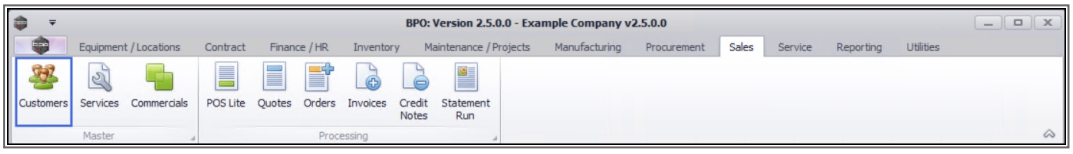
PROJECTS

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.

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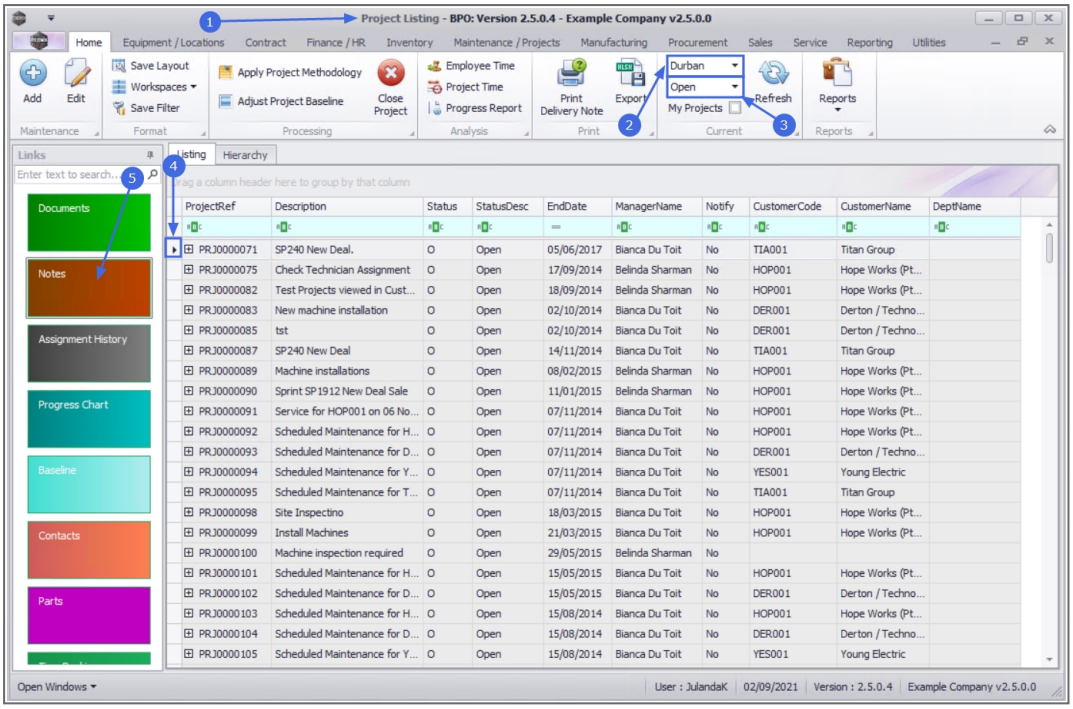

ADD A NOTES

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***.

