

PROJECTS

WORK ORDER ALLOCATION – AUTO CREATE PROJECTS

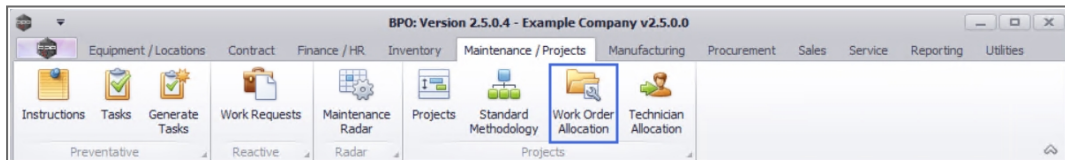
The **Auto Create Projects** process creates projects from work orders with matching parameters.

Important Notes

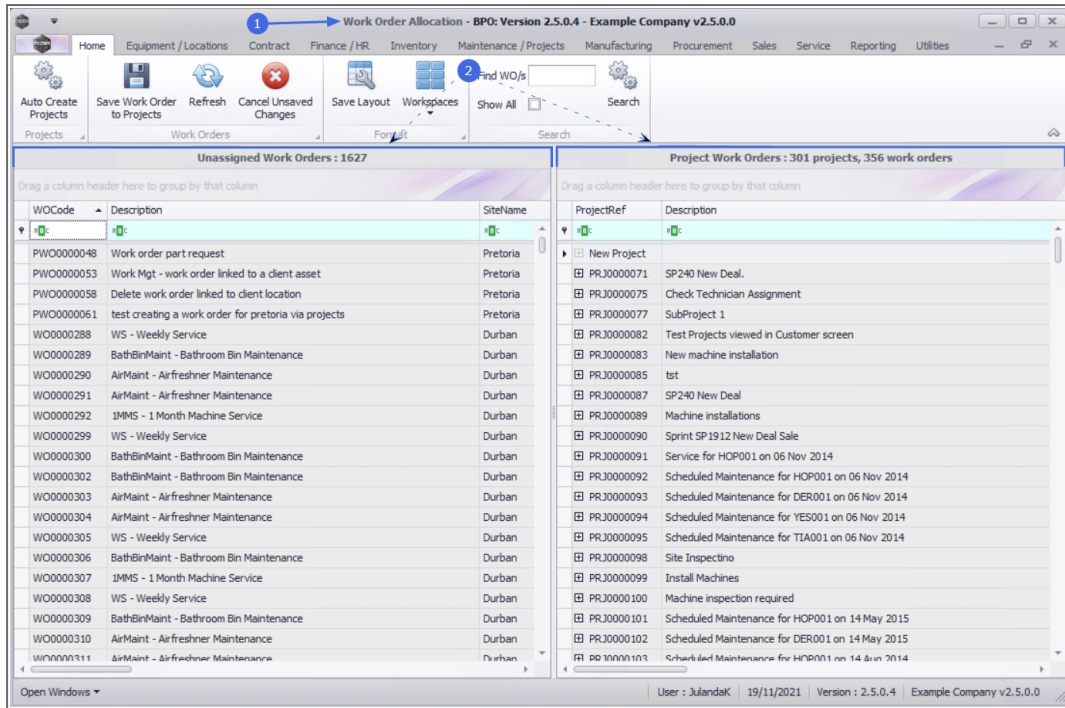
The *default* Project Manager for Auto Created Projects will use the *Site Task Manager* set up in the **company site configuration**

This person should *not* be configured as a **Technician**

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.



