

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

# **PROJECTS**

# **PROJECTS - ASSIGNMENT HISTORY**

In BPO2 v2.5.0.8 (or higher) the first assignee is no longer required to accept the assignment before subsequent assignments on the same project with different work orders can be made.

#### Ribbon Access: Maintenance / Projects > Projects

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Ins	structions	Tasks	Generate Tasks	Work Requests	Maintenance Radar	Projects	Standard Methodology	Work Order Allocation	Technician Allocation					
	Pre	ventative		Reactive	Radar	4	Proje	ects	4					$\Diamond$

- 1. The **Project Listing** screen will be displayed.
- 2. Select the **Site** where the project can be located.
  - The example has **Durban** selected.
- 3. Ensure that the **Status** has been set to **Open**.

Note that you cannot assign resources to a Closed project.

- 4. Click on the **row** of the project you wish to assign a technician to.
- 5. Click on the Assignment History tile.



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			New machine installation	0	Open	02/10/2014	Bianca Du Toit	No	DER001	Derton / Techno		
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		PRJ0000089	Machine installations	0	Open	08/02/2015	Belinda Sharman	No	HOP001	Hope Works (Pt		
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		E PRJ0000098	Site Inspectino	0	Open	18/03/2015	Bianca Du Toit	No	HOP001	Hope Works (Pt		
		PR30000099	Install Machines	0	Open	21/03/2015	Bianca Du Toit	No	HOP001	Hope Works (Pt		
			Machine inspection required	0	Open	29/05/2015	Belinda Sharman	No				
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- 6. The **Assignment Listing for Project:** [project ref number] screen will be displayed.
- 7. A list of the assignment details for the Technician(s) that have been assigned to this Project with their Work Order Codes can be viewed from this screen.

### **ASSIGN TECHNICIAN**

6. Click on **Add**.

Short cut key: Right click to display the Process menu list. Click on Add.



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- 9. The **Project Assignment: Reference No.:** [project ref number] screen will be displayed
  - Assigned To: Click on the down arrow to select the Technician you would like to assign.
  - **Detail:** This field will auto populate with the description of the project as recorded in the project listing screen. You can type in extra details, if required.
  - Assignment Date: The date and time will be auto populated with the current date and time.
    - Type in or click on the down **arrow** in the date field to use the **calendar function** to select an alternative date, if required.
    - Type in or use the **arrow indicators** to select an alternative **time**, if required.
  - Assigned By: This field will default to the user creating the assignment. Click on the down **arrow** to select an

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alternative person, for example the name of the Project Manager, if required.

- Functional Location or Equipment: This shows whether the project assignment is linked to a Location or a Machine.
- **Item:** This field will auto populate with the Location or Machine linked to the project.
- Location: This field will auto populate based on the description of the item linked to the project.
- Create new Work Order: Click on the check box to create a new work order.

If the technician needs to follow up on the same project, but for a different task, then make sure you also change the assignment detail accordingly.

- Open Work Orders: From here you can view the list of all the Open Work Orders linked to this project.
   Select to link the technician to one of the open work orders.
- 10. When you have finished adding the technician assignment details, click on **Save**.



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- 11. When you receive the **Project Processing** message to confirm that;
  - Project No: [project ref number] has been assigned.
- 12. Click on OK.

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- 13. You will return to the **Assignment Listing for Project** screen where you can **view** the details of the **technician(s)** assigned to this project.
- 14. Click on **Close** to return to the **Project Listing** Screen.

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### **UNASSIGN TECHNICIAN**

- 1. From the Assignment Listing for Project: [project ref number] screen,
- 2. Click on the **row** of the technician and the **correct Work Order** the technician is linked to.
- 3. Click on **Delete**.

Short cut key: Right click to display the Process menu list. Click on Delete.



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- 4. When you receive the **Delete Note** message to confirm;
  - Are you sure you want to delete this assignment from the project [project ref number]?
- 5. Click on **Yes**.



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- 6. The **Rejection Comments** text box will display.
- Type in the rejection comments for the assignment removal and click on Save.

