

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

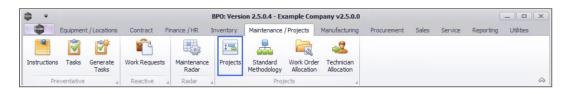
# **PROJECTS**

## **PROJECTS - EDIT PROJECT**

The Edit project feature allows you to make changes to the Main and/or subproject 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.



#### Projects - Edit Project

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		Testing BPO2	0	Open	18/01/2019	Bianca Du Toit	No				
		Implementation BPO2	0	Open	20/01/2019	Bianca Du Toit	Yes				
Work Orders	■ PR30000402	test	0	Open	22/05/2020	Bianca Du Toit	No	DER001	Derton / Techno		
		TT002 - Weekly - Call per WO	0	Open	06/03/2017	Belinda Sharman	No	HOP001	Hope Works (Pt		
		TT041 - Bi-annually, Mono 10	0	Open	17/07/2020	Belinda Sharman	No	DER001	Derton / Techno		
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		B60004	0	Open	31/03/2021	Steven Cooper	No	BIG0001	Big Bargains		
		OSU1001	0	Open	31/03/2021	Julanda Kessler	No	OFF001	Office Supplies		
Documents	▶ E PRJ0000408	Maintenance Project - SP400	0	Open	26/02/2022	David Rowe	No	HOP001	Hope Works (Pt		
bocumenta		New machine installation	0	Open	26/02/2022	David Rowe	No	HOP001	Hope Works (Pt		
		Site Inspection	0	Open	26/02/2022	David Rowe	No	HOP001	Hope Works (Pt		
		Install Machines	0	Open	26/02/2022	David Rowe	No	HOP001	Hope Works (Pt		
Notes		PRJ408/BS001	0	Open	08/10/2021	Wesley Haynes	No	BEA001	Bearing and Shoe		
		Sprint SP 1912 New Deal Sale	0	Open	30/10/2021	David Rowe	No	HOP001	Hope Works (Pt		
		SP240 New Deal	0	Open	31/10/2021	David Rowe	No	HOP001	Hope Works (Pt		
Assignment History	PRJ0000416	Second installation project fo	0	Open	14/01/2022	Belinda Sharman	No	TIA001	Titan Group		
	PRJ0000417	Scheduled Maintenance for T	0	Open	24/11/2021	John Twain	No	TIA001	Titan Group		
		Scheduled Maintenance for	0	Open	24/11/2021	Steven Cooper	No				
Progress Chart		Scheduled Maintenance for	0	Open	24/11/2021	Ben Johnson	No				
		Scheduled Maintenance for T	0	Open	24/11/2021	Steven Cooper	No	TIA001	Titan Group		

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>&</sup>lt;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>&</sup>lt;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

- **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**

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.



	6	Edit project	t : PRJ0000408 - BP	PO: Version 2.5.	0.4 - Example Co	mpany v2.5.0	0.0				
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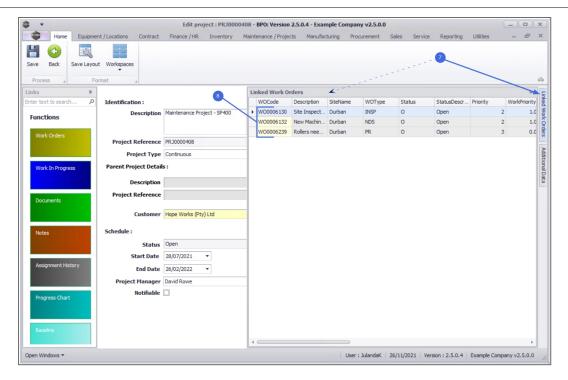
#### LINKED WORK ORDERS

7. 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.

8. 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.



### Projects - Edit Project

<b>v</b>		Edit project : PRJ000	00408 - BPO: Version 2.5.	0.4 - Example Company v	2.5.0.0		
Home Equipmen	nt / Locations Contract	Finance / HR Inventory	Maintenance / Projects	Manufacturing Procurer	nent Sales Service	Reporting Utilities	- 8
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			-		Custom 2	Field 2	
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nonkan rogicao					Custom 6	Field 6	
	Description				Custom 7	Field 7	
Documents	Project Reference				Custom 8	Field 8	
	Customer	Hope Works (Pty) Ltd	Q		Custom 9	Field 9	
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	Status	Open					
	Start Date	28/07/2021 🔹					
Assignment History	End Date	26/02/2022 -					
	Project Manager	David Rowe	* *				
Progress Chart	Notifiable						
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oen Windows 🔻				User : Jula	ndaK 26/11/2021 Vers	ion : 2.5.0.4 Example C	ompany v2.5.0.0

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