

# **PROJECTS**

## **PROJECTS - EDIT PROJECT**

The Edit project feature allows you to make changes to the Main and/or subproject details in either the *Open* or *Closed* status.

Making changes to the details of a Closed project does not change the status to Open. The project will remain in the Closed status.

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

<b>\$</b> =	BPO: Version 2.5.0.4 - Example Company v2.5.0.							pany v2.5.0.0					_ <b>D</b> X	
	Equipmen	t / Locations	Contract F	Finance / HR	Inventory	Maintenance	/ Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities	
-	Ì	Ť	<b>î</b>		1=	-		2						
Instructions	Tasks	Generate Tasks	Work Requests	Maintenance Radar	Projects	Standard Methodology	Work Order Allocation	Technician Allocation						
Pre	eventative		Reactive	Radar		Proje	ects						$\Diamond$	

- 1. The *Project Listing* screen will be displayed.
- 2. Select the *Site* where the project you wish to edit can be located.
  - The example has *Durban* selected.
- 3. Select the *Status* for the project you wish to edit.
  - The example has **Open** selected.
- 4. Click on the *row* of the project you wish to update.
- 5. Click on *Edit*.

P

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



Home Equipm Add Edit Baintenance	e Layo kspac	es 🕶	🎽 Apply	ract Finance / HR Invent Project Methodology Project Baseline Close Project Processing	🚜 Emp Proje	aintenance / Pr loyee Time ect Time ress Report	Print Print Print Print	Durba	n T ojects Current	3	<b>A</b> .,	Jtilities –	- 6			
nks 4	T	Listing	Hierarchy								_					
iter text to search 🖇		rag a	column heade	r here to group by that column								1/		/		
Functions	F		ectRef	Description	Status	StatusDesc	EndDate	ManagerName	Notify	CustomerCode	CustomerName	DeptName	/			
unctions		n D c	ceuter		n C		=	I C	#CC	nDc	noc.	noc				
Gantt	1	-	RJ0000399	Developmennt BPO2	0	Open	16/01/2019	Bianca Du Toit	Yes	-	-	-				
			RJ0000400	Testing BPO2	0	Open	18/01/2019	Bianca Du Toit	No							
			R 10000401	Implementation BPO2	0	Open	20/01/2019	Bianca Du Toit	Yes							
Work Orders			RJ0000402	test	0	Open	22/05/2020	Bianca Du Toit	No	DER001	Derton / Techno					
			RJ0000403	TT002 - Weekly - Call per WO	0	Open	06/03/2017	Belinda Sharman	No	HOP001	Hope Works (Pt					
			R 30000404	TT041 - Bi-annually, Mono 10		Open	17/07/2020	Belinda Sharman	No	DER001	Derton / Techno					
Work In Progress		E P	RJ0000405	8601010202	0	Open	12/02/2021	Wesley Havnes	No	PAN001	Panda Copiers					
Norkarriogreas		ΞP	RJ0000406	B60004	0	Open	31/03/2021	Steven Cooper	No	BIG0001	Big Bargains					
		1			ΞP	RJ0000407	OSU1001	0	Open	31/03/2021	Julanda Kessler	No	OFF001	Office Supplies		
	L,	ΞP	RJ0000408	Maintenance Project - SP400	0	Open	26/02/2022	David Rowe	No	HOP001	Hope Works (Pt					
Documents		🗄 P	RJ0000410	New machine installation	0	Open	26/02/2022	David Rowe	No	HOP001	Hope Works (Pt					
		± P	RJ0000411	Site Inspection	0	Open	26/02/2022	David Rowe	No	HOP001	Hope Works (Pt					
		• P	RJ0000412	Install Machines	0	Open	26/02/2022	David Rowe	No	HOP001	Hope Works (Pt					
Notes		ΞP	RJ0000413	PRJ408/BS001	0	Open	08/10/2021	Wesley Haynes	nes No	BEA001	Bearing and Shoe					
		±Ρ	RJ0000414	Sprint SP1912 New Deal Sale	0	Open	30/10/2021	David Rowe	No	HOP001	Hope Works (Pt					
		±Ρ	RJ0000415	SP240 New Deal	0	Open	31/10/2021	David Rowe	No	HOP001	Hope Works (Pt					
Assignment History		⊞ P	RJ0000416	Second installation project fo	0	Open	14/01/2022	Belinda Sharman	No	TIA001	Titan Group					
		PRJ0000417		Scheduled Maintenance for T	0	Open	24/11/2021	John Twain	No	TIA001	Titan Group					
		ΞP	RJ0000418	Scheduled Maintenance for	0	Open	24/11/2021	Steven Cooper	No							
Progress Chart		ΞP	RJ0000419	Scheduled Maintenance for	0	Open	24/11/2021	Ben Johnson	No							
		±Ρ	RJ0000420	Scheduled Maintenance for T	0	Open	24/11/2021	Steven Cooper	No	TIA001	Titan Group					

6. The *Edit project : [project ref number]* screen will be displayed.

#### **IDENTIFICATION**

- **Description:** Type in a description<sup>1</sup>, or make the necessary change to this field, if required.
- **Project Reference:** The project reference field cannot be edited.
- Project Type: Click on the down *arrow* to select, or change the project type<sup>2</sup>.
- **Customer:** Click on the *Search* button to select the customer you wish to link to the project.

