

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

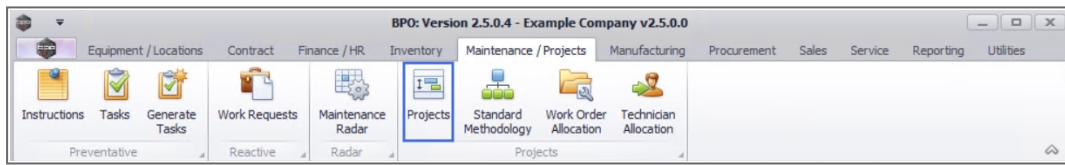
## PROJECTS

### PROJECTS – PROGRESS REPORT

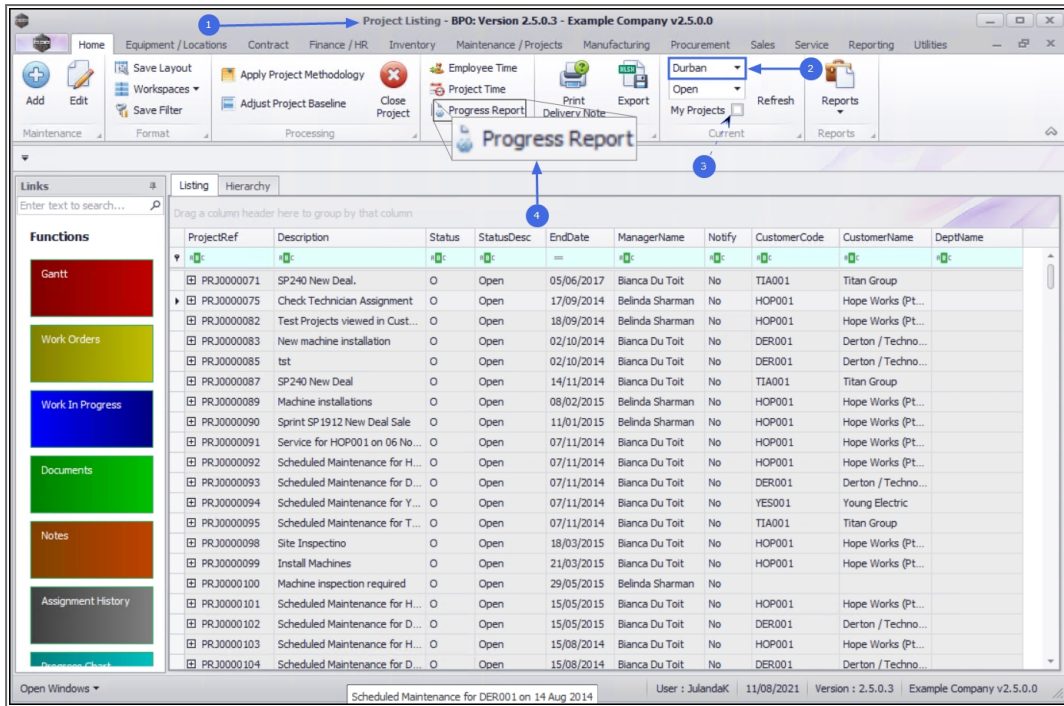
In order to correctly track your progress via the Project Progress Report, there are a few things to consider and keep track of:

- [Work Order Required Craft](#) details need to be configured on each work order within the project.

**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. The Progress Report can include all projects or [Projects - My Projects](#) only.
4. Click on **Progress Report**.



5. Give the system a few minutes to generate and exported the Progress Report to **Microsoft Excel**.
6. In the **Overview** tab, you will see a list of all projects from the project list screen, with the following information:

- **Project:** A description of the project.
- **State:** An indicator of the project progress.
  - **Yellow** - Planned (not yet started)
  - **Green** - In Progress
  - **Red** - Done
- **Progress%:** This is a percentage of the project completed, based on completed work orders within the project.
- **Start:** Project Start Date.
- **End:** Project End Date.
- **EstDays:** Total Estimated Days based on the estimated hours for all work orders within the project, configured

on the Work Order Schedule tab > Required Crafts section.

- **ActDays:** Actual Days represent the total labour time as booked on underlying project work orders.
- **Date Done:** Completion date of the project.
- **Achieved:** An indicator of whether the project was completed at, or within the estimated time.
- **Status:** Determines the status for the project as still being Planned, In Progress or Done.

