

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

# PROJECTS

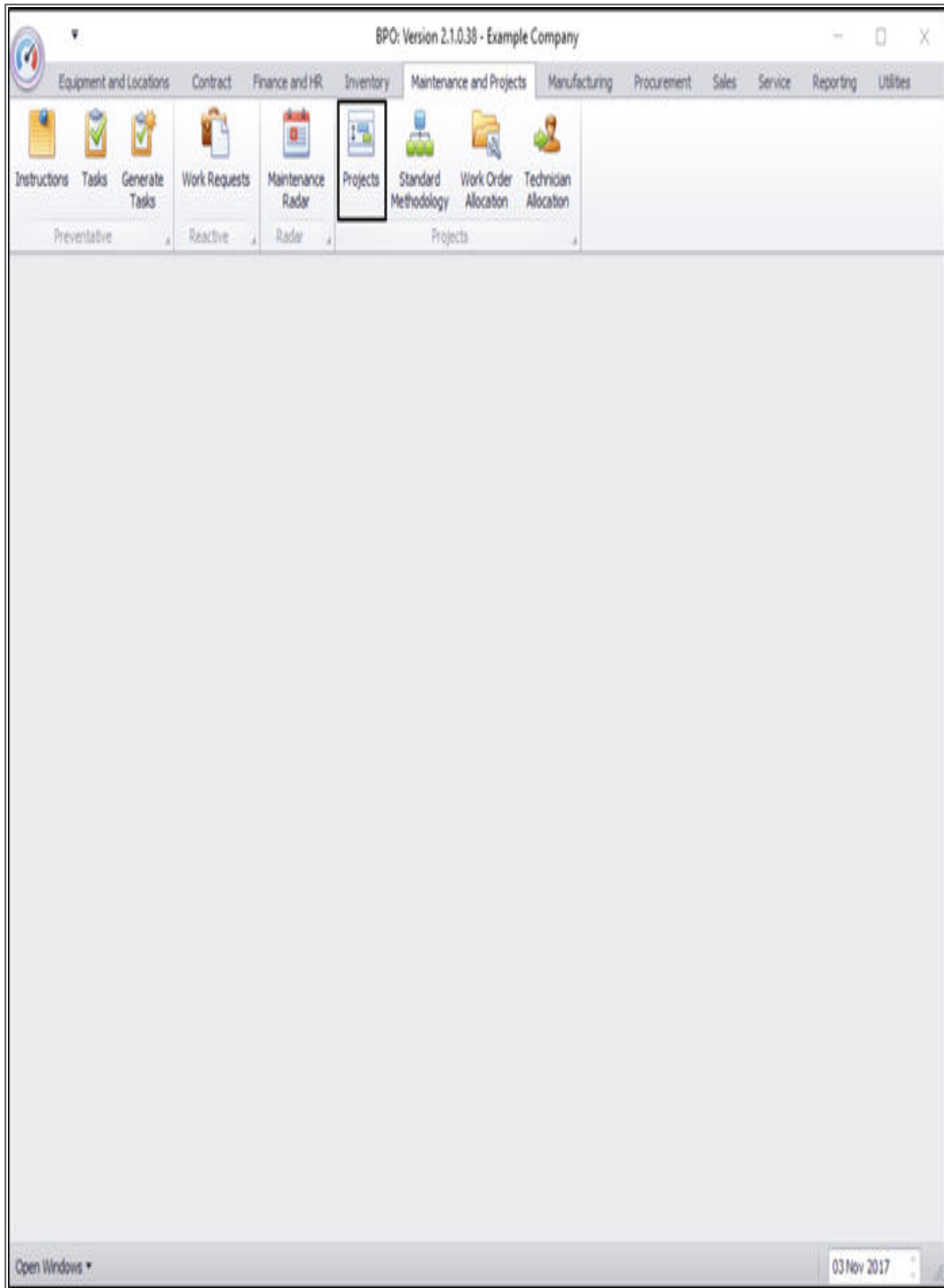
## PROJECTS – EXPENSES

If you cannot log expenses due the message, 'No Items to select from', then expenses haven't been set up yet. Refer to [Expense Allocation and Setup](#).

