

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

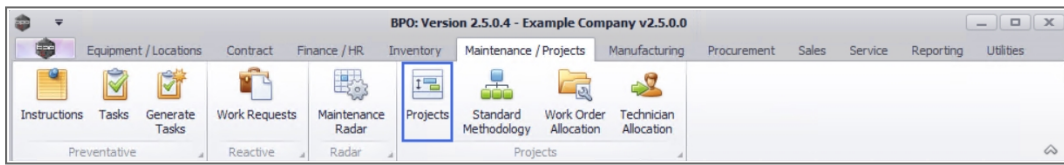
## PROJECTS

### PROJECTS – EDIT PROJECT

The Edit project feature allows you to make changes to the Main and/or sub-project details in either the **Open** or **Closed** status.

Making changes to the details of a Closed project does not change the status to Open. The project will remain in the Closed status.

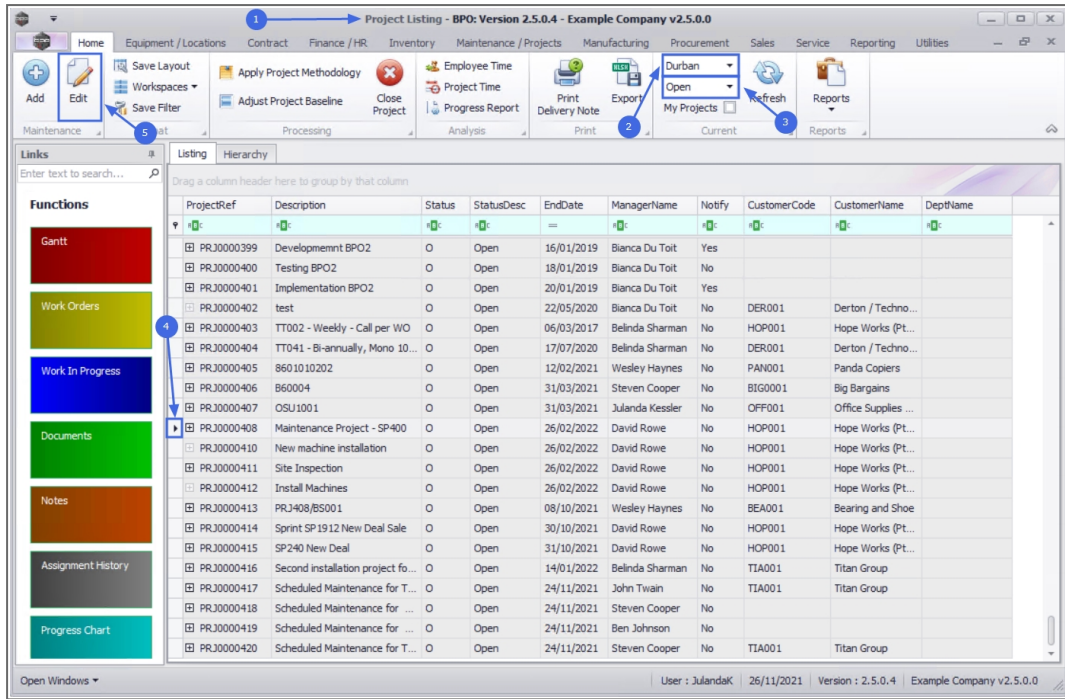
**Ribbon Access:** Maintenance / Projects > Projects



1. The **Project Listing** screen will be displayed.
2. Select the **Site** where the project you wish to edit can be located.
  - The example has **Durban** selected.
3. Select the **Status** for the project you wish to edit.
  - The example has **Open** selected.
4. Click on the **row** of the project you wish to update.
5. Click on **Edit**.



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



6. The **Edit project** : [project ref number] screen will be displayed.

## IDENTIFICATION

- **Description:** Type in a **description**<sup>1</sup>, or make the necessary change to this field, if required.
- **Project Reference:** The project reference field cannot be edited.
- **Project Type:** Click on the down **arrow** to select, or change the **project type**<sup>2</sup>.
- **Customer:** Click on the **Search** button to select the customer you wish to link to the project.

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

<sup>2</sup>Unique - 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 may need to take place over a period of time.

