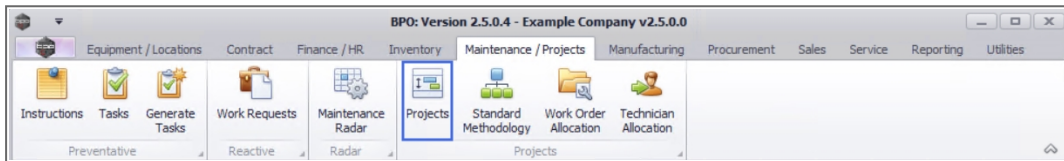


# PROJECTS

## PROJECTS - ADD SUB-PROJECT

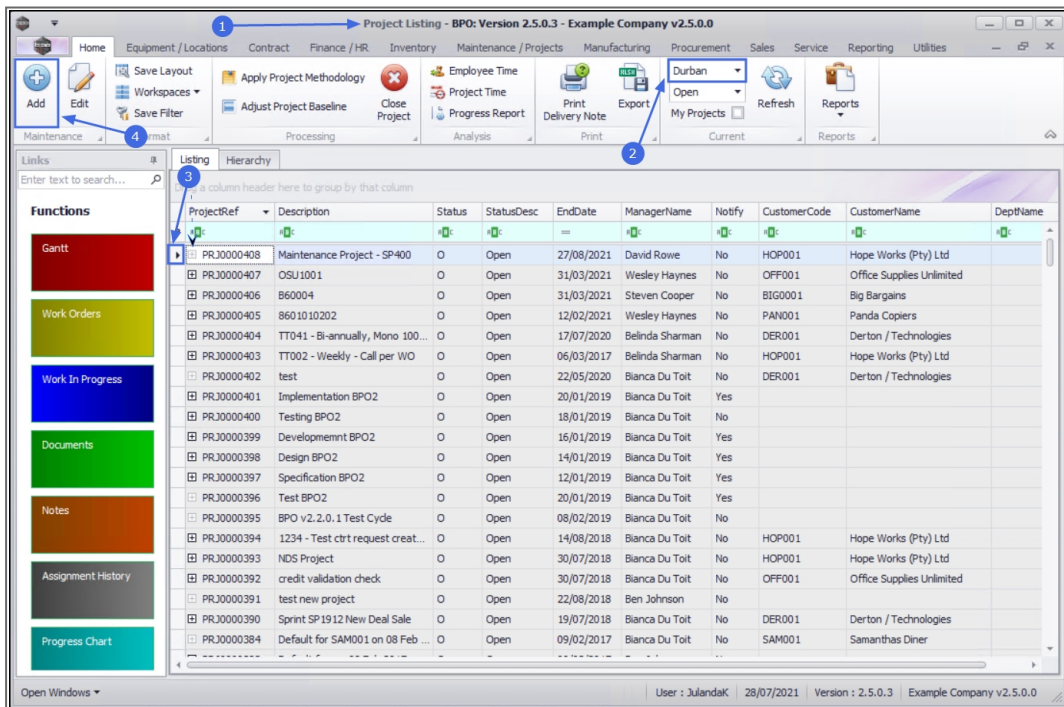
*Ribbon Access: Maintenance / Projects > Projects*



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**.