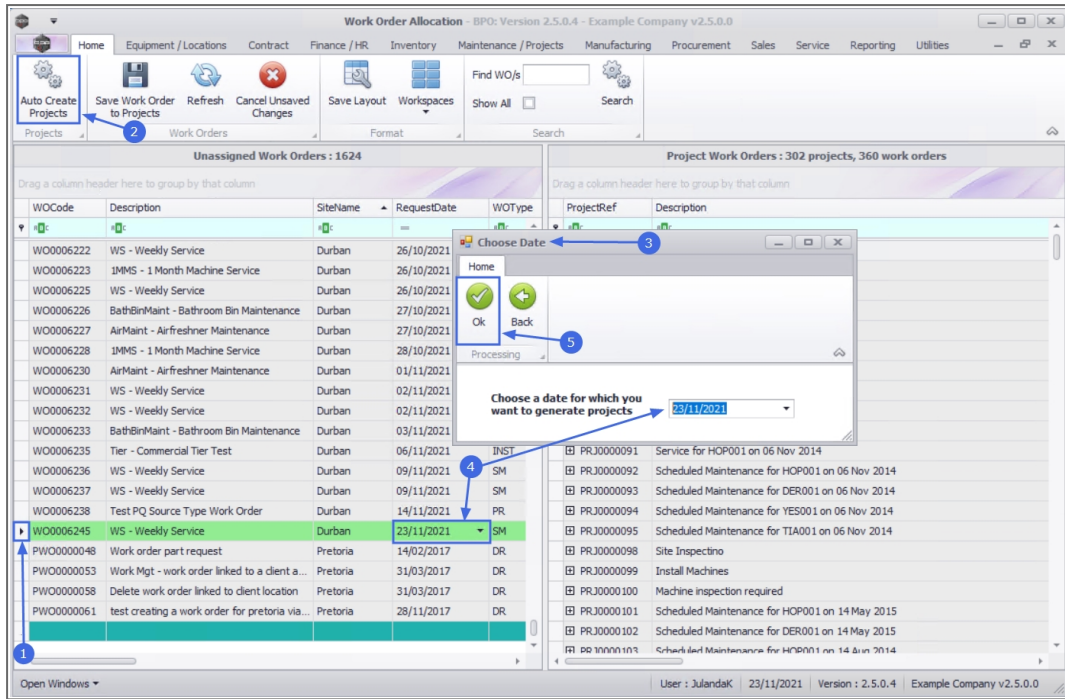
SINGLE WORK ORDER

1. In the **Unassigned Work Orders** frame, click in the **row** of the work order you wish to create a project for.
2. Click on **Auto Create Projects**.
3. The **Choose Date** screen will display.
4. The **date field** will display the current date. Type in or click on the down **arrow** to use the calendar function to select the date to generate the project for.

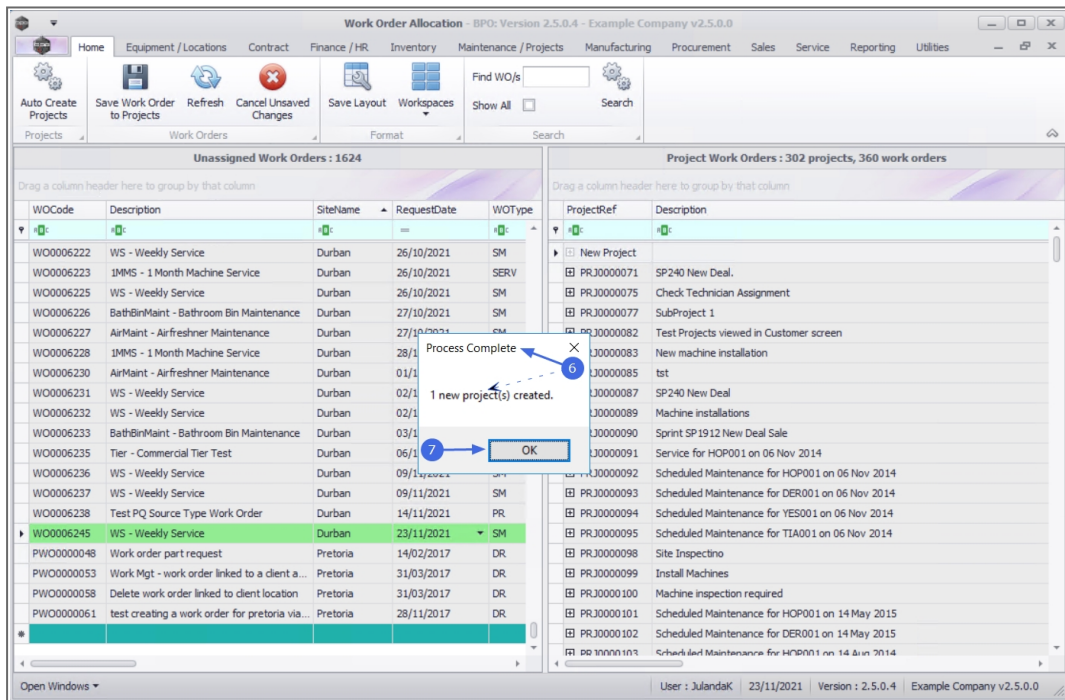


Note that the date for the Project has to match the Request Date of the work order.