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

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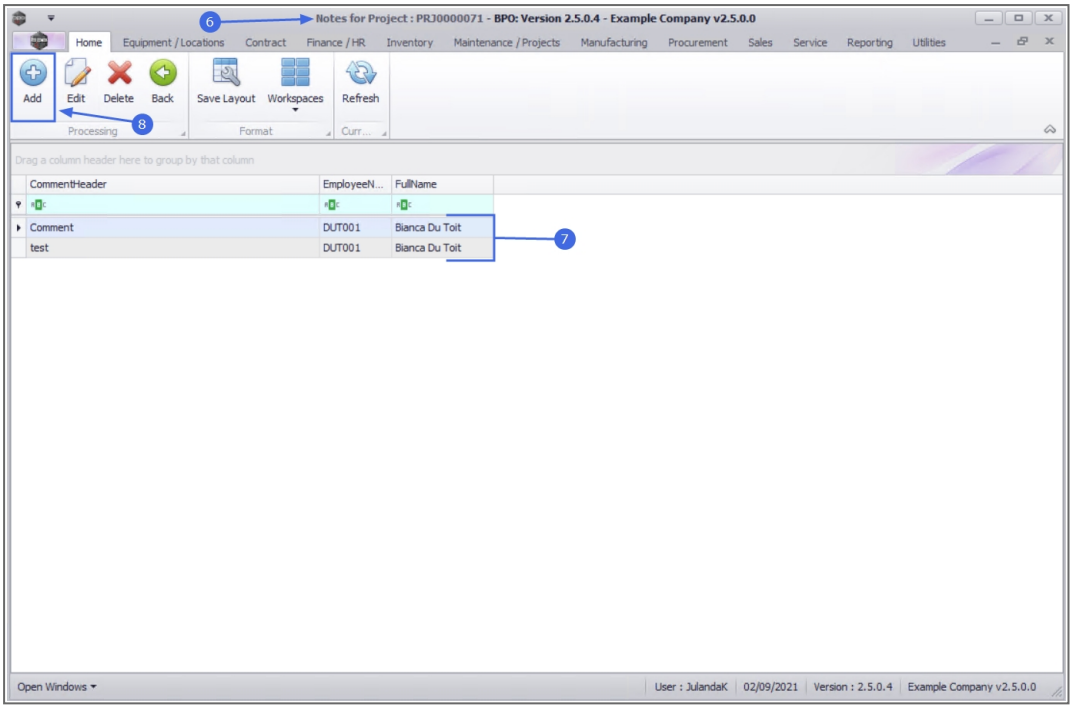

9. The ***Add Comment*** screen will be displayed.
    - **Comment Header:** Type in the Comment Header for the Project Note. This information will display on the ***Notes for Project*** list screen to identify the Note.
    - **Comment:** Type a simple Project Note related to the project, as required.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