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**Ribbon Access:** Maintenance/ Projects > Projects

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The **Project Listing** screen will be displayed.

- Select the **site**.
  - In this image **Durban** has been selected.

The screenshot shows the 'Project Listing' window in BPO Version 2.1.0.38 for Example Company. The interface includes a menu bar with options like Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. A toolbar contains various actions such as Add, Edit, Save Layout, Workspaces, Save Filter, Apply Project Methodology, Adjust Project Baseline, Close Project, Employee Time, Project Time, Progress Report, Print Delivery Note, Export, My Projects, Refresh, and Reports. A dropdown menu for 'Durban' is open, showing 'Open' and 'Refresh' options. The main area displays a table of projects with columns for ProjectRef, Description, Status, StatusDesc, StartDate, EndDate, CustomerName, CustomerCode, and ManagerName. A sidebar on the left lists functions like Work Orders, Work In Progress, Documents, Notes, Assignment History, Progress Chart, and Baseline. The bottom status bar shows the date 03 Nov 2017.

ProjectRef	Description	Status	StatusDesc	StartDate	EndDate	CustomerName	CustomerCode	ManagerName
PRJ0000267	New Machine Installation	0	Open	03 Nov 2017	03 Dec 2017	Office Supplies Unli...	OFF001	Ben Johns
PRJ0000266	Sprint SP1912 New Deal Sale	0	Open	22 Jun 2017	24 Jun 2017	Big Bargains	BIG0001	Susan Du
PRJ0000265	Test Project Methodology	0	Open	22 Jun 2017	29 Jun 2017	Big Bargains	BIG0001	Susan Du
PRJ0000264	Apple Juice Project Methodology New ...	0	Open	20 Jun 2017	27 Jun 2017	Apple Juice Inc	APP0001	Susan Du
PRJ0000263	Project with work order linked to asse...	0	Open	20 Jun 2017	20 Jul 2017	Hope Works	HOP001	Belinda St
PRJ0000262	TT026 - Monthly - Generate Project	0	Open	19 Jun 2017	20 Jun 2017	Hope Works	HOP001	Susan Du
PRJ0000261	Test NDP Methodology	0	Open	15 Jun 2017	22 Jun 2017	Big Bargains	BIG0001	Susan Du
PRJ0000260	test	0	Open	14 Jun 2017	21 Jun 2017	Apple Juice Inc	APP0001	Susan Du
PRJ0000259	SP240 New Deal	0	Open	07 Jun 2017	10 Jun 2017	Hope Works	HOP001	Susan Du
PRJ0000258	Sprint SP1912 New Deal Sale	0	Open	07 Jun 2017	09 Jun 2017	Hope Works	HOP001	Susan Du
PRJ0000257	st methodology	0	Open	07 Jun 2017	14 Jun 2017	Hope Works	HOP001	Susan Du
PRJ0000256	v2.1.0.7 - My work order linked to a ...	0	Open	02 Jun 2017	02 Jul 2017	Hope Works	HOP001	Mark Mud
PRJ0000255	Loan unit part request B class	0	Open	01 Jun 2017	01 Jul 2017	Hope Works	HOP001	Mark Mud
PRJ0000254	Loan unit part request A class	0	Open	01 Jun 2017	01 Jul 2017	Hope Works	HOP001	Mark Mud
PRJ0000253	New Deal Rental	0	Open	01 Jun 2017	08 Jun 2017	Hope Works	HOP001	Mark Mud
PRJ0000252	Quick Part Return v2.1.0.7	0	Open	31 May 2017	30 Jun 2017	Hope Works	HOP001	Mark Mud
PRJ0000251	Sprint SP1912 New Deal Sale	0	Open	29 May 2017	31 May 2017	Hope Works	HOP001	Mark Mud
PRJ0000250	Project Invoices	0	Open	26 May 2017	25 Jun 2017	Hope Works	HOP001	Mark Mud
PRJ0000249	Orders - PRJ	0	Open	25 May 2017	01 Jun 2017	Hope Works	HOP001	Susan Du
PRJ0000247	Projects - Quotes v2.1.0.6	0	Open	25 May 2017	24 Jun 2017	Hope Works	HOP001	Mark Mud
PRJ0000246	Project Assignment Test v2.0.5	0	Open	25 May 2017	24 Jun 2017	Hope Works	HOP001	Mark Mud
PRJ0000245	Swap Outs p rojects v2.1.0.5	0	Open	25 May 2017	24 Jun 2017	Hope Works	HOP001	Mark Mud

