

We are currently updating our site; thank you for your patience.

PROJECTS

INTRODUCTION TO PROJECTS

A project is a collective group of jobs that need to be carried out.

The Project module is a tool for users to collectively view the work to be done under a project, to manage timelines and project schedules.

By monitoring the project, you can keep track of work that has been done and work that still needs to be done.

You can **invoice** a project when complete.

You can create a **New Deal Sale** or **New Deal Rental** Project from a Sales Order.

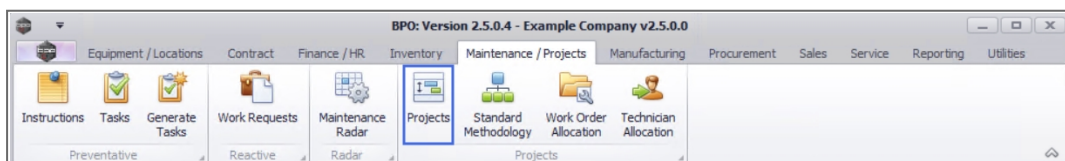
Projects are either **Open** or **Closed**. Once closed, a project cannot be re-opened.

Use BPO to [Projects - Add Main Project](#) or use [Projects - Work Orders](#) to create a project for Maintenance Planning work orders.

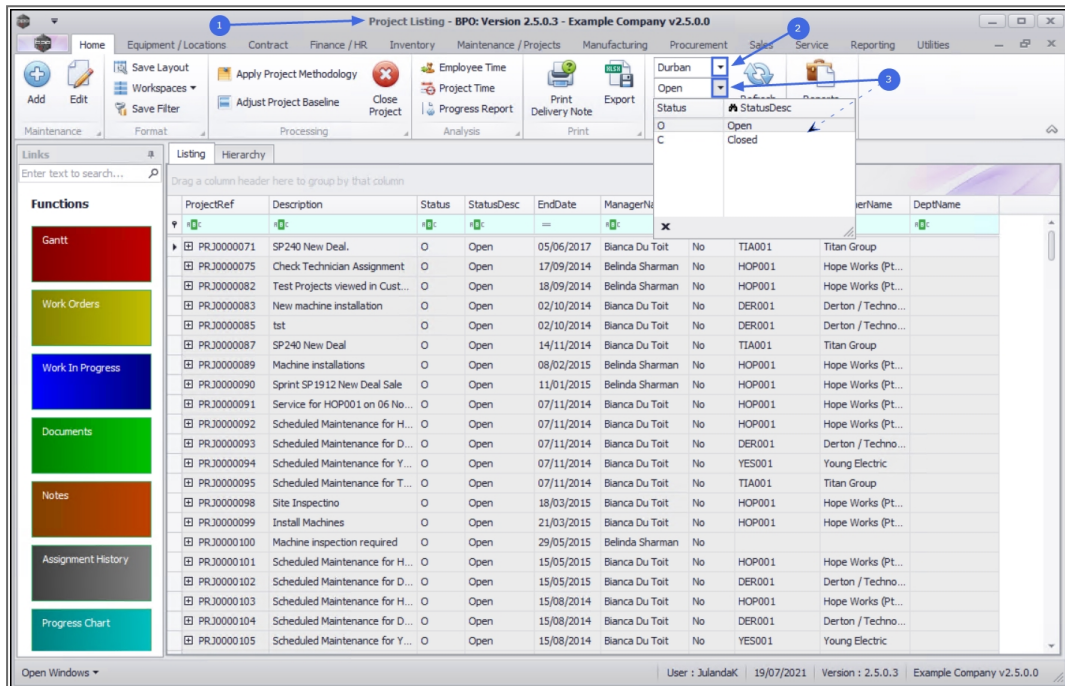
Project Static Data Setup

- [Project Contact Type](#)
- [Project Methodology Class](#)

