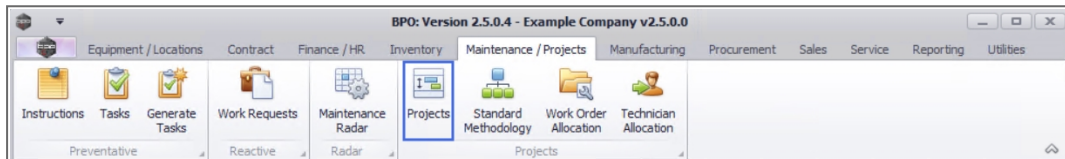


## PROJECTS

### PROJECTS - ADD SUB-PROJECT

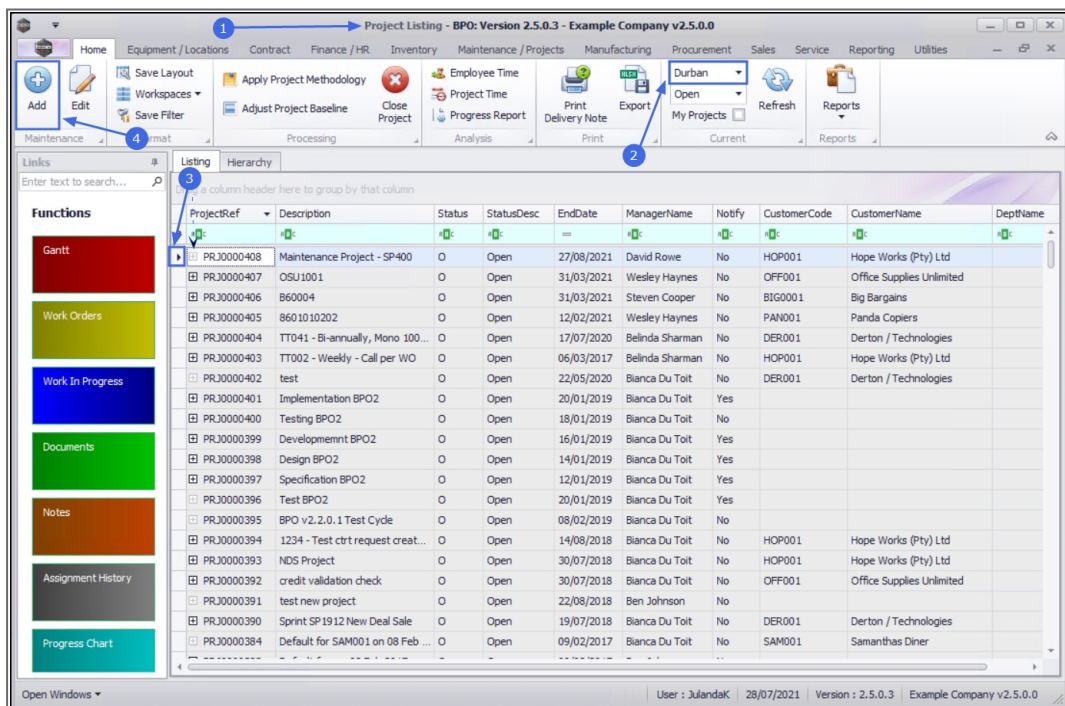
**Ribbon Access:** Maintenance / Projects > Projects



1. The **Project Listing** screen will be displayed.
2. Select the **Site** where the Main Project can be located.
  - The example has **Durban** selected.
3. Click on the **row** of the project you wish to create a sub project for.
4. Click on **Add**.

