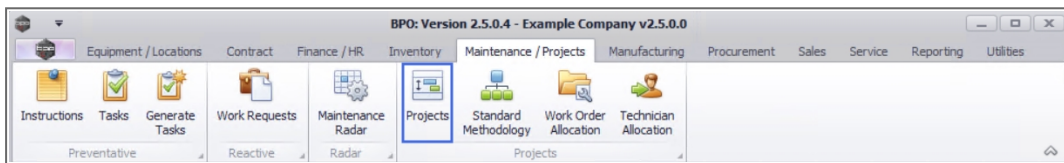


We are currently updating our site; thank you for your patience.

PROJECTS

PROJECTS – ADD SUB-PROJECT

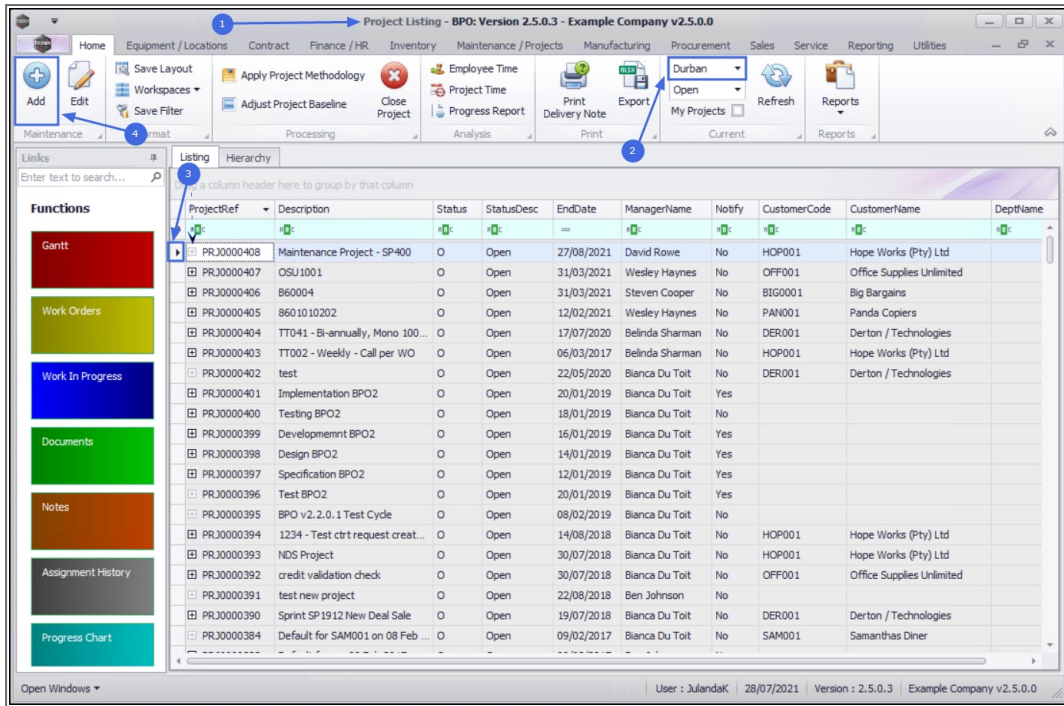
Ribbon Access: Maintenance / Projects > Projects



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**.