- Click on the **row selector** in front of the **project** that you wish to add expenses to.
- Click on the **Work Orders** tile.

The **Work Orders for Project Ref [ ]** listing screen will be displayed.

- Click on the **row selector** in front of the **Work Order** you wish to allocate expenses to.
- Click on the **Expenses** tile.

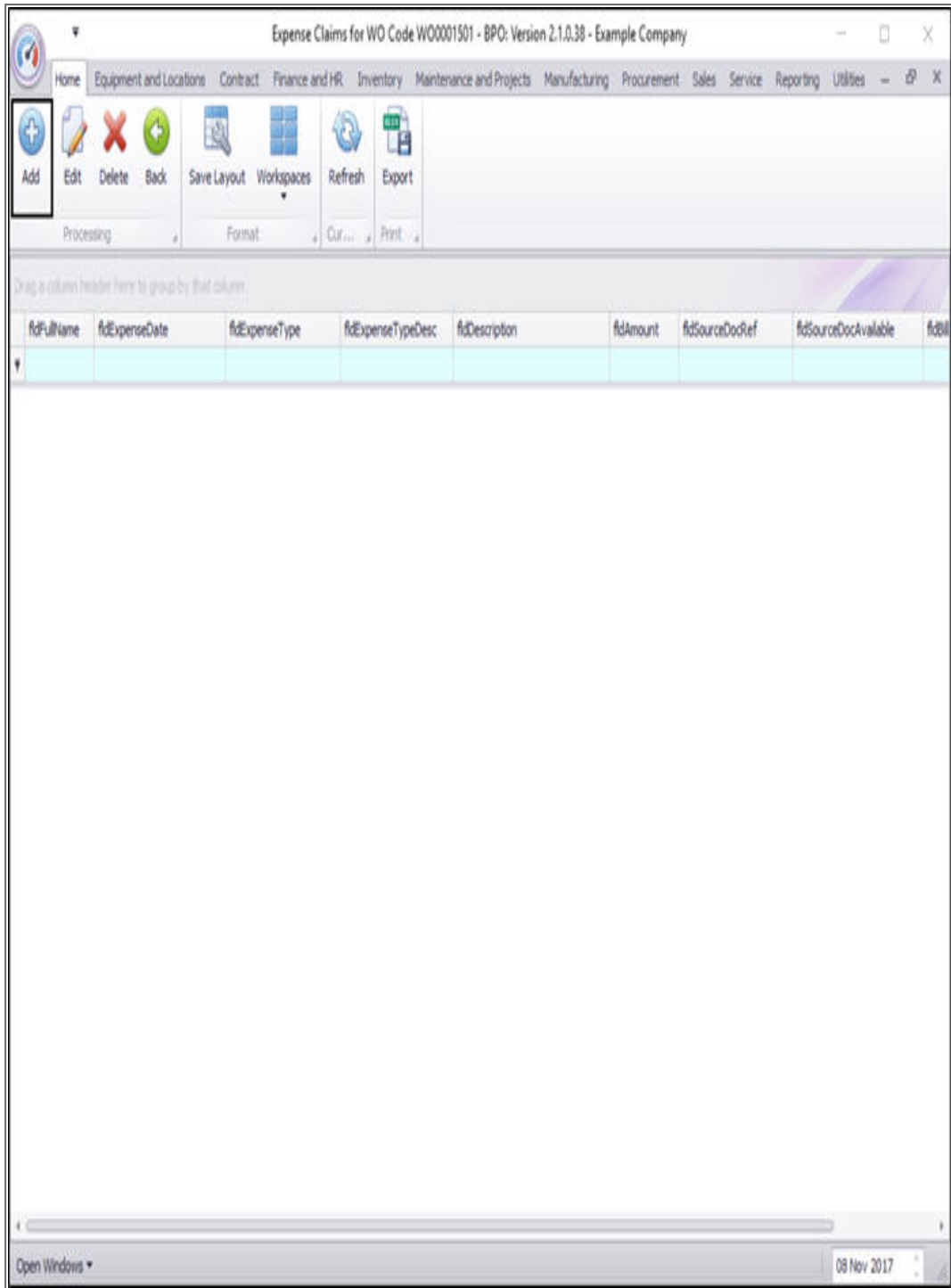
The screenshot shows the 'Work Orders for Project Ref PRJ0000266 - BPO: Version 2.1.0.38 - Example Company' window. The interface includes a ribbon with various tabs and a table of work orders. The 'Expenses' tile in the left sidebar is highlighted with a red box.

