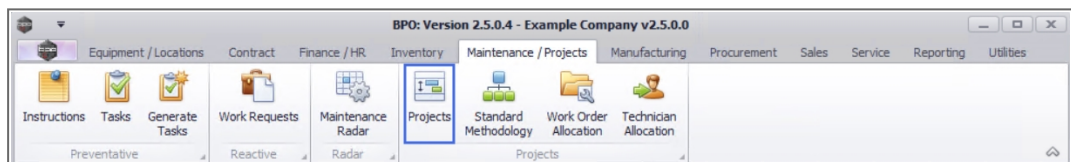We are currently updating our site; thank you for your patience.
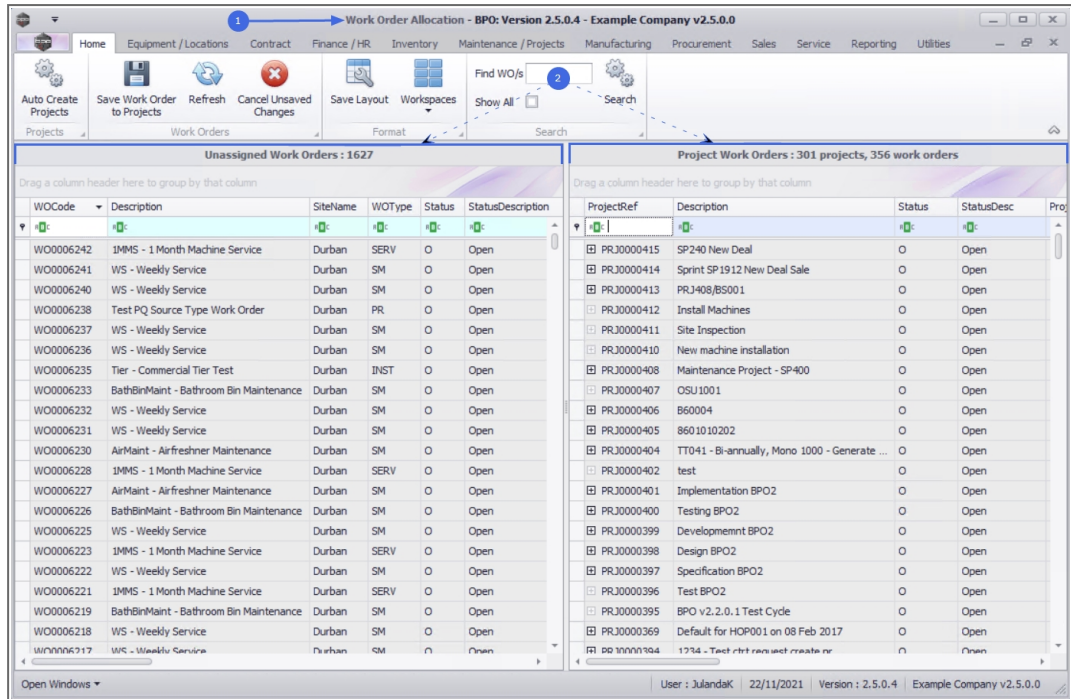
PROJECTS

