

PROJECTS

PROJECTS - GANTT CHART

The Gantt chart assists you in the planning and scheduling of your projects.

Ribbon Access: Maintenance / Projects > Projects

| | Ŧ | | | | | BPO: Versi | on 2.5.0.4 - Ex | ample Com | pany v2.5.0.0 | | | | | X |
|----|------------|---|-------------------|----------------------------------|----------------------|------------|-------------------------|--------------------------|--------------------------|---------|-----------|-----------|--|---|
| | | Equipment / Locations Contract Finance / HR | | Inventory Maintenance / Projects | | | Manufacturing | Procurement | Sales | Service | Reporting | Utilities | | |
| Γ | ۹ | Ì | Ť | 1 | | 1= | | | 2 | | | | | |
| In | structions | Tasks | Generate Tasks | Work Requests | Maintenance Radar | Projects | Standard Methodology | Work Order Allocation | Technician Allocation | | | | | |
| | Pre | eventative | | Reactive | Radar | | Proj | ects | | | | | | G |

- 1. The *Project Listing* screen will be displayed.
- 2. Select the *Site* where the project can be located.
 - The example has **Durban** selected.
- 3. Click on the *row* of the project you wish to chart.
- 4. Click on the *Gantt* tile.



| \$ | | 1- | Project List | ing - BP | : Version 2.5 | .0.3 - Example | e Company v2.5.0 | 0.0 | | | | |
|----------------------|--------------------|-----------------------------------|---|-------------------------|--|------------------------|------------------|----------------------|---------------|---------------------|------------------|-------|
| Home | Equipmen | t / Locations Con | tract Finance / HR Invento | ory Ma | intenance / Pro | ojects Manu | facturing Procur | ement | Sales Service | Reporting Uti | lities — | ъх |
| Add Edit | Save La Workspa | yout Apply aces • ter Adjus | Project Methodology (Close Project Baseline Close Project | 🚜 Emp Proj 🔓 Prog | loyee Time ect Time gress Report | Print Delivery Note | Export Durba | n • • ojects 🗌 | Refresh R | eports | | |
| Maintenance " | Format | 4 | Processing 4 | Ani | alysis 🔺 | Print | | Current | Re R | eports 🔺 | | \$ |
| Ŧ | | | | | | | | | | | | |
| Links | 4 | Listing Hierarch | У | | | | | | | | | |
| Enter text to search | n p | 3 lo a column head | er here to group by that column | | | | | | | | | |
| Functions | 4 | ProjectRef | Description | Status | StatusDesc | EndDate | ManagerName | Notify | CustomerCode | CustomerName | DeptName | |
| | | * # D C | ROC | 800 | a 🗖 c | = | ADC | ROC | A C | * D ¢ | R C | |
| Gantt 🖌 | | | Test Ticketing | 0 | Open | 06/11/2015 | Julanda Kessler | No | | | | |
| | | | New Deal Part Requests | 0 | Open | 21/10/2015 | George James | No | HOP001 | Hope Works (Pt | | |
| | | | test | 0 | Open | 26/10/2015 | George James | No | HOP001 | Hope Works (Pt | | |
| Work Orders | 1 | ▶ E PRJ0000139 | SP240 New Deal | 0 | Open | 22/10/2015 | George James | No | HOP001 | Hope Works (Pt | | |
| | | | Test project profitability report | 0 | Open | 26/11/2015 | Belinda Sharman | No | HOP001 | Hope Works (Pt | | |
| | | PRJ0000141 | service test | 0 | Open | 04/11/2015 | George James | No | HOP001 | Hope Works (Pt | | |
| Work In Progre | ss | PRJ0000142 | Test travel project | 0 | Open | 13/12/2015 | Bianca Du Toit | No | HOP001 | Hope Works (Pt | | |
| | | | Tech v1.3.0.4 - project assig | 0 | Open | 13/12/2015 | Bianca Du Toit | No | HOP001 | Hope Works (Pt | | |
| | | | Test partial NS grns | 0 | Open | 18/12/2015 | Bianca Du Toit | No | HOP001 | Hope Works (Pt | | |
| Documents | | | Partial non stock receipts and | 0 | Open | 18/12/2015 | Bianca Du Toit | No | HOP001 | Hope Works (Pt | | |
| Documenta | | | Partial Non STock Debit Note | 0 | Open | 18/12/2015 | Bianca Du Toit | No | DER001 | Derton / Techno | | |
| | | | Project with serial number | 0 | Open | 01/01/2016 | Bianca Du Toit | No | HOP001 | Hope Works (Pt | | |
| | | | Project with location | 0 | Open | 01/01/2016 | Bianca Du Toit | No | HOP001 | Hope Works (Pt | | |
| Notes | | | Project with single work order | 0 | Open | 01/01/2016 | Bianca Du Toit | No | HOP001 | Hope Works (Pt | | |
| | | | New project with single work | 0 | Open | 01/01/2016 | Bianca Du Toit | No | HOP001 | Hope Works (Pt | | |
| | | | Another project to test rejec | 0 | Open | 01/01/2016 | Bianca Du Toit | No | HOP001 | Hope Works (Pt | | |
| Assignment His | tory | | Sales Commercials Tiers | 0 | Open | 19/02/2016 | George James | No | HOP001 | Hope Works (Pt | | |
| | | | test auto apply task | 0 | Open | 05/04/2016 | Bianca Du Toit | No | DER001 | Derton / Techno | | |
| | | | SP240 New Deal | 0 | Open | 30/05/2016 | Bianca Du Toit | No | HOP001 | Hope Works (Pt | | |
| Brogross Chart | | | test | 0 | Open | 16/06/2016 | Bianca Du Toit | No | HOP001 | Hope Works (Pt | | Ŧ |
| Open Windows 🔻 | | | | | | | User : Ju | andaK | 11/08/2021 Ve | rsion : 2.5.0.3 Exa | mple Company v2. | 5.0.0 |