Ribbon Access: Maintenance / Projects > Projects



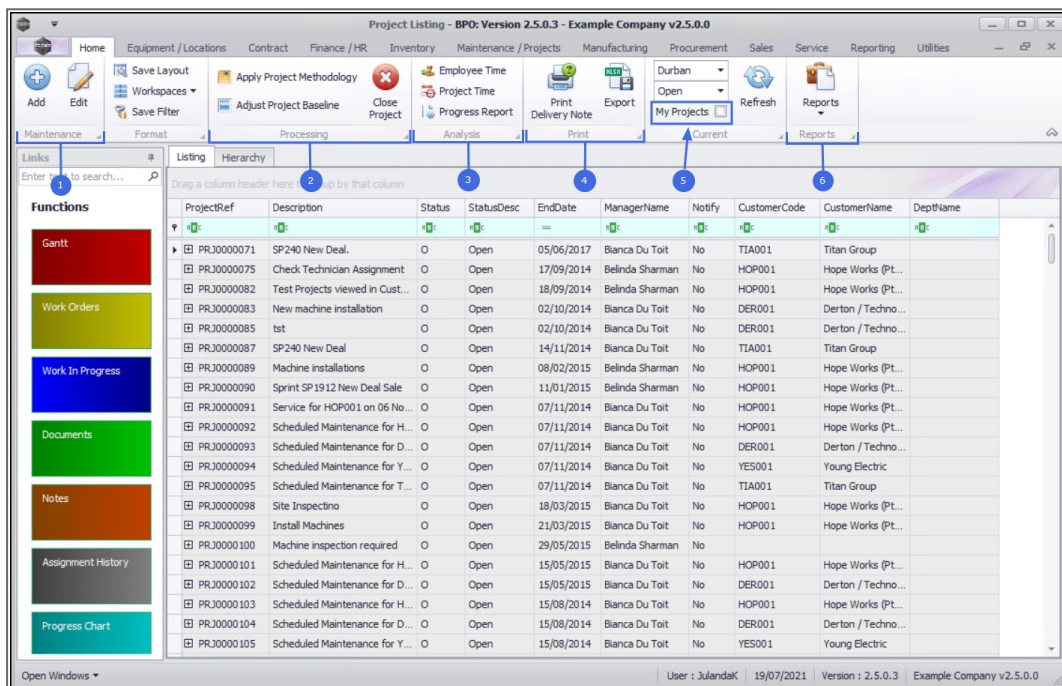
1. The **Project Listing** screen will be displayed.
2. Select the **Site** that you wish to work in by clicking on the down arrow and selecting the required site
 - The example has **Durban** selected.
3. The Project **Status** can either be set to **Open** or **Closed**.
 - The screen will open by default in the Open status as you will most likely be working in this status.



PROJECT RIBBON

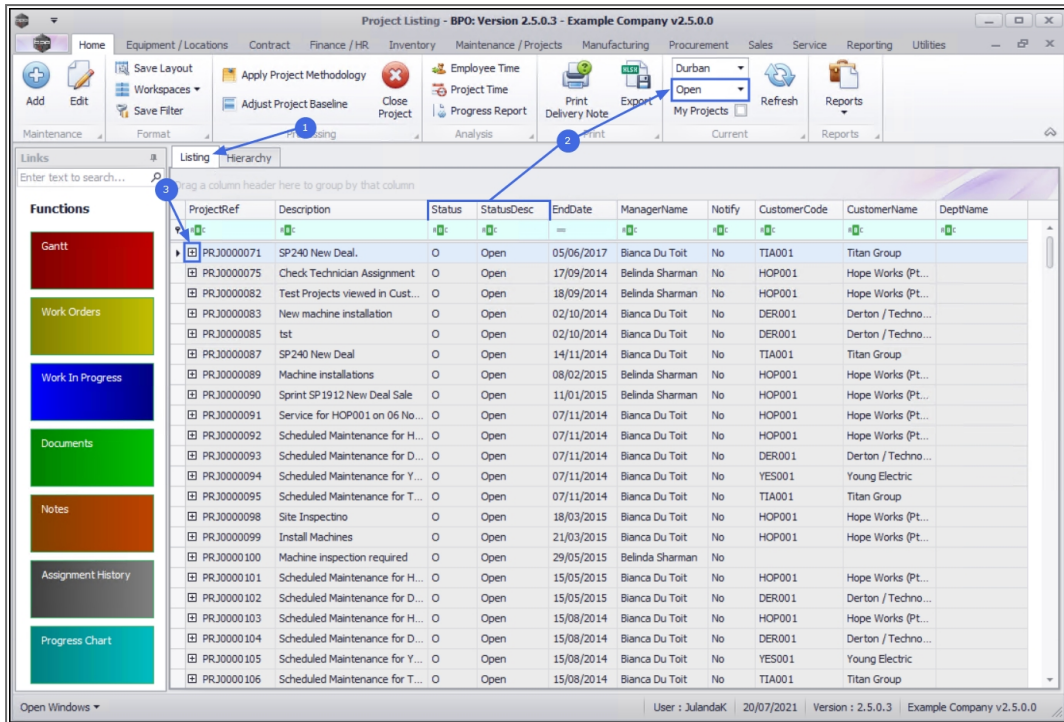
1. From the **Maintenance section** you can [Projects - Add Main Project](#) and / or [Projects - Add Sub-Project](#). The [Projects - Edit Project](#) function allows you to make changes to project information as well as link digital documents, invoices, book time, etc. to the project.
2. From the **Processing section**, you may choose to [Projects - Apply Project Methodology](#), [Projects - Adjust Project Baseline](#) or [Projects - Close Project](#).

