

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

PROJECTS

WORK ORDER ALLOCATION – AUTO CREATE PROJECTS

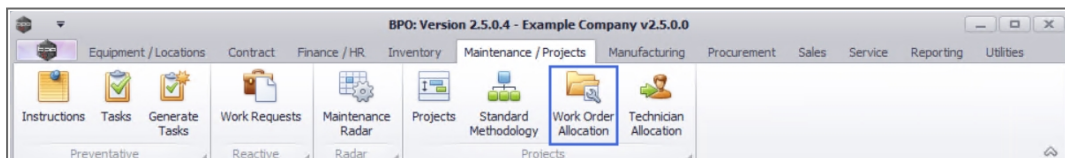
The **Auto Create Projects** process creates projects from work orders with matching parameters.

Important Notes

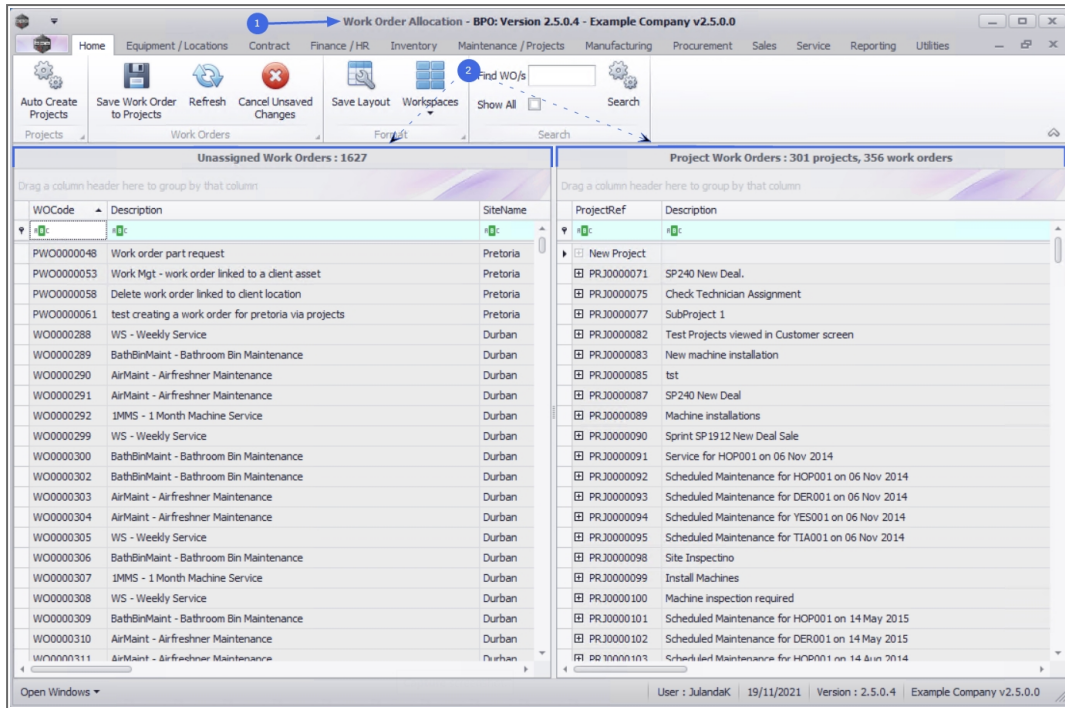
The default Project Manager for Auto Created Projects will use the Site Task Manager set up in the **company site configuration**

This person should not be configured as a **Technician**

Ribbon Access: Maintenance / Projects > Work Order Allocation



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.



