

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

PROJECTS

WORK ORDER ALLOCATION - LINK TO NEW PROJECT

An **unassigned** work order(s) can be allocated to a **new** project.

One or multiple work orders can be linked to a **new** project.

Ribbon Access: Maintenance / Projects > Work Order Allocation

• •					BPO: Versio	n 2.5.0.4 - Exa	mple Com	pany v2.5.0.0				C	_) D) ×
	Equipmen	t / Locations	Contract i	Finance / HR.	Inventory	Maintenance / P	Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities
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Instructions	s Tasks	Generate Tasks	Work Requests	Maintenance Radar	e Projects	Standard Methodology	Work Orde 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.



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		Equipment / Locations Contract	Finance / H		itory i	Maintenance / Project	00	Procurement Sales Service Reportin	ıg Utiliti	es — 🗆	
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		Unassigned Work (Orders : 162	27			11	Project Work Orders : 301 projects, 356	work ord	ers	
	WOCode 👻	Description	SiteName	WOType	Status	StatusDescription	ProjectRef	Description	Status	StatusDesc	1
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	WO0006242	1MMS - 1 Month Machine Service	Durban	SERV	0	Open	PRJ0000415	SP240 New Deal	0	Open	
	WO0006241	WS - Weekly Service	Durban	SM	0	Open	PRJ0000414	Sprint SP1912 New Deal Sale	0	Open	
	WO0006240	WS - Weekly Service	Durban	SM	0	Open	PRJ0000413	PRJ408/BS001	0	Open	
	WO0006238	Test PQ Source Type Work Order	Durban	PR	0	Open	PRJ0000412	Install Machines	0	Open	
	WO0006237	WS - Weekly Service	Durban	SM	0	Open		Site Inspection	0	Open	
	WO0006236	WS - Weekly Service	Durban	SM	0	Open	E PRJ0000410	New machine installation	0	Open	
	WO0006235	Tier - Commercial Tier Test	Durban	INST	0	Open	PRJ0000408	Maintenance Project - SP400	0	Open	
	WO0006233	BathBinMaint - Bathroom Bin Maintenance	Durban	SM	0	Open	PRJ0000407	OSU1001	0	Open	
	WO0006232	WS - Weekly Service	Durban	SM	0	Open	■ PRJ0000406	B60004	0	Open	
	WO0006231	WS - Weekly Service	Durban	SM	0	Open		8601010202	0	Open	
	WO0006230	AirMaint - Airfreshner Maintenance	Durban	SM	0	Open	PR30000404	TT041 - Bi-annually, Mono 1000 - Generate	0	Open	
	WO0006228	1MMS - 1 Month Machine Service	Durban	SERV	0	Open	PR30000402	test	0	Open	
	WO0006227	AirMaint - Airfreshner Maintenance	Durban	SM	0	Open		Implementation BPO2	0	Open	
	WO0006226	BathBinMaint - Bathroom Bin Maintenance	Durban	SM	0	Open		Testing BPO2	0	Open	
	WO0006225	WS - Weekly Service	Durban	SM	0	Open		Developmemnt BPO2	0	Open	
	WO0006223	1MMS - 1 Month Machine Service	Durban	SERV	0	Open		Design BPO2	0	Open	
	WO0006222	WS - Weekly Service	Durban	SM	0	Open		Specification BPO2	0	Open	
	WO0006221	1MMS - 1 Month Machine Service	Durban	SERV	0	Open	PRJ0000396	Test BPO2	0	Open	
	WO0006219	BathBinMaint - Bathroom Bin Maintenance	Durban	SM	0	Open	PRJ0000395	BPO v2.2.0.1 Test Cycle	0	Open	
	WO0006218	WS - Weekly Service	Durban	SM	0	Open		Default for HOP001 on 08 Feb 2017	0	Open	
	W00006217	WS - Weekly Service	Durhan	SM	0	Onen	FFI PR 10000394	1734 - Test strt request create nr	0	Onen	

- 3. 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 new project, or
- 4. 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 new 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.
- 5. Click anywhere on the selected line(s) then drag the work order(s) you want to allocate, from the **Unassigned Work Orders** frame,
- 6. and drop on the New Project in the **Project Work Orders** frame.



