

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

PROJECTS

WORK ORDER ALLOCATION – UNLINK / REASSIGN WORK ORDERS

Work orders linked to a project can be **unlinked** from a project or can be **reassigned** to another project.

Ribbon Access: Maintenance / Projects > Work Order Allocation

• •					BPO: Versio	n 2.5.0.4 - Exa	mple Com	pany v2.5.0.0					_) =) ×
	Equipmen	t / Locations	Contract F	Finance / HR.	Inventory	Maintenance / F	Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities
	Ì	Ť	Ê		I 💼			2					
Instructions	Tasks	Generate Tasks	Work Requests	Maintenano Radar	e Projects	Standard Methodology	Work Orde Allocation	Technician Allocation					
Preventative _ Reactive _ Radar					4	Proje	ects						\$

- 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.
- 3. In the **Project Work Orders** frame, click on the **expand** button in the row of the project you wish to **unlink /reassign** work orders from.



Work Order Allocation - Unlink or Re-Assign Work

-	Ŧ	1	> Work Order Allocation	- BPO: Version 2	.5.0.4	- Exa	mple Com	pany v2.5.	0.0				>
	to Ho	me Equipment / Locations Contract F	inance / HR Inventory M	laintenance / Proje	cts	Manu	ufacturing	Procureme	ent Sales	Servio	e Reporting	Utilities	- 8 3
	(A)			Find WO/s	2		100 C						
A	uto Create Projects	Save Work Order Refresh Cancel Unsaved to Projects Changes	Save Layout Workspaces	Show All		S	Search						
F	rojects	Work Orders	Format	L' Sea	rch		1						4
-		Unassigned Work Ord	lers : 1623		٦٢			Project	Work Orders	s : 302 p	projects, 360 w	ork orders	
				//	3								
	WOCode	- Description		SiteName		Proje	ectRef -	Descriptio	n				
٩	R C	4 0 4		A D C	î Y	۶ØC		ROC					
۲	WO0006238	Test PQ Source Type Work Order		Durban	١Ŋ	🗄 Pi	RJ0000416	Second in	stallation proj	ect for T	tan Group		
	WO0006237	WS - Weekly Service		Durban		🖯 Pi	RJ0000415	SP240 Ne	w Deal				
	WO0006236	W00006236 WS - Weekly Service W00006235 Tier - Commercial Tier Test					Assigned V	Vork Orders					
	WO0006235					NOCod₩OCod		ode WOType 06140 INST		Description			
	WO0006233 BathBinMaint - Bathroom Bin Maintenance			Durban						S	SP240-1 - Machine Installation		
	WO0006232	WS - Weekly Service		Durban			WO0006	141	41 IT		SP240-2 - Network setup		
	WO0006231	WS - Weekly Service		Durban		WO0006142 INST SP240-3 - Docum				P240-3 - Documer	rentation		
	WO0006230	AirMaint - Airfreshner Maintenance		Durban									F
	WO0006228	1MMS - 1 Month Machine Service		Durban	1000	■ PRJ0000414 Sprint SP1912 New Deal Sale							
	WO0006227	AirMaint - Airfreshner Maintenance		Durban									
	WO0006226	BathBinMaint - Bathroom Bin Maintenance		Durban		E P	RJ0000412	Install Ma	chines				
	WO0006225	WS - Weekly Service		Durban		🗉 Pi	RJ0000411	Site Insp	ection				
	WO0006223	1MMS - 1 Month Machine Service		Durban		D PI	RJ0000410	New mad	hine installation	n			
	WO0006222	WS - Weekly Service		Durban		■ PRJ0000408 Maintenance Project - SP400							
	WO0006221	1MMS - 1 Month Machine Service		Durban		□ PRJ0000407 OSU1001							
	WO0006219	BathBinMaint - Bathroom Bin Maintenance		Durban		E P	RJ0000406	B60004					
	WO0006218	WS - Weekly Service		Durban		E P	RJ0000405	8601010	202				
	WO0006217 WS - Weekly Service					■ PRJ0000404 TT041 - Bi-annually, Mono 1000 - Generate Project					ct		
	WO0006216 AirMaint - Airfreshner Maintenance					■ PRJ0000403 TT002 - Weekly - Call per WO							
	WO0006213	2MS - 2 month service		Durban		• P	RJ0000402	test					
	W00006211	ΔirMaint - Δirfreshner Maintenance		Durhan	•	-							

UNASSIGN WORK ORDER(S)

- 4. From the **Assigned Work Orders** sub grid select the work order(s) you wish to unlink from the project.
- Click anywhere on the selected work order(s) line and drag and drop it anywhere in the Unassigned Work Orders frame to unlink the work order.