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

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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.
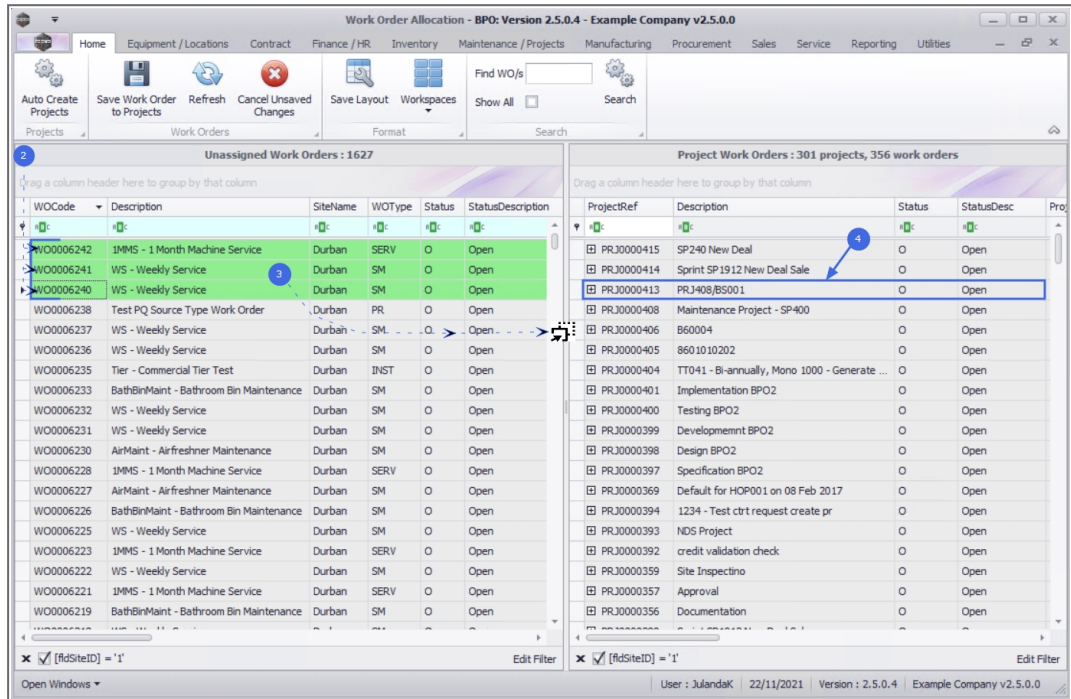
SELECTING WORK ORDERS

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

1. 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.

3. 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,

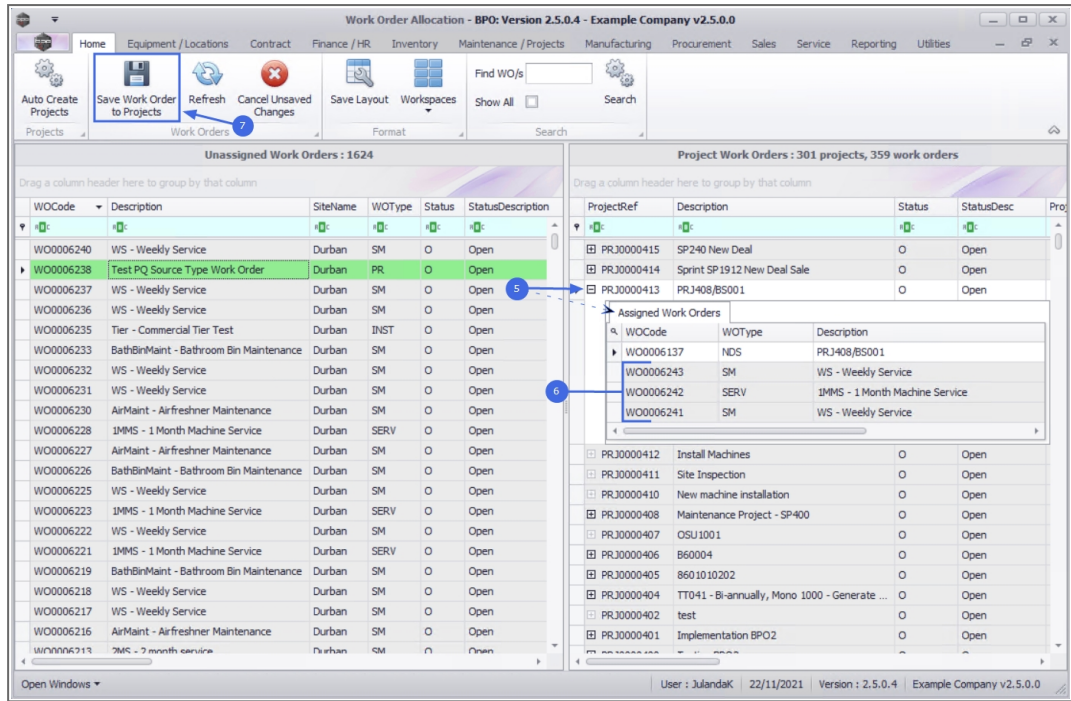4. and drop on the correct project in the **Project Work Orders** frame.