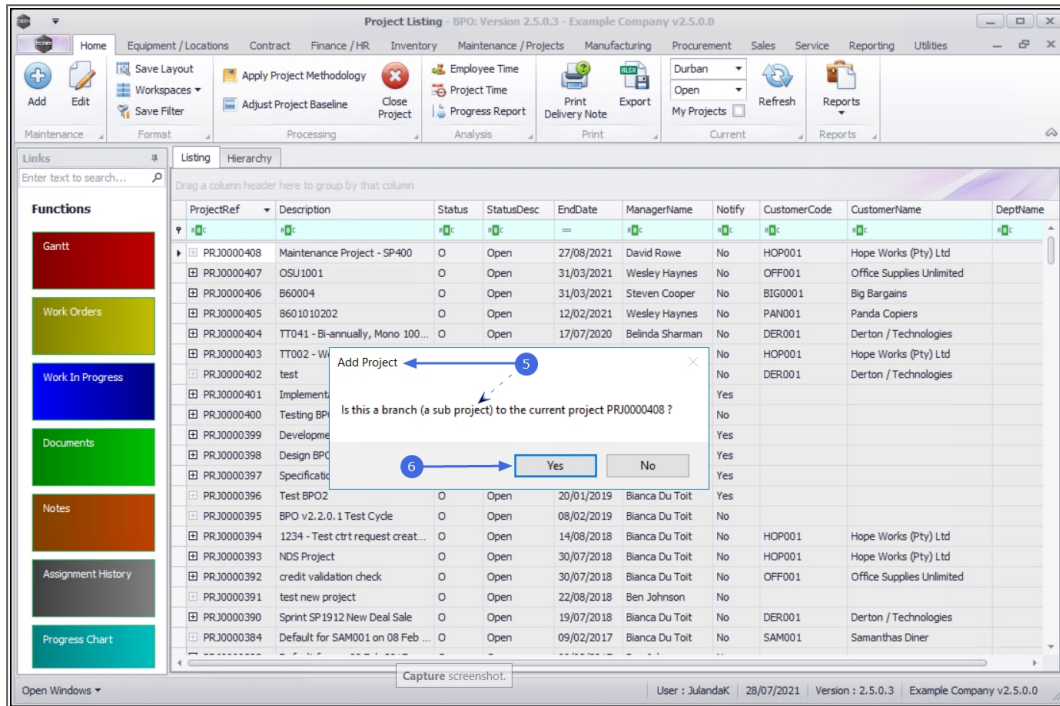


Short cut key: **Right click** to display the **All groups** menu list. Click on **Add**.



## ADD SUB-PROJECT

5. When you receive the **Add Project** message to confirm;
  - *Is this a branch (a sub project) to the current project [project ref number]?*
6. Click on **Yes** to create the sub-project.



7. The **Add new project** screen will be displayed.

## IDENTIFICATION

- **Description:** Type in a **description**<sup>1</sup> for the sub-project you are creating.

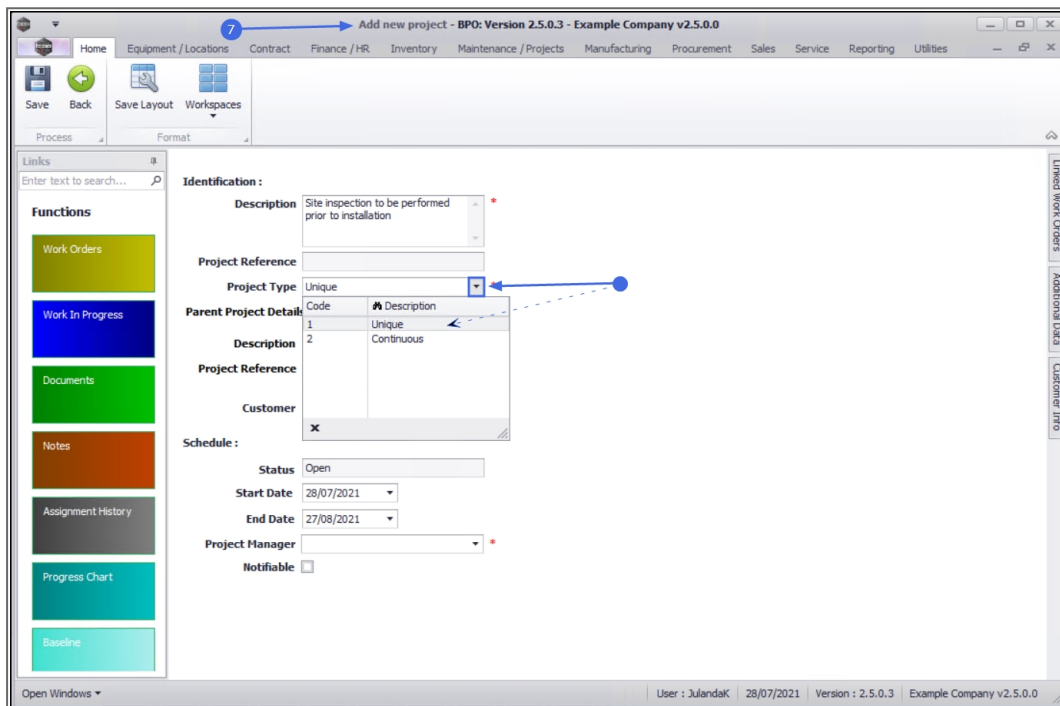
<sup>1</sup>The project description is a short explanation what the project is all about, e.g. Scheduled Maintenance that needs to be performed.