Work Order Allocation - Unlink or Re-Assign Work

	Ŧ		Work Order Allocation	- BPO: Version 2.5	5.0.4	- Example Com	pany v2.5.0.0	0				
	ф н	ome Equipment / Locations Contract Fi	inance / HR Inventory M	laintenance / Project	s	Manufacturing	Procurement	Sales	Service	Reporting	Utilities	- 8 3
1		💾 🐼 😰	2	Find WO/s		(i)						
Aut	to Create rojects	Save Work Order Refresh Cancel Unsaved to Projects Changes	Save Layout Workspaces	Show All		Search						
Pr	ojects 🦼	Work Orders	Format	Sear	ch	4						6
		Unassigned Work Ord	lers : 1623				Project W	ork Order	s : 302 pi	ojects, 360 w	ork orders	
1	NOCode	✓ Description		SiteName	1	ProjectRef	 Description 					
9	1 0 0	∧□ <		* O ¢	9	× O C	8 C					
•	NO0006238	8 Test PQ Source Type Work Order		Durban			Second insta	allation proj	ect for Tit	an Group	-4)
1	NO000623	7 WS - Weekly Service	222	Durban	•	PRJ0000415	SP240 New	Deal	_		1	
1	NO0006236	6 WS - Weekly Service	i R	Durban		Assigned	Work Orders				1	
1	NO000623	5 Tier - Commercial Tier Test	×	Durban		۹ WOCode	e W	OType	De	scription 🖌		
1	NO0006233	3 BathBinMaint - Bathroom Bin Maintenance		- Durban 5		• WO0006	5140 IN	IST	SP	240-1 - Machine	Installation	
1	NO0006232	2 WS - Weekly Service		Durban		W00006	5141 IT		SP	240-2 - Network	setup	
1	NO000623	1 WS - Weekly Service		Durban		W00006	5142 IN	IST	SP	240-3 - Documer	ntation	
1	NO0006230	D AirMaint - Airfreshner Maintenance		Durban		•						F
١	NO0006228	8 1MMS - 1 Month Machine Service		Durban	1000		Sprint SP19	12 New Dea	il Sale			
١	NO0006223	7 AirMaint - Airfreshner Maintenance		Durban			PRJ408/BS0	01				
1	NO0006226	6 BathBinMaint - Bathroom Bin Maintenance		Durban		PRJ0000412	Install Mach	ines				
1	NO000622	5 WS - Weekly Service		Durban		PRJ0000411	Site Inspect	ion				
1	NO0006223	3 1MMS - 1 Month Machine Service		Durban		PRJ0000410	New machin	e installatio	n			
1	NO0006222	2 WS - Weekly Service		Durban			Maintenance	e Project - S	SP400			
1	NO000622	1 1MMS - 1 Month Machine Service		Durban		PRJ0000407	OSU1001					
1	NO0006219	9 BathBinMaint - Bathroom Bin Maintenance		Durban			B60004					
1	NO0006218	8 WS - Weekly Service		Durban			8601010202	2				
1	NO000621	7 WS - Weekly Service		Durban			TT041 - Bi-a	innually, Mo	no 1000 -	Generate Proje	ct	
1	NO0006216	6 AirMaint - Airfreshner Maintenance		Durban			TT002 - We	ekly - Call p	er WO			
1	NO000621	3 2MS - 2 month service		Durban		PRJ0000402	test					
40	//0000621	1 ΔirMaint - Δirfreshner Maintenance		Durhan	4		· · · ·					•

- 6. The work order(s) will be removed from the **Assigned Work Orders** frame and can now be found in the **Unassigned Work Orders** frame.
- _ **•** x -Work Order Allocation - BPO: Version 2.5.0.4 - Example Company v2.5.0.0 . Equipment / Locations Finance / HR Inventory Maintenance / Projects Manufactu 8 X Home Contract -22 H 2 × 2 Find WO/s Refresh Cancel Unsa Changes rk Orders Save Layout Workspaces Auto Create Projects ave Work Ori to Projects Show All Search Unassigned Work Orders : 1623 Project Work Orders : 302 projects, 360 work orders Description ProjectRef WOCode SiteName + Description a**D**c REC •**D**¢ 9 x0c R**O**C WO0006148 Tier - Commercial Tier Test Durban PRJ0000416 Second installation project for Titan Group Durban 6 + E PRJ0000415 SP240 New Deal WO0006146 AirMaint - Airfreshner Maintenance WO0006145 BathBinMaint - Bathroom Bin Maintenance Durban Assigned Work Orders WO0006144 WS - Weekly Service Durban
 Q
 WOCode
 WOType