Project	State	Progress%	Start	End	EstDays	ActDays	DateDone	Achieved	Category	Status
project link to a client location	O		12/04/2017	12/05/2017	0	0.125	12/05/2017			Unknown
project linked to a non-client location	O		12/04/2017	12/05/2017	0	0	12/05/2017			Unknown
work order linked to a location - linked to a project - start work, end work as State Resolved and	O		30/03/2017	29/04/2017	0	0.00294	29/04/2017	Yes		Unknown
work order linked to an asset linked to a project - start work, end work as State Resolved and A	O		30/03/2017	29/04/2017	0	0.00807	29/04/2017	Yes		Unknown
1234	O		17/04/2018	07/06/2018	0	0.125	24/04/2018	No		In Progress
1234 - Test ctrt request create pr	O		07/08/2018	14/08/2018	0	0	14/08/2018			Unknown
12345 - New machine installation	O		08/11/2016	15/11/2016	0	0.125	15/11/2016			Unknown
2MS - 2 month service	O		29/06/2015	30/06/2015	0.375	0	30/06/2015			Planned
8601010202	O		05/02/2021	12/02/2021	0	0	12/02/2021			Unknown
A part request project decline	O		15/02/2017	22/02/2017	0	0	22/02/2017			Unknown
A, project part approval	O		15/02/2017	22/02/2017	0	0	22/02/2017			Unknown
A,B,C project part request approval	O		7.142857143	21/08/2014	31/03/2017	1.75	2.82015	22/08/2014	No	In Progress
All open tickets	O		30/03/2017	01/04/2017	0	0	29/04/2017	No		In Progress
Another project to test reject assignment	O		50	02/12/2015	09/06/2016	0.75	3.40002	03/12/2015	No	In Progress
Apple Juice Project Methodology New Deal Sale Test	O		20/06/2017	26/07/2017	0	0.0625	27/06/2017	No		In Progress
Approval	O		04/07/2018	03/08/2018	0	0	03/08/2018			Unknown
Auto approve off	O		16/02/2017	18/03/2017	0	0	18/03/2017			Unknown
B project part request approval	O		15/02/2017	22/02/2017	0	0.5	22/02/2017			Unknown
B project part request decline	O		15/02/2017	22/02/2017	0	0	22/02/2017			Unknown
B60004	O		24/03/2021	31/03/2021	0	0	31/03/2021			Unknown
BPO2 Testing at Hope Works	O		27/01/2017	31/03/2017	0	0.3759	26/02/2017	No		In Progress
Check Technician Assignment	O		01/01/1900	19/08/2014	0.375	0	02/01/1900	No		In Progress
CO125	O		04/09/2015	05/09/2015	0.125	0	05/09/2015			Planned

7. Click on the **Task Details** tab to view all the work orders within these projects.

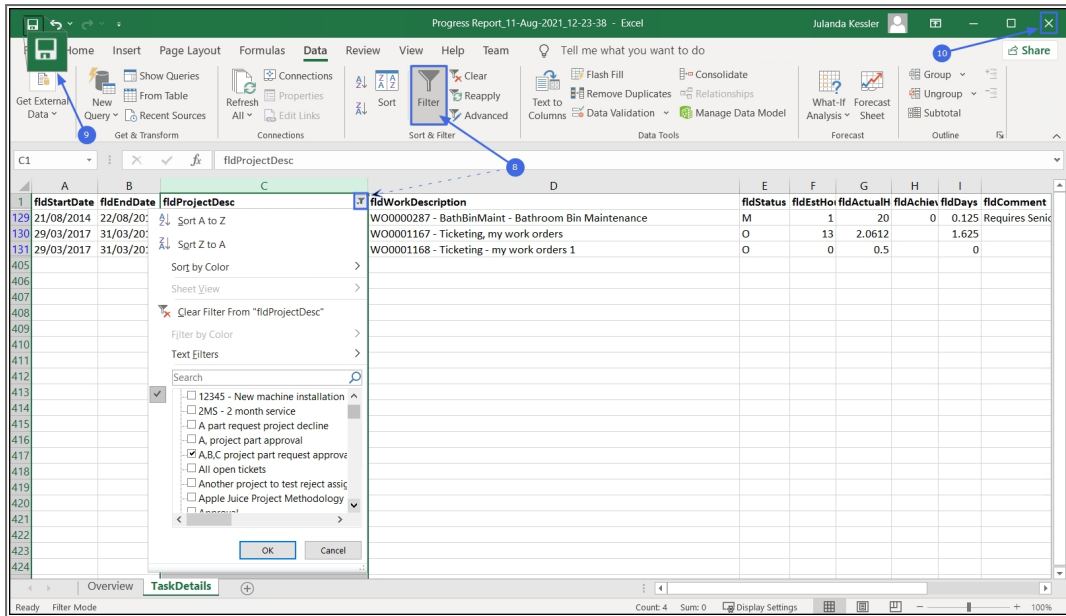
- The **Status** details in the report show you whether a work order is;
  - **Open (O)**
  - **Completed (M)** or
  - **Closed (C)**