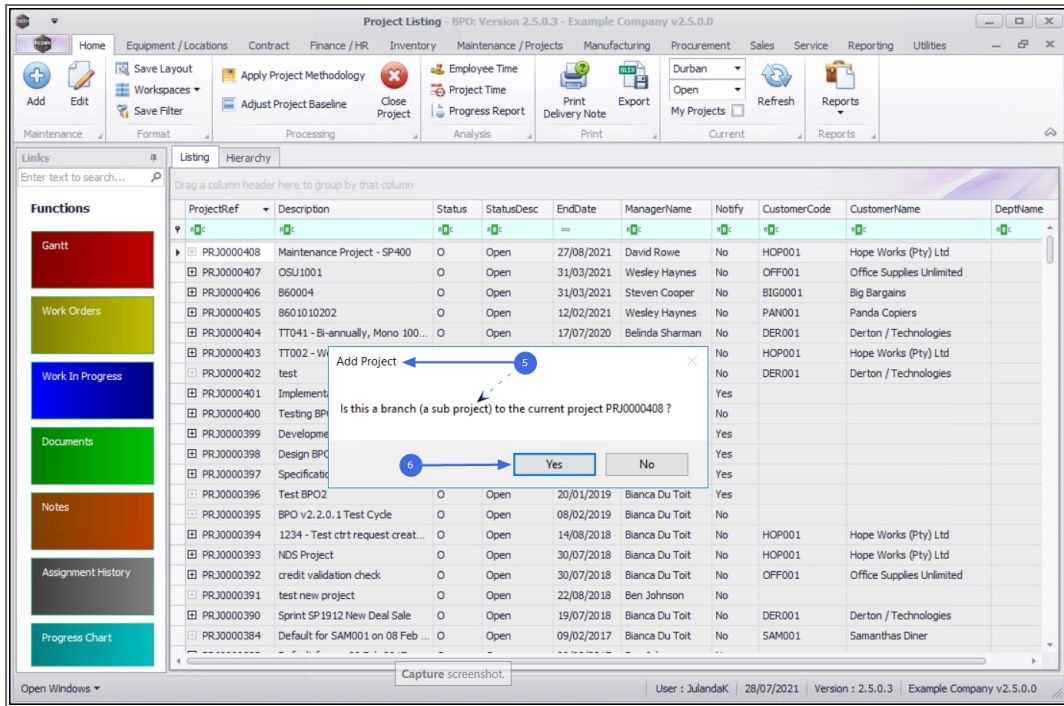


Short cut key: Right click to display the **All groups** menu list. Click on **Add**.



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

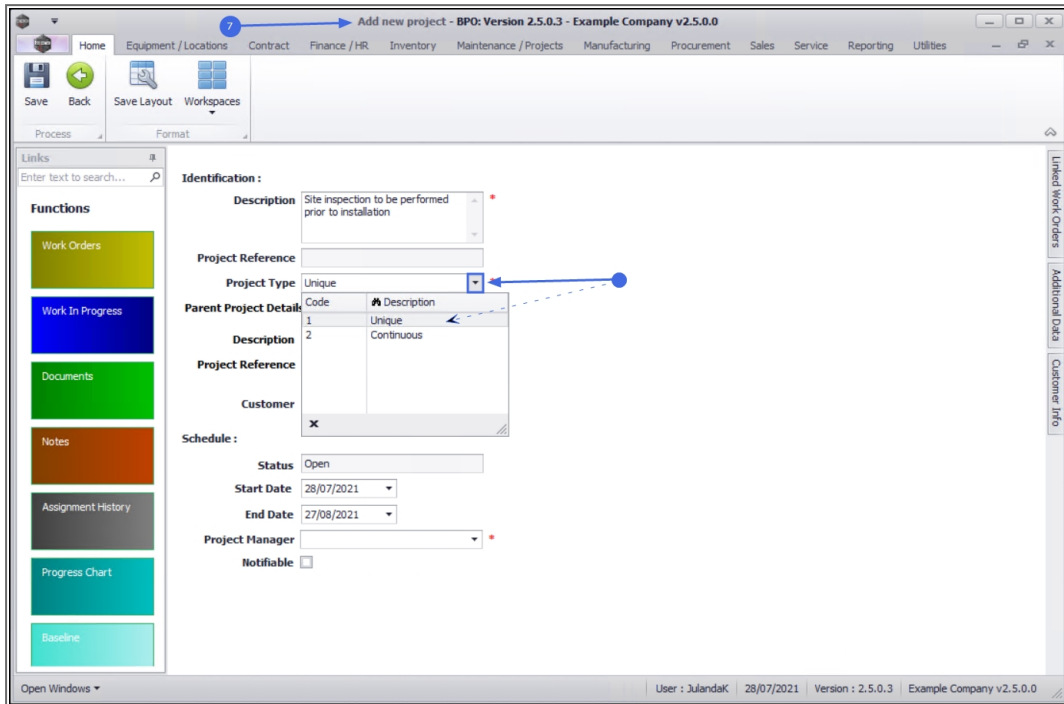
- **Description:** Type in a **description**¹ for the sub-project you are creating.
- **Project Reference:** Type in the Project reference Number.



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.

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

- **Project Type:** Click on the down **arrow** to select the **project type**¹ that applies to the sub-project you are creating.