 Image: WO0006141
 IT
 WO0006142
 INST
 Description SP240-2 - Network setup WO0006143 WS - Weekly Service Durban WO0006140 SP240-1 - Machine Installation Durban SP240-3 - Documentation WO0006128 1MMS - 1 Month Machine Service Durban WO0006127 BathBinMaint - Bathroom Bin Maintenance Durban ■ PRJ0000414 Sprint SP 1912 New Deal Sale WO0006126 WS - Weekly Service Durban WO0006125 WS - Weekly Service Durban PRJ0000412 Install Machines WO0006124 AirMaint - Airfreshner Maintenance Durban PRJ0000411 Site Inspection WO0006123 1MMS - 1 Month Machine Service Durban PRJ0000410 New machine installatio WO0006122 1MMS - 1 Month Machine Service Durban PRJ0000408 Maintenance Project - SP400 WO0006120 AirMaint - Airfreshner Maintenance Durban PRJ0000407 OSU1001 WO0006119 BathBinMaint - Bathroom Bin Maintenance Durban WO0006118 WS - Weekly Service Durban ➡ PRJ0000405 8601010202 WO0006117 WS - Weekly Service Durban PRJ0000404 TT041 - Bi-annually, Mono 1000 - Generate Project WO0006113 BathBinMaint - Bathroom Bin Maintenance Durban PRJ0000403 TT002 - Weekly - Call per WO WO0006112 WS - Weekly Service Durban PRJ0000402 test WO0006111 WS - Weekly Service Durban WORRAG110 AirMaint - Airfreshner Maintenance Durhan x √ [fldSiteID] In (1', '0') Edit Filte User : JulandaK 22/11/2021 Version : 2.5.0.4 Example Company v2.5.0.0 Open Windows -
- 7. Click on Save Work Order to Projects.



REASSIGN WORK ORDER(S)

- 1. From the **Assigned Work Orders** sub grid select the work order(s) you wish to reassign from the project.
- 2. Click **anywhere** on the selected work order(s) line and **drag** and **drop** it on to the **project line** you wish to **reassign** it to.

	Work Order Allocation	- BPO: Version 2.5	5.0.4 - Example Company v2.5.0.0
Hom	e Equipment / Locations Contract Finance / HR Inventory N	laintenance / Project	ts Manufacturing Procurement Sales Service Reporting Utilities — 🗗 🤇
(i)	🗄 😳 😵 🖪	Find WO/s	
Auto Create S Projects	Save Work Order Refresh Cancel Unsaved Save Layout Workspaces	Show All	Search
Projects 4	Work Orders A Format A	Searc	ch 4
	Unassigned Work Orders : 1623		Project Work Orders : 302 projects, 360 work orders
Drag a column he			
WOCode	Description	SiteName	ProjectOaf - Description
• • • • • • • • •			
NO0006228	"W" Teat DO Seurce Ture Werk Order	Durhan	PD 20000416 Careed installation project for Titan Craum
W00006238	WS - Weekly Senice	Durban	E PR30000416 Second installation project for ritan Group
W00006237	WS - Weeky Service	Durban	
W00006235	Tier - Commercial Tier Test	Durban	Assigned Work Orders
W00006233	BathBinMaint - Bathroom Bin Maintenance	Durban	Wolcode Wolfype Description
W00006233	WS - Weekly Service	Durban	W00006140 INST SP240-1 - Madhine Installation
W00006231	WS - Weekly Service	Durban	W00006142 INST SP210-2 - Network Setup
WO0006230	AirMaint - Airfreshner Maintenance	Durban	4
WO0006228	1MMS - 1 Month Machine Service	Durban	DD D0000414 Coviet SD 1012 New Deal Sale
WO0006227	AirMaint - Airfreshner Maintenance	Durban	E PR0000414 Spint 3-1312 New Deal Sale
WO0006226	BathBinMaint - Bathroom Bin Maintenance	Durban	PR30000412 Install Machines
WO0006225	WS - Weekly Service	Durban	PR0000412 Install Pacifics 2
WO0006223	1MMS - 1 Month Machine Service	Durban	E PR10000410 New machine installation
WO0006222	WS - Weekly Service	Durban	E PR 10000408 Maintenance Project - SP400
WO0006221	1MMS - 1 Month Machine Service	Durban	PR30000407 OSU1001
WO0006219	BathBinMaint - Bathroom Bin Maintenance	Durban	E PRJ0000406 B60004
WO0006218	WS - Weekly Service	Durban	田 PRJ0000405 8601010202
WO0006217	WS - Weekly Service	Durban	PRJ0000404 TT041 - Bi-annually, Mono 1000 - Generate Project
WO0006216	AirMaint - Airfreshner Maintenance	Durban	E PRJ0000403 TT002 - Weekly - Call per WO
WO0006213	2MS - 2 month service	Durban	
W00006211	ΔirMaint - Δirfreshner Maintenance	Durhan	
Open Windows •		•	User : JulandaK 22/11/2021 Version : 2.5.0.4 Example Company v2.5.0.0