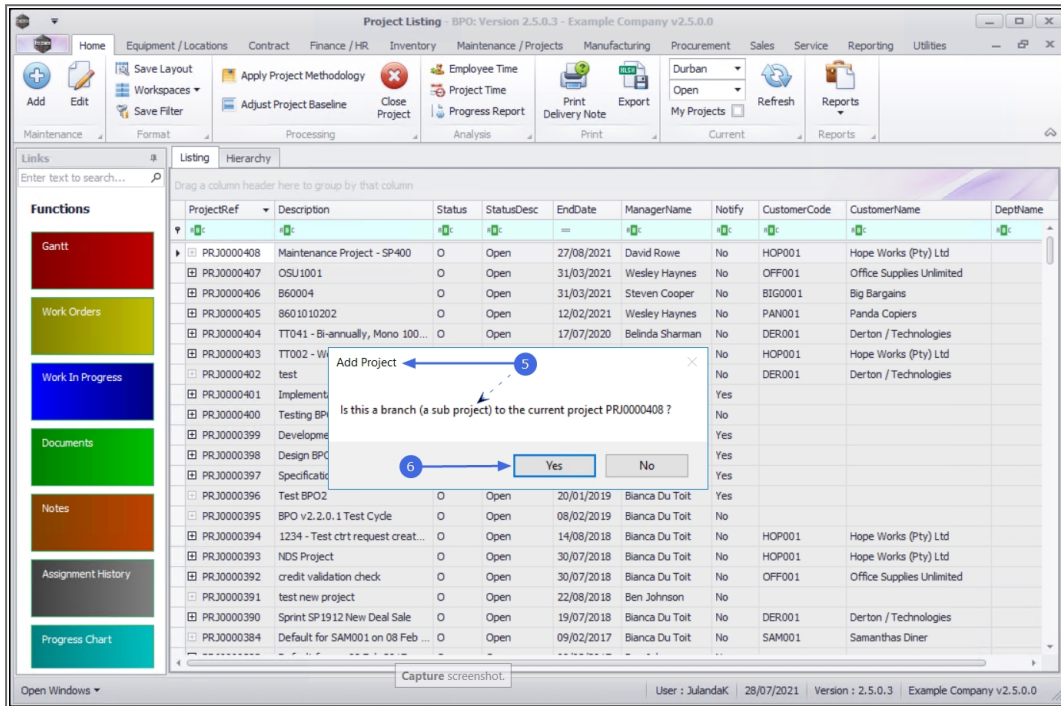


Short cut key: **Right click** to display the **All groups** menu list. Click on **Add**.



## 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.

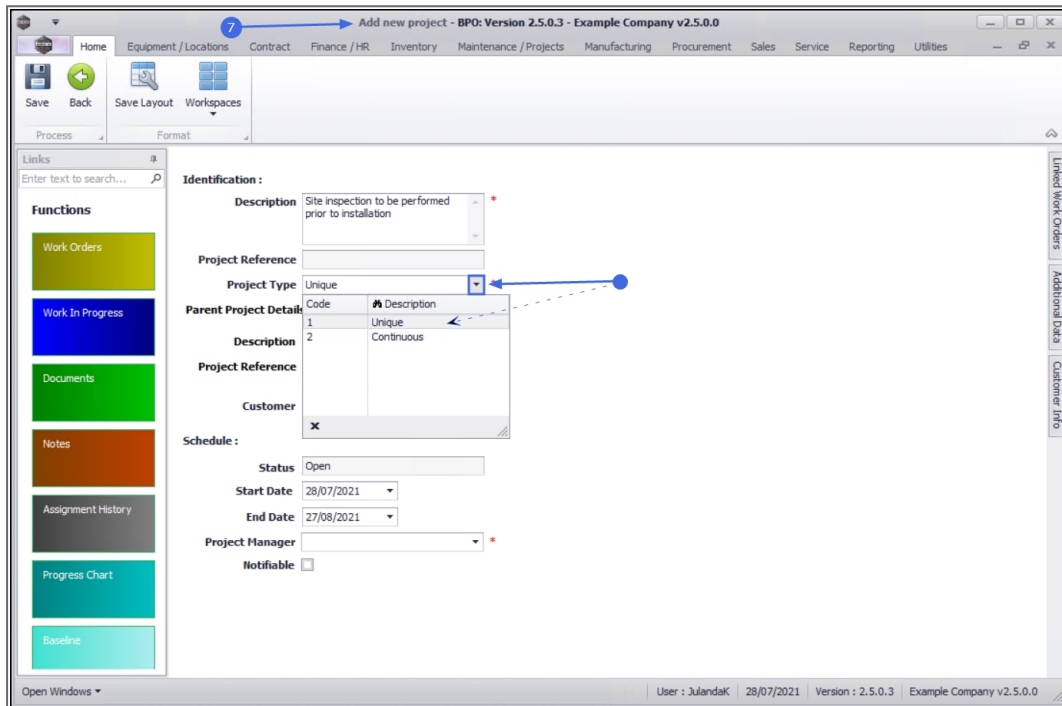
<sup>1</sup>The project description is a short explanation what the project is all about, e.g. Scheduled Maintenance that needs to be performed.