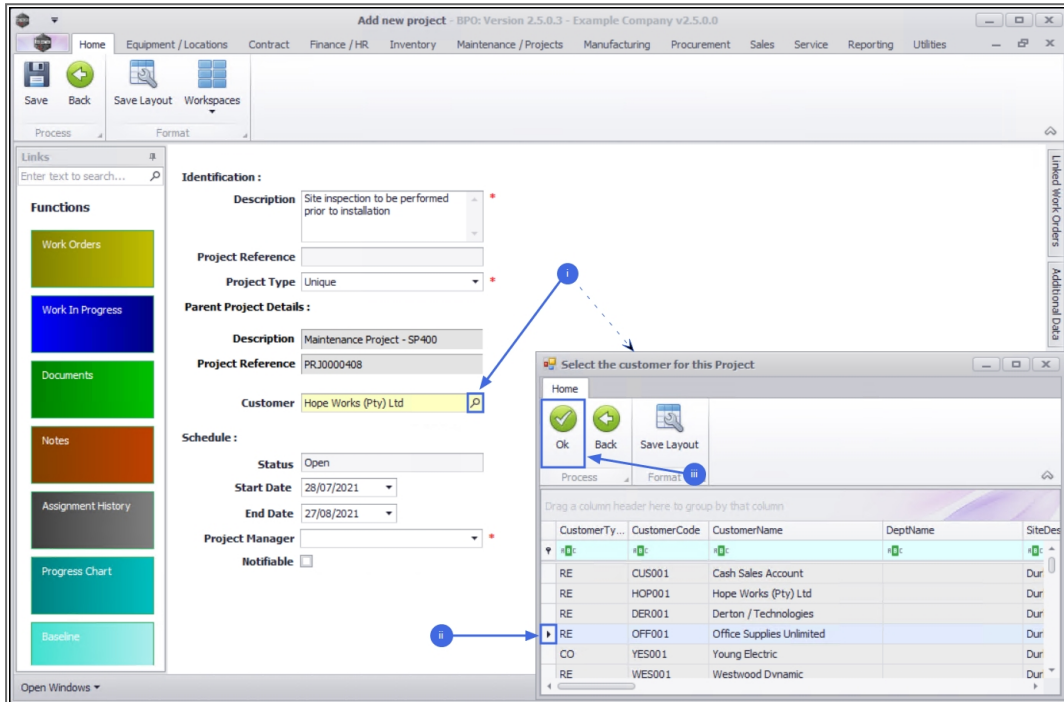
PARENT PROJECT DETAILS

- **Description:** The description field has been auto populated with the project description of the main project you have selected.
- **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

¹Unique - 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.

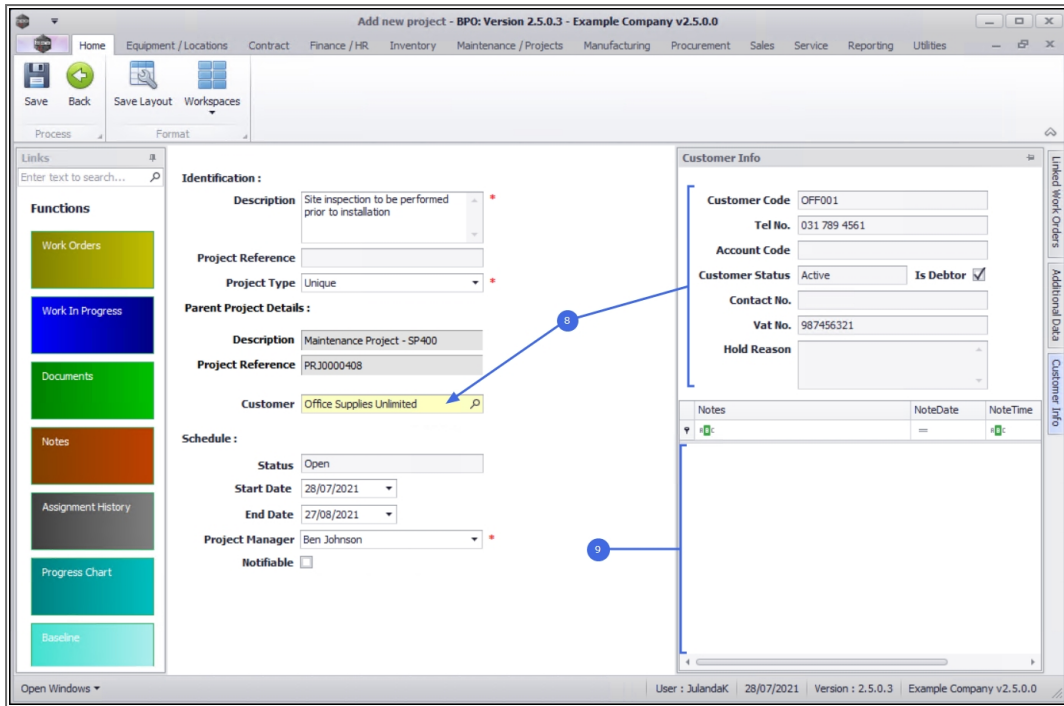
to a different customer.