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**.

8. The selected work order allocations will be **linked** to the selected project and the **Assigned Work Orders** sub grid will close.
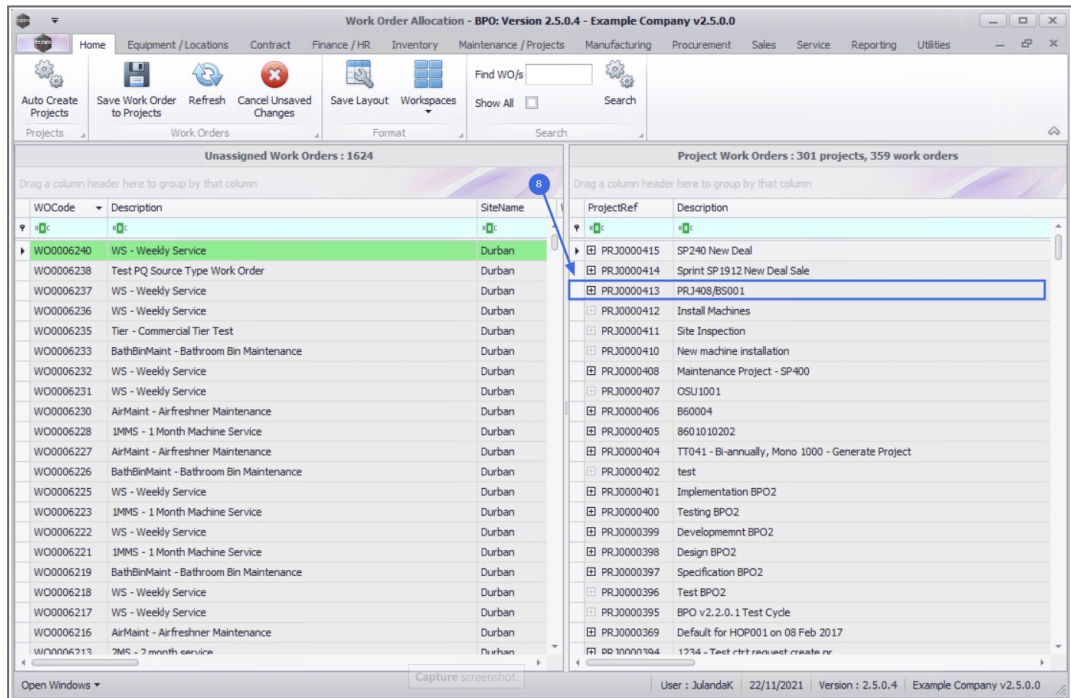
CANCEL A WORK ORDER ALLOCATION

A Work Order allocation can **only** be cancelled when it has **not yet** been saved.

This action will result in:

    i. **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 **all** projects with unsaved work order allocations.