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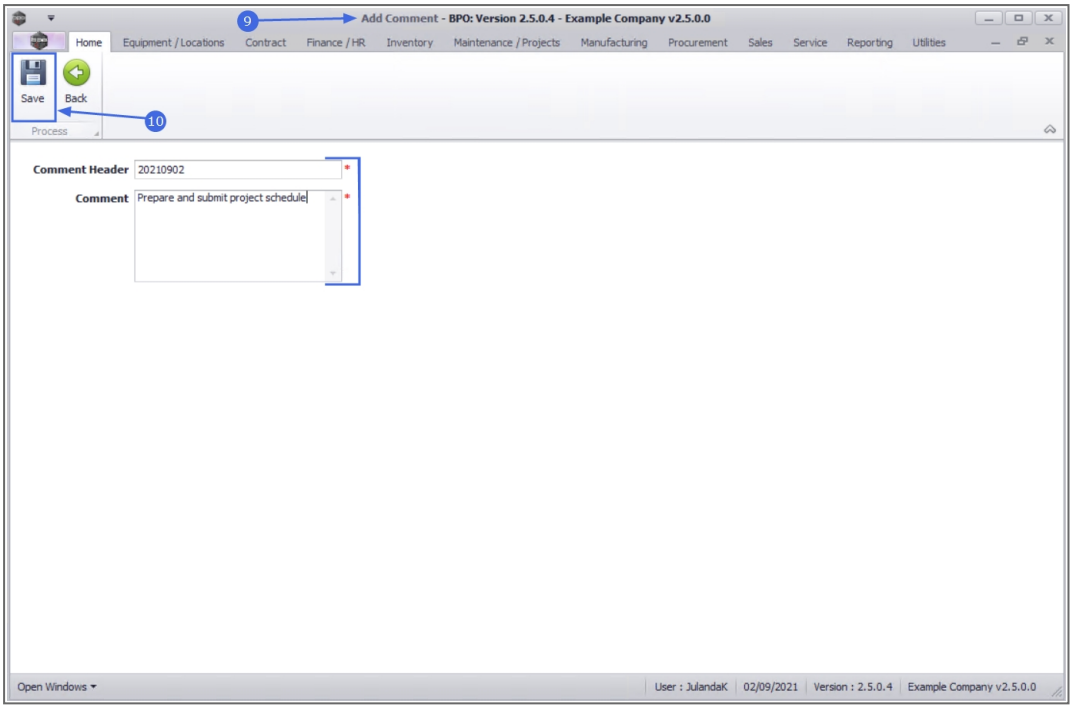
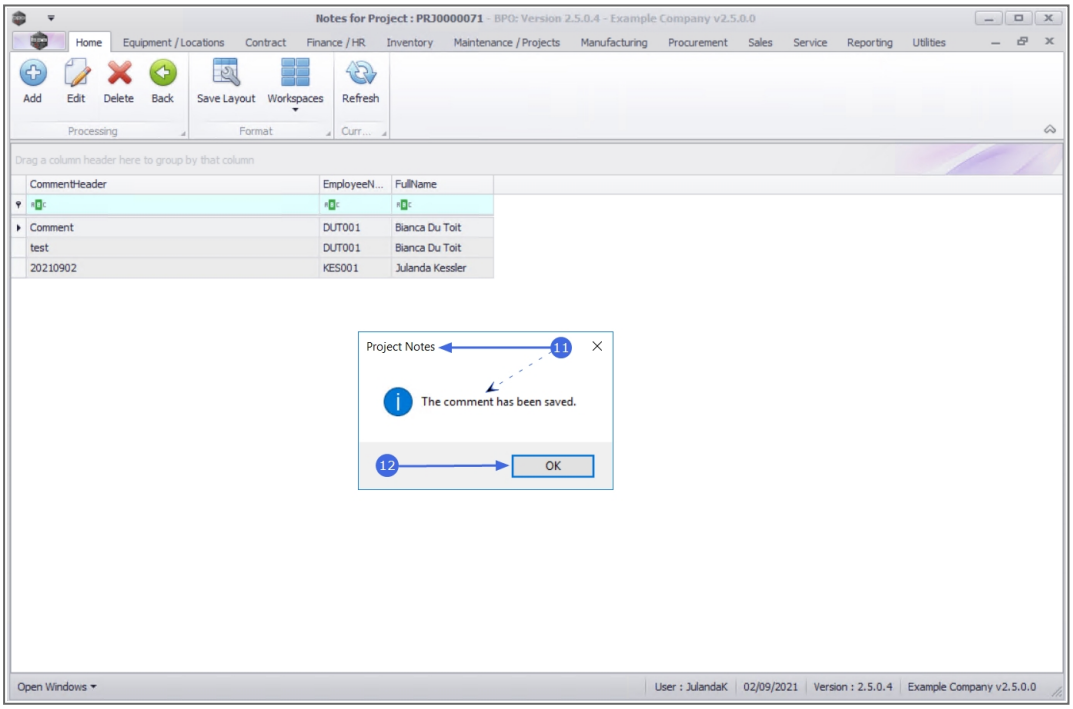


11. When you receive the ***Project Notes*** message confirming;
    - ***The comment has been saved.***
12. Click on ***OK***.