- **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.

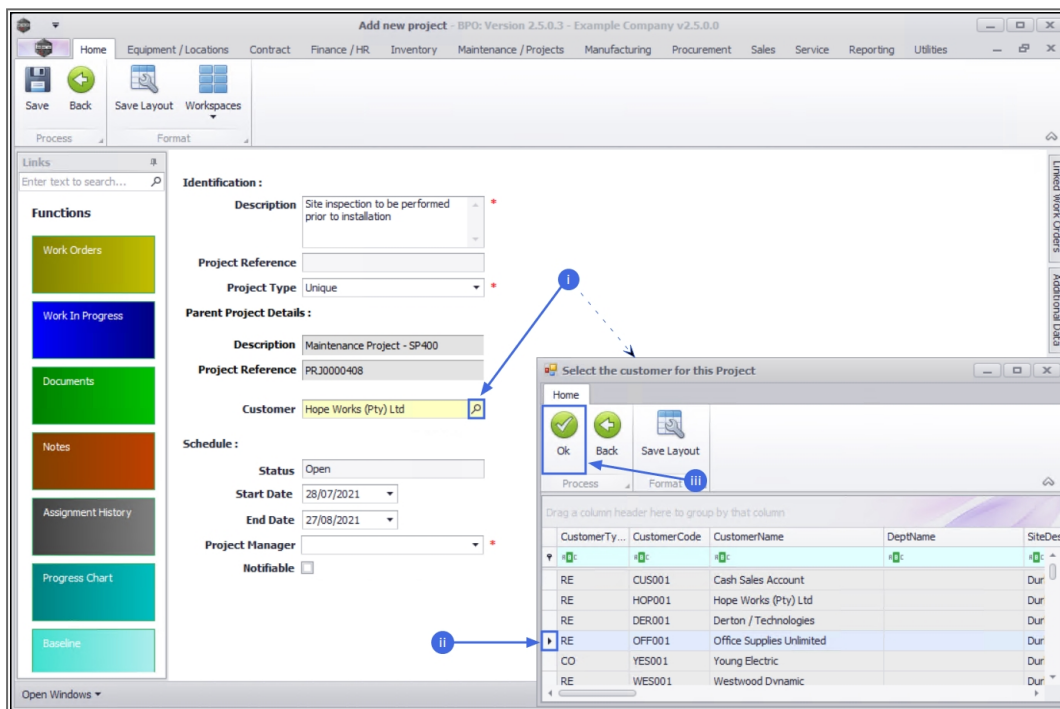


## PARENT PROJECT DETAILS

- **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.

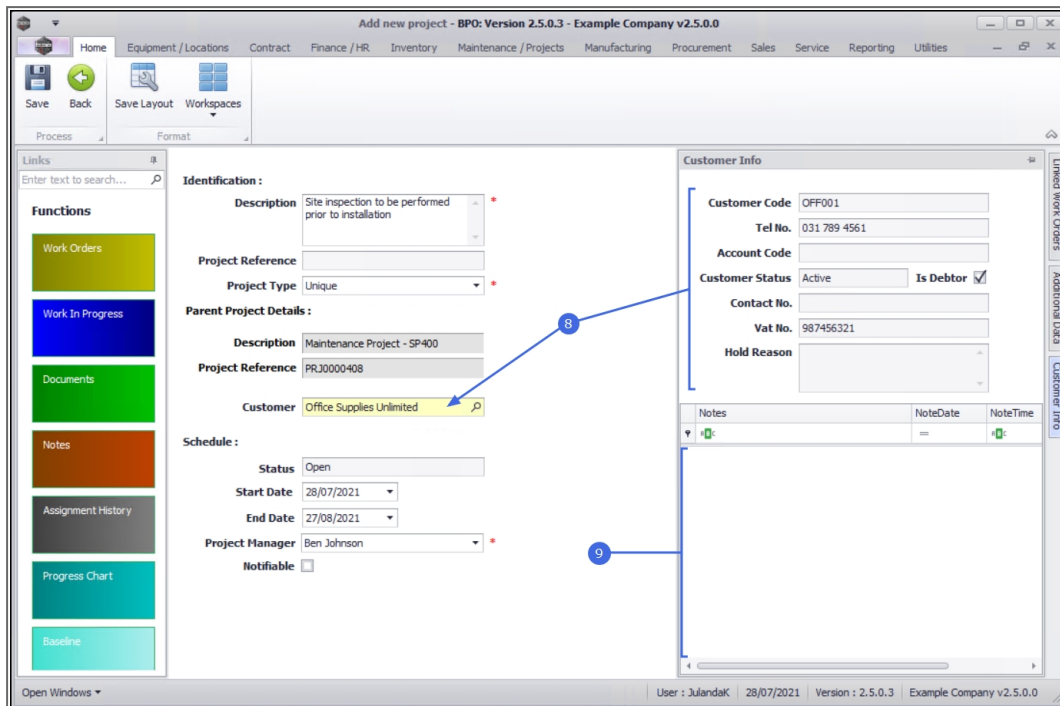
- **Project Reference:** The project reference has been auto populated with the project reference of the main project you have selected.
- **Customer:** The customer field has been auto populated with the customer selected on the main project. You may wish to change the customer for the sub-project, 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**.