- 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.



The screenshot shows a software interface for adding a new project. The main window is titled 'Add new project - BPO: Version 2.5.0.3 - Example Company v2.5.0.0'. The interface is divided into several sections:

- Left Panel (Functions):** A vertical list of buttons including 'Work Orders', 'Work In Progress', 'Documents', 'Notes', 'Assignment History', 'Progress Chart', and 'Baseline'.
- Identification:**
 - Description: Site inspection to be performed prior to installation
 - Project Reference: (empty field)
 - Project Type: Unique
- Parent Project Details:**
 - Description: Maintenance Project - SP400
 - Project Reference: PRJ0000408
 - Customer: Office Supplies Unlimited
- Schedule:**
 - Status: Open
 - Start Date: 28/07/2021
 - End Date: 27/08/2021
 - Project Manager: Ben Johnson
 - Notifiable:
- Customer Info (Right Panel):**
 - Customer Code: OFF001
 - Tel No.: 031 789 4561
 - Account Code: (empty field)
 - Customer Status: Active
 - Is Debtor:
 - Contact No.: (empty field)
 - Vat No.: 987456321
 - Hold Reason: (empty field)
- Notes (Bottom Right):** A table with columns for 'Notes', 'NoteDate', and 'NoteTime'. The 'Notes' column contains a dropdown arrow and a plus sign icon.

Annotations in the image include a blue circle '8' pointing to the 'Customer' field in the 'Parent Project Details' section, and a blue circle '9' pointing to the 'Notes' table.

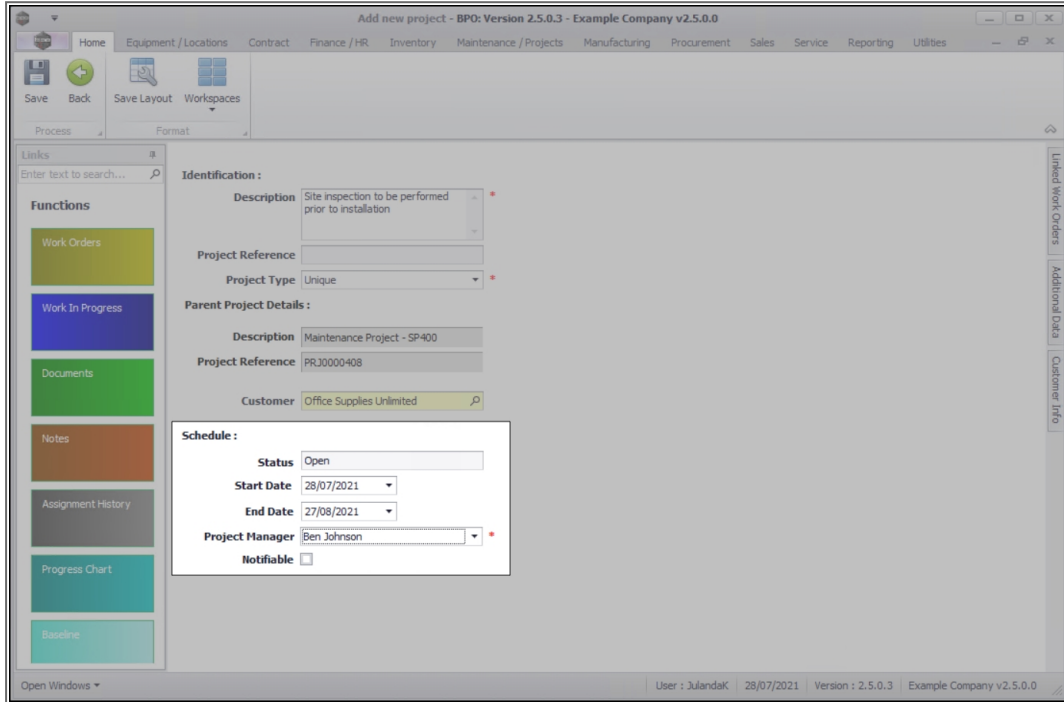
SCHEDULE

- **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.