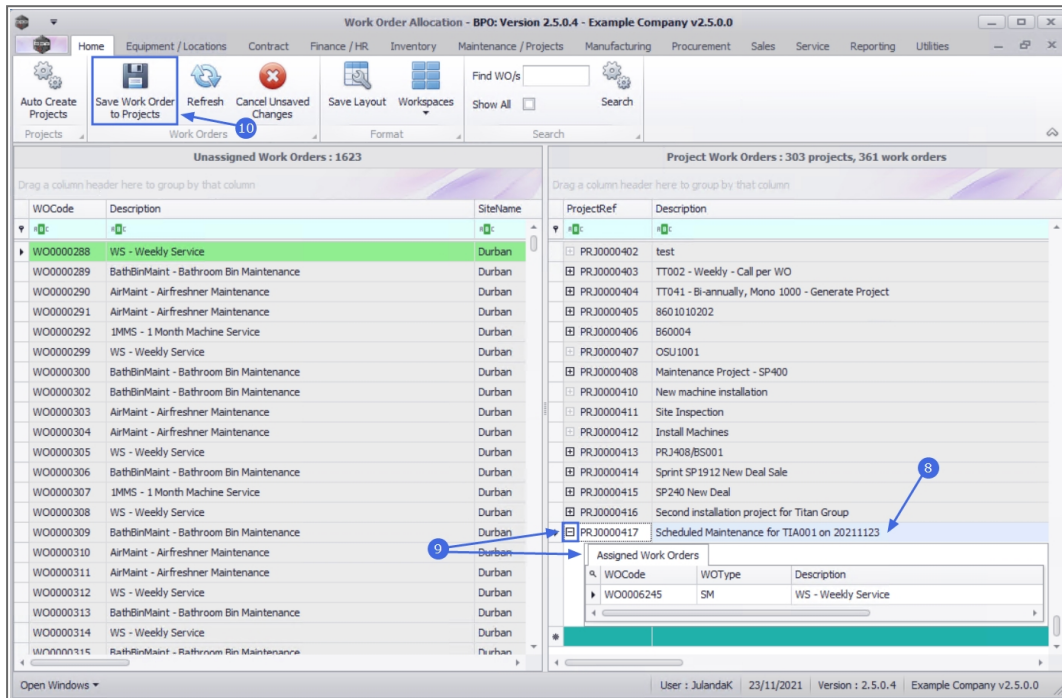
5. Click on **OK**.



6. When you receive the **Process Complete** message to confirm that;
 - **1 new project(s) created.**
7. Click on **OK**.



8. The newly created project will be displayed in the **Project Work Orders** frame.
9. Click on the **expand** button in the row of the new project to display the **Assigned Work Orders** frame.
10. Click on **Save Work Order to Projects**.