## 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.



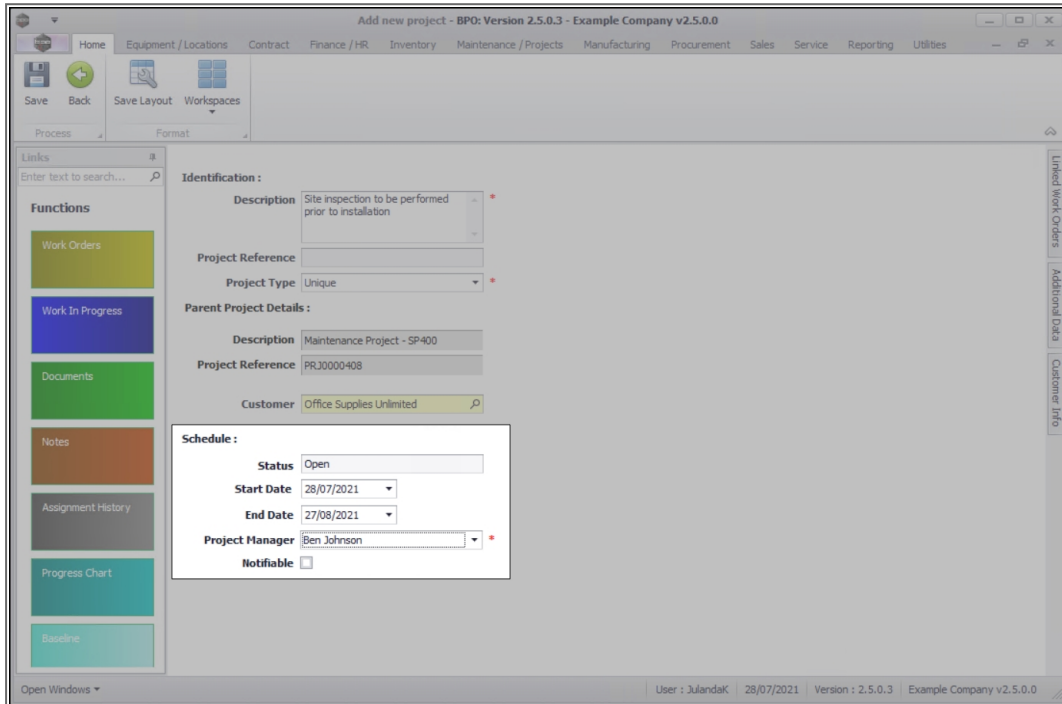
## SCHEDULE

- **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.



