

PROJECTS

INTRODUCTION TO PROJECTS

A project is a collective group of jobs that need to be carried out.

The Project module is a tool for users to collectively view the work to be done under a project, to manage timelines and project schedules.

By monitoring the project, you can keep track of work that has been done and work that still needs to be done.

You can **invoice** a project when complete.

You can create a **New Deal Sale** or **New Deal Rental** Project from a Sales Order.

Projects are either **Open** or **Closed**. Once closed, a project <u>cannot</u> be reopened.

Use BPO to **Projects - Add Main Project** or use **Projects - Work Orders** to create a project for Maintenance Planning work orders.

Project Static Data Setup

- Project Contact Type
- Project Methodology Class

Ribbon Access: Maintenance / Projects > Projects

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- 1. The *Project Listing* screen will be displayed.
- 2. Select the *Site* that you wish to work in by clicking on the down arrow and selecting the required site
 - The example has *Durban* selected.
- 3. The Project *Status* can either be set to *Open* or *Closed*.
 - The screen will open by default in the Open status as you will most likely be working in this status.

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PROJECT RIBBON

- From the Maintenance section you can Projects Add Main Project and / or Projects - Add Sub-Project. The Projects - Edit Project function allows you to make changes to project information as well as link digital documents, invoices, book time, etc. to the project.
- From the Processing section, you may choose to Projects Apply Project Methodology, Projects - Adjust Project Baseline or Projects - Close Project.



- From the Analysis section, you can generate and view the Projects -Employee Time Sheet, the Projects - Project Time Report or generate a Projects - Progress Report for the project.
- 4. From the **Print section**, you can **Projects Print Delivery Note** for the Project, or Export the Project list to an Excel Spreadsheet.
- From the Current section, click on the Projects My Projects check box to filter the project list by the projects that are *assigned to you* (the person currently logged on the system).

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6. **Reports** allow you to print Project Reports.

PROJECT LISTING FRAME

- 1. The Project Listing screen will by default open on the *Listing frame*.
- 2. The projects listed in this frame will be filtered using the *Status filer* that was selected.
- You can click on the *expand button* in front of a project to *view* the work orders linked to the project.



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- 4. The *Work Orders* frame will expand to display the list of work orders.
- 5. Double click anywhere in the **row** of the work order, to open the **Maintain Work Order** screen where you can view more details for the work order.



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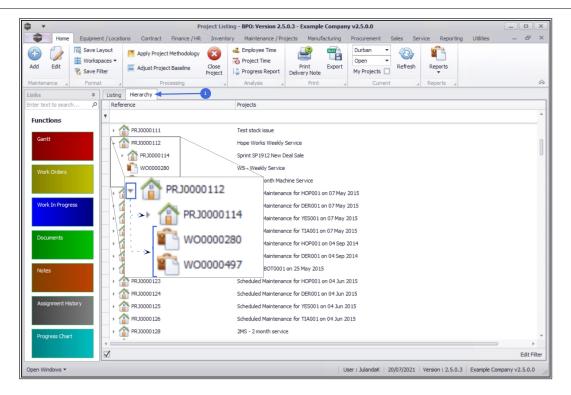
PROJECT HIERARCHY FRAME

- 1. The *Hierarchy* tab allows you to view the projects in a *tiered* order.
- Click on the *tree view chevron* node in front of a project to expand any sub-projects¹ and Work Orders attached to the project.

¹A sub-project may also be referred to as a nested relationship project



Introduction to Projects



FUNCTIONS TILES

The *Functions* tiles will direct you to further information for a selected project.

These tiles are available from the *Project Listing* as well as the *Edit project* screen.

When using the function tiles from the *Project Listing* screen, ensure that you have selected the <u>correct</u> project before you click on a tile.



The Gantt tile will direct you to *Project Gantt View* screen where you can view the <u>Gantt chart</u>, which assists in the planning and scheduling of projects.



The WO History tile will direct you to the *Work Orders for Project Ref* listing screen where you can view a list of <u>all</u> the Projects - Work Orders linked to the selected project.



Depending on the status of the project, you can *Add*, *Edit*, *Delete*, *View*, *Close*, *Complete* or *Reinstate* a selected work order.