fdWOCODE	fdDescription	fdRequestDate	fdStatus	fdProjectRef	fdProjectID...	fdWOTYPE	fdPriority	fdInvoiceable	fdBatch
WO0001501	SP1912_NDS_1 - Machine installation	22 Jun 2017	O	PRJ0000266	Sprint SP19...	NDS	2	No	
WO0001502	SP1912_NDS_2 - Network configuration	23 Jun 2017	O	PRJ0000266	Sprint SP19...	IT	2	No	
WO0001503	Test project assignment listing refresh ...	28 Jun 2017	O	PRJ0000266	Sprint SP19...	DR	2	No	
WO0001504	Test work request - ensure project ref ...	28 Jun 2017	O	PRJ0000266	Sprint SP19...	DR	2	No	

The **Expense Claims for Work Order Code [ ]** listing screen will be displayed.

- Click on **Add**.

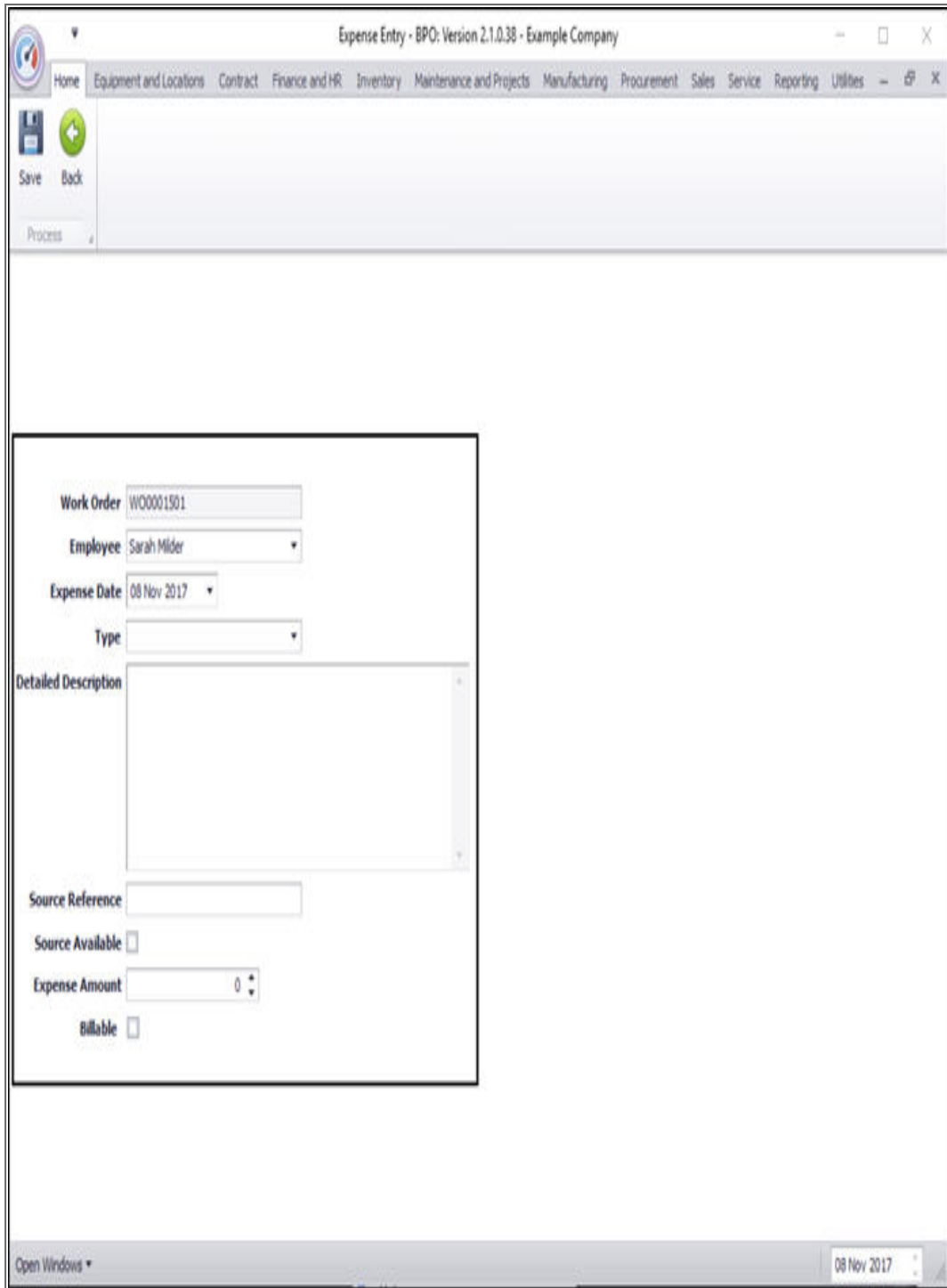




The **Expense Entry** screen will be displayed.



- **Work Order:** This will auto populate with the Work Order you initially selected.
- **Employee:** Click on the drop-down arrow and select the employee from the menu.
- **Expense Date:** This will default to the current date, click on the drop-down arrow and use the calendar function to change the date if required.
- **Type:** Click on the drop-down arrow and select the type of expense from the menu.
- **Detailed Description:** Type in a description for this expense.
- **Source Reference:** Type in the reference number of the receipt if available.
- **Source Available:** Select if the receipt is available.
- **Amount:** Type in the total amount of the expense.
- **Billable:** Select this option if the service is billable. This will be set to billable by default, unless the service is linked to the contract as an inclusion.