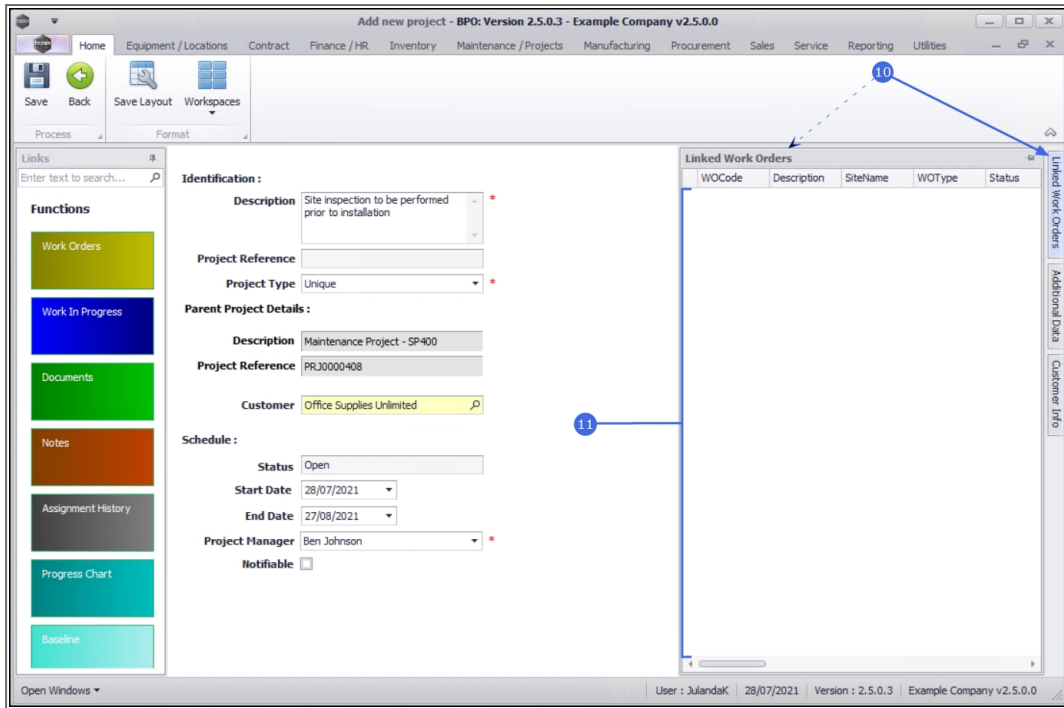
## LINKED WORK ORDERS

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



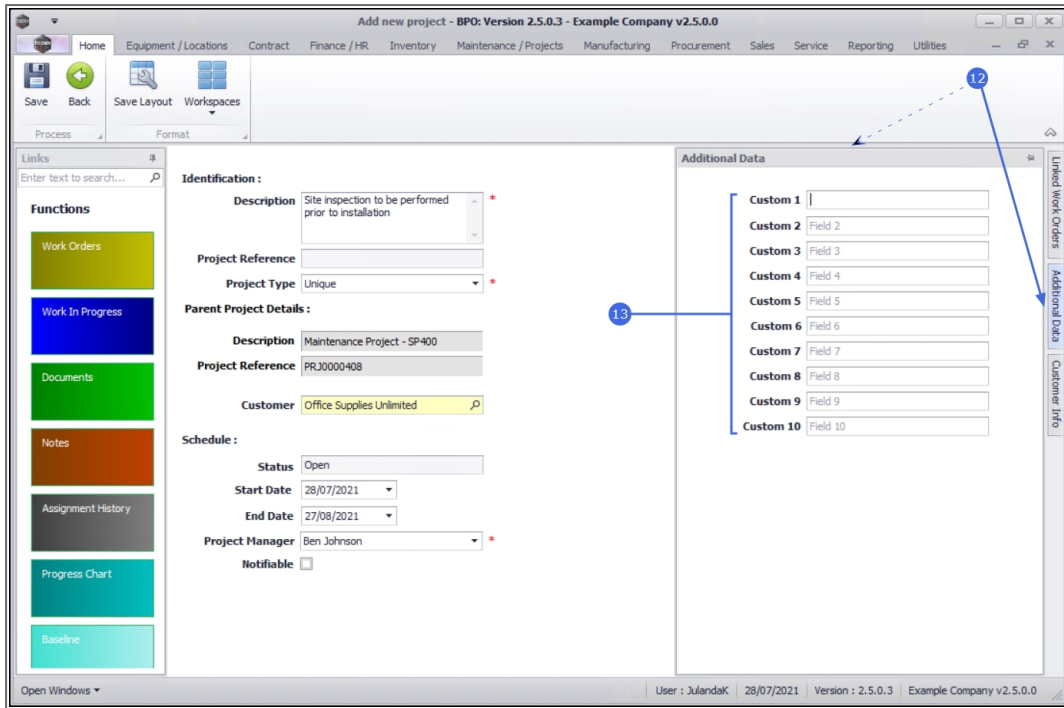
This panel can be docked to leave it expanded on the screen, which will make it easier to work in.