The Work In Progress tile will direct you to the *Work in Progress for Project* screen you can view a list of the *issued parts* requested against this project, create a <u>Return</u> <u>Request</u> for a selected part, or a *Customer Invoice* for the <u>work order</u> linked to a selected part, as well as a *Customer Invoice* for the <u>project</u>. Refer to Projects - Work in Progress (WIP)

The Documents tile will direct you to the *Documents for Project* screen where you can view a list of the *digital documents* linked to the selected project, as well as *Add*, *Edit*, *Delete* or *View* project documents. Refer to Project - Documents.



Documents

ork In Progress

The Notes tile will direct you to the Notes for Project screen you can view a list of the *notes and / or comments* linked to the selected project as well as Projects - Notes, or and / or comments.

The Assignment History tile will direct you to the Assignment Listing for Project screen you can view a list of the assignments linked to the selected project as well as Assign Technician, Unassign Technician or Force Accept a selected assignment. Refer to Projects - Assignment History

The Progress Chart tile will direct you to the Projects - Progress Chart for Project screen you can view a chart displaying the project status, the start and end times and percentage of the work completed.

The Baseline tile will direct you to the *Baseline Adjustments for Project* screen , where you can view a list of any





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Projects - Baseline adjustments (new project start and end dates) that have been applied to the selected project as well as **Add** an adjustment, if required.

The Contacts tile will direct you to the Contacts for Pro*ject* screen where you can view a list of any *contacts* that have been linked to the selected project as well as **Add**, Edit or Delete a contact as required. Refer to Projects -Contacts

Parts

The Parts tile will direct you to the **Parts for Project** screen where you can view a list of the Projects - Parts that have been requested for the selected project, as well as print the

Project Picking Slip.



The Time Bookings tile will direct you to the *Time Bookings* for Project screen you can view a list of any Projects - Time Bookings linked to the selected project.



The Services tile will direct you to the Services for Project screen, where you can view a list of any Projects - Services linked to the selected project.

The Third Party Services tile will direct you to the Third-*Party Services for Project* screen where you can view a list of any *third-party services* linked to the selected project.



Third Party Services

The Travel tile will direct you to the Travel for Project screen, where you can view a list of any Projects - Travel *costs* linked to the selected project.

The Expenses tile will direct you to the Expenses for Project screen, where you can view a list of any Projects -**Expenses** linked to the selected project.

The Finance tile will direct you to the Finance Analysis for **Project** screen you can view a breakdown of the **Items** / **Parts** required as well as the **Planned Actual** and **Invoiced**





For Contract

Time Review

costs of the selected project.

The For Contract tile will direct you to the *Items Awaiting Contract for Project* screen. This screen is divided into a *Parts* and a *Contracts* frame. You can select a <u>part to be</u> <u>linked to a specific contract or a new contract</u> by dragging and dropping a selected part line into a contract line. The Time Review tile will direct you to the *Time Not Billed for Project* screen will be displayed where you will be able to Invoice a Work Order or Project, Flag Reviewed time, SLA Time and View Work Order or Project. Refer to Projects - Time Review

PROCESSING TILES

Quotes

The Quotes tile will direct you to the *Sales Quotes for Project* screen where you can view a list of all the Projects -Quotes linked to the selected project. You can *Accept* and *Reject* a quote or *Convert a quote to an order*. You can also *Add*, *Edit*, *Delete* and *View* a quote.

The Orders tile will direct you to the *Sales Orders for Project* screen where you can view a list of all the Projects -Sales Orders linked to the selected project. From this screen you can *Add / Create* an order, *Edit, Delete* and *View* an order. You can also *Create an invoice, Create a New Deal, Add Items to the Work Order* as well as *Create a New Deal Project*.

The Invoices tile will direct you to the *Sales Invoices for Project* screen you can view the Project Invoices. You can also *Add*, *Edit* and *View* a Tax Invoice as well as record a Comment and Reference for an invoice. From the *Issues*

Orders





tile you can view a list of all the *items issued* against the selected sales invoice. Refer to Invoice a Project The Credit Notes tile will direct you to the *Sales Credit Notes for Project* screen where you can view a list of all the *sales credit notes* linked to the selected project. You can also Raise Project Credit Note, *Edit*, *Delete* and *View* a credit note. From this screen you can also *Release* a credit note for approval, *Remove* a credit note from approval, *Approve* a credit note and *Reject* a credit note. From the *Returns* tile, you can view a list of all the *return items* linked to the selected sales credit note.

Related Topics

Credit Notes

- Creating a New Project
- Technician Allocation Technician Projects
- Creating a New Work Order
- Link a Work order to a Project
- Link a Work order to a New Project
- Link a Work order to a Current Project
- Work Order Allocation
- Closing a Project

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