- **EstHours:** (Estimated Hours) is pulled directly from the Work Order Schedule > Required Crafts details on the work order.
- **Actual Hours:** The total labour time booked on the work order will pull through.
- **Achieved:** This field will only pull through information on completed and closed work orders.
- **Days:** This column displays the labour time as a conversion in days for longer running work orders and projects.
- **Comment:** This column displays the rectification comment as updated on the work order when completed.

	A	B	C	D	E	F	G	H	I	
	fidStartDate	fidEndDate	fidProjectDesc	fidWorkDescription	fidStatus	fidEstHrs	fidActualHrs	fidAchievHrs	fidDays	fidComment
1	18/08/2014	19/08/2014	Check Technician Assignment	WO0000230 - Check technician assignment	O	1	0	0	0.125	
2	01/01/1900	02/01/1900	Check Technician Assignment	WO0000231 -	O	2	0	0	0.25	
3	08/02/2017	10/03/2017	SubProject 1	PWO0000033 - Add B class part from boot stock BPO2 Pretoria	O	0	0	0	0	
4	23/03/2017	22/04/2017	Test Projects viewed in Customer screen	WO0001156 - Work order linked to customer project	O	0	0	0	0	
5	25/09/2014	26/09/2014	New machine installation	WO0000248 - New machine installation	O	1	0	0	0.125	
6	16/11/2017	16/12/2017	New machine installation	WO0001609 - test part requests without prior requests	O	0	0	0	0	
7	11/11/2014	12/11/2014	SP240 New Deal	WO0000267 - SP240-1 - Machine Installation	O	5	0	0	0.625	
8	13/11/2014	14/11/2014	SP240 New Deal	WO0000268 - SP240-2 - Network setup	O	1	0	0	0.125	
9	13/11/2014	14/11/2014	SP240 New Deal	WO0000269 - SP240-3 - Documentation	O	1	0	0	0.125	
10	05/08/2014	06/08/2014	SP240 New Deal.	WO0000205 - SP240-1 - Machine Installations	O	5	13	0	0.625	
11	07/08/2014	08/08/2014	SP240 New Deal.	WO0000206 - SP240-2 - Network setup - test edi work order from project	O	2	5.131	0	0.25	
12	21/08/2014	22/08/2014	SP240 New Deal.	WO0000286 - WS - Weekly Service	M	1	2	0	0.125	
13	26/04/2017	28/04/2017	SP240 New Deal.	WO0001313 - Retest issue with changing the assigned to person	O	0	0	0	0	
14	19/10/2017	20/10/2017	SP240 New Deal.	WO0001593 - Contract Closure - CO0000009	C	0	0	0	0	
15	29/05/2018	31/05/2018	SP240 New Deal.	WO0002198 - Test project assignment with auto accept assignment on	M	0	0.0468	0	0	stuff is pear
16	29/05/2018	29/05/2018	SP240 New Deal.	WO0002201 - Testing projects	O	0	0	0	0	
17	30/05/2018	29/06/2018	SP240 New Deal.	WO0002205 - Test creating new work order via the project screen.	O	0	0	0	0	
18	26/07/2018	28/07/2018	SP240 New Deal.	WO0002257 - SP240 New Deal.	O	0	0	0	0	
19	17/04/2020	17/04/2020	SP240 New Deal.	WO0002336 - Rollers need replacing	O	0	0	0	0	
20	25/09/2014	26/09/2014	tst	WO0000250 - tst	M	1	0.50528	2	0.125	test resolving
21	22/04/2020	22/04/2020	tst	WO0002349 - test	O	0	0	0	0	
22	09/01/2015	10/01/2015	Machine installations	WO0000433 - Review release notes - identify basic process flows	O	1	0	0	0.125	
23	09/01/2015	10/01/2015	Sprint SP1912 New Deal Sale	WO0000434 - SP1912_NDS_1 - Machine installation	O	3	0	0	0.375	

## FILTER BY PROJECT

8. Insert a **filter** to view specific project information.
9. Click on **Save** to save a copy of the report to the Server.
10. **Close** Microsoft Excel to return to BPO.



## Related Topics

- [Projects - My Projects](#)

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