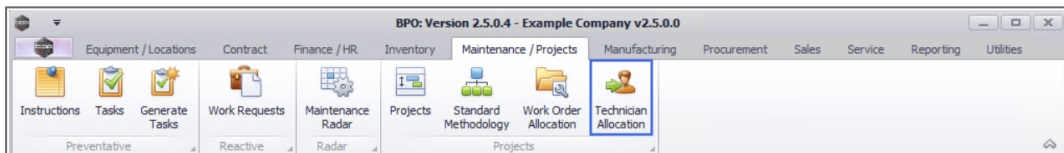


PROJECTS

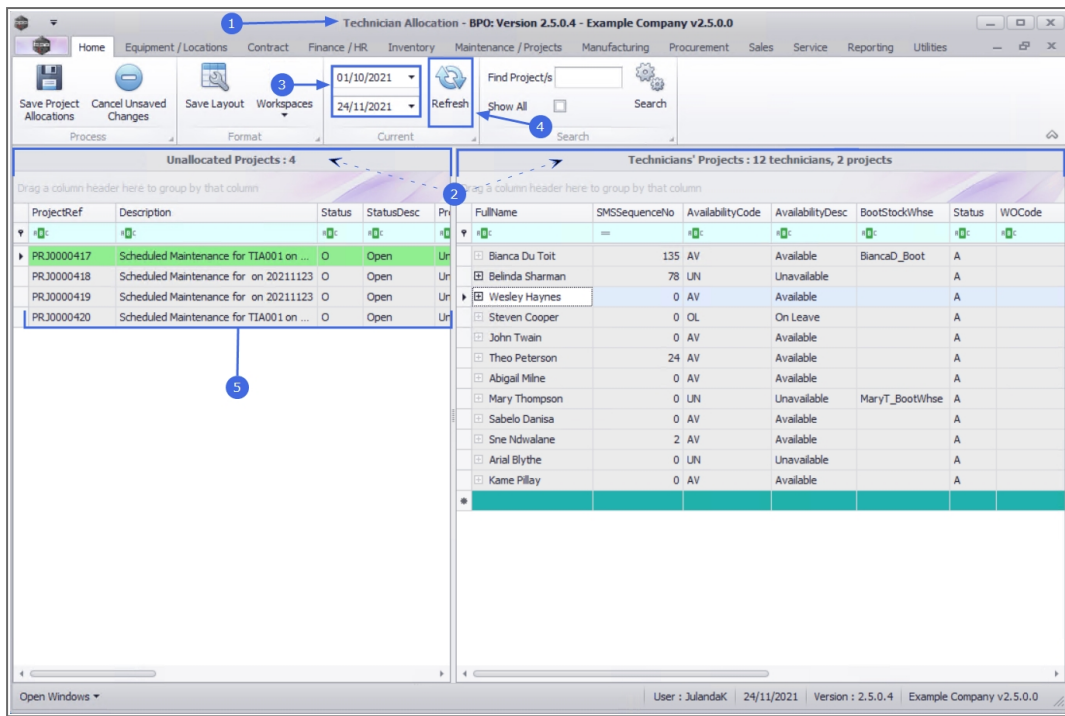
TECHNICIAN ALLOCATION - UNALLOCATED PROJECTS

Unallocated projects are projects assigned to employees who are **not** configured as **technicians**.