- The selected work order(s) will be **removed** from the Assigned Work
 Orders sub grid of the **project** you dragged them from, and
- 4. can now be viewed in the **Assigned Work Orders** sub grid of the project you have **reassigned** (dropped) them to.
- 5. Click on Save Work Order to Projects.



Work Order Allocation - Unlink or Re-Assign Work

-	Ŧ	Work Order Alle	ocation - BPO: Version 2.5.	.0.4	- Example Com	pany v2.5.	0.0				_ – x
	i Ha	me Equipment / Locations Contract Finance / HR Invento	ry Maintenance / Projects	5	Manufacturing	Procureme	nt Sales	Service	Reporting	Utilities	_ & ×
A	uto Create Projects	Save Work Order to Projects Save Layout Work	Find WO/s spaces Show All		Search						
	Projects 🦼	Work Orders	∡ Seard	h 1 [A						~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~
H		Unassigned Work Orders : 1623				Project	Work Order	rs : 288 pr	ojects, 360 w	ork orders	
D											
	WOCode	✓ Description	SiteName		ProjectRef ·	 Description 	n				
٩	a n c	4 0 4	ADC	9	1 0 0	R C					<u></u>
Þ	WO0006238	Test PQ Source Type Work Order	Durban			Second in	stallation pro	ject for Tita	an Group		U
	WO0006237	WS - Weekly Service	Durban	•	PRJ0000415	SP240 Ne	w Deal				
	WO0006236	WS - Weekly Service	Durban		Assigned	Work Orders					
	WO0006235	Tier - Commercial Tier Test	Durban		۹ WOCode	e	WOType	Des	scription		
	WO0006233	WO0006233 BathBinMaint - Bathroom Bin Maintenance			► WO0006	5141	п	SP2	240-2 - Network)-2 - Network setup	
	WO0006232	2 WS - Weekly Service	Durban	4	WO0006	00006142 INST		SP2	SP240-3 - Documentation		
	WO0006231	WS - Weekly Service	Durban								۱.
	WO0006230	AirMaint - Airfreshner Maintenance	Durban			Sprint SP	1912 New De	al Sale			
	WO0006228	1MMS - 1 Month Machine Service	Durban			PR.J408/8	S001				
	WO0006227	AirMaint - Airfreshner Maintenance	Durban		PRJ0000412	Instal Ma	chines				
	WO0006226	BathBinMaint - Bathroom Bin Maintenance	Durban		PRJ0000411	Site Inspe	ection				
	WO0006225	WS - Weekly Service	Durban		PRJ0000410	New mad	nine installatio	on			
L	WO0006223	1MMS - 1 Month Machine Service	Durban			Maintena	nce Project -	SP400			
L	WO0006222	WS - Weekly Service	Durban		E PRJ0000407	OSU 100 1					
L	WO0006221	1MMS - 1 Month Machine Service	Durban		Assigned	Work Orders					
L	WO0006219	BathBinMaint - Bathroom Bin Maintenance	Durban		۹ WOCode	e	WOType	Des	scription		
L	WO0006218	WS - Weekly Service	Durban 4	-	+ WO0006	5140	INST	SP2	240-1 - Machine	Installation	
L	WO0006217	WS - Weekly Service	Durban		-						
	WO0006216	AirMaint - Airfreshner Maintenance	Durban		۰						+ +
	WO0006213	2MS - 2 month service	Durban	4	C						Þ
4	W00006211	ΔirMaint - Δirfreshner Maintenance	Durhan	>	c 🔲 [fldSiteID] In	n ('1', '0')					Edit Filter
C	pen Windows	•			1	User : Juland	aK 22/11/	2021 Ver	rsion : 2.5.0.4	Example Co	ompany v2.5.0.0

MNU.151.004

Help v2024.5.0.7/1.0 - Pg 5 - Printed: 21/08/2024

CO3 Technologies (Pty) Ltd © Company Confidential