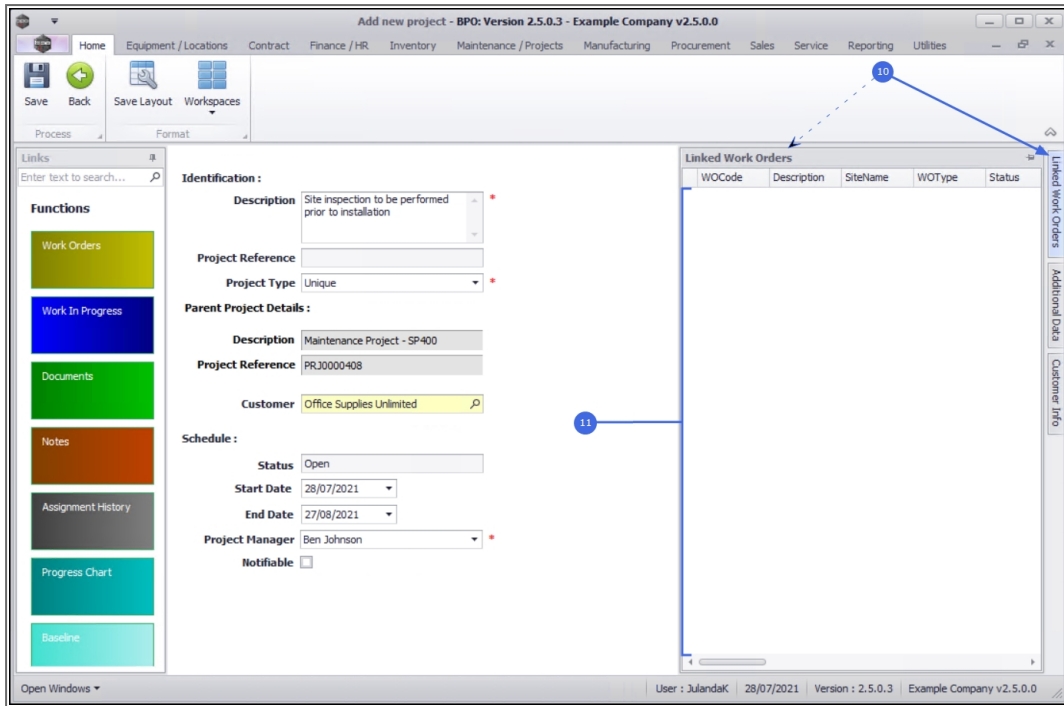
LINKED WORK ORDERS

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



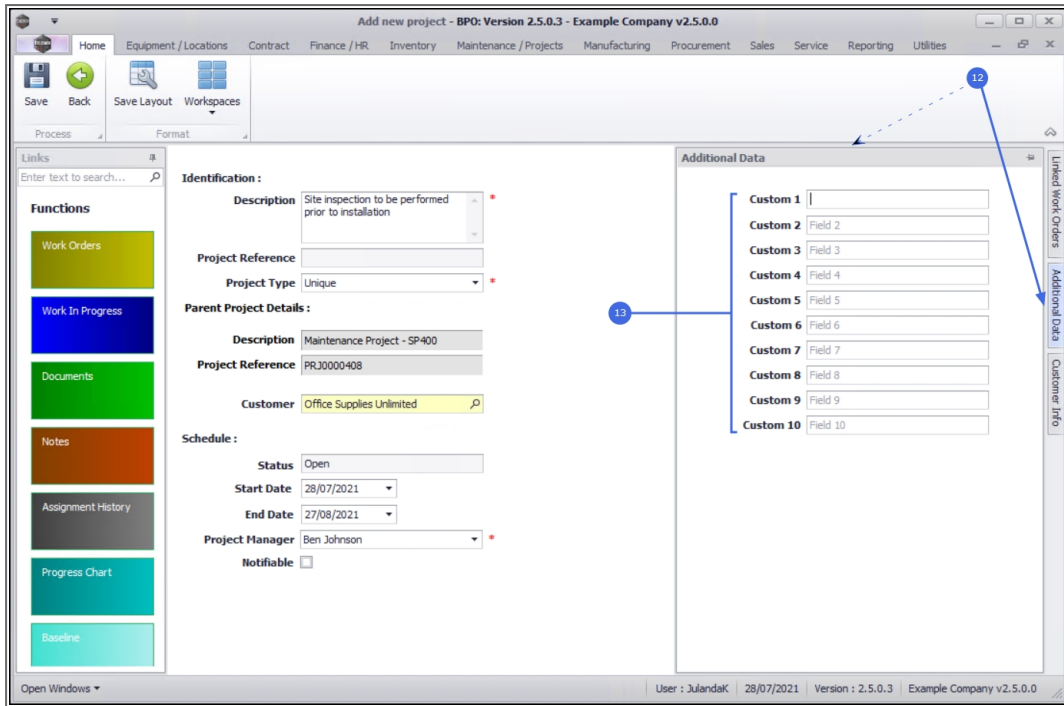
This panel can be docked to leave it expanded on the screen, which will make it easier to work in.