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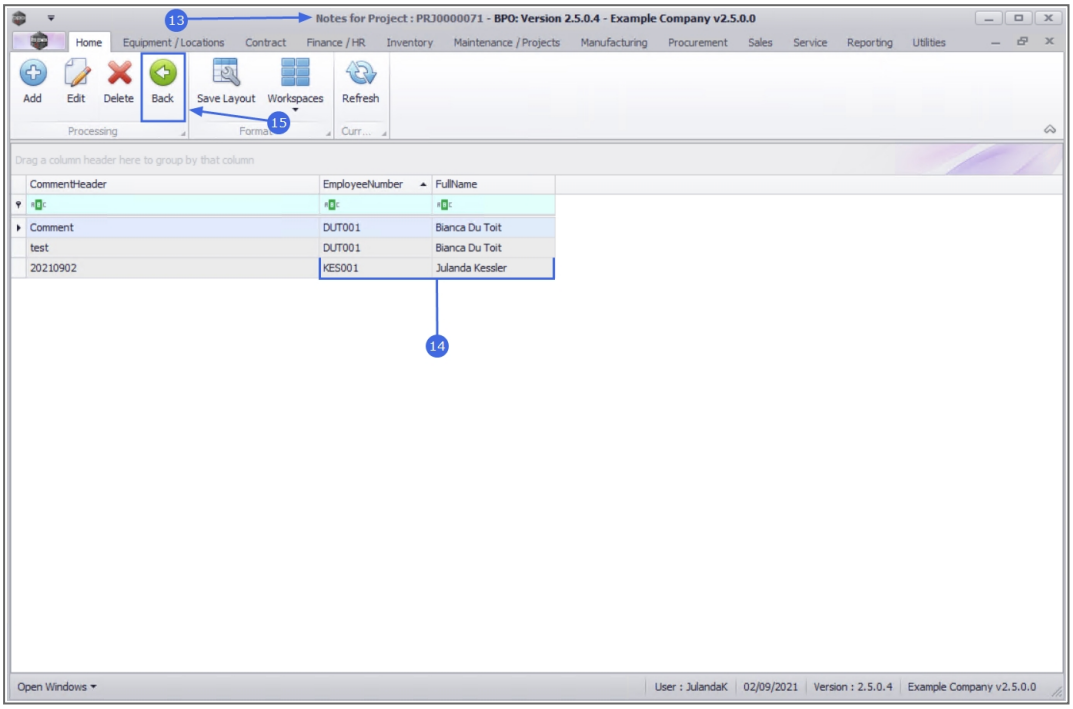
13. The ***Notes for Project*** screen has been updated with the new note.
14. The ***Employee Number*** and ***Employee Full Name*** of the person logged onto to system has been recorded as the employee who created the note.
15. Click on ***Back*** to return to the ***Project Listing*** screen.



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***.