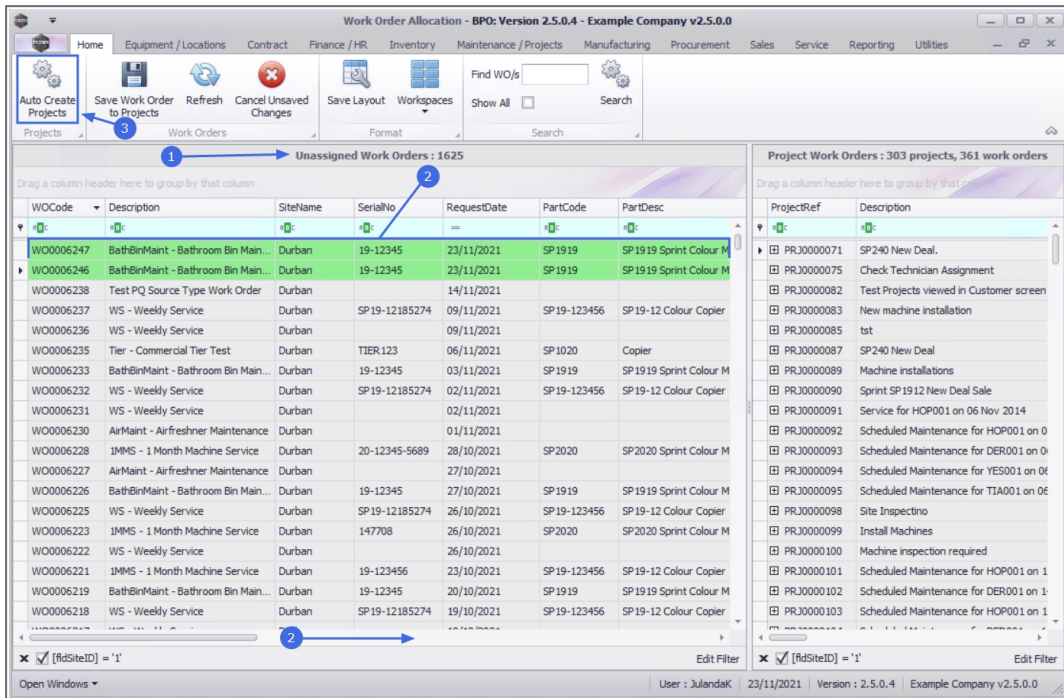


AUTO CREATE SINGLE PROJECT WITH MULTIPLE WORK ORDERS

Important Note To create a single project from multiple work orders, the work order *parameters* have to be the *same*.

1. In the **Unassigned Work Order** frame, select the Work orders you wish to allocate to a project.
 - To select multiple work orders, hold down the **Ctrl** key on the keyboard and use your **mouse** to click on the relevant work orders to select.

2. **Scroll right** in this frame until you can view the parameters for the work orders to ensure that they are the same.
3. Click on **Auto Create Projects**.



4. The **Choose Date** screen will display.
5. The **date field** will auto populate with the current date. Type in or click on the down **arrow** to use the calendar function to select an alternative date, if required.



Note that the date for the Project has to match the Request Date of the work order.

6. Click on **OK**.

Work Order Allocation - BPO: Version 2.5.0.4 - Example Company v2.5.0.0

Unassigned Work Orders : 1625

| WOCCode | Description | SiteName | SerialNo | RequestDate | PartCode | PartDesc |
|-----------|-------------------------------------|----------|---------------|-------------|-------------|------------------------|
| WO0006247 | BathBinMaint - Bathroom Bin Main... | Durban | 19-12345 | 23/11/2021 | SP1919 | SP1919 Sprint Colour M |
| WO0006246 | BathBinMaint - Bathroom Bin Main... | Durban | 19-12345 | 23/11/2021 | SP1919 | SP1919 Sprint Colour M |
| WO0006238 | Test PQ Source Type Work Order | Durban | | 14/11/2021 | | |
| WO0006237 | WS - Weekly Service | Durban | SP19-12185274 | 09/11/2021 | SP19-123456 | SP19-12 Colour Copier |
| WO0006236 | WS - Weekly Service | Durban | | 09/11/2021 | | |
| WO0006235 | Tier - Commercial Tier Test | Durban | TIER 123 | 06/11/2021 | | |
| WO0006233 | BathBinMaint - Bathroom Bin Main... | Durban | 19-12345 | 03/11/2021 | | |
| WO0006232 | WS - Weekly Service | Durban | SP19-12185274 | 02/11/2021 | | |
| WO0006231 | WS - Weekly Service | Durban | | 02/11/2021 | | |
| WO0006230 | AirMaint - Airfreshner Maintenance | Durban | | 01/11/2021 | | |
| WO0006228 | IMMS - 1 Month Machine Service | Durban | 20-12345-5689 | 28/10/2021 | SP2020 | SP2020 Sprint Colour M |
| WO0006227 | AirMaint - Airfreshner Maintenance | Durban | | 27/10/2021 | | |
| WO0006226 | BathBinMaint - Bathroom Bin Main... | Durban | 19-12345 | 27/10/2021 | | |
| WO0006225 | WS - Weekly Service | Durban | SP19-12185274 | 26/10/2021 | SP19-123456 | SP19-12 Colour Copier |
| WO0006223 | IMMS - 1 Month Machine Service | Durban | 147708 | 26/10/2021 | SP2020 | SP2020 Sprint Colour M |
| WO0006222 | WS - Weekly Service | Durban | | 26/10/2021 | | |
| WO0006221 | IMMS - 1 Month Machine Service | Durban | 19-123456 | 23/10/2021 | SP19-123456 | SP19-12 Colour Copier |
| WO0006219 | BathBinMaint - Bathroom Bin Main... | Durban | 19-12345 | 20/10/2021 | SP1919 | SP1919 Sprint Colour M |
| WO0006218 | WS - Weekly Service | Durban | SP19-12185274 | 19/10/2021 | SP19-123456 | SP19-12 Colour Copier |