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- 8. The **Assignment Listing for Project** screen has been updated with the assignment comments.
- 9. Click on **Close** to return to the **Project Listing** screen.
- 10. You can now "Assign Technician " on page 2 to this Work Order, if required.

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Judith Mudzengi Judith Mudzengi	Judith Mudzengi Judith Mudzengi	12/04/2017 12/04/2017	15:56:37 15:56:26	SP240 New Deal 1 Work Order not required on Project. Incorrectly assigned	0.00	
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## FORCE ACCEPT

- 1. From the Assignment Listing for Project: [project ref number] screen,
- 2. Click on the **row** of the technician you wish to Accept the Work Order assignment for.

Note that the Status for the Technician selected in the Status Column is N - New.

3. Click on Force Accept.

Short cut key: Right click to display the Process menu list. Click on Force Accept.



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AssigneeName	AssignorName	AssignDate	AssignTime	Comments	GPSLongitude	GPSLatitude	Status	WOCode	WODesc
REC	100	=	100	·O:	=	=	-0:	REC.	R C
Arial Blythe	Julanda Kessler	03/09/2021	13:24:11	SP240 New Deal.	0.00	0.00	N	WO0000205	SP240-1 - Ma
Mary Thompson	Julanda Kessler	03/09/2021	11:27:49	SP240 New Deal.	0.00	0.00		WO0002336	Rollers need
Bianca Du Toit	Bianca Du Toit	26/07/2018	12:47:33	SP240 New Deal.	0.00	0.00	N	WO0002257	SP240 New D
Bianca Du Toit	Bianca Du Toit	29/05/2018	12:50:57	Test project assignment with auto accept assignment on	0.00	0.00	R	WO0002198	Test project
Judith Mudzengi	Judith Mudzengi	26/04/2017	10:54:06		0.00	0.00	A	WO0001313	Retest issue
Judith Mudzengi	Judith Mudzengi	12/04/2017	15:56:37	SP240 New Deal 1	0.00	0.00	A	WO0000206	SP240-2 - Ne
Judith Mudzengi	Judith Mudzengi	12/04/2017	15:56:26	Work order no longer required for the project. Incorrectly .	0.00	0.00	R	WO0000205	SP240-1 - Ma

4. The Assignment Listing for Project screen has been updated.

Note that the **Status** for the Technician that was selected in the Status Column has changed to **A** - **Accept**.

5. Close the screen to return to the **Project Listing** screen.



# Projects - Assignment History

A	Home Home		Contract Finance Vorkspaces Refresh	e / HR Inventor	y Maintenance / Projects Manufacturing Procureme	ent Sales	Service R		Utilities	- 8 ×
	Acc Processing	Format	Curr					for the	Technician - Accept	6
	AssigneeName	AssignorName	AssignDate	AssignTime	Comments	GPSLongitude	GPSLatitude	Status	WOCode	WODesc
P	REC	R C	=	REC	×0:	=	=	10:	* <b>0</b> ¢	8 <b>8</b> 0
	Arial Blythe	Julanda Kessler	03/09/2021	13:24:11		0.00	0.00	A	WO0000205	SP240-1-1
	Mary Thompson	Julanda Kessler	03/09/2021	11:27:49	SP240 New Deal.	0.00	0.00	N	WO0002336	Rollers nee
	Bianca Du Toit	Bianca Du Toit	26/07/2018	12:47:33	SP240 New Deal.	0.00	0.00	N	WO0002257	SP240 New
	Bianca Du Toit	Bianca Du Toit	29/05/2018	12:50:57	Test project assignment with auto accept assignment on	0.00	0.00	R	WO0002198	Test projec
	Judith Mudzengi	Judith Mudzengi	26/04/2017	10:54:06		0.00	0.00	A	WO0001313	Retest issu
	Judith Mudzengi	Judith Mudzengi	12/04/2017	15:56:37	SP240 New Deal 1	0.00	0.00	A	WO0000206	SP240-2 - N
	Judith Mudzengi	Judith Mudzengi	12/04/2017	15:56:26	Work order no longer required for the project. Incorrec	0.00	0.00	R	WO0000205	SP240-1 - M

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