1. The example, has **WO0006240** allocated to **PRJ0000412** but the change has not yet been saved.

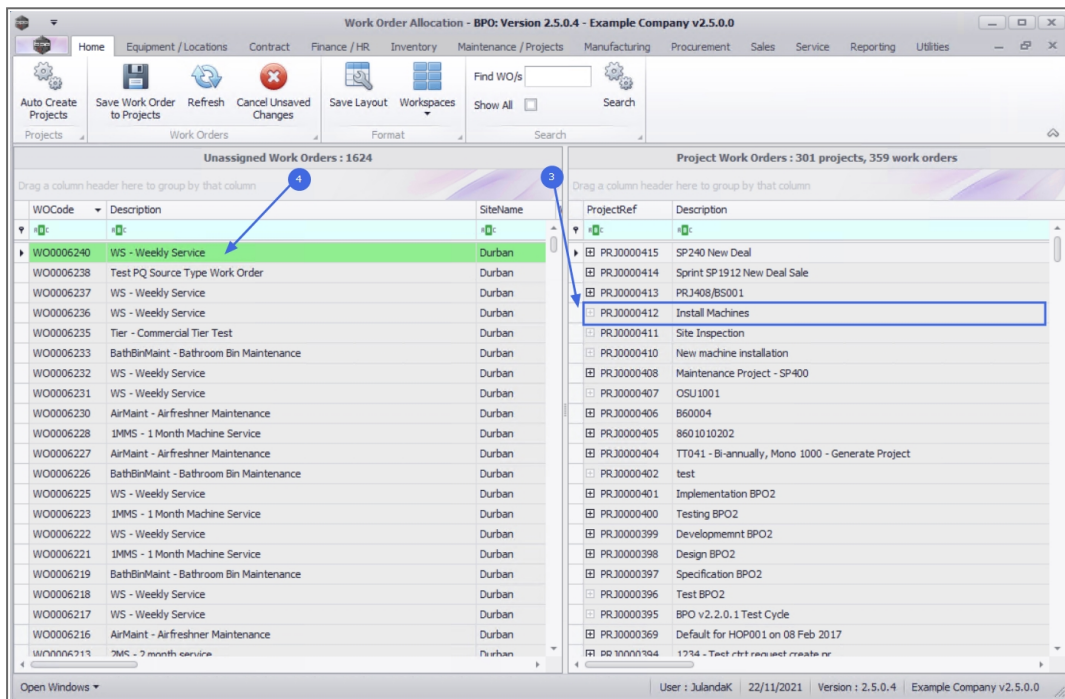2. Click on **Cancel Unsaved Changes**.
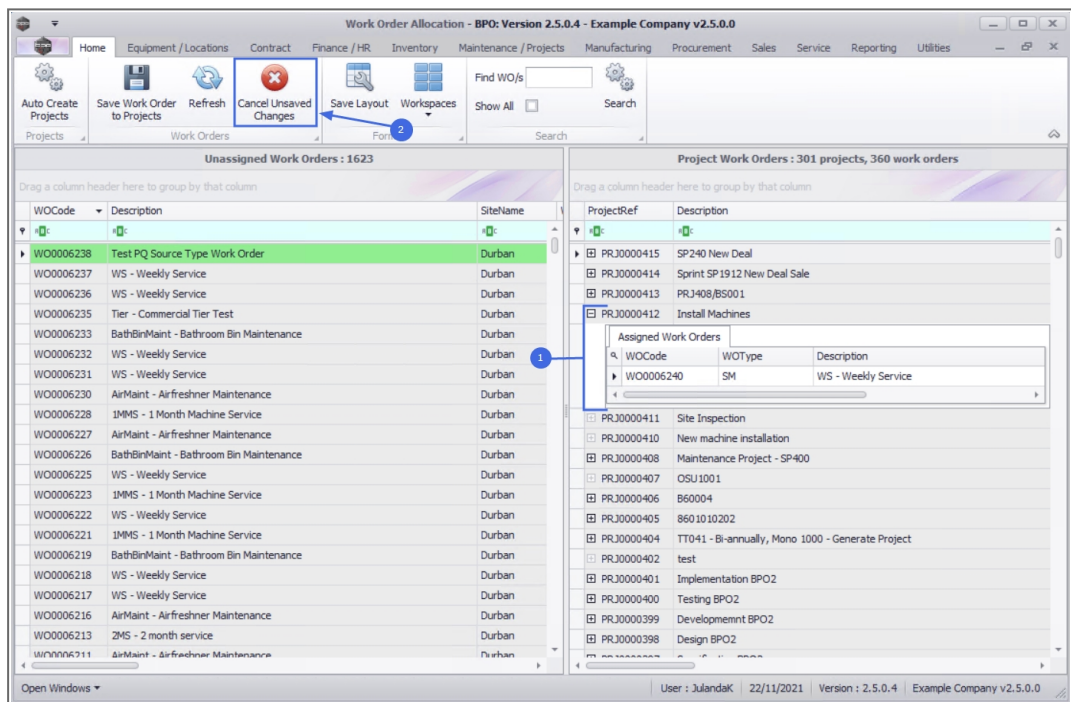
3. The recently allocated work order(s) will be **removed** from the project and the **Assigned Work Orders** frame will be **closed**.

> *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.

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

MNU.151.002