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

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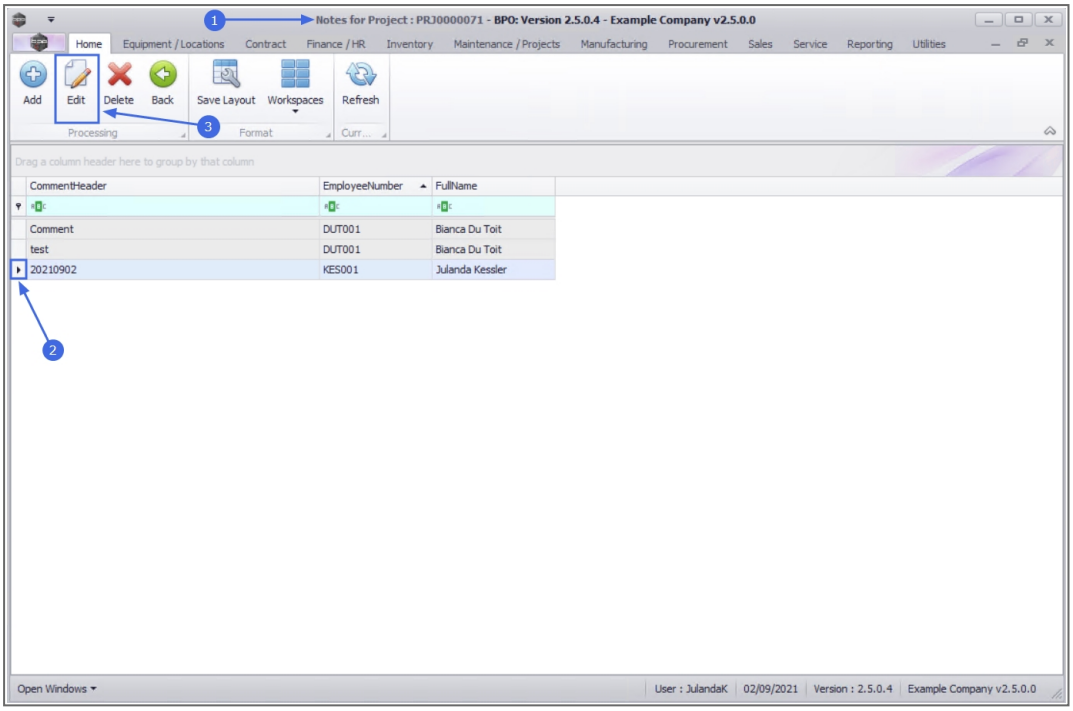
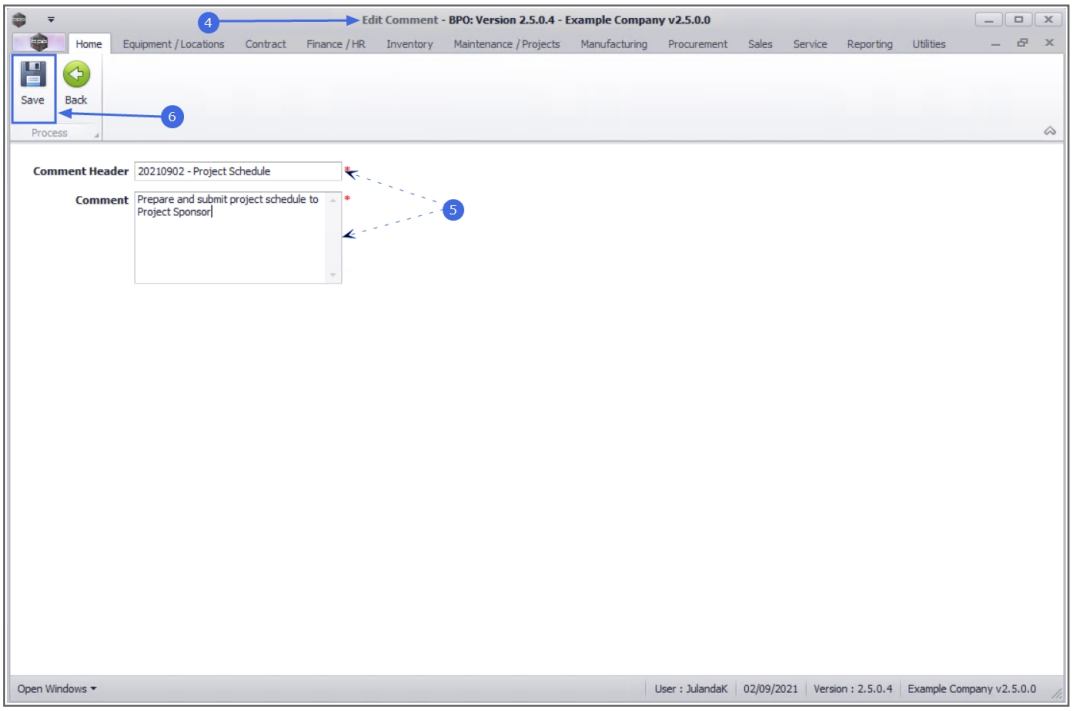


4. The ***Edit Comment*** screen will be displayed.
5. Make changes to the ***Comment Header*** and ***Comment***, as required.
6. Click on ***Save***.