	Home	Equipment / Locations Contract i	Finance / HR Inventory	Maintenance / Projects		Manufacturing	Procurement	Sales	Service	Reporting	Utilities	-	8
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3		Unassigned Work Or	ders : 1624				Project Wo	rk Order	s : 301 pro	jects, 359 wo	ork orders		
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W	00006236	WS - Weekly Service	<u>`</u> ≱₅	>- Dürban - 7		E PRJ0000077	SubProject 1						
W	00006235	Tier - Commercial Tier Test		Durban	H	PRJ0000082	Test Projects	viewed in	Customer s	creen			
W	00006233	BathBinMaint - Bathroom Bin Maintenance		Durban	H	PRJ0000083	New machine	installatio	n				
W	00006232	WS - Weekly Service		Durban		PRJ000085	tst						
W	00006231	WS - Weekly Service		Durban		PRJ000087	SP240 New D	eal					
W	00006230	AirMaint - Airfreshner Maintenance		Durban		E PRJ000089	Machine insta	allations					
W	00006228	1MMS - 1 Month Machine Service		Durban		PRJ0000090	Sprint SP 191	2 New Dea	al Sale				
W	00006227	AirMaint - Airfreshner Maintenance		Durban		PRJ0000091	Service for H	OP001 on	06 Nov 201	4			
W	00006226	BathBinMaint - Bathroom Bin Maintenance		Durban		PRJ0000092	Scheduled Ma	aintenance	for HOP00	1 on 06 Nov 20	14		
W	00006225	WS - Weekly Service		Durban		PRJ0000093	Scheduled Ma	aintenance	for DER00	1 on 06 Nov 20	14		
W	00006223	1MMS - 1 Month Machine Service		Durban			Scheduled M	aintenance	for YES001	on 06 Nov 20	14		
W	00006222	WS - Weekly Service		Durban			Scheduled Ma	aintenance	for TIA001	on 06 Nov 201	14		
W	00006221	1MMS - 1 Month Machine Service		Durban			Site Inspectin	10					
W	00006219	BathBinMaint - Bathroom Bin Maintenance		Durban			Install Machin	nes					
W	00006218	WS - Weekly Service		Durban			Machine insp	ection requ	uired				
W	00006217	WS - Weekly Service		Durban		➡ PRJ0000101	Scheduled M	aintenance	for HOP00	1 on 14 May 20	15		
W	00006216	AirMaint - Airfreshner Maintenance		Durban			Scheduled M	aintenance	for DER00	1 on 14 May 20	15		
W	00006213	2MS - 2 month service		Durhan		FT PR 10000 103	Scheduled M	aintenance	for HOPOO	1 on 14 Aug 20	14		

- 7. The Add a new project screen will display.
- 8. Click in the **Description** text box to type in a description for the project.
- 9. Confirm the editable project **Identification** and **Schedule** details, for example: Project Type, Start and End Dates.

For a detailed handling of this topic refer to Projects - Add Main Project

10. When you have finished adding the relevant details, click on **Save**.



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► W00006	Functions	Description	Second installation pro Titan Group	ject for 🔺 *		Customer Code	TIA001			4 O
WO0006						Tel No.	031 852 9632			Orde
WO0006		Project Reference				Account Code				5
WO0006		Project Type	Jnique	• *		Customer Status	Active	Is Debtor	1	Add
W000000		Parent Project Details			F	Contact No.				Additional Data
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WO0006		End Date	14/01/2022 -							
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VIEW NEW PROJECT

- 11. The new project will be displayed in the **Project Work Orders** data grid as **NEWPROJ**.
- 12. Click on the **Expand** button in the row of the **New Project** to view the linked work order detail .

Remember that if you have assigned the wrong work order(s), click on **Cancel Unsaved Changes** to cancel the assignment.