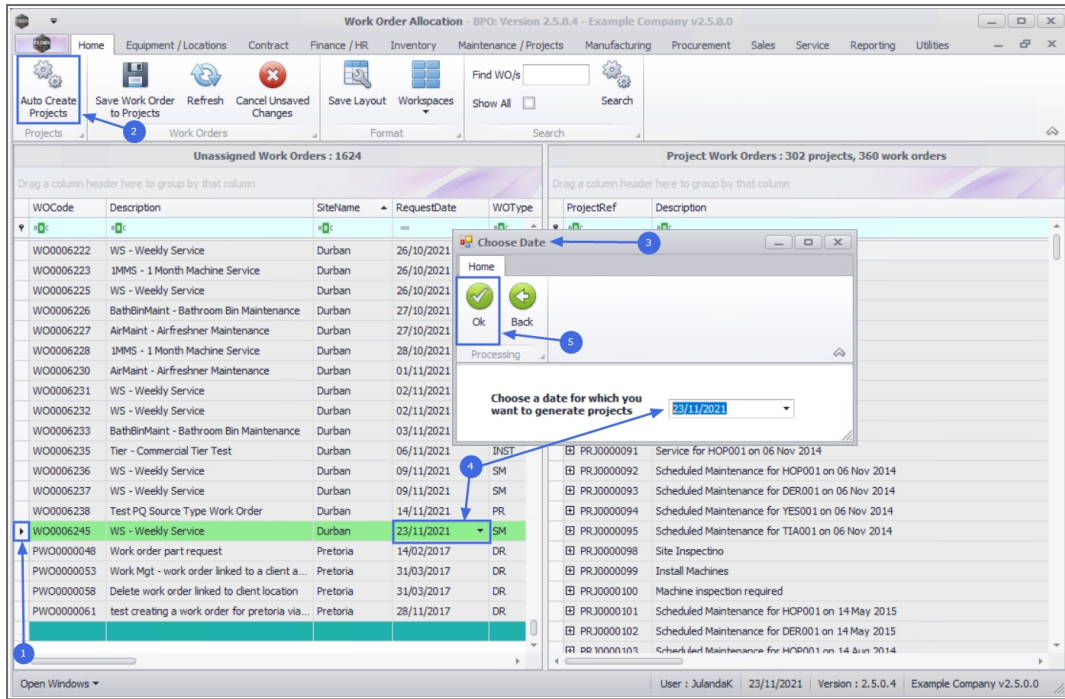
SINGLE WORK ORDER

1. In the **Unassigned Work Orders** frame, click in the **row** of the work order you wish to create a project for.
2. Click on **Auto Create Projects**.
3. The **Choose Date** screen will display.
4. The **date field** will display the current date. Type in or click on the down **arrow** to use the calendar function to select the date to generate the project for.