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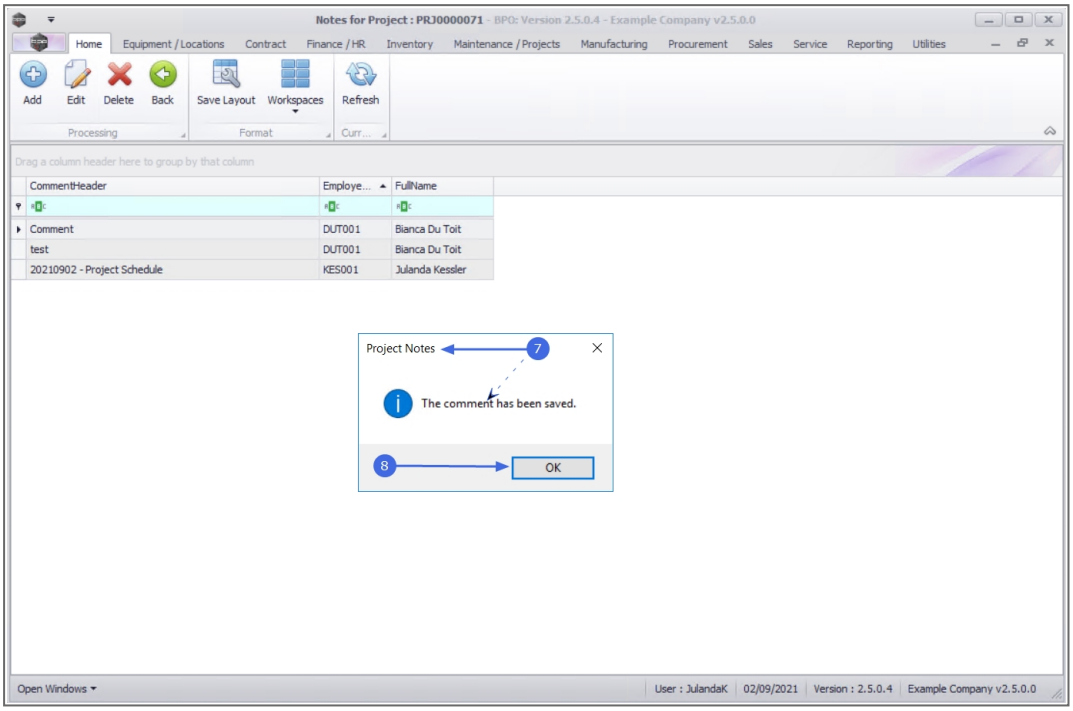
7. When you receive the ***Project Notes*** message to confirm;
    - ***The comment has been saved.***
8. Click on ***OK***.



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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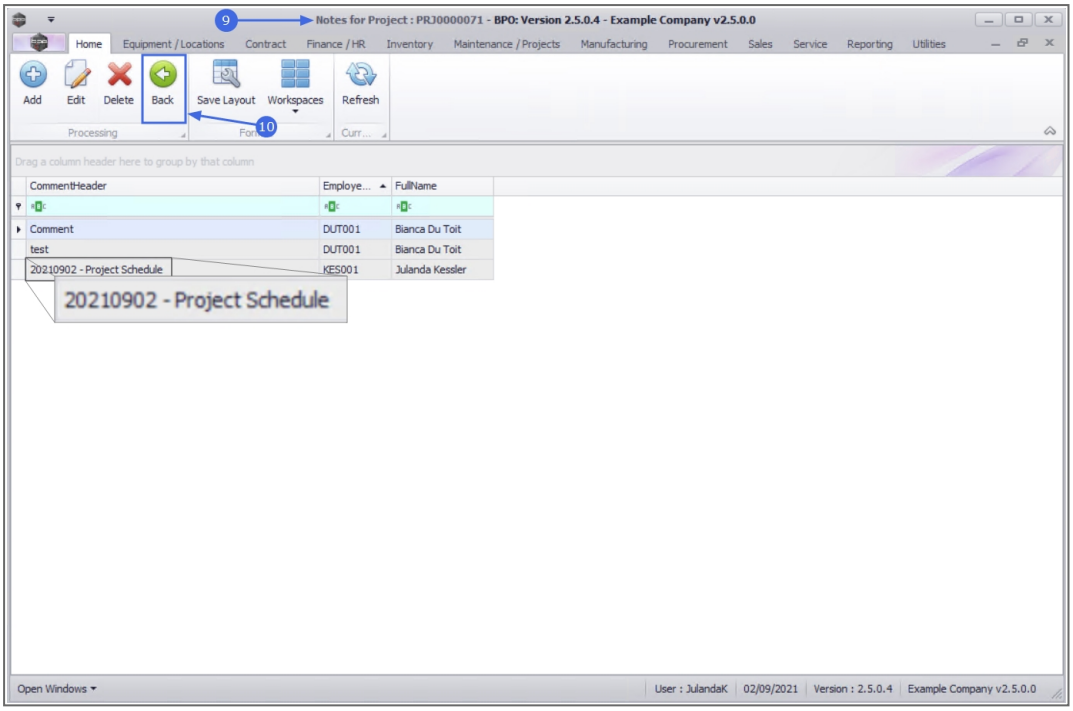

DELETE A NOTE

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***.