- 5. The *Project Gantt View* for the main project layer with all sub-layers will display.
- 6. *Description* frame will list the descriptions for the Main and Sub-projects.
- 7. *Gantt Chart* frame displays a visual format, how the project will be rolled out from start to finish.
- 8. The *start and end dates* for the project is displayed.
- 9. The *forward and back* navigation buttons allows you to scroll through the project to view the duration of each layer in the methodology.
- 10. The *side navigation* allows you to scroll up and down a complex layered project methodology.





UPDATE WORK OR PROGRESS

You can update work or progress from the project Gantt chart.

From the Project Gantt View *double click* on the progress grid of the work description you wish to update.



| ф т | | | Projec | t Gantt | View - BPC | : Version | 1 2.5.0.4 - | Example | Compar | ny v2.5.0. | D | | | | | _ | | |
|---|----------|--------|-----------|------------|--------------|-------------------|--------------------|---------|---------|--------------|------------|------------|-------------|-----------|-----------|----------------|---------|--|
| Home Equipment / Locations | Contract | Finan | ce / HR | Inventor | y Maint | enance / F | Projects | Manufac | turing: | Procureme | nt Sal | es Serv | rice Re | porting | Utilities | - | 8 > | |
| | 2 | | | | | | | | | | | | | | | | | |
| Print Back Save Layout Workspace | s Refre | sh | | | | | | | | | | | | | | | | |
| Processing a Format | ∡ Curr | | | | | | | | | | | | | | | | 6 | |
| | • | ▶ 14 A | ugust 202 | 1 - 30 Aug | just 2021 | | | | | | | | | | | | | |
| Description | Sunda | : | Sunday, 1 | 5 August 2 | 2021 - Satur | day, 21 A | ugust 2021 | L | | Sunday, 22 | 2 August 2 | 021 - Satu | day, 28 A | ugust 202 | 1 | Sunday, 29 Aug | | |
| | 14 Sat | 15 Sun | 16 Mon | 17 Tue | 18 Wed | 19 Thu | 20 Fri | 21 Sat | 22 Sun | 23 Mon | 24 Tue | 25 Wed | 26 Thu | 27 Fri | 28 Sat | 29 Sun | 30 Mon | |
| Maintenance Project - SP400 | - | | | | grid to | update progres | work or | | | | | | | | | | | |
| + New machine installation | 4 | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | |
| 1818-1-1 - Check network req | | | | | | | | | | | | | | | | | | |
| Install Machines | | | | | | | | | | | | | | | | | | |
| | - | | | | | | | | | | | | | | | | | |
| SP1912_NDS_1 - Machine installat | - | | | | | | | | | | | | | | | | 1+ | |
| SP1912_NDS_2 - Network configu | - | | | | | | | | | | | | | | | | | |
| | - | | | | | | | | | | | | | | | | | |
| SP240-1 - Machine Installation | 4 | | | | | | | | | | | | | | | | 1+ | |
| SP240-2 - Network setup | - | | | | | | | | | | | | | | | | 1+ | |
| SP240-3 - Documentation | - | | | | | | | | | | | | | | | | + | |
| Site Inspection for Network Cable Ins | | | | | | | | | | | | | | | | | | |
| New Machine Installation SP2020 | | | | | | | | | | | | | | | | | | |
| Rollers need replacing | 4 | | | | | | | | | | | | | | | | ŀ | |
| Open Windows 👻 | | | | | | | | | U | ser : Juland | laK 23/ | 11/2021 | Version : : | 2.5.0.4 | Example (| Company v | 2.5.0.0 | |