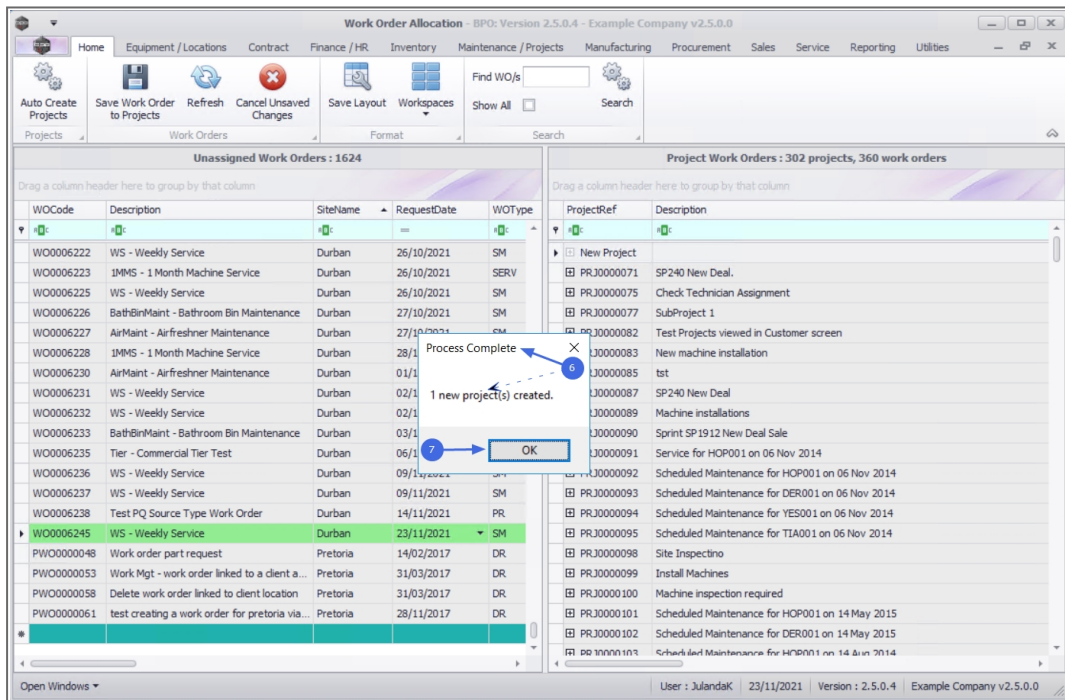


Note that the date for the Project has to match the Request Date of the work order.

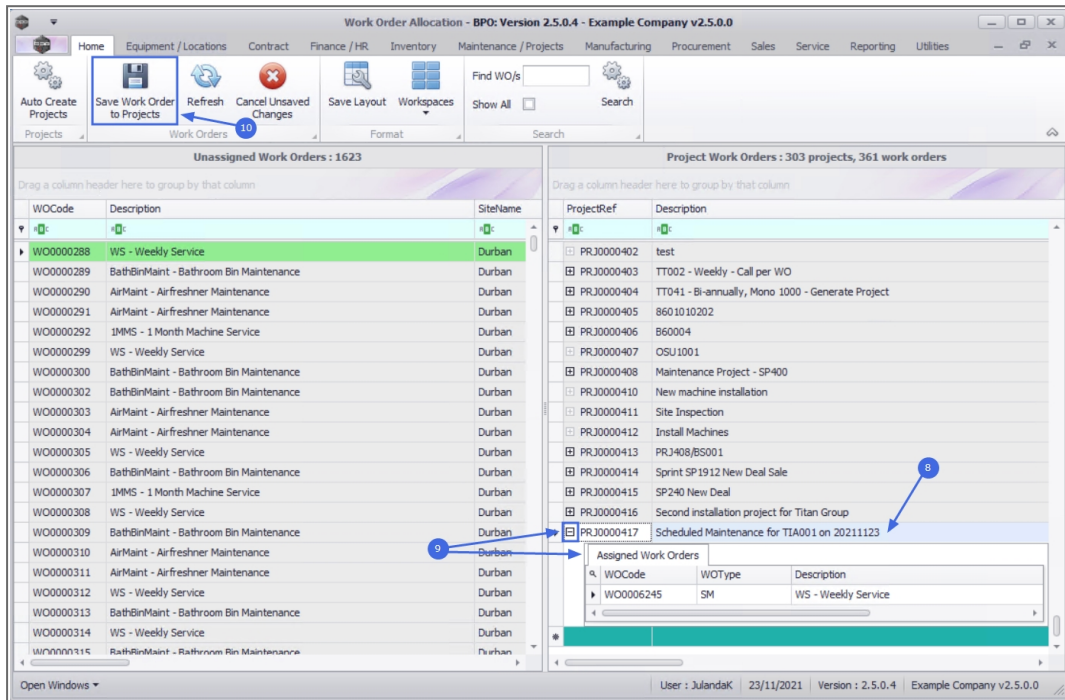
5. Click on **OK**.



6. When you receive the **Process Complete** message to confirm that;
 - **1 new project(s) created.**
7. Click on **OK**.



8. The newly created project will be displayed in the **Project Work Orders** frame.
9. Click on the **expand** button in the row of the new project to display the **Assigned Work Orders** frame.
10. Click on **Save Work Order to Projects**.