- **Project Reference:** Type in the Project reference Number.



If the field is greyed out, then the Project Reference has been set to automatically issue the project reference number. Refer to [project configuration](#) for more information.

- **Project Type:** Click on the down **arrow** to select the **project type**<sup>1</sup> that applies to the sub-project you are creating.

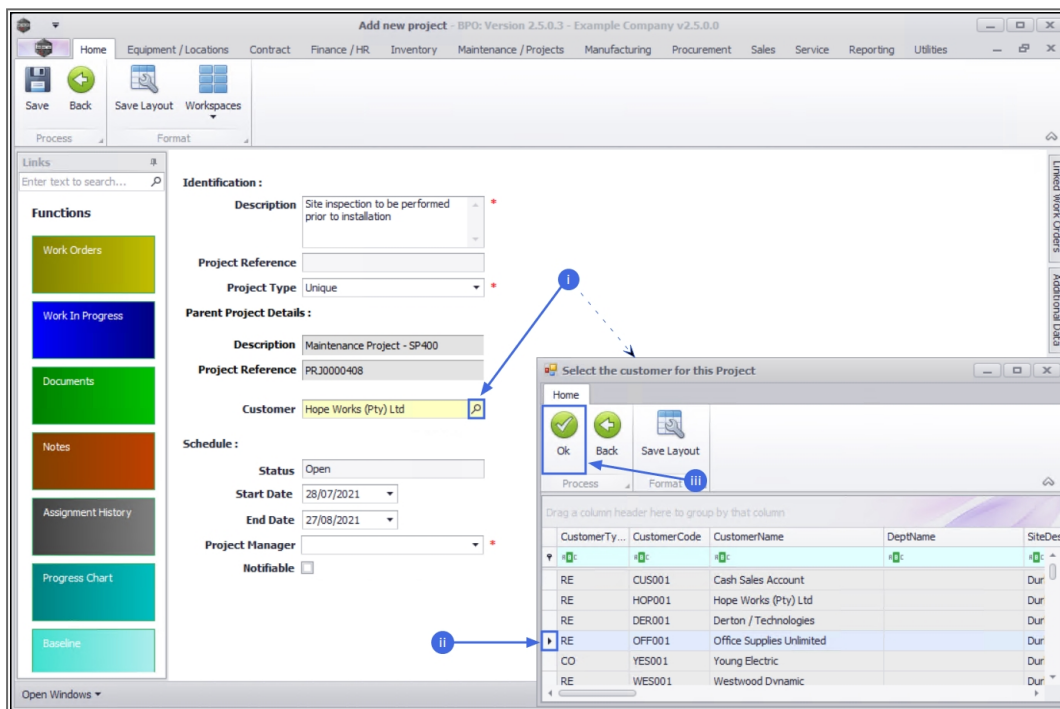


## PARENT PROJECT DETAILS

- **Description:** The description field has been auto populated with the project description of the main project you have selected.

<sup>1</sup>Unique - Applies to a project that you will start work on and close, for instance a Customer Installation. Continuous - Applies to a project that will have an expanded duration, for instance a Service Agreement where maintenance needs to take place over the span of a few year.

- **Project Reference:** The project reference has been auto populated with the project reference of the main project you have selected.
- **Customer:** The customer field has been auto populated with the customer selected on the main project. You may wish to change the customer for the sub-project, if you are linking the sub-project to a different customer.
  - i. Click on the **search** button to display the **Select the customer for this Project** screen.
  - ii. Click on the **row** of the Customer you wish to link to the sub-project.
  - iii. Click on **OK**.