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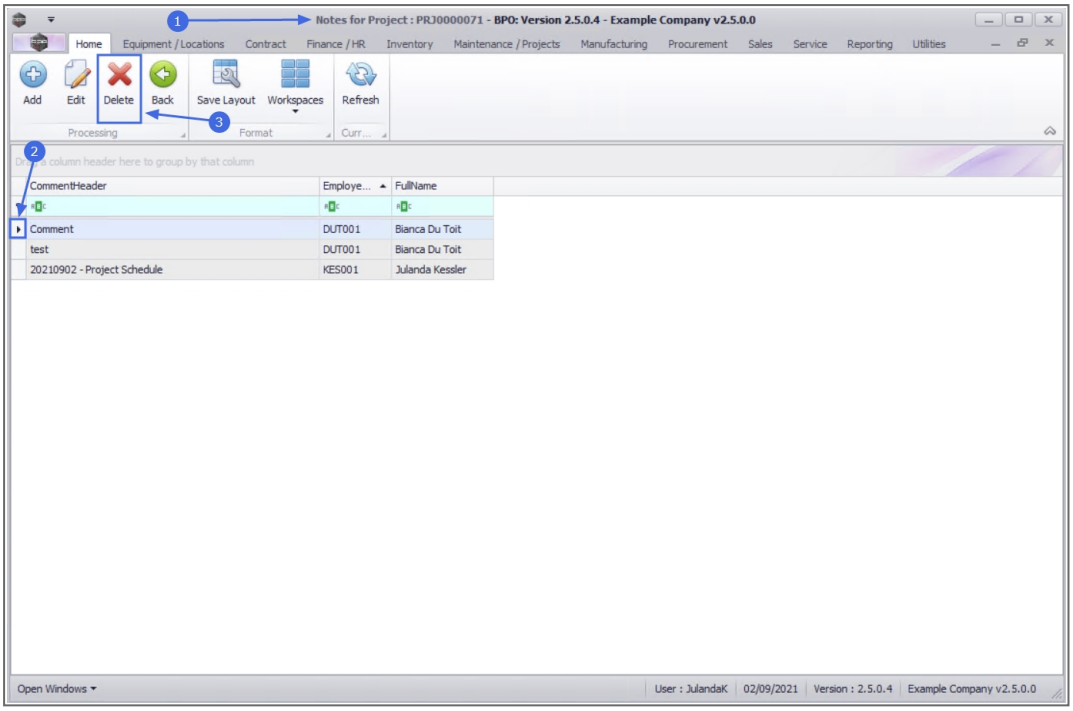

4. When you receive the ***Delete Note*** message to confirm;
    - ***Are you sure you want to delete this note, from project [****project ref number****]?***
5. Click on ***Yes***.