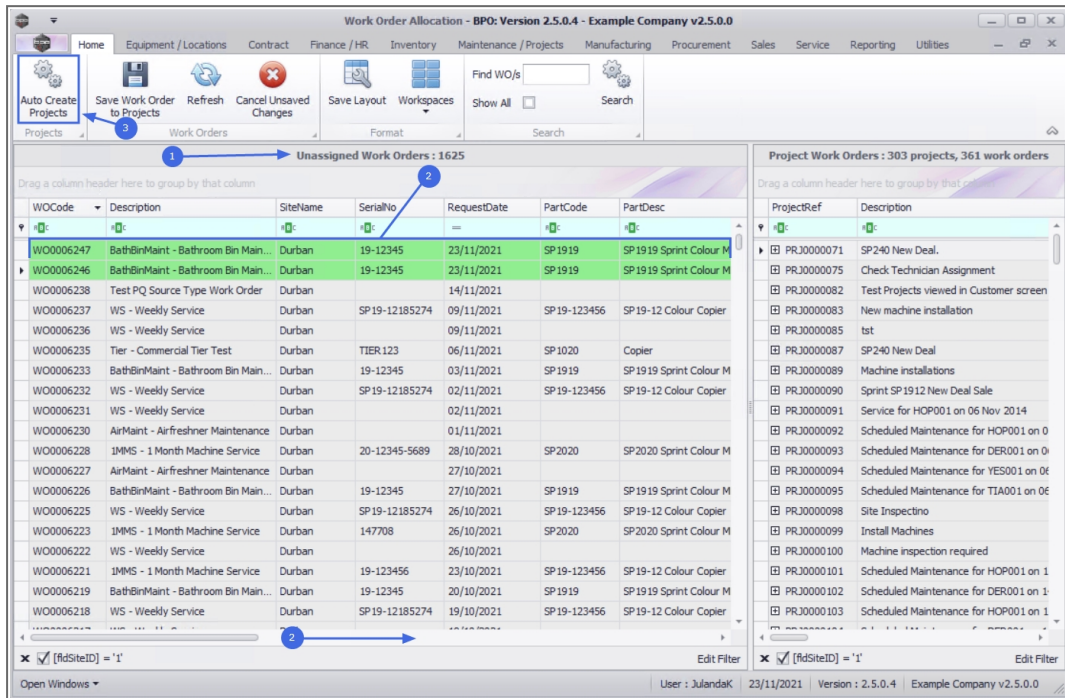


AUTO CREATE SINGLE PROJECT WITH MULTIPLE WORK ORDERS

Important Note To create a single project from multiple work orders, the work order parameters have to be the same .

1. In the **Unassigned Work Order** frame, select the Work orders you wish to allocate to a project.
 - To select multiple work orders, hold down the **Ctrl** key on the keyboard and use your **mouse** to click on the relevant work orders to select.

2. **Scroll right** in this frame until you can view the parameters for the work orders to ensure that they are the same.
3. Click on **Auto Create Projects**.



4. The **Choose Date** screen will display.
5. The **date field** will auto populate with the current date. Type in or click on the down **arrow** to use the calendar function to select an alternative date, if required.



Note that the date for the Project has to match the Request Date of the work order.