Project Work Orders : 303 projects, 361 work orders

Choose Date dialog: 23/11/2021

7. When you receive the **Process Complete** message to confirm that;
 - **1 new project(s) created.**
8. Click on **OK**.

Work Order Allocation - BPO: Version 2.5.0.4 - Example Company v2.5.0.0

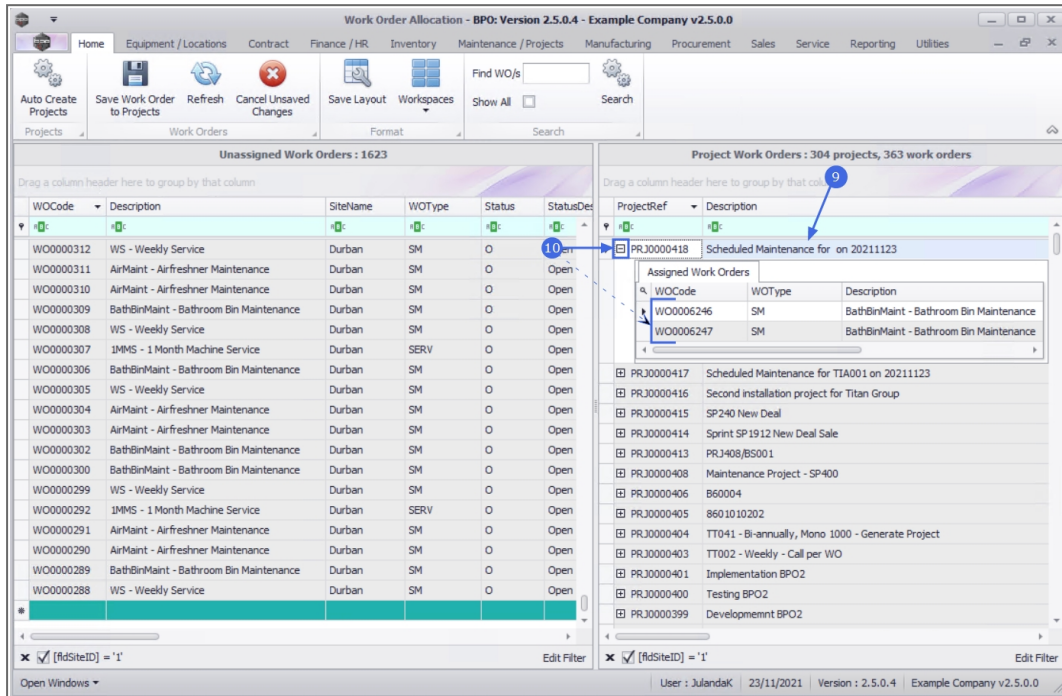
Unassigned Work Orders : 1625

| WOCCode | Description | SiteName | SerialNo | RequestDate | PartCode | PartDesc |
|-----------|-------------------------------------|----------|---------------|-------------|-------------|------------------------|
| WO0006247 | BathBinMaint - Bathroom Bin Main... | Durban | 19-12345 | 23/11/2021 | SP1919 | SP1919 Sprint Colour M |
| WO0006246 | BathBinMaint - Bathroom Bin Main... | Durban | 19-12345 | 23/11/2021 | SP1919 | SP1919 Sprint Colour M |
| WO0006238 | Test PQ Source Type Work Order | Durban | | 14/11/2021 | | |
| WO0006237 | WS - Weekly Service | Durban | SP19-12185274 | 09/11/2021 | SP19-123456 | SP19-12 Colour Copier |
| WO0006236 | WS - Weekly Service | Durban | | 09/11/2021 | | |
| WO0006235 | Tier - Commercial Tier Test | Durban | | 09/11/2021 | | |
| WO0006233 | BathBinMaint - Bathroom Bin Main... | Durban | 19-12345 | 03/11/2021 | | |
| WO0006232 | WS - Weekly Service | Durban | SP19-12185274 | 02/11/2021 | | |
| WO0006231 | WS - Weekly Service | Durban | | 02/11/2021 | | |