**Identification :**

Description: Site inspection to be performed prior to installation

Project Reference: [Empty]

Project Type: Unique

**Parent Project Details :**

Description: Maintenance Project - SP400

Project Reference: PRJ0000408

Customer: Hope Works (Pty) Ltd

**Schedule :**

Status: Open

Start Date: 28/07/2021

End Date: 27/08/2021

Project Manager: [Empty]

Notifiable: ☐

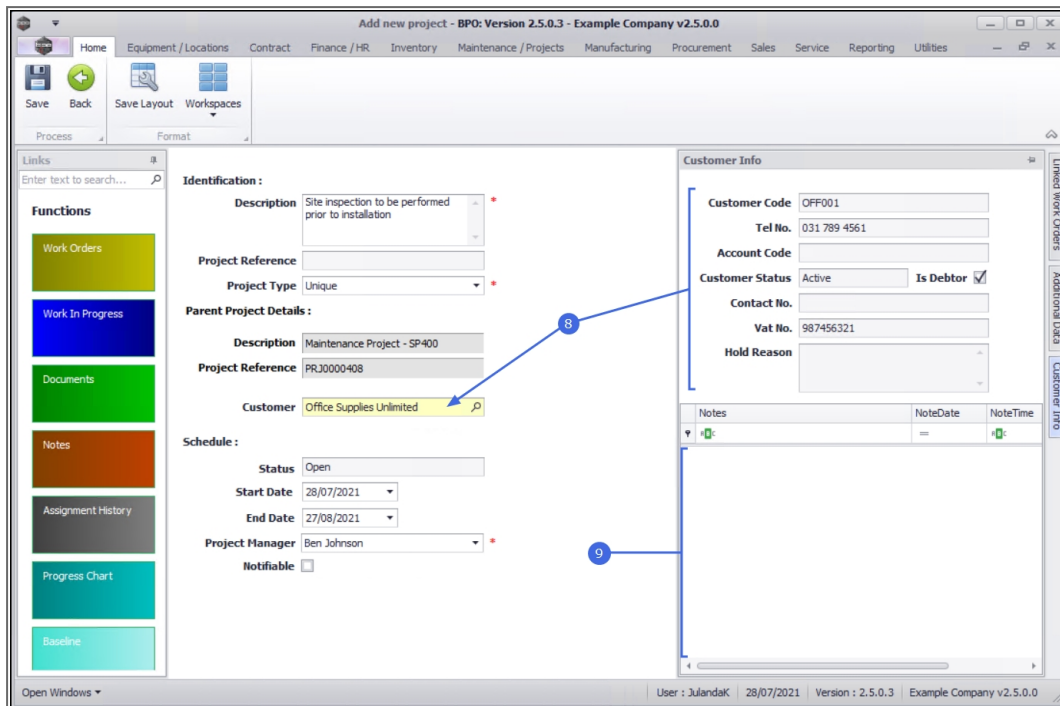
**Select the customer for this Project**

CustomerTy...	CustomerCode	CustomerName	DeptName	SiteDes
RE	CUS001	Cash Sales Account		Dur
RE	HOP001	Hope Works (Pty) Ltd		Dur
RE	DER001	Derton / Technologies		Dur
RE	OFF001	Office Supplies Unlimited		Dur
CO	YES001	Young Electric		Dur
RE	WES001	Westwood Dynamic		Dur

## CUSTOMER INFO

8. The **Customer Info** frame will auto populate with the customer information you have selected as the Parent Project Details.