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.



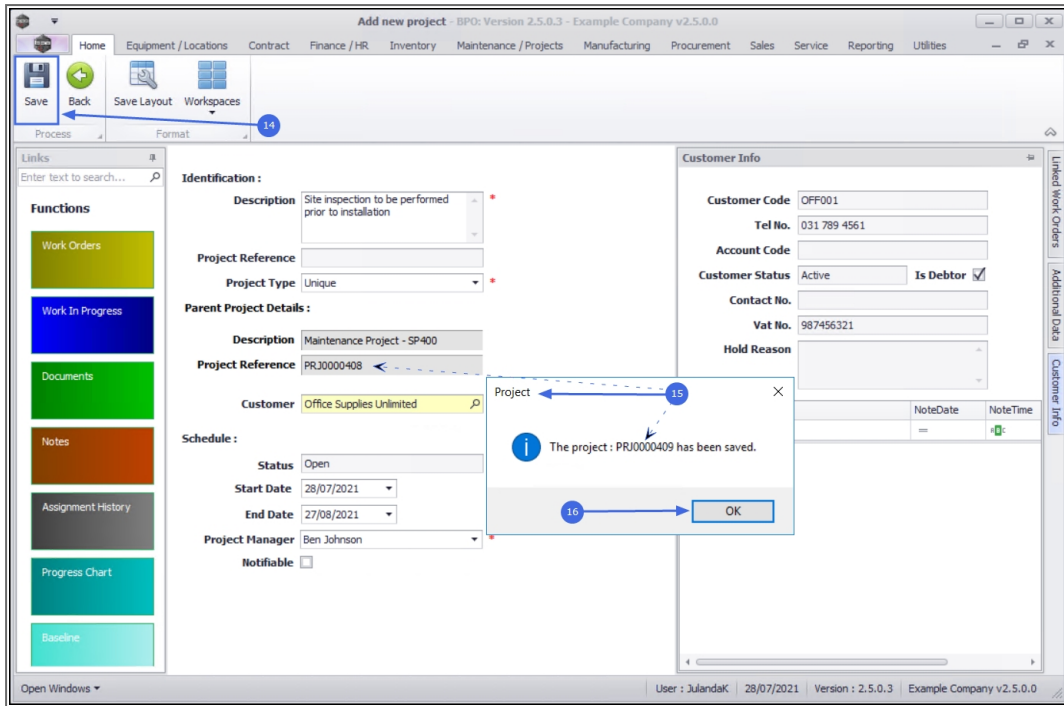
SAVE SUB-PROJECT

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.**

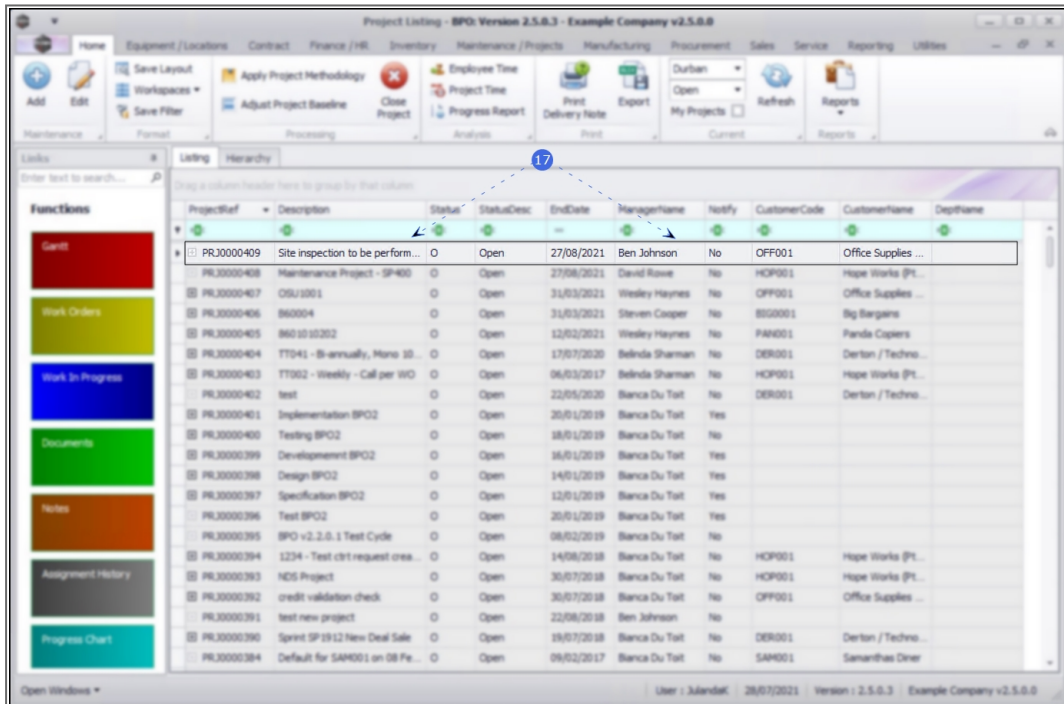