| WO0006230 | AirMaint - Airfreshner Maintenance | Durban | | 01/11/2021 | | |
| WO0006228 | IMMS - 1 Month Machine Service | Durban | 20-12345-5689 | 28/10/2021 | SP2020 | SP2020 Sprint Colour M |
| WO0006227 | AirMaint - Airfreshner Maintenance | Durban | | 27/10/2021 | | |
| WO0006226 | BathBinMaint - Bathroom Bin Main... | Durban | 19-12345 | 27/10/2021 | | |
| WO0006225 | WS - Weekly Service | Durban | SP19-12185274 | 26/10/2021 | SP19-123456 | SP19-12 Colour Copier |
| WO0006223 | IMMS - 1 Month Machine Service | Durban | 147708 | 26/10/2021 | SP2020 | SP2020 Sprint Colour M |
| WO0006222 | WS - Weekly Service | Durban | | 26/10/2021 | | |
| WO0006221 | IMMS - 1 Month Machine Service | Durban | 19-123456 | 23/10/2021 | SP19-123456 | SP19-12 Colour Copier |
| WO0006219 | BathBinMaint - Bathroom Bin Main... | Durban | 19-12345 | 20/10/2021 | SP1919 | SP1919 Sprint Colour M |
| WO0006218 | WS - Weekly Service | Durban | SP19-12185274 | 19/10/2021 | SP19-123456 | SP19-12 Colour Copier |

Project Work Orders : 303 projects, 361 work orders

Process Complete dialog: 1 new project(s) created.

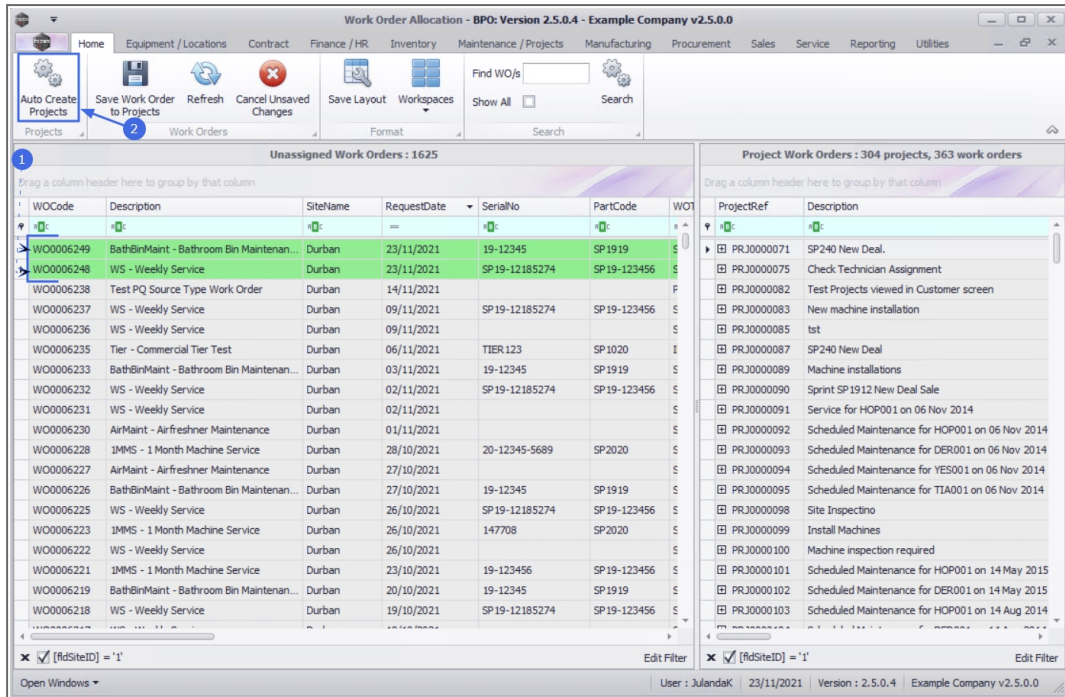
9. The newly created project will be displayed in the **Project Work Orders** frame.
10. Click on the **Expand** button of the new project, to view the linked work orders.