3. From the **Analysis section**, you can generate and view the [Projects - Employee Time Sheet](#), the [Projects - Project Time Report](#) or generate a [Projects - Progress Report](#) for the project.
4. From the **Print section**, you can [Projects - Print Delivery Note](#) for the Project, or Export the Project list to an Excel Spreadsheet.
5. From the **Current section**, click on the [Projects - My Projects](#) check box to filter the project list by the projects that are **assigned to you** (the person currently logged on the system).
6. **Reports** allow you to print Project Reports.

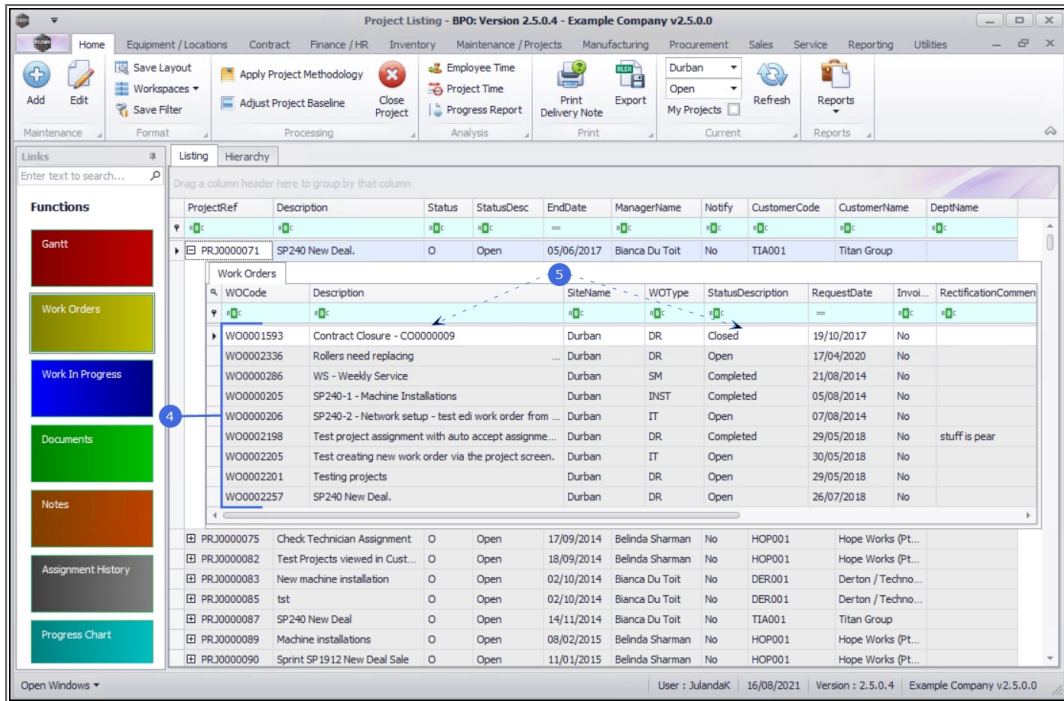


PROJECT LISTING FRAME

1. The Project Listing screen will by default open on the **Listing frame**.
2. The projects listed in this frame will be filtered using the **Status filer** that was selected.
3. You can click on the **expand button** in front of a project to **view** the work orders linked to the project.