## SCHEDULE

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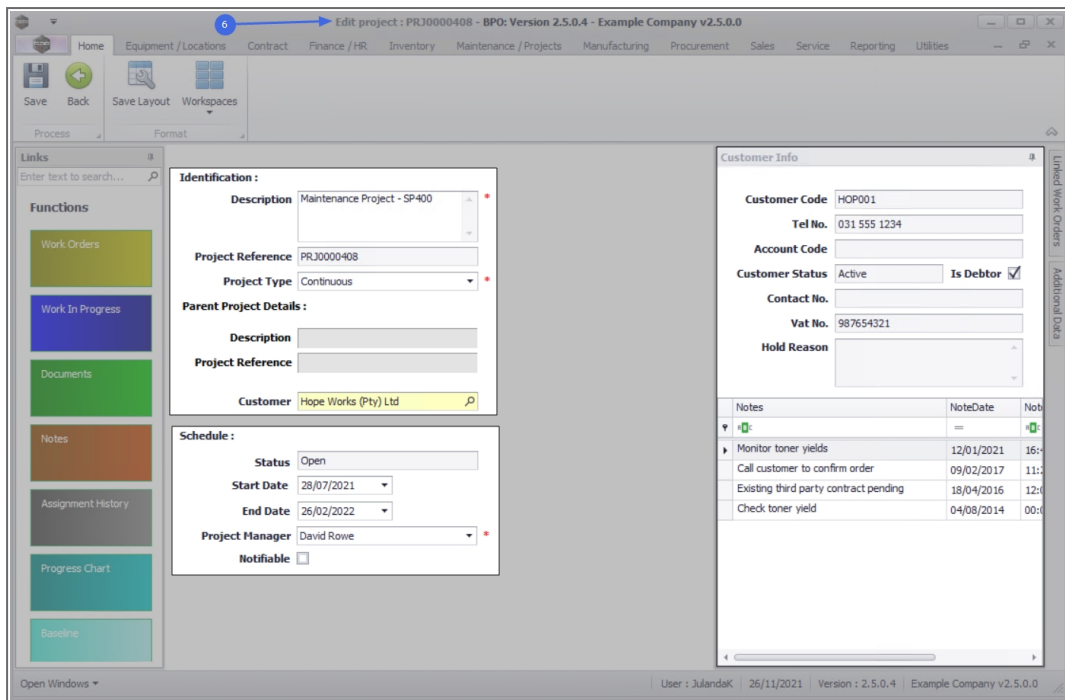
- **Status:** This is the status for the project and this field cannot be changed from this screen.
- **Start Date:** This will display the start date for the project. **Type** in or click on the down **arrow** to select an alternative start date for the project using the Calendar function.
- **End Date:** The date the project is scheduled to be completed is displayed. **Type** in or click on the down **arrow** to select an alternative end date for the project using the Calendar function.
- **Project Manager:** Click on the down **arrow** to select an alternative project manager for the project.
- **Notifiable:** This option is not used by the system.

## CUSTOMER INFO FRAME

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The Customer Info frame will be auto populated with the Customer information selected and no changes can be made to the Customer Information in this frame.

- Any **Notes** linked to this customer can be viewed here.