Ribbon Access: Maintenance / Projects > Technician Allocation

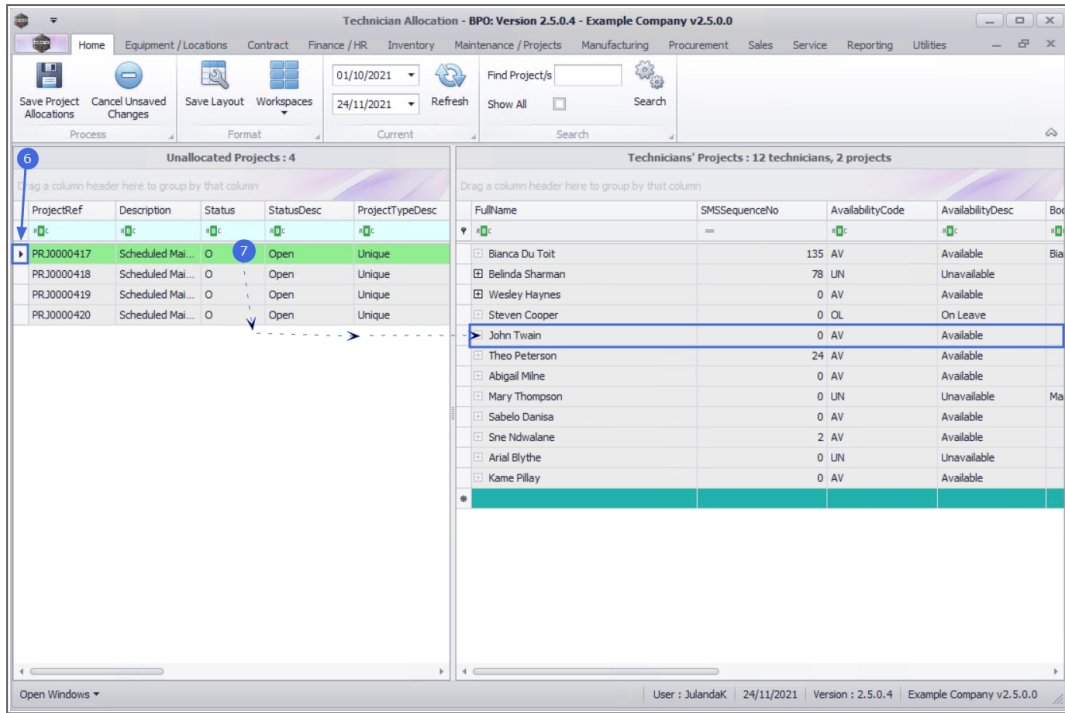


1. The **Technician Allocation** screen will be displayed.
2. The screen is divided into **two** panels;
 - The **left** panel is the **Unallocated Projects**. A list of all the unassigned work orders is displayed in this panel.
 - The **right** panel is the **Technicians' Projects**. This panel will list the and their Availability Status . Refer to [Technicians - Set Up](#) to set up the Technicians for projects.
3. Set the **Date Range** for the projects you wish to view.
 - Type in or click on the down **arrow** to set the date range using the calendar function.
4. Click on **Refresh**.
5. The projects that fall within the selected date range will be displayed in the Unallocated Projects frame.