6. Click on **OK**.

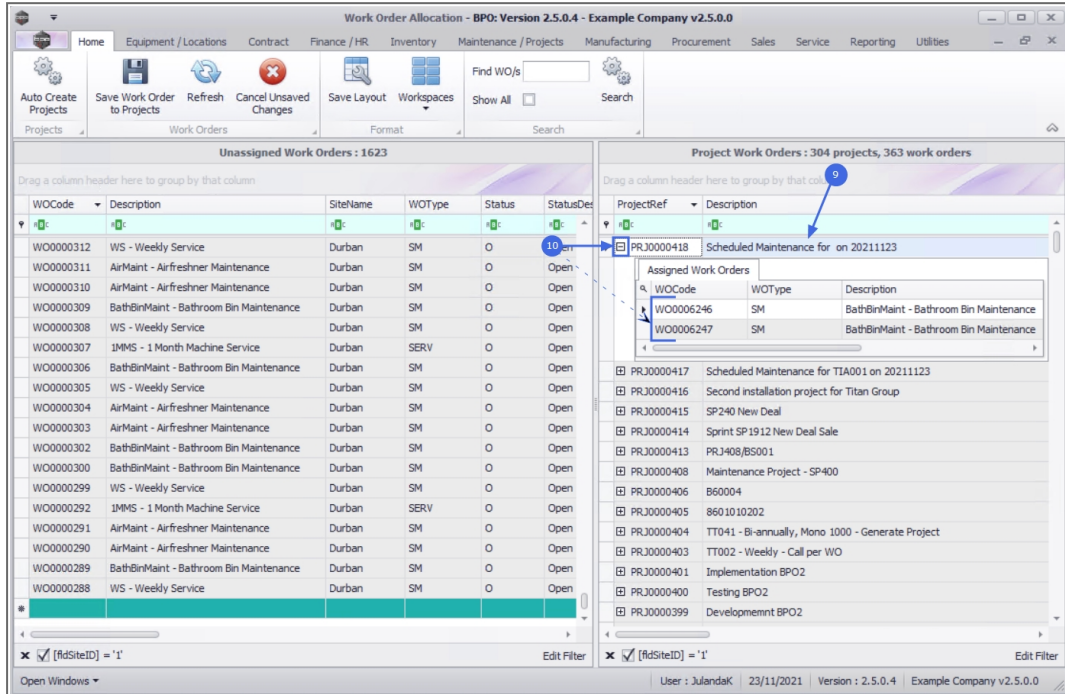
The screenshot shows the 'Work Order Allocation' interface. A 'Choose Date' dialog box is open, asking the user to select a date for generating projects. The date '23/11/2021' is selected in the date picker. The background displays a table of 'Unassigned Work Orders' and a list of 'Project Work Orders'.

WCode	Description	SiteName	SerialNo	RequestDate	PartCode	PartDesc
WO0006247	BathBinMaint - Bathroom Bin Main...	Durban	19-12345	23/11/2021	SP1919	SP1919 Sprint Colour M
WO0006246	BathBinMaint - Bathroom Bin Main...	Durban	19-12345	23/11/2021	SP1919	SP1919 Sprint Colour M
WO0006238	Test PQ Source Type Work Order	Durban		14/11/2021		
WO0006237	WS - Weekly Service	Durban	SP19-12185274	09/11/2021	SP19-123456	SP19-12 Colour Copier
WO0006236	WS - Weekly Service	Durban		09/11/2021		
WO0006235	Tier - Commercial Tier Test	Durban	TIER 123	06/11/2021		
WO0006233	BathBinMaint - Bathroom Bin Main...	Durban	19-12345	03/11/2021		
WO0006232	WS - Weekly Service	Durban	SP19-12185274	02/11/2021		
WO0006231	WS - Weekly Service	Durban		02/11/2021		
WO0006230	AirMaint - Airfreshner Maintenance	Durban		01/11/2021		
WO0006228	IMMS - 1 Month Machine Service	Durban	20-12345-5689	28/10/2021	SP2020	SP2020 Sprint Colour M
WO0006227	AirMaint - Airfreshner Maintenance	Durban		27/10/2021		
WO0006226	BathBinMaint - Bathroom Bin Main...	Durban	19-12345	27/10/2021		
WO0006225	WS - Weekly Service	Durban	SP19-12185274	26/10/2021	SP19-123456	SP19-12 Colour Copier
WO0006223	IMMS - 1 Month Machine Service	Durban	147708	26/10/2021	SP2020	SP2020 Sprint Colour M
WO0006222	WS - Weekly Service	Durban		26/10/2021		
WO0006221	IMMS - 1 Month Machine Service	Durban	19-123456	23/10/2021	SP19-123456	SP19-12 Colour Copier
WO0006219	BathBinMaint - Bathroom Bin Main...	Durban	19-12345	20/10/2021	SP1919	SP1919 Sprint Colour M
WO0006218	WS - Weekly Service	Durban	SP19-12185274	19/10/2021	SP19-123456	SP19-12 Colour Copier

7. When you receive the **Process Complete** message to confirm that;
 - **1 new project(s) created.**
8. Click on **OK**.