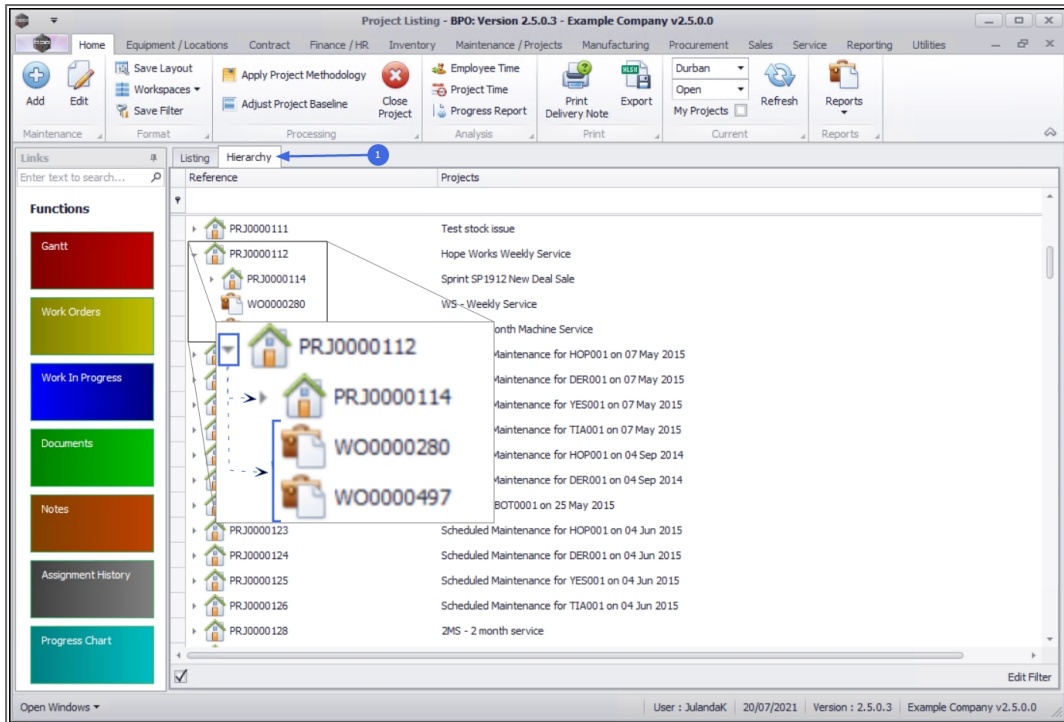
- The **Work Orders** frame will expand to display the list of work orders.
- Double click** anywhere in the **row** of the work order, to open the **Maintain Work Order** screen where you can view more details for the work order.



PROJECT HIERARCHY FRAME

1. The **Hierarchy** tab allows you to view the projects in a **tiered** order.
2. Click on the **tree view chevron** node in front of a project to expand any **sub-projects**¹ and Work Orders attached to the project.

¹A sub-project may also be referred to as a nested relationship project



FUNCTIONS TILES

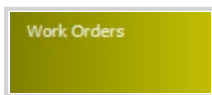
The **Functions** tiles will direct you to further information for a selected project.

These tiles are available from the **Project Listing** as well as the **Edit project** screen.

When using the function tiles from the **Project Listing** screen, ensure that you have selected the correct project before you click on a tile.



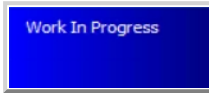
The **Gantt tile** will direct you to **Project Gantt View** screen where you can view the **Gantt chart**, which assists in the planning and scheduling of projects.



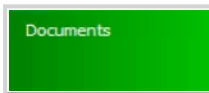
The **WO History tile** will direct you to the **Work Orders for Project Ref** listing screen where you can view a list of all the **Projects - Work Orders** linked to the selected project.

Depending on the status of the project, you can **Add, Edit, Delete, View, Close, Complete** or **Reinstate** a selected work order.

The [Work In Progress tile](#) will direct you to the **Work in Progress for Project** screen you can view a list of the **issued parts** requested against this project, create a [Return Request](#) for a selected part, or a **Customer Invoice** for the work order linked to a selected part, as well as a **Customer Invoice** for the project. Refer to [Projects - Work in Progress \(WIP\)](#)



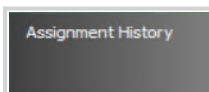
The [Documents tile](#) will direct you to the **Documents for Project** screen where you can view a list of the **digital documents** linked to the selected project, as well as **Add, Edit, Delete** or **View** project documents. Refer to [Project - Documents](#).



The [Notes tile](#) will direct you to the **Notes for Project** screen you can view a list of the **notes and / or comments** linked to the selected project as well as [Projects - Notes](#), or and / or comments.



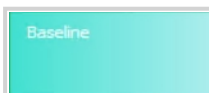
The [Assignment History tile](#) will direct you to the **Assignment Listing for Project** screen you can view a list of the **assignments** linked to the selected project as well as Assign Technician, Unassign Technician or Force Accept a selected assignment. Refer to [Projects - Assignment History](#)



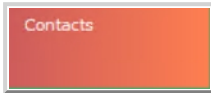
The [Progress Chart tile](#) will direct you to the [Projects - Progress Chart](#) for Project screen you can view a chart displaying the project status, the start and end times and percentage of the work completed.