<sup>&</sup>lt;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.

<sup>&</sup>lt;sup>2</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 may need to take place over a period of time.



#### SCHEDULE

- **Status:** This is the status for the project and this field cannot be changed from this screen.
- Start Date: This will display the start date for the project. *Type* in or click on the down *arrow* to select an alternative start date for the project using the Calendar function.
- End Date: The date the project is scheduled to be completed is displayed. *Type* in or click on the down *arrow* to select an alternative end date for the project using the Calendar function.
- **Project Manager:** Click on the down *arrow* to select an alternative project manager for the project.
- Notifiable: This option is not used by the system.

#### **CUSTOMER INFO FRAME**

The Customer Info frame will be auto populated with the Customer information selected and no changes can be made to the Customer Information in this frame.

• Any *Notes* linked to this customer can be viewed here.



<b>\$</b> =	6	Edit proje	ct : PRJ000040	8 - BI	PO: Version 2.5.	0.4 - Example Co	mpany v2.5.	0.0				I X
Home Equipmen	nt / Locations Contract	Finance / HR	Inventory M	ainten	ance / Projects	Manufacturing	Procuremen	t Sales	Service	Reporting	Utilities —	₽ ×
	t Workspaces											
	*											
												~
Links # Enter text to search	Identification :				1		9	ustomer 1	nfo			H Linked Work Orders
		Maintenance Projec	t - SP400					Custor	ner Code	HOP001		DM De
Functions	beschption	- to the second second second						custor		031 555 1234		- Jiko
Work Orders				Ŧ				1000	unt Code	051 555 1254		ders
	Project Reference								er Status	Activo	Is Debtor	
	Project Type	Continuous		• *					ntact No.	Acuve	IS DEDLOF	Additional Data
Work In Progress	Parent Project Detail						Vat No. 98765432					
	Description								d Reason	987054321		lata
	Project Reference							Hol	1 Reason			^
Documents												v
	Customer	Hope Works (Pty) L	.td	2				Notes			NoteDate	Not
Notes	Schedule :			_	7			e a 🖸 c			=	8 <b>0</b> 0
	Status	Open						Monitor to	oner yields mer to conf		12/01/2021	16:•
	Start Date		]							ontract pending	09/02/2017 18/04/2016	11::
Assignment History	End Date	26/02/2022 -	1					Check tor		one accipanion g	04/08/2014	00:0
	Project Manager			• •								
	Notifiable											
Progress Chart	L											
Baseline												
												-
Open Windows 🕶							Licer + Julanda	K 26/11/	2021 Ver	cion + 2 5 0 4	Example Company v2	500
Open Wildows *							user . Julanua	20/11/	ver ver	3011.2.3.0.4	Example Company v2	5.0.0

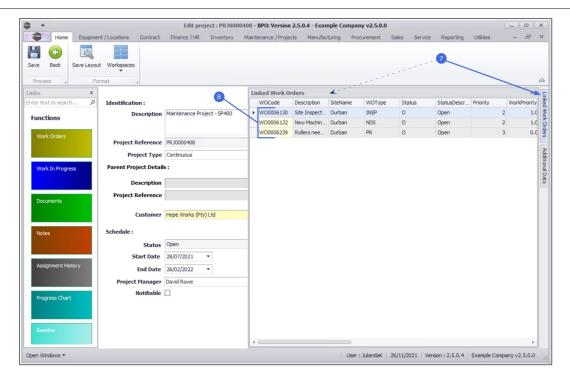
#### LINKED WORK ORDERS

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

**Note** that this panel can be docked to leave it expanded on the screen to make it easier to work in.

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





#### **ADDITIONAL DATA**

- You may wish to include information not covered in the project frames.
   Click on the *Additional Data* tab to expand the *Additional Data* frame.
- 10. Any *extra* information can be added in the Custom 1 10 fields. The field names can be re-named to suit your company requirements.

Please contact your BPO Analyst or CO3 Support for assistance.

12. Click on *Save* to save the changes made.



### Projects - Edit Project

Ŧ		Edit project : PRJ000	00408 - BPO: Version 2.5.	0.4 - Example Company v	2.5.0.0		
Home Equipm	ent / Locations Contract	Finance / HR Inventory	Maintenance / Projects	Manufacturing Procure	ment Sales Service	Reporting Utilities	- 8
	out Workspaces						9
nks 4	]				Additional Data	Ľ	+
ter text to search P		Maintenance Project - SP400			Custom 1	I	$\rightarrow$
Functions	Description	riantenance rioject or ioo			Custom 2		$ \rightarrow $
Work Orders			-		Custom 3		=
	Project Reference Project Type		<b>*</b> *		Custom 4	Field 4	;
Work In Progress	Parent Project Detail				Custom 5	Field 5	
work in Progress				10	Custom 6	Field 6	
	Description				Custom 7	Field 7	
Documents	Project Reference				Custom 8	Field 8	
	Customer	Hope Works (Pty) Ltd	Q		Custom 9	Field 9	
Notes	Schedule :				Custom 10	Field 10	
	Status	Open					
Assignment History	Start Date	28/07/2021 🔹					
Assignment History		26/02/2022 -					
	Project Manager		•				
Progress Chart Baseline	Notifiable						

MNU.058.018