9. Any **Notes** linked to this customer can also be viewed from this screen.



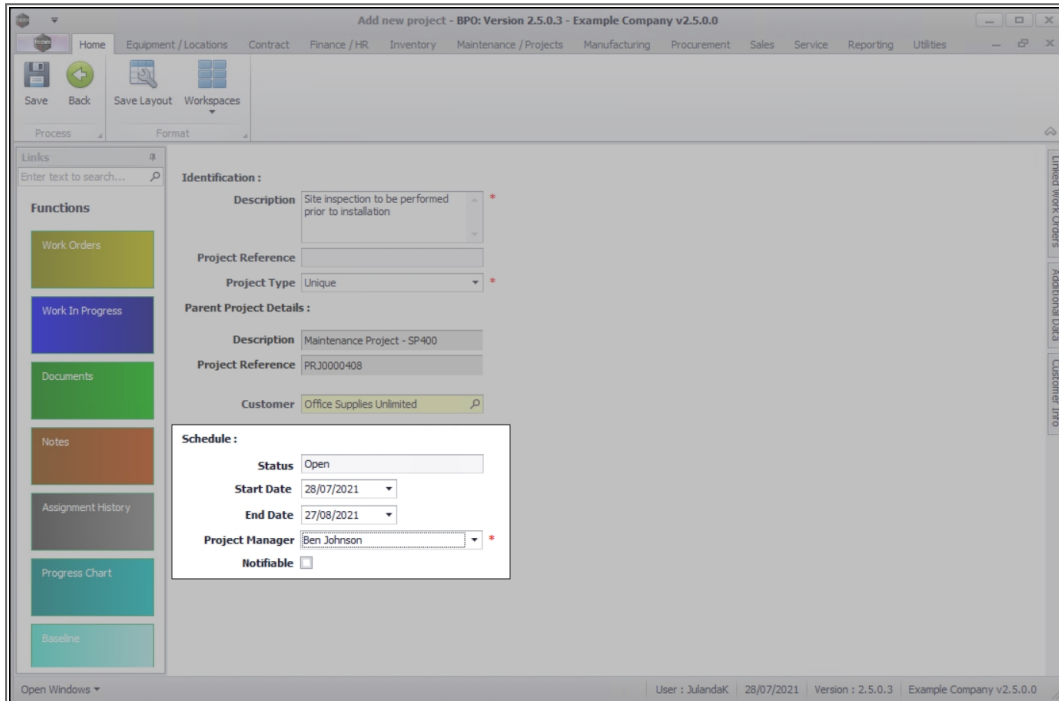
## SCHEDULE

- **Status:** This is the current status for the sub-project and will display as **Open** by default. This field cannot be changed on this screen.
- **Start Date:** This date will auto populate with the current date. **Type** in or click on the down **arrow** to select an alternative starting date for the sub-project using the Calendar function.
- **End Date:** The end date will be set a month from the start date. **Type** in or click on the down **arrow** to select the expected end date for the project using the Calendar function.
- **Project Manager:** Click on the down **arrow** to select the name of the project manager for the project.

- **Notifiable:** This option is not used by the system.



Note For notifications, use the [Assign Technician](#) to the project work order(s) function. If the [Company Configuration](#) is set up correctly, then the technician will receive an email for the assignment.