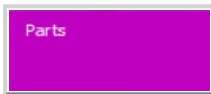
The [Baseline tile](#) will direct you to the **Baseline Adjustments for Project** screen , where you can view a list of any



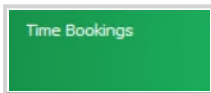
Projects - Baselineadjustments (new project start and end dates) that have been applied to the selected project as well as **Add** an adjustment, if required.



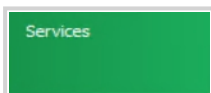
The **Contacts tile** will direct you to the **Contacts for Project** screen where you can view a list of any **contacts** that have been linked to the selected project as well as **Add**, **Edit** or **Delete** a contact as required. Refer to **Projects - Contacts**



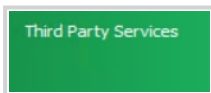
The **Parts tile** will direct you to the **Parts for Project** screen where you can view a list of the **Projects - Parts** that have been requested for the selected project, as well as print the **Project Picking Slip**.



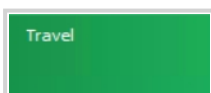
The **Time Bookings tile** will direct you to the **Time Bookings for Project** screen you can view a list of any **Projects - Time Bookings** linked to the selected project.



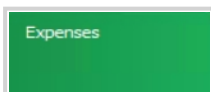
The **Services tile** will direct you to the **Services for Project** screen, where you can view a list of any **Projects - Services** linked to the selected project.



The **Third Party Services tile** will direct you to the **Third-Party Services for Project** screen where you can view a list of any **third-party services** linked to the selected project.



The **Travel tile** will direct you to the **Travel for Project** screen, where you can view a list of any **Projects - Travel costs** linked to the selected project.



The **Expenses tile** will direct you to the **Expenses for Project** screen, where you can view a list of any **Projects - Expenses** linked to the selected project.



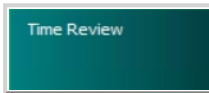
The **Finance tile** will direct you to the **Finance Analysis for Project** screen you can view a breakdown of the **Items / Parts** required as well as the **Planned Actual** and **Invoiced**

costs of the selected project.

The [For Contract](#) tile will direct you to the **Items Awaiting Contract for Project** screen. This screen is divided into a **Parts** and a **Contracts** frame. You can select a [part to be linked to a specific contract or a new contract](#) by dragging and dropping a selected part line into a contract line.

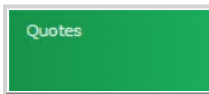


The [Time Review](#) tile will direct you to the **Time Not Billed for Project** screen where you will be able to Invoice a Work Order or Project, Flag Reviewed time, SLA Time and View Work Order or Project. Refer to [Projects - Time Review](#)

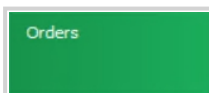


PROCESSING TILES

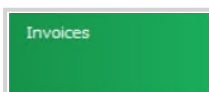
The [Quotes](#) tile will direct you to the **Sales Quotes for Project** screen where you can view a list of all the [Projects - Quotes](#) linked to the selected project. You can **Accept** and **Reject** a quote or **Convert a quote to an order**. You can also **Add**, **Edit**, **Delete** and **View** a quote.



The [Orders](#) tile will direct you to the **Sales Orders for Project** screen where you can view a list of all the [Projects - Sales Orders](#) linked to the selected project. From this screen you can **Add / Create** an order, **Edit**, **Delete** and **View** an order. You can also **Create an invoice**, **Create a New Deal**, **Add Items to the Work Order** as well as **Create a New Deal Project**.

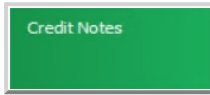


The [Invoices](#) tile will direct you to the **Sales Invoices for Project** screen where you can view the Project Invoices. You can also **Add**, **Edit** and **View** a Tax Invoice as well as record a Comment and Reference for an invoice. From the **Issues**



tile you can view a list of all the **items issued** against the selected sales invoice. Refer to [Invoice a Project](#)

The [Credit Notes](#) tile will direct you to the **Sales Credit Notes for Project** screen where you can view a list of all the **sales credit notes** linked to the selected project. You



can also [Raise Project Credit Note](#), **Edit**, **Delete** and **View** a credit note. From this screen you can also **Release** a credit note for approval, **Remove** a credit note from approval, **Approve** a credit note and **Reject** a credit note. From the **Returns** tile, you can view a list of all the **return items** linked to the selected sales credit note.

Related Topics

- [Creating a New Project](#)
- [Technician Allocation - Technician Projects](#)
- [Creating a New Work Order](#)
- [Link a Work order to a Project](#)
- [Link a Work order to a New Project](#)
- [Link a Work order to a Current Project](#)
- [Work Order Allocation](#)
- [Closing a Project](#)

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