AUTO CREATE PROJECT FROM MULTIPLE WORK ORDERS

Note that when selecting Work Orders with different parameters, a separate project will be created for each work order.

1. In the **Unassigned Work Order** frame, select the Work orders you wish to allocate to a project.
 - To select multiple work orders, hold down the **Ctrl** key on the keyboard and use your **mouse** to click on the relevant work orders to select.
2. Click on **Auto Create Projects**.

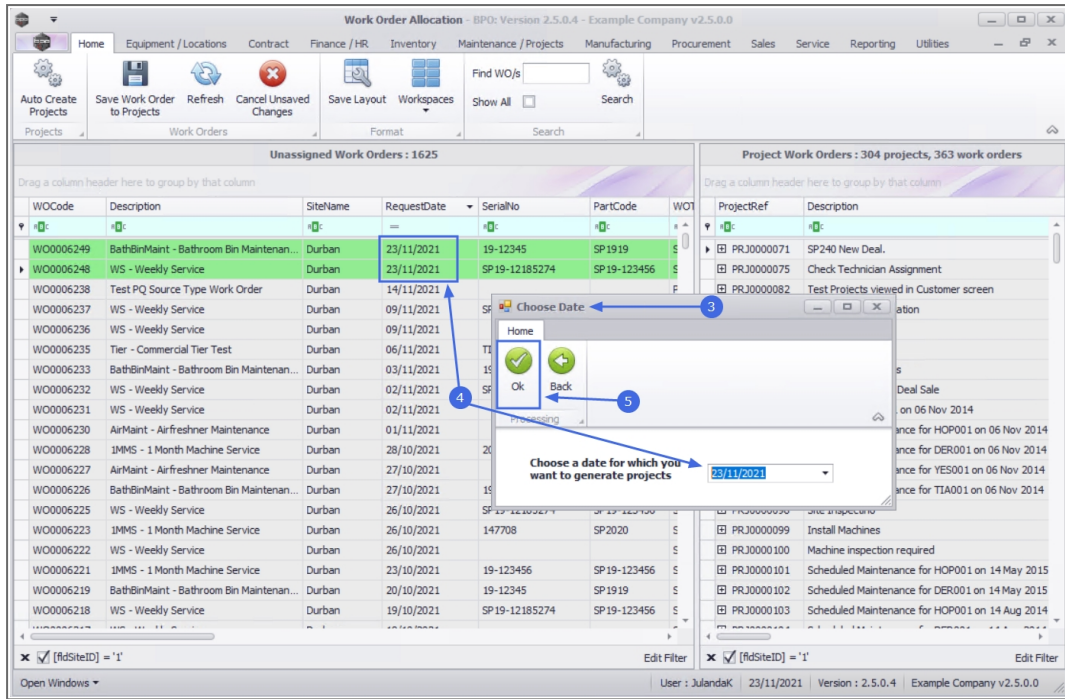


3. The **Choose Date** screen will display.
4. The **date field** will auto populate with the current date. Type in or click on the down **arrow** to use the calendar function to select an alternative date, if required.



Note that the date for the Project has to match the Request Date of the work order.