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



## ADDITIONAL DATA

12. 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.
13. 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

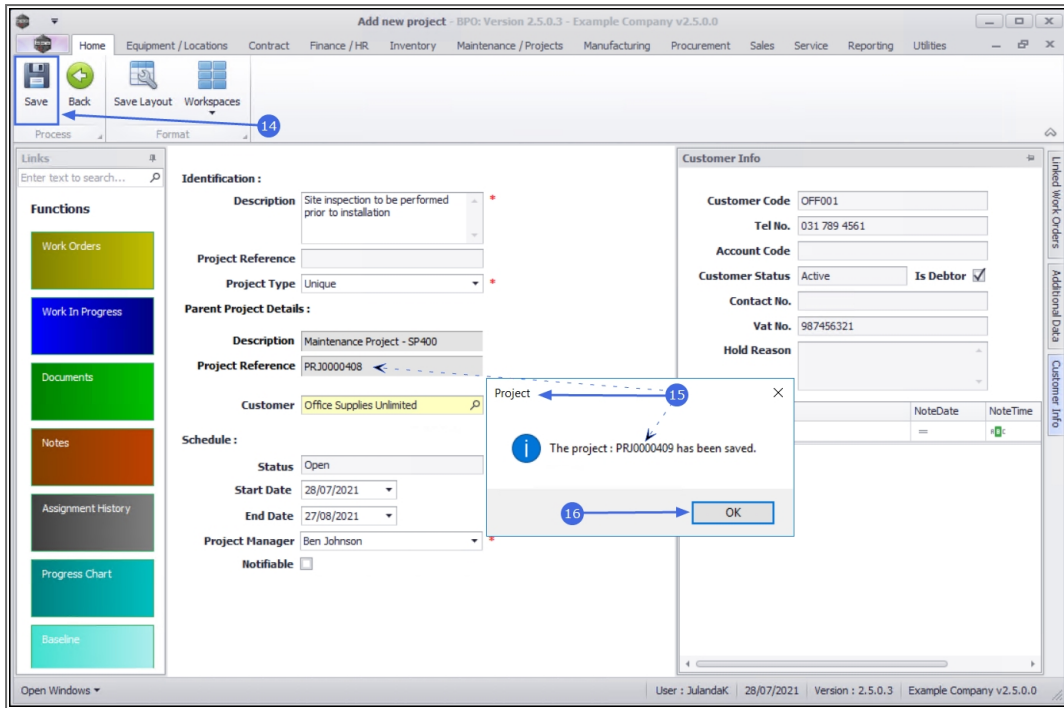
14. After adding the relevant information for creating the Sub-Project, click on **Save**.
15. When you receive the **Project** message screen informing you that;
  - **The project: [project ref number] has been saved.**