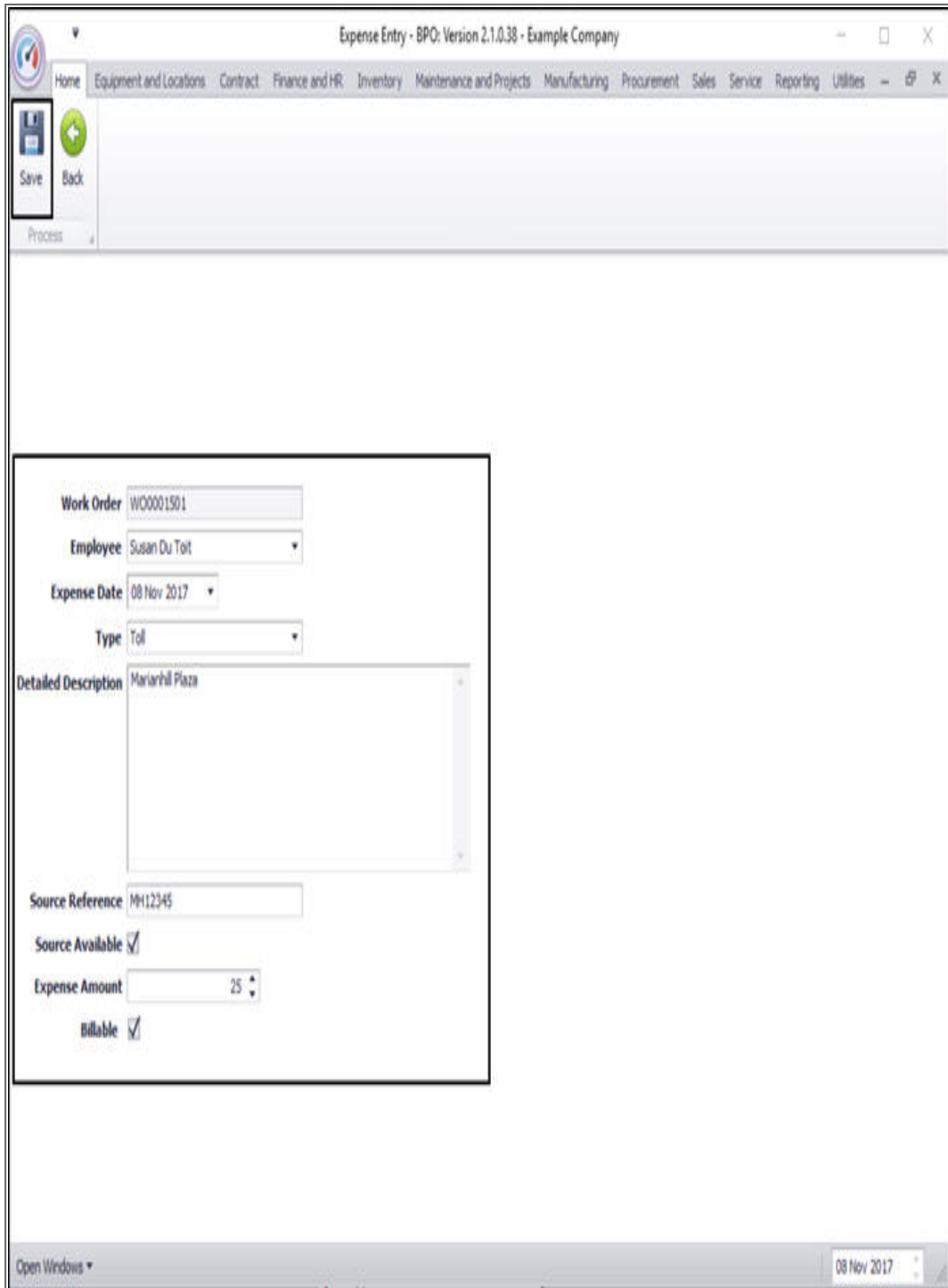


The screenshot shows a web application window titled "Expense Entry - BPO: Version 2.1.0.38 - Example Company". The window has a navigation menu at the top with items: Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the menu are "Save" and "Back" buttons, and a "Process" dropdown. The main content area contains a form with the following fields:

- Work Order:
- Employee:
- Expense Date:
- Type:
- Detailed Description:
- Source Reference:
- Source Available:
- Expense Amount:
- Billable:

At the bottom of the window, there is an "Open Windows" dropdown on the left and a date/time indicator "08 Nov 2017" on the right.

- When you have finished adding the details, click on **Save**.



Expense Entry - BPO: Version 2.1.0.38 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back

Process

Work Order: WC0001501

Employee: Susan Du Toit

Expense Date: 08 Nov 2017

Type: Toll

Detailed Description: Marianhill Plaza

Source Reference: MH12345

Source Available:

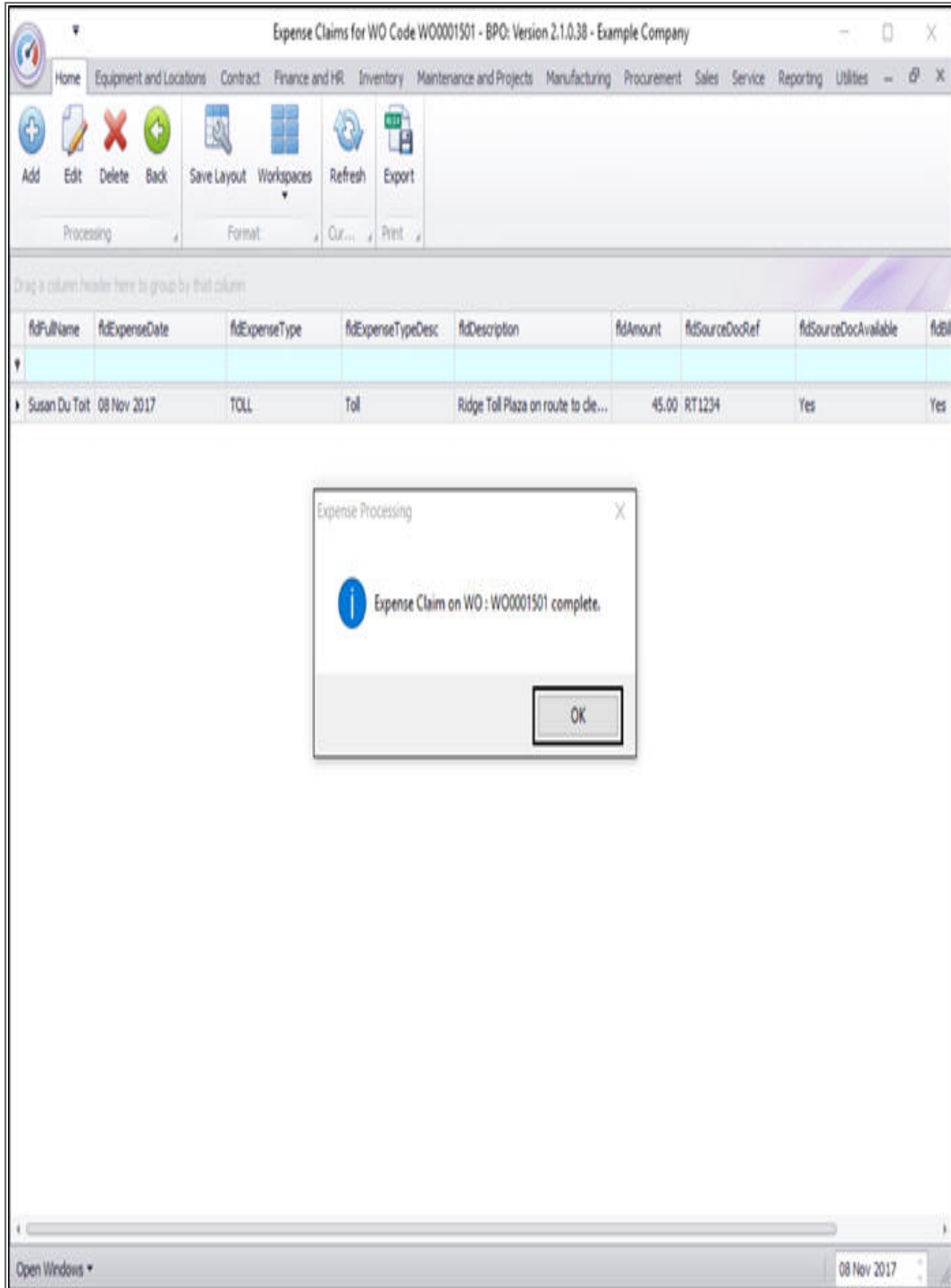
Expense Amount: 25

Billable:

Open Windows 08 Nov 2017

- An **Expense Processing** message box will pop up informing you that;

- Expense Claim on WO: [ ] complete.
- Click on **OK**.



- You will return to the **Expense Claims for WO Code [ ]** listing screen where you can now view the added expense claim.

Expense Claims for WO Code W00001501 - BPO: Version 2.1.0.38 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Add | Edit | Delete | Back | Save Layout | Workspaces | Refresh | Export

Processing | Format | Cur... | Print

Drag a column header here to group by that column

fdFullName	fdExpenseDate	fdExpenseType	fdExpenseTypeDesc	fdDescription	fdAmount	fdSourceDocRef	fdSourceDocAvailable	fdBillable	fdStatus
Susan Du Toit	08 Nov 2017	TOLL	Toll	Ridge Toll Plaza on route to dent installation.	45.00	RT1234	Yes	Yes	A

Open Windows | 08 Nov 2017

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