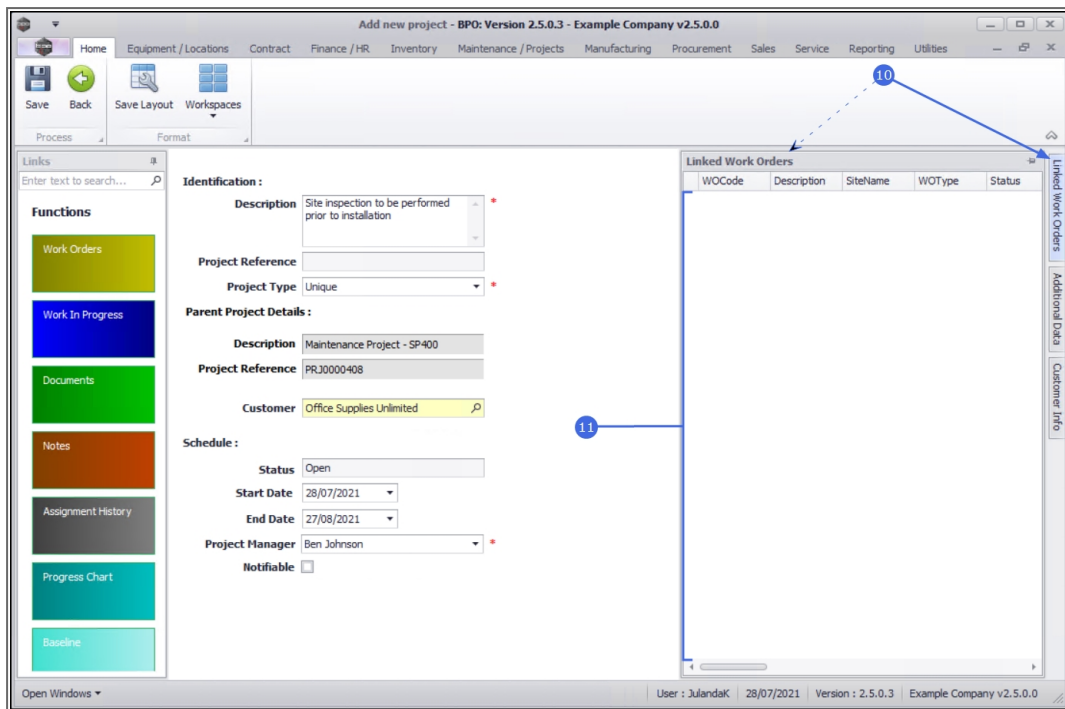
## LINKED WORK ORDERS

- Click on the **Linked Work Orders** tab, on the right hand side of this screen, to display the **Linked Work Orders** frame.



This panel can be docked to leave it expanded on the screen, which will make it easier to work in.

- Any work order(s) linked to this sub-project will display in this frame.



**Add new project - BPO: Version 2.5.0.3 - Example Company v2.5.0.0**

**Home** | Equipment / Locations | Contract | Finance / HR | Inventory | Maintenance / Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

**Save** | **Back** | **Save Layout** | **Workspaces**

**Process** | **Format**

**Links**  
Enter text to search...

**Functions**

- Work Orders
- Work In Progress
- Documents
- Notes
- Assignment History
- Progress Chart
- Baseline

**Identification :**

**Description** Site inspection to be performed prior to installation

**Project Reference**

**Project Type** Unique

**Parent Project Details :**

**Description** Maintenance Project - SP400

**Project Reference** PRJ0000408

**Customer** Office Supplies Unlimited

**Schedule :**

**Status** Open

**Start Date** 28/07/2021

**End Date** 27/08/2021

**Project Manager** Ben Johnson

**Notifiable** ☐

**Linked Work Orders**

WOCCode	Description	SiteName	WOType	Status
---------	-------------	----------	--------	--------