Note that the sub-project number is different from the main project number.

16. Click on **OK**.

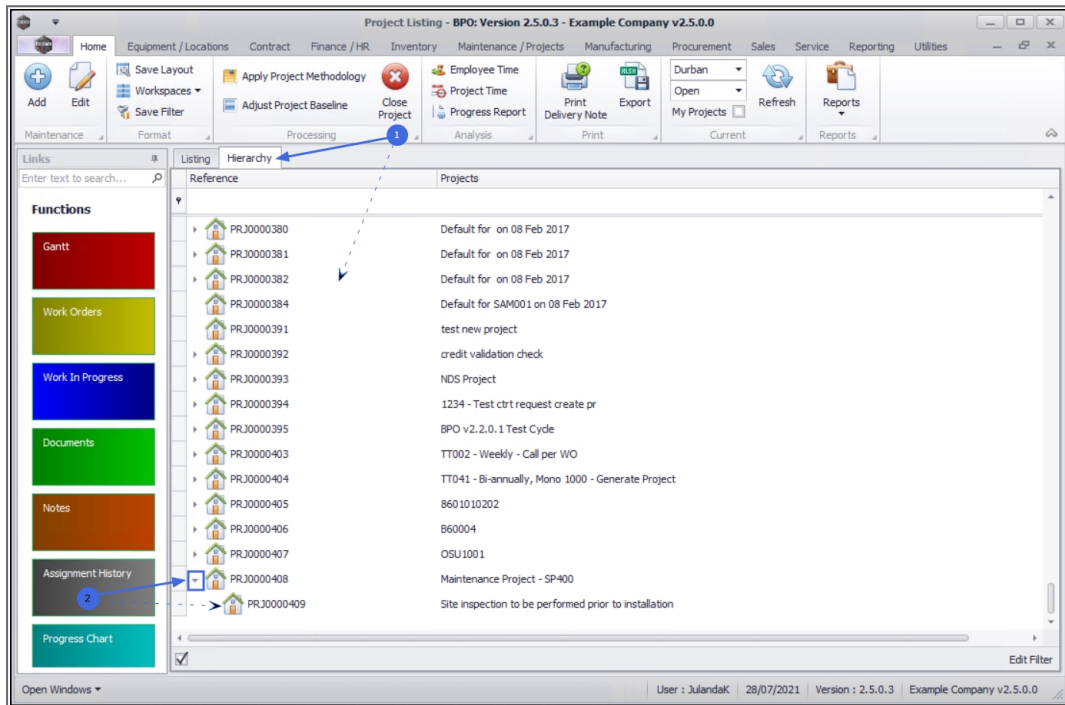


17. You will return to the **Project Listing** screen where you can view the sub-project.



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