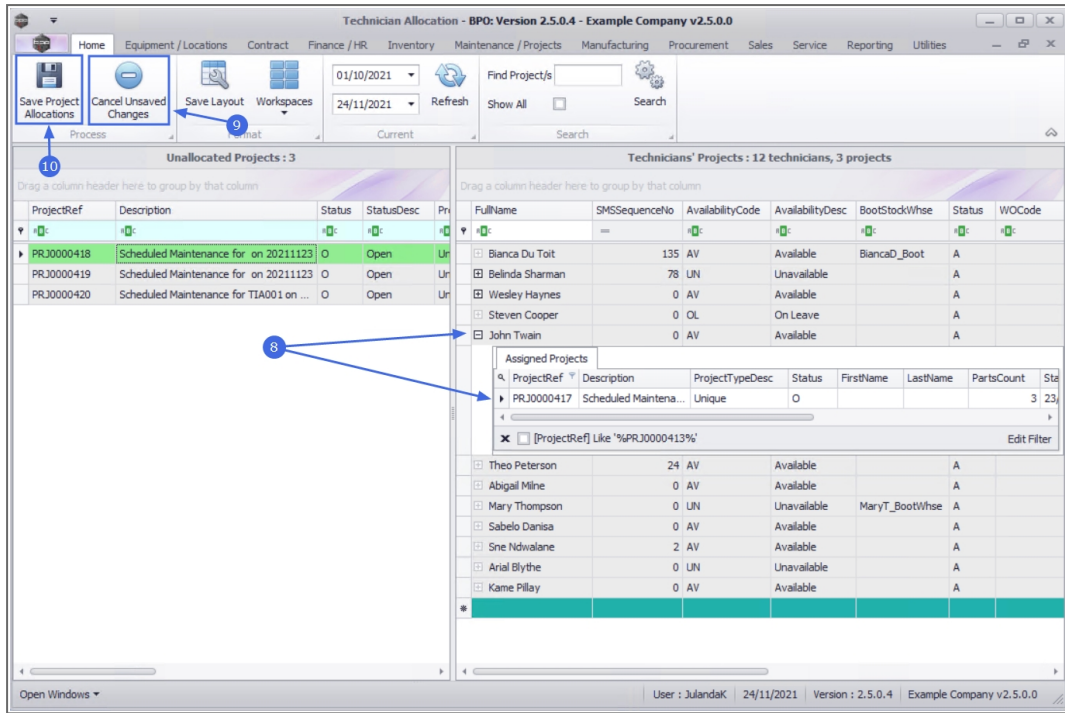


ALLOCATE SINGLE PROJECT

6. In the *Unallocated Projects* frame, **click** in the row of the project you wish to allocate.
7. Click anywhere in the selected row and **drag** and **drop** the project to the Technician in the *Technicians' Projects* frame.



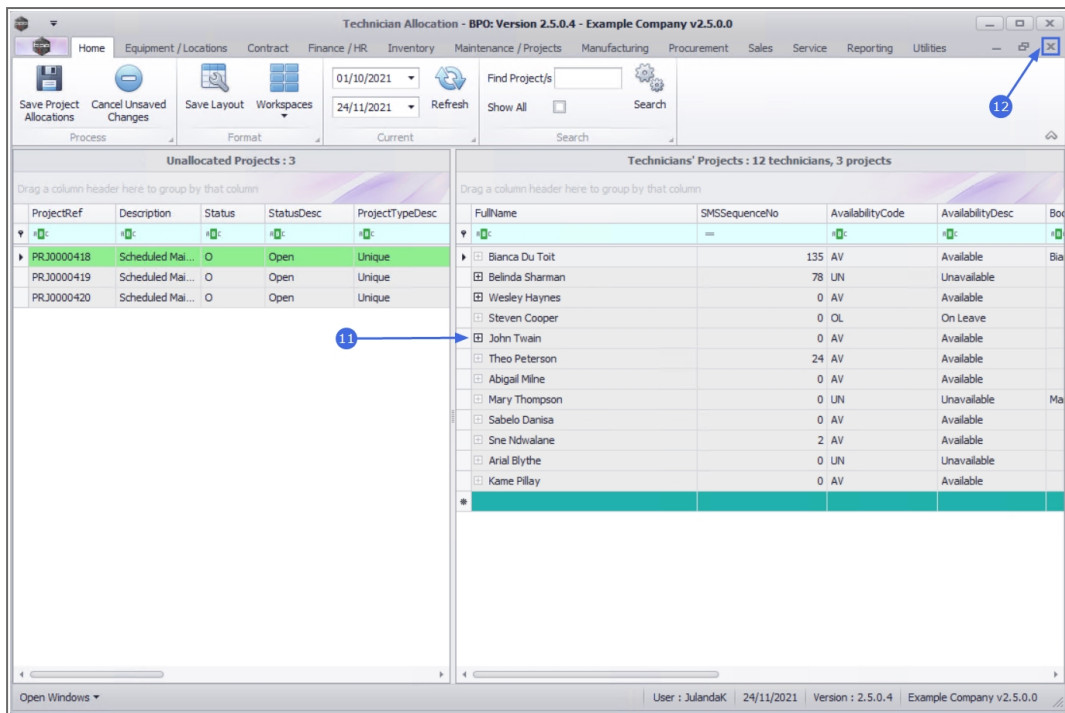
8. The **Assigned Projects** sub grid for the Technician will expand to display the allocated project.
9. Click on **Cancel Unsaved Changes** to return the project to the Unallocated Projects frame.
10. Click on **Save Work Order to Projects**.