**Additional Data** | **Customer Info**

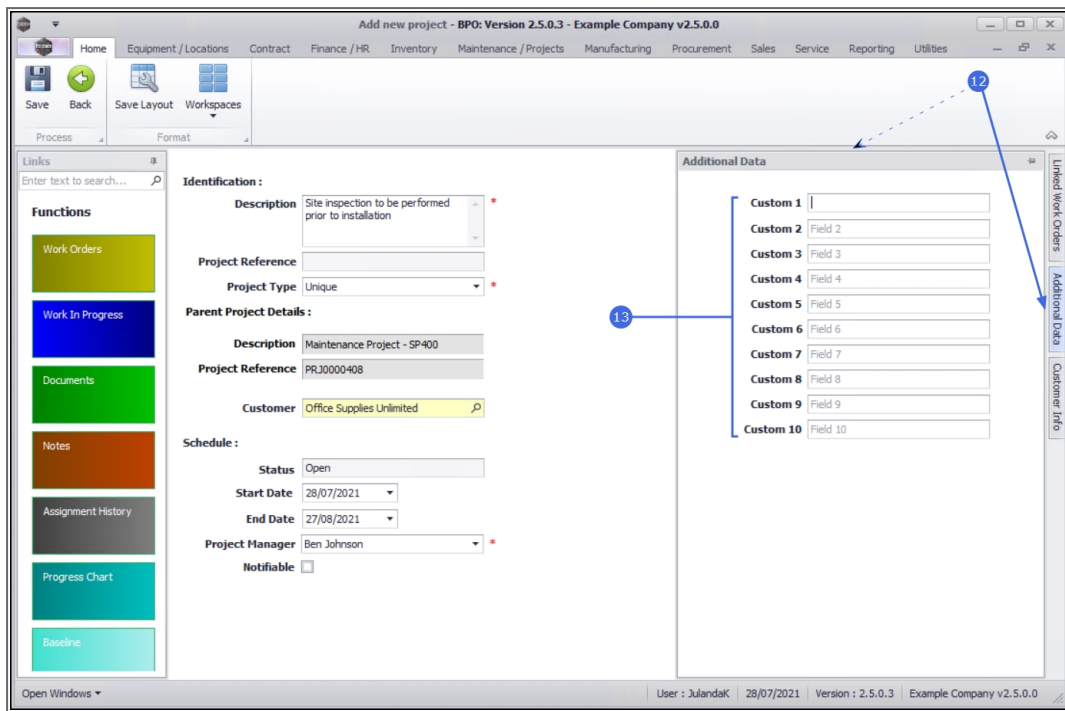
Open Windows

User : JulandaK | 28/07/2021 | Version : 2.5.0.3 | Example Company v2.5.0.0

## ADDITIONAL DATA

- You may wish to include information not covered in the sub-project frames. Click on the **Additional Data** tab to expand the **Additional Data** frame.
- Any **extra** information can be added in the Custom 1 - 10 fields. These field names can be re-named to suit your company requirements.
  - Please contact your BPO Analyst or CO3 Support for assistance.





## SAVE SUB-PROJECT

14. After adding the relevant information for creating the Sub-Project, click on **Save**.
15. When you receive the **Project** message screen informing you that;
  - **The project: [project ref number] has been saved.**



Note that the sub-project number is different from the main project number.

16. Click on **OK**.



**Add new project** - BPO: Version 2.5.0.3 - Example Company v2.5.0.0

**Identification :**

Description: Site inspection to be performed prior to installation

Project Reference:

Project Type: Unique

**Parent Project Details :**

Description: Maintenance Project - SP400

Project Reference: PRJ0000408

Customer: Office Supplies Unlimited

**Schedule :**

Status: Open

Start Date: 28/07/2021

End Date: 27/08/2021

Project Manager: Ben Johnson

Notifiable: ☐

**Customer Info**

Customer Code: OFF001

Tel No.: 031 789 4561

Account Code:

Customer Status: Active ☒ Is Debtor ☒

Contact No.:

Vat No.: 987456321

Hold Reason:

**Modal Dialog:**

The project: PRJ0000409 has been saved.

OK

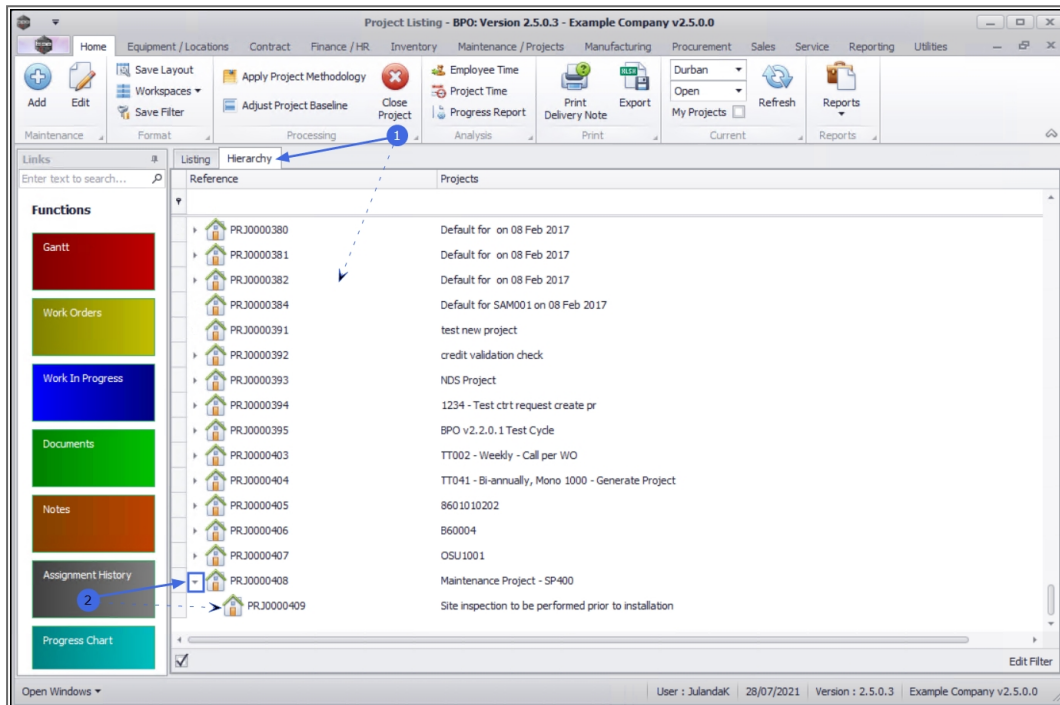
17. You will return to the **Project Listing** screen where you can view the sub-project.

