Maintenance		Durhan	PR 1000395	RPO v2 2 0 1 Test Cycle

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