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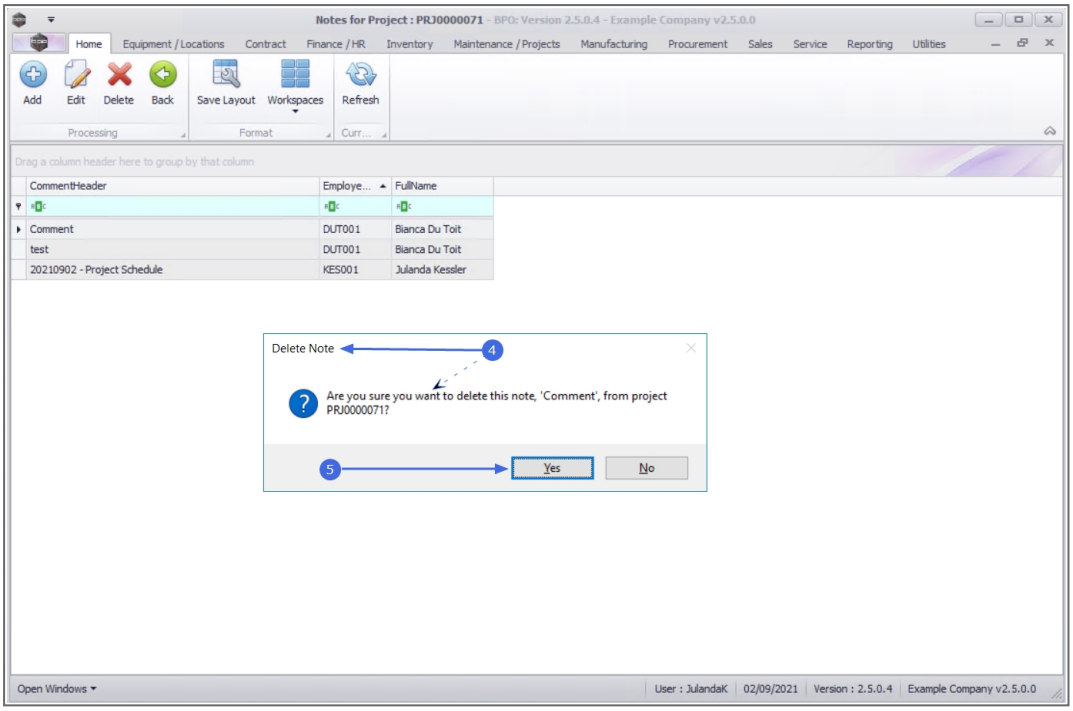
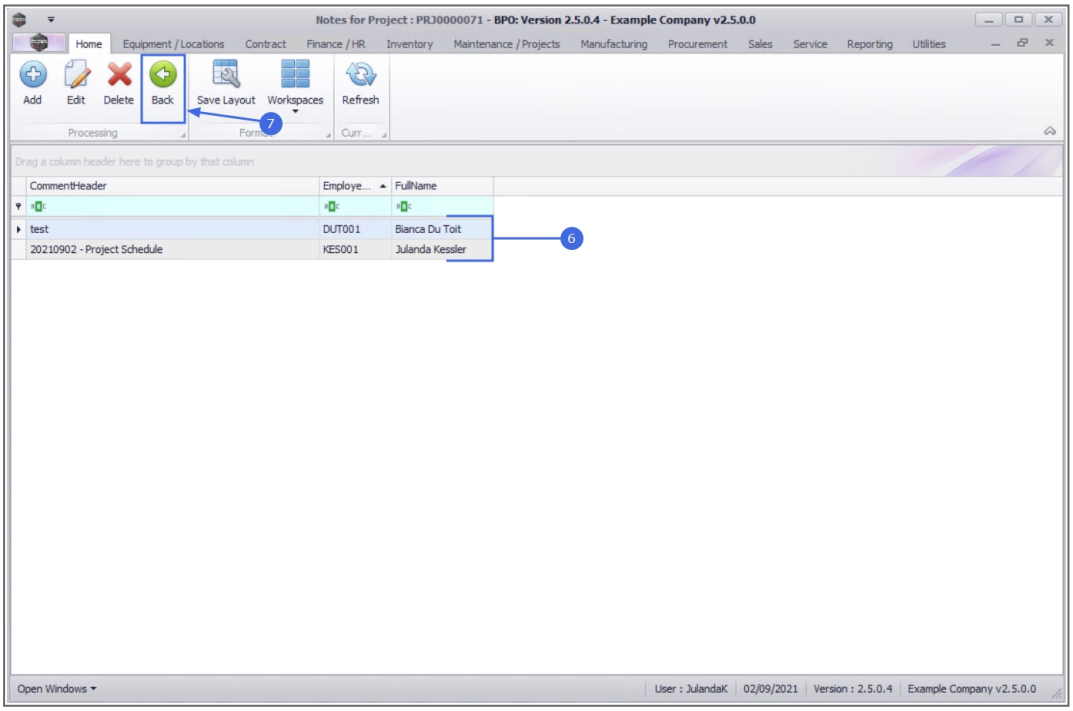


6. You will return to the ***Notes for Project*** screen and the Project Note has been removed.
7. Click on ***Back*** to return to the ***Project Listing*** screen.



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