13. Click on Save Work Order to Projects.



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P	rojects 🖌	Work Orders	. Sear	ch	4								
		Unassigned Work Orders : 1623				Project	Work Order	s : 302 pr	ojects, 360 w	ork orders			
	WOCode -	Description	SiteName	F	rojectRef	▲ Descript	ion					-	
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,	WO0006238	Test PQ Source Type Work Order	Durban	E	New Project	/							
1	WO0006237	WS - Weekly Service	Durban 12		NEWPROJ	Second	installation pro	ject for Tit	an Group				
	WO0006236	WS - Weekly Service	Durban		Assigner	d Work Order							
	WO0006235	Tier - Commercial Tier Test	Durban	1	9 WOCo		WOType	De	scription				
	WO0006233	BathBinMaint - Bathroom Bin Maintenance	Durban		A . WO00		SM		- Weekly Servi	ice			
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	WO0006230	AirMaint - Airfreshner Maintenance	Durban		PRJ000007		echnician Assig	Inment					
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	WO0006227	AirMaint - Airfreshner Maintenance	Durban		PRJ000008;	,	jects viewed ir	Customer	screen				
	WO0006226	BathBinMaint - Bathroom Bin Maintenance	Durban		PRJ000008		chine installatio						
	WO0006225	WS - Weekly Service	Durban		PRJ000008								
	WO0006223	1MMS - 1 Month Machine Service	Durban		PRJ000008		ew Deal						
	WO0006222	WS - Weekly Service	Durban	B	PRJ0000089	9 Machine	installations						
	WO0006221	1MMS - 1 Month Machine Service	Durban	B	PR 10000090) Sprint S	P1912 New De	al Sale					
	WO0006219	BathBinMaint - Bathroom Bin Maintenance	Durban		PRJ000009	1 Service	for HOP001 or	06 Nov 20	14				
	WO0006218	WS - Weekly Service	Durban		PRJ000009;	2 Schedule	ed Maintenanc	e for HOPO	01 on 06 Nov 2	014			
	WO0006217	WS - Weekly Service	Durban	B	9 PRJ0000093	3 Schedul	ed Maintenanc	e for DERO	01 on 06 Nov 2	014			
	WO0006216	AirMaint - Airfreshner Maintenance	Durban		9 PRJ0000094		ed Maintenanc	e for YESO	01 on 06 Nov 20	014			
	WO0006213	2MS - 2 month service	Durban	B	PRJ000009	5 Schedule	ed Maintenanc	e for TIAOO	1 on 06 Nov 20)14			
	W00006211	ΔirMaint - Δirfreshner Maintenance	Durhan		1 00 1000000								

ASSIGN PROJECT NUMBER

14. The newly created project will now be assigned a **Project Reference**

Number.

- The example project has been assigned project number **PRJ0000416**.
- 15. Click on **Close** to exit this screen.



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	Unassigned Work Orde				Project Work Orders : 302 projects, 360 work orders
	ider here to group by that column			Drag a column hea	14 nere to group by that column
WOCode 👻	Description		SiteName	ProjectRef	✓ Description
P #00	* D c		10c 🔶	9 x0c	*Dc
WO0006238	Test PQ Source Type Work Order		Durban	▶ 🗄 PRJ0000416	Second installation project for Titan Group
WO0006237	WS - Weekly Service		Durban	PRJ0000415	SP240 New Deal
WO0006236	WS - Weekly Service		Durban	PRJ0000414	Sprint SP1912 New Deal Sale
WO0006235	Tier - Commercial Tier Test		Durban		PRJ408/BS001
WO0006233	BathBinMaint - Bathroom Bin Maintenance		Durban	PRJ0000412	Install Machines
WO0006232	WS - Weekly Service		Durban	PRJ0000411	Site Inspection
WO0006231	WS - Weekly Service		Durban	PRJ0000410	New machine installation
WO0006230	AirMaint - Airfreshner Maintenance		Durban		Maintenance Project - SP400
WO0006228	1MMS - 1 Month Machine Service		Durban	PR30000407	OSU1001
WO0006227	AirMaint - Airfreshner Maintenance		Durban		B60004
WO0006226	BathBinMaint - Bathroom Bin Maintenance		Durban		8601010202
WO0006225	WS - Weekly Service		Durban		TT041 - Bi-annually, Mono 1000 - Generate Project
WO0006223	1MMS - 1 Month Machine Service		Durban		TT002 - Weekly - Call per WO
WO0006222	WS - Weekly Service		Durban	PRJ0000402	test
WO0006221	1MMS - 1 Month Machine Service		Durban		Implementation BPO2
WO0006219	BathBinMaint - Bathroom Bin Maintenance		Durban		Testing BPO2
WO0006218	WS - Weekly Service		Durban		Developmemnt BPO2
WO0006217	WS - Weekly Service		Durban		Design BPO2
WO0006216	AirMaint - Airfreshner Maintenance		Durban	PRJ0000397	Specification BPO2
WO0006213	2MS - 2 month service		Durban	PRJ0000396	Test BPO2
W00006211	AirMaint - Airfreshner Maintenance		Durhan	PR 1000395	RPO v2 2 0 1 Test Cycle

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