The screenshot shows the 'Work Order Allocation' interface after the date selection. A 'Process Complete' dialog box is displayed, indicating that '1 new project(s) created.' The user is prompted to click 'OK' to confirm. The background table of work orders remains visible.

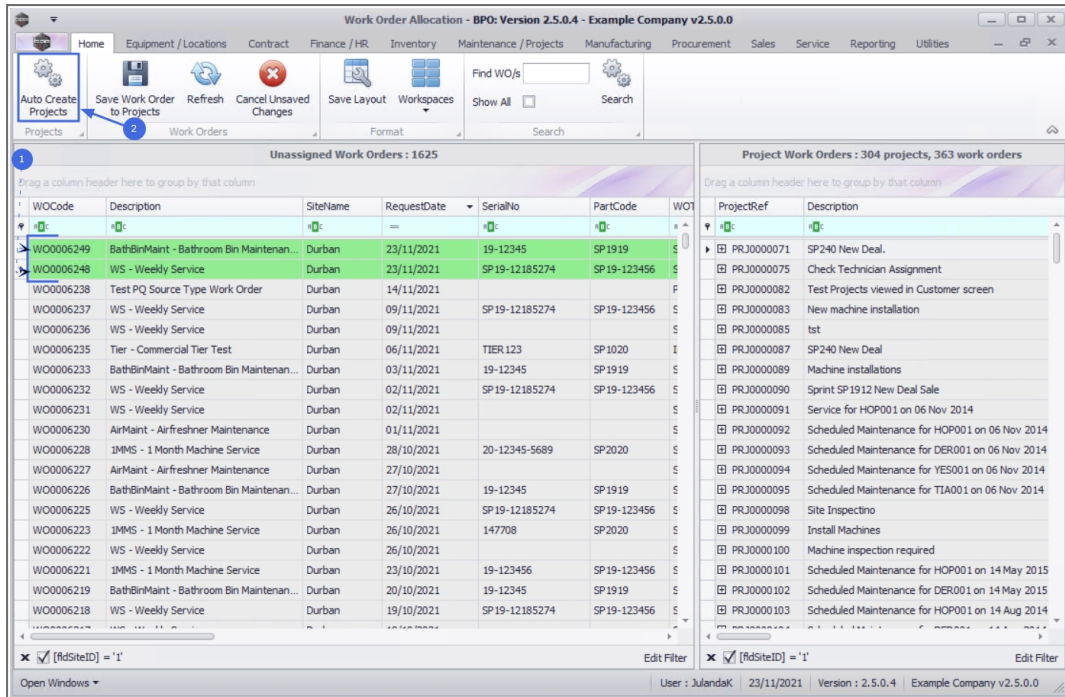
9. The newly created project will be displayed in the **Project Work Orders** frame.
10. Click on the **Expand** button of the new project, to view the linked work orders.



AUTO CREATE PROJECT FROM MULTIPLE WORK ORDERS

Note that when selecting Work Orders with different parameters, a separate project will be created for each work order.

1. In the **Unassigned Work Order** frame, select the Work orders you wish to allocate to a project.
 - To select multiple work orders, hold down the **Ctrl** key on the keyboard and use your **mouse** to click on the relevant work orders to select.
2. Click on **Auto Create Projects**.