**Project Listing** - BPO: Version 2.5.0.3 - Example Company v2.5.0.0

ProjectRef	Description	Status	StatusDesc	EndDate	ManagerName	Notify	CustomerCode	CustomerName	DepName
PRJ0000409	Site inspection to be performed prior to installation	O	Open	27/08/2021	Ben Johnson	No	OFF001	Office Supplies Unlimited	
PRJ0000408	Maintenance Project - SP400	O	Open	27/08/2021	David Rowe	No	HOP001	Hope Works (Pty) Ltd	
PRJ0000407	OSU/1001	O	Open	31/03/2021	Wesley Haynes	No	OFF001	Office Supplies Unlimited	
PRJ0000406	960004	O	Open	31/03/2021	Steven Cooper	No	BSG001	Big Bargains	
PRJ0000405	8601010202	O	Open	12/02/2021	Wesley Haynes	No	PAH001	Panda Copiers	
PRJ0000404	TT041 - B-annually, Mono 10...	O	Open	17/07/2020	Belinda Sherman	No	DER001	Derton / Techno...	
PRJ0000403	TT002 - Weekly - Call per W/O	O	Open	06/03/2017	Belinda Sherman	No	HOP001	Hope Works (Pty) Ltd	
PRJ0000402	test	O	Open	22/05/2020	Bianca Du Toit	Yes	DER001	Derton / Techno...	
PRJ0000401	Implementation BPO2	O	Open	20/01/2019	Bianca Du Toit	Yes			
PRJ0000400	Testing BPO2	O	Open	18/01/2019	Bianca Du Toit	No			
PRJ0000399	Development BPO2	O	Open	16/01/2019	Bianca Du Toit	Yes			
PRJ0000398	Design BPO2	O	Open	14/01/2019	Bianca Du Toit	Yes			
PRJ0000397	Specification BPO2	O	Open	12/01/2019	Bianca Du Toit	Yes			
PRJ0000396	Test BPO2	O	Open	20/01/2019	Bianca Du Toit	Yes			
PRJ0000395	BPO v2.2.0.1 Test Cycle	O	Open	08/02/2019	Bianca Du Toit	No			
PRJ0000394	1234 - Test chrt request area...	O	Open	14/08/2018	Bianca Du Toit	No	HOP001	Hope Works (Pty) Ltd	
PRJ0000393	NDS Project	O	Open	30/07/2018	Bianca Du Toit	No	HOP001	Hope Works (Pty) Ltd	
PRJ0000392	credit validation check	O	Open	30/07/2018	Bianca Du Toit	No	OFF001	Office Supplies Unlimited	
PRJ0000391	test new project	O	Open	22/08/2018	Ben Johnson	No			
PRJ0000390	Sprint SP1912 New Deal Sale	O	Open	19/07/2018	Bianca Du Toit	No	DER001	Derton / Techno...	
PRJ0000384	Default for SAH001 on 08 Fe...	O	Open	09/02/2017	Bianca Du Toit	No	SAH001	Samanthas Diner	

## VIEW IN HIERARCHY VIEW

1. Click on the **Hierarchy** tab to display the Project Listing screen in Hierarchy view.
2. **Scroll** to the parent project number and click on the **tree view node** to expand the parent project hierarchy.
3. The linked **sub-project number** and description can now be viewed.



## Related Topics

- [Projects - Add Main Project](#)
- [Projects - Edit Project](#)
- [Projects - Close Project](#)
- [Assign Technician](#)

MNU.058.006