

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

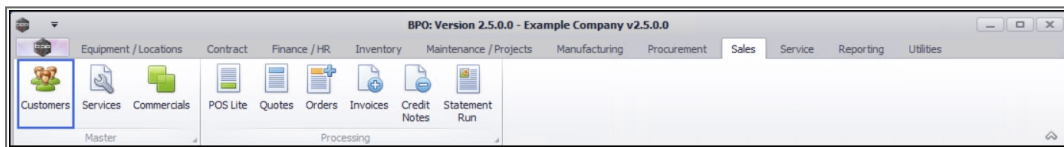
PROJECTS

PROJECTS – NOTES