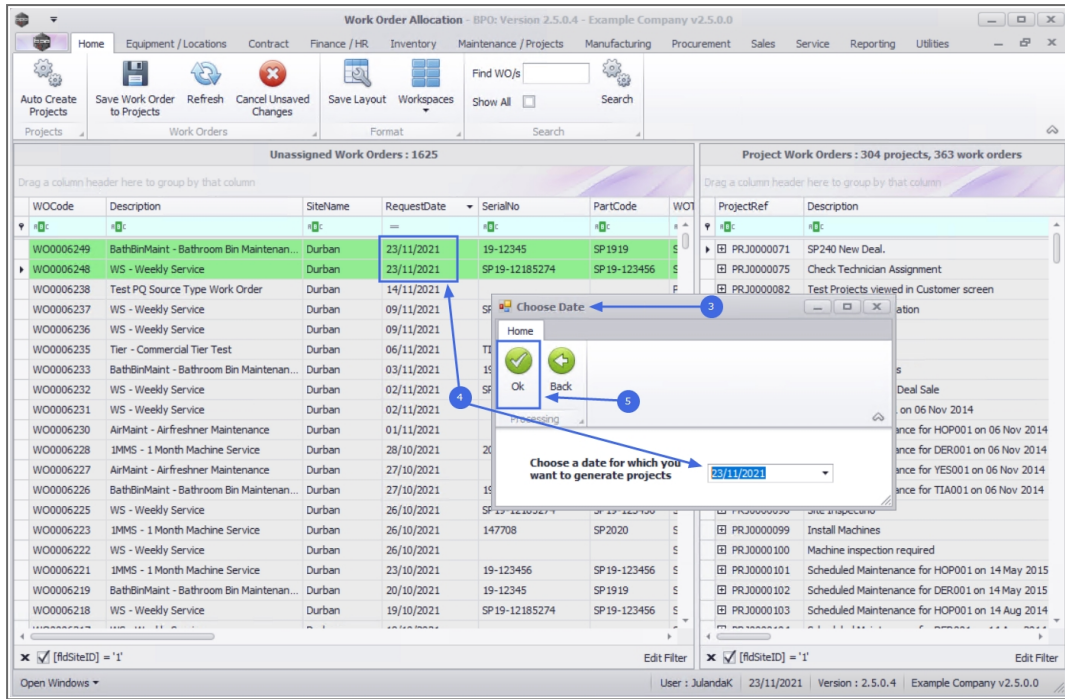


- The **Choose Date** screen will display.
- The **date field** will auto populate with the current date. Type in or click on the down **arrow** to use the calendar function to select an alternative date, if required.



Note that the date for the Project has to match the Request Date of the work order.

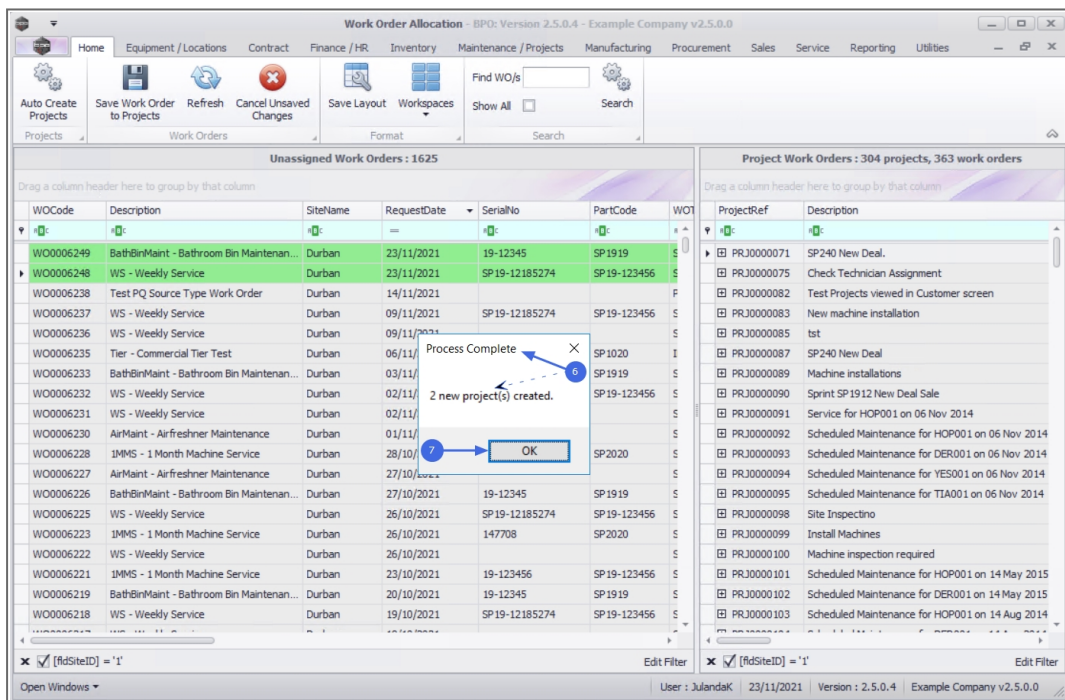
- Click on **OK**.