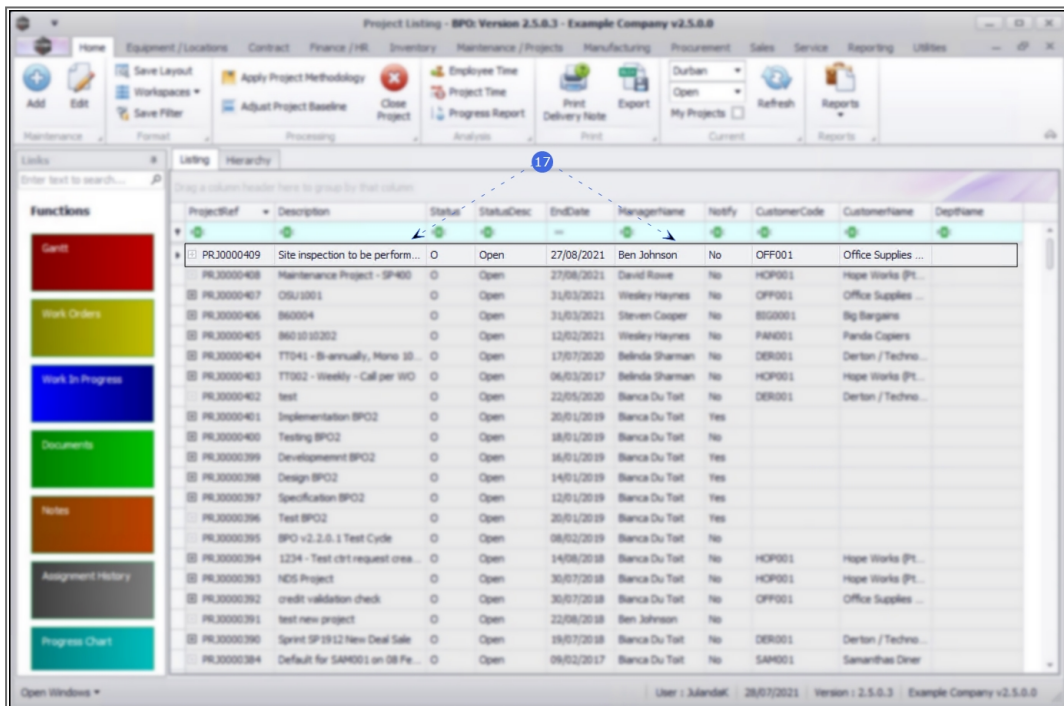
Note that the sub-project number is different from the main project number.

16. Click on **OK**.



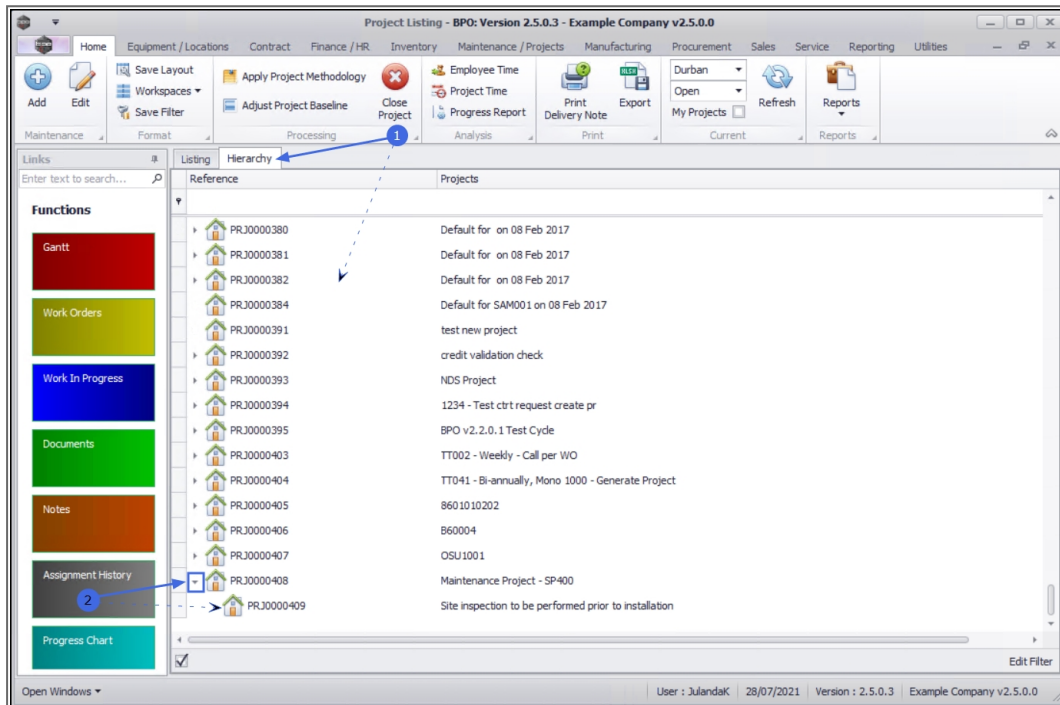


17. You will return to the **Project Listing** screen where you can view the sub-project.



## 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