Depending on the option you have selected;

MAKE AN APPOINTMENT

- 1. The *Untitled Appointment* screen will display.
 - Label: Specify the type of appointment by clicking on the down *arrow* to select the appropriate appointment label.
 - Show time as: Select the appointment as *Busy*, *Out of Office*, by clicking on the down *arrow* to select the relevant option.
 - **Subject:** Click in the text box to type a subject for the appointment you are making.

| Note that the Untitled Appointment heading is replaced with | |
|---|--|
| the <i>Subject</i> line. | |



- *Location:* You may need to specify a location for the appointment.
- *All day event:* Click on the check box to select if this is an all day event, in which case you do not need to specify a start and end time for the appointment.
- *Start time:* Specify the starting time for the appointment, if this is not an all day event.
 - Type in or click on the down arrow to use the *calendar function* to select the *date* for the appointment.
 - Type in or use the arrow indicators to set the *starting time* for the appointment.
- *End time:* Specify the end time for the appointment, if this is not an all day event.
 - Type in or click on the down arrow to use the *calendar function* to select the *date* the appointment may be completed.
 - Type in or use the arrow indicators to set the *starting time* for the appointment.
- Comment text: Use the comment area to expand on the appointment notes, etc.
- 2. Click on *Save and Close*.



| ah | Project Cantt View - RDO: Version 2.5.0.4 - Evample Company | |
|--|---|---|
| Home Equipment / Locations Co | antract Finance / HR Inventory Maintenance / Projects Manufacturing I | Procurement Sales Service Reporting Utilities — 🗗 🌶 |
| Print Back Preview Processing Format | Refresh | |
| Description St | Appointment Site Inspection - Post Meeting - J | Appointment |
| Maintenance Project - SP400 v New machine installation | Save And Delete Show time as: Out Of Office Actions Options | |
| Site Inspection 1818-1-1 - Check network req | Subject: Site Inspection - Post Meeting | Resource: New machine I * |
| Install Machines Sprint SP1912 New Deal Sale SP1912 NDS 1 - Machine installat | Start time: 25/11/2021 End time: 25/11/2021 | 10:00 |
| SP1912_NDS_2 - Network configu 4 + SP240 New Deal | % Complete: | |
| SP240-1 - Machine Installation SP240-2 - Network setup SP240-3 - Documentation 4 | New machine installation - Post Inspection meeting for new machine installation | |
| Site Inspection for Network Cable Ins New Machine Installation SP2020 Rollers need replacing | | |
| Open Windows 🕶 | Capture screenshol. | er : JulandaK 23/11/2021 Version : 2.5.0.4 Example Company v2.5.0.0 |

UPDATE PROGRESS

- 1. The *Project Methodology Maintain* screen will be displayed.
- Update the project progress as required on the screen and click on Save.



| ₽ | Project G | Gantt View - BPO: Ver | sion 2.5.0.4 - | Example Compa | any v2.5.0.0 | | | | | _ | |
|--|---------------------|--|----------------|---------------|--------------|------------|----------|--------------|-----------|---------|--------|
| Home Equipment / Locations Contra | ict Finance / HR In | ventory Maintenanc | e / Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities | - | 8, |
| | 3 | | | | | | | | | | |
| Print Back Save Layout Workspaces Ref Preview | resh | | | | | | | | | | |
| Processing a Format a Cur | Project Methodo | logy Maintain | | | | X | | | | | 6 |
| | Home | | | | | | | | | | |
| <u> </u> | | | | | | | | | | | |
| Description Sunda | Sava Back | | | | | | Saturday | 28 August 20 | 21 | Sunday, | 29 Aug |
| 1 14 Sa | t Save Back | | | | | | /ed 26 | Thu 27 Fri | 28 Sat | 29 Sun | 30 Mon |
| - Maintenance Project - SP400 | Process 4 | 2 | | | | \diamond | | | | | |
| | W0 Code | WO0006131 | | | | | | | | | 1. |
| New machine installation | Description | 1818-1-1 - Check netw | ork requiremen | s | | | | | | | , |
| | | | | | | | | | | | |
| 1818-1-1 - Check network req | | | | _ | Y | | | | | | |
| Install Machines | Scheduled Start | 19/08/2021 - | 12:00:00 | | | | | | | | |
| ✓ Sprint SP1912 New Deal Sale | Scheduled End | 24/08/2021 🔹 | 12:00:00 | | | | | | | | |
| SP1912 NDS 1 - Machine installat | Delay Comments | Delay Comments Currently on Schedule | | | | | | | | | 1. |
| SP1012 NDS 2 Notwork configu | | | | | | | | | | | |
| SP1912_NDS_2 * Network cornigd | | | | - | Ŷ | | | | | | |
| | Actual Start | 21/09/2021 - | 12:00:00 | | | | | | | | |
| SP240-1 - Machine Installation | Actual End | 21/09/2021 - | 12:00:00 | 2 | | | | | | | 1+ |
| SP240-2 - Network setup 4 | Completion Date | 21/09/2021 - | 12:00:00 | 2 | | | | | | | + |
| SP240-3 - Documentation | Percent Complete | | | | 100 % | | | | | | + |
| Site Inspection for Network Cable Ins | | 1. | | | i i | | | | | - | |
| New Machine Installation SP2020 | P | | | | | | - | | | | |
| | | | | | | | | | | | |
| Rollers need replacing | | | | | | | | | | | |
| | | | | | | | | | | | , |