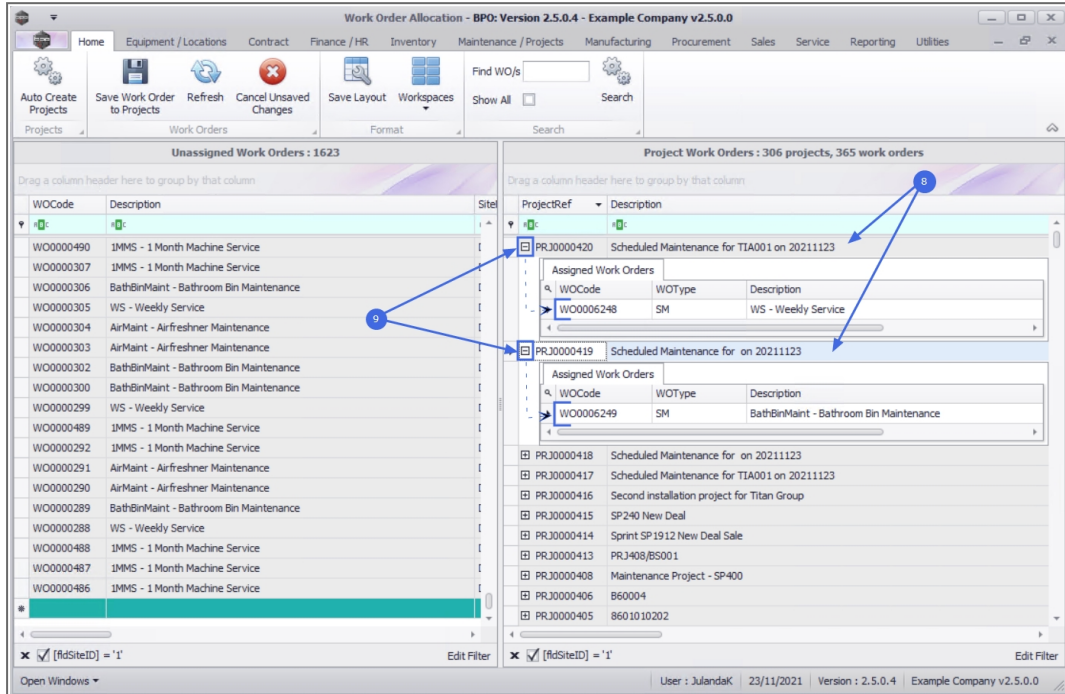
6. The **Process Complete** message will display informing you that;

- 2 new project(s) created.

7. Click on **OK**.



8. The newly created projects will be displayed in the **Project Work Orders** frame.
9. Click on the **Expand** icon of the new projects to view the **Assigned Work Orders** frames.



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