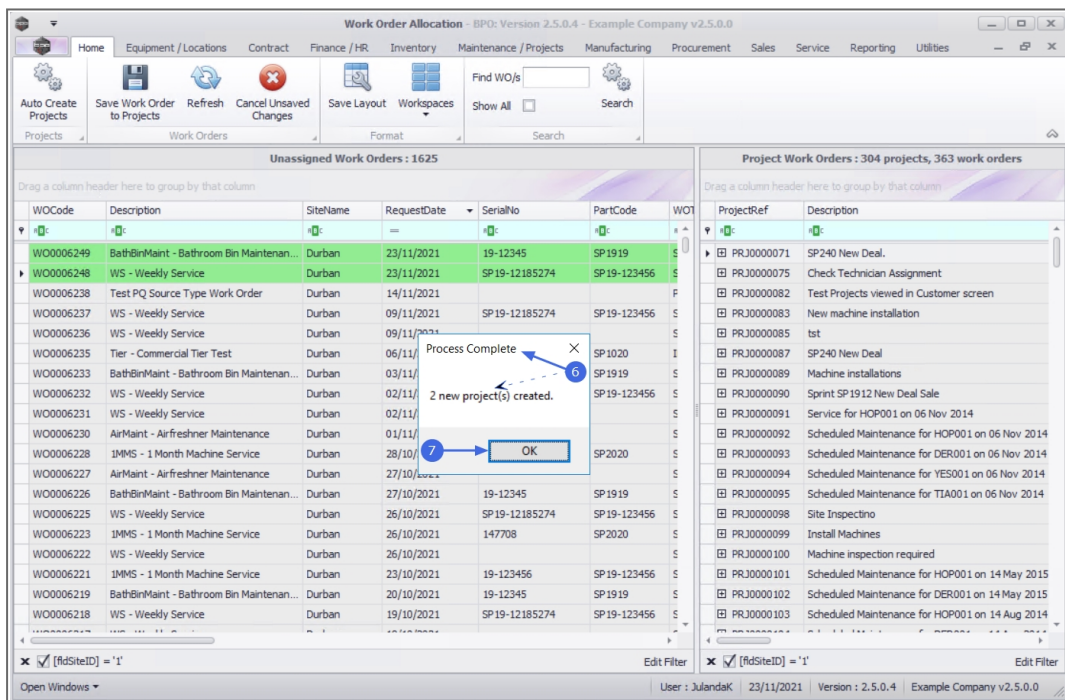
5. Click on **OK**.



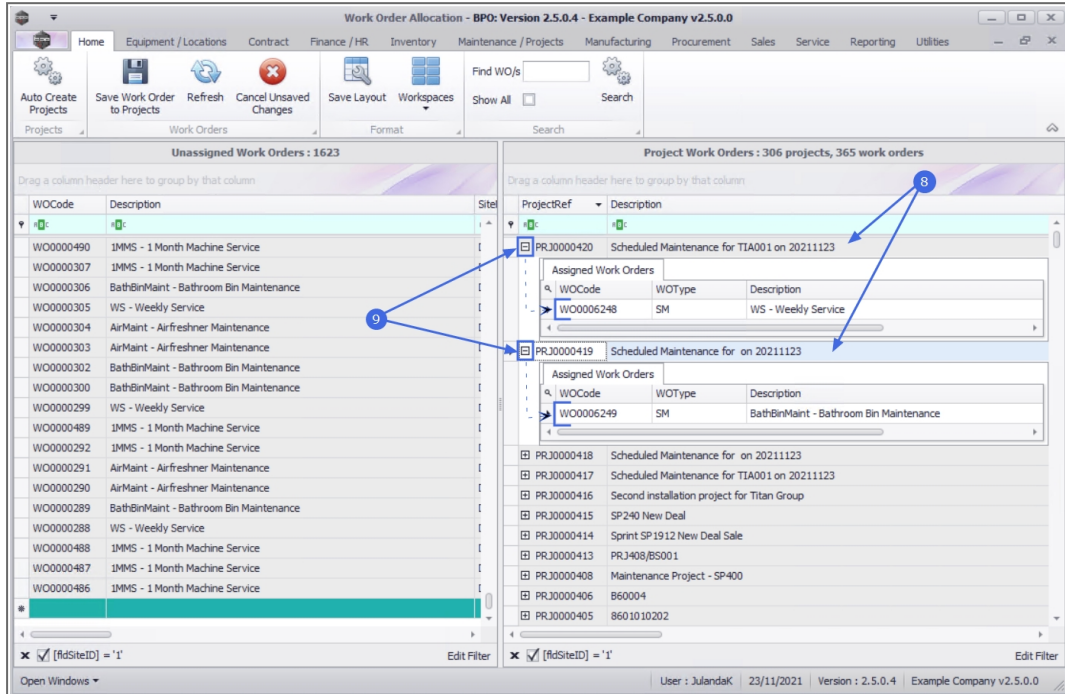
6. The **Process Complete** message will display informing you that;

- **2 new project(s) created.**

7. Click on **OK**.



8. The newly created projects will be displayed in the **Project Work Orders** frame.
9. Click on the **Expand** icon of the new projects to view the **Assigned Work Orders** frames.



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