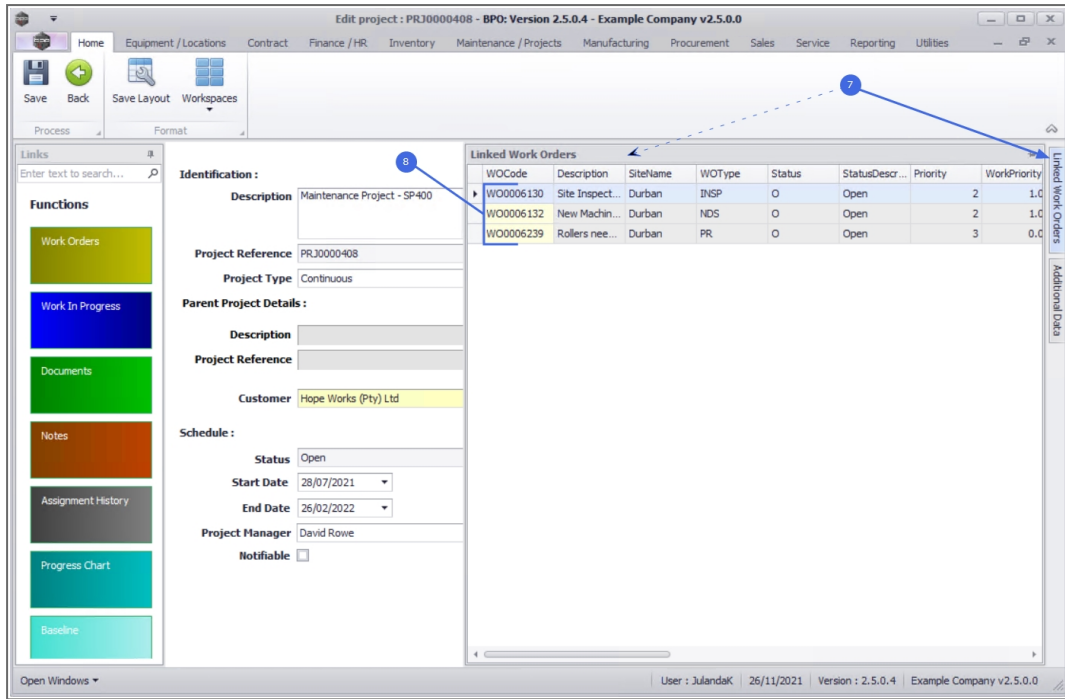
## LINKED WORK ORDERS

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



Note that this panel can be docked to leave it expanded on the screen to make it easier to work in.

- Any work order(s) linked to this project will display in this frame.

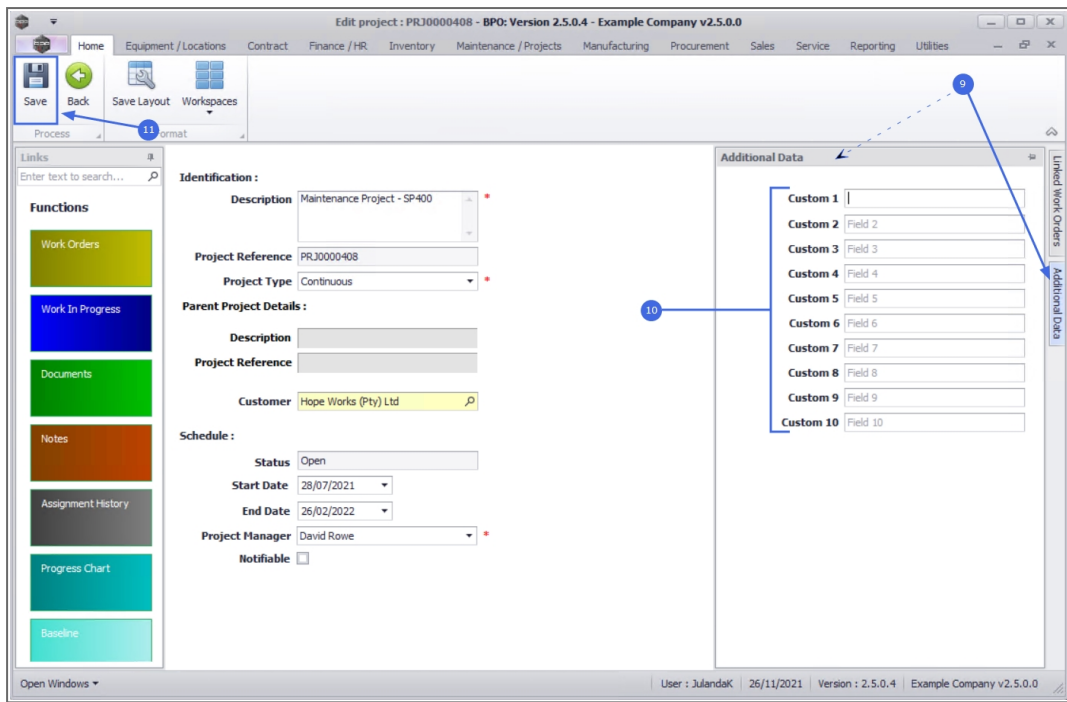


## ADDITIONAL DATA

9. You may wish to include information not covered in the project frames. Click on the **Additional Data** tab to expand the **Additional Data** frame.
10. Any **extra** information can be added in the Custom 1 - 10 fields. The field names can be re-named to suit your company requirements.

Please contact your BPO Analyst or CO3 Support for assistance.

12. Click on **Save** to save the changes made.



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