11. The changes will be **saved** and the **Assigned Projects** sub grid will **close**.

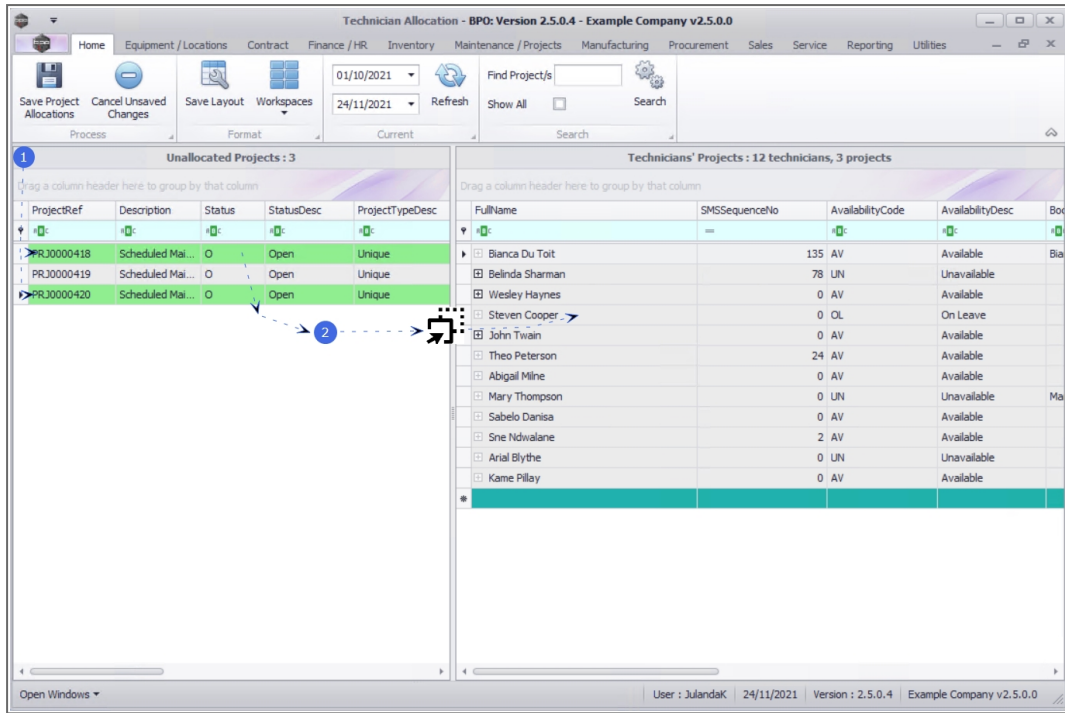
Note that the expand button, that was previously greyed out, is now available.