PRINT PREVIEW

1. Click on *Print Preview*.

| \$ | | | Projec | t Gantt Vi | ew - BPO | : Version | 2.5.0.3 - | Example | Company | y v2.5.0.0 | | | | | | - | | | | |
|---------------------------------------|----------|---|--------|----------------------|----------|-------------|-----------|----------|---|-------------------------------|---------|-------|------------|---------|-------------|------------------------------------|----------------|--|--|--|
| Home Equipment / Locations | Contract | Financ | e / HR | Inventory | Mainte | enance / Pr | rojects | Manufact | uring P | rocuremen | t Sales | Servi | ce Rep | orting | Utilities | - | ₽ x | | | |
| | 3 | | | | | | | | | | | | | | | | | | | |
| Print Back Save Layout Workspace | es Refre | sh | | | | | | | | | | | | | | | | | | |
| Processing _ 1 Format | . Curr | | | | | | | | | | | | | | | | \diamond | | | |
| ¥ | | | | | | | | | | | | | | | | | | | | |
| 19 October 2015 - 04 November 2015 | | | | | | | | | | | | | | | | | | | | |
| Description | Sunda | Sunday, 18 October 2015 - Saturday, 24 October 2015 | | | | | | | Sunday, 25 October 2015 - Saturday, 31 October 2015 | | | | | | | Sunday, 01 November 2015 - Saturd. | | | | |
| | 19 Mon | 20 Tue | 21 Wed | 22 Thu 23 Fri 24 Sat | | | 25 Sun | 26 Mon | 27 Tue | 27 Tue 28 Wed 29 Thu 30 Fri 3 | | | | 1 Sun | 2 Mon 3 Tue | | 4 Wei | | | |
| Ψ test | | | - | | | | | 1 | | | | | | | | | | | | |
| → SP240 New Deal | | | | | | | | | | | | | | | | | | | | |
| SP240-1 - Machine Installation | | | | | | | | | | | | | | | | | | | | |
| SP240-2 - Network setup | | | | | | | | | | | | | | | | | | | | |
| SP240-3 - Documentation | | | | | | | | | | | | | | | | | + | | | |
| | 4 | | | | | | | | | | | | | | | | • [±] | | | |
| Test project assignment | 4 | | | | | | | | | | | | | | | | + _ | | | |
| New test same project - no address | 4 | | | | | | | | | | | | | | | | + + | | | |
| Test with prior version | + | | | | | | | | | | | | | | | | • ž + | | | |
| test refreshing on tech connect after | 1 | | | | | | | | | | | | | | | | • - | | | |
| | | | | | | | | | | | | | | | | | | | | |
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| | | | | | | | | | | | | | | | | | | | | |
| | | | | Cambra | | hat | | | | | | | | | | | | | | |
| Open Windows 👻 | | | | | | | | | User | r : Julandai | (11/08 | /2021 | /ersion:2. | 5.0.3 E | xample Co | mpany v2. | 5.0.0 //. | | | |



- 2. The Gantt chart will display in the *Preview* screen.
- From this screen you can make cosmetic changes to the Preview, by changing the *Scale* or *Orientation* of the diagram, or to adjust the *Margins*, the page *Size* or add a *Header* and/or *Footer*, to the chart.
- 4. The *Export* function will allow you to export or Email the chart as a PDF, HTML, DOCX, XLS or an Image File.
- 5. After making the preview changes to the Gantt diagram, click on *Save* to save the chart to the Server.



6. Click on *Close* to return to the *Project Listing* screen.

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