

We are currently updating our site; thank you for your patience.

# 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

=				BPO: Version 2.5.0.4 - Example Company v2.5.0.0								0	_
	Equipmen	t / Locations	Contract F	inance / HR	Inventory	Maintenance	/ Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities
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Instructions	Tasks	Generate Tasks	Work Requests	Maintenance Radar	Projects	Standard Methodology	Work Order Allocation	Technician Allocation					
Pre	ventative		Reactive	Radar		Proje	ects	4					$\Diamond$

- 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

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WO0006238	Test PQ Source Type Work Order	Durban	PR	0	Open		PRJ0000412	Install Machines	0	Open	
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WO0006236	WS - Weekly Service	Durban	SM	0	Open		PRJ0000410	New machine installation	0	Open	
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#### **SELECTING WORK ORDERS**

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

- 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.

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WO0006240	WS - Weekly Service	Durban	SM	0	Open	➡ PRJ0000413	PRJ408/BS001	0	Open	Т
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	
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WO0006233	BathBinMaint - Bathroom Bin Maintenance	Durban	SM	0	Open		Implementation BPO2	0	Open	
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WO0006231	WS - Weekly Service	Durban	SM	0	Open		Developmemnt BPO2	0	Open	
WO0006230	AirMaint - Airfreshner Maintenance	Durban	SM	0	Open		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	
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WO0006225	WS - Weekly Service	Durban	SM	0	Open		NDS Project	0	Open	
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WO0006222	WS - Weekly Service	Durban	SM	0	Open		Site Inspectino	0	Open	
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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

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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	ale	0	Open	
WO0006237	WS - Weekly Service	Durban	SM	0	Open 5	► PRJ0000413	PRJ408/BS0	01		0	Open	
WO0006236	WS - Weekly Service	Durban	SM	0	Open	Assigned W	Vork Orders					
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WO0006233	BathBinMaint - Bathroom Bin Maintenance	Durban	SM	0	Open	► WO0006	137 N	DS	PRJ408/BS001			
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WO0006230	AirMaint - Airfreshner Maintenance	Durban	SM	0	Open	WO0006	241 SM	4	WS - Weekly Se	ervice		
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WO0006221	1MMS - 1 Month Machine Service	Durban	SERV	0	Open		B60004			0	Open	
WO0006219	BathBinMaint - Bathroom Bin Maintenance	Durban	SM	0	Open		860101020	2		0	Open	
WO0006218	WS - Weekly Service	Durban	SM	0	Open		TT041 - Bi-a	nnually, Mono	1000 - Generate	0	Open	
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8. The selected work order allocations will be **linked** to the selected project and the **Assigned Work Orders** sub grid will close.

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WO0006240	WS - Weekly Service		Durban	▶   PRJ0000415	SP240 New Deal					
WO0006238	Test PQ Source Type Work Order		Durban	PRJ0000414	Sprint SP1912 New De	al 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	B PRJ0000410	New machine installation	n				
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, M	ono 1000 - Gen	erate Projec	t		
WO0006226	BathBinMaint - Bathroom Bin Maintenance		Durban	PRJ0000402	test					
WO0006225	WS - Weekly Service		Durban		Implementation BPO2					
WO0006223	1MMS - 1 Month Machine Service		Durban	PRJ0000400	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 Cyc	le				
WO0006216	AirMaint - Airfreshner Maintenance		Durban		Default for HOP001 on	08 Feb 2017				
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## 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.

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	WO0006236	WS - Weekly Service		Durban		_	30000413	PR.J408/BS								
	WO0006235	Tier - Commercial Tier Test		Durban		E PR.	30000412	Install Mac	nines							
	WO0006233	BathBinMaint - Bathroom Bin Maintenance		Durban			Assigned V	Nork Orders								
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	WO0006227	AirMaint - Airfreshner Maintenance		Durban		• PR	30000410	New machi	ne installatio	n						
	WO0006226	BathBinMaint - Bathroom Bin Maintenance		Durban		E PR	30000408	Maintenan	e Project - :	SP400						
	WO0006225	WS - Weekly Service		Durban		• PR	30000407	OSU1001								
	WO0006223	1MMS - 1 Month Machine Service		Durban			30000406	B60004								
	WO0006222	WS - Weekly Service		Durban		E PR	30000405	860101020	2							
	WO0006221	1MMS - 1 Month Machine Service		Durban		E PR	30000404	TT041 - Bi-	annually, Mo	ono 1000	- Generate Pr	oject				
	WO0006219	BathBinMaint - Bathroom Bin Maintenance		Durban		🗄 PR	30000402	test								
	WO0006218	WS - Weekly Service		Durban		E PR	30000401	Implement	ation BPO2							
	WO0006217	WS - Weekly Service		Durban		E PR	30000400	Testing BP	02							
	WO0006216	AirMaint - Airfreshner Maintenance		Durban		E PR	10000399	Developme	mnt BPO2							
	WO0006213	2MS - 2 month service		Durban		E PR	10000398	Design BPC	2							
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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.

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

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WO0006240	WS - Weekly Service		Durban	▶ E PRJ0000415	SP240 New Deal	
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WO0006236	WS - Weekly Service		Durban	PRJ0000412	Install Machines	
WO0006235	Tier - Commercial Tier Test		Durban	PRJ0000411	Site Inspection	
WO0006233	BathBinMaint - Bathroom Bin Maintenance		Durban	E 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/00006213	2MS - 2 month service		Durhan	FT PR 1000394	1234 - Test ctrt request create or	

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