12. Click on **Close** to close the screen and to return to the **Projects Listing** screen.

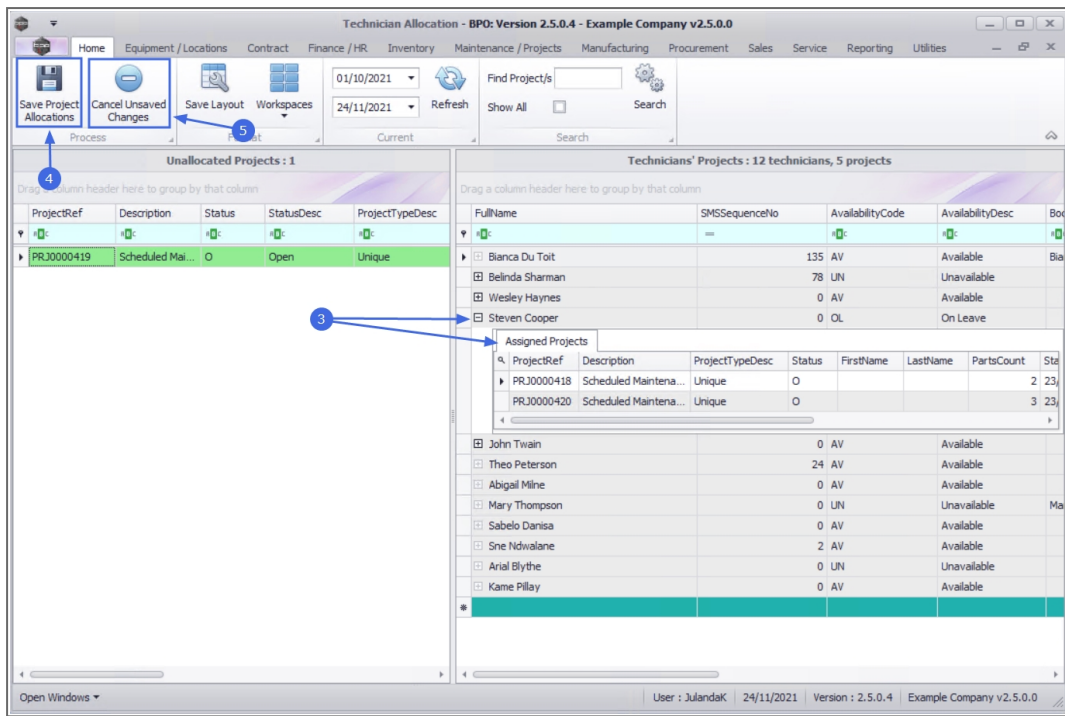


ALLOCATE MULTIPLE PROJECTS

- In the **Unallocated Projects** frame, select each project you wish to allocate to a technician.
 - To select multi projects hold down the **Ctrl** key and use your **mouse** to click on the relevant projects.
- Click** anywhere on the selected project area and **drag** and **drop** the projects on the technician in the **Technicians' Projects** frame.



3. The **Assigned Projects** sub grid for the Technician will expand to display the allocated projects.
4. Click on **Cancel Unsaved Changes** to return the project to the Unallocated Projects frame.
5. Click on **Save Work Order to Projects**.



6. The changes will be **saved** and the **Assigned Projects** sub grid will **close**.



Note that the expand button, that was previously greyed out, is now available.

7. Click on **Close** to close the screen and return to the **Project Listing** screen.

Technician Allocation - 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

Save Project Allocations | Cancel Unsaved Changes | Save Layout | Workspaces | 01/10/2021 | 24/11/2021 | Refresh | Find Projects | Show All | Search

Unallocated Projects : 1

Drag a column header here to group by that column

ProjectRef	Description	Status	StatusDesc	ProjectTypeDesc
PRJ0000419	Scheduled Mai...	O	Open	Unique

Technicians' Projects : 12 technicians, 5 projects

Drag a column header here to group by that column

FullName	SMSSequenceNo	AvailabilityCode	AvailabilityDesc	Bo
Bianca Du Toit	135	AV	Available	Bia
Belinda Sharman	78	UN	Unavailable	
Wesley Haynes	0	AV	Available	
Steven Cooper	0	OL	On Leave	
John Twain	0	AV	Available	
Theo Peterson	24	AV	Available	
Abigail Milne	0	AV	Available	
Mary Thompson	0	UN	Unavailable	Ma
Sabelo Danisa	0	AV	Available	
Sne Ndwalande	2	AV	Available	
Arial Blythe	0	UN	Unavailable	
Kame Pillay	0	AV	Available	

Open Windows | User : JulandaK | 24/11/2021 | Version : 2.5.0.4 | Example Company v2.5.0.0

MNU.152.002