

# **PROJECTS**

## **PROJECTS - NOTES**

Project Notes can help everyone working on the project to immediately understand what is important and essential to the project.

Project Notes can be added to a Project that has been Closed.

#### Ribbon Access: Maintenance / Projects > Projects



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



#### Projects - Notes

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#### **ADD A NOTES**

- 6. The *Notes for Project : [project ref number]* screen will be displayed.
- 7. From this screen you can view <u>all</u> the Notes relating to the project.
- 8. Click on **Add**.

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



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- 9. The *Add Comment* screen will be displayed.
  - Comment Header: Type in the Comment Header for the Project Note. This information will display on the *Notes for Project* list screen to identify the Note.
  - **Comment:** Type a simple Project Note related to the project, as required.
- 10. Click on *Save*.



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- 11. When you receive the *Project Notes* message confirming;
  - The comment has been saved.
- 12. Click on *OK*.

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13. The *Notes for Project* screen has been updated with the new note.

14. The *Employee Number* and *Employee Full Name* of the person logged onto to system has been recorded as the employee who created the note.

15. Click on *Back* to return to the *Project Listing* screen.



### EDIT A NOTE

- 1. From the *Notes for Project : [project ref number]* screen,
- 2. Click on the *row* of the project note you wish to edit.
- 3. Click on *Edit*.

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



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- 4. The *Edit Comment* screen will be displayed.
- 5. Make changes to the *Comment Header* and *Comment*, as required.
- 6. Click on *Save*.

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- 7. When you receive the *Project Notes* message to confirm;
  - The comment has been saved.
- 8. Click on OK.

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- 9. You will return to the *Notes for Project* screen where you can view the changes made to the *Comment Header*.
- 10. Click on *Back* to return to the *Project Listing* screen.



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#### **DELETE A NOTE**

- 1. From the *Notes for Project : [project ref number]* screen,
- 2. Click on the *row* of the project note you wish to remove.
- 3. Click on *Delete*.

Short cut key: *Right click* to display the *Process* menu list. Click on *Delete*.





- 4. When you receive the *Delete Note* message to confirm;
  - Are you sure you want to delete this note, from project [project ref number]?
- 5. Click on Yes.



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- 6. You will return to the *Notes for Project* screen and the Project Note has been removed.
- 7. Click on *Back* to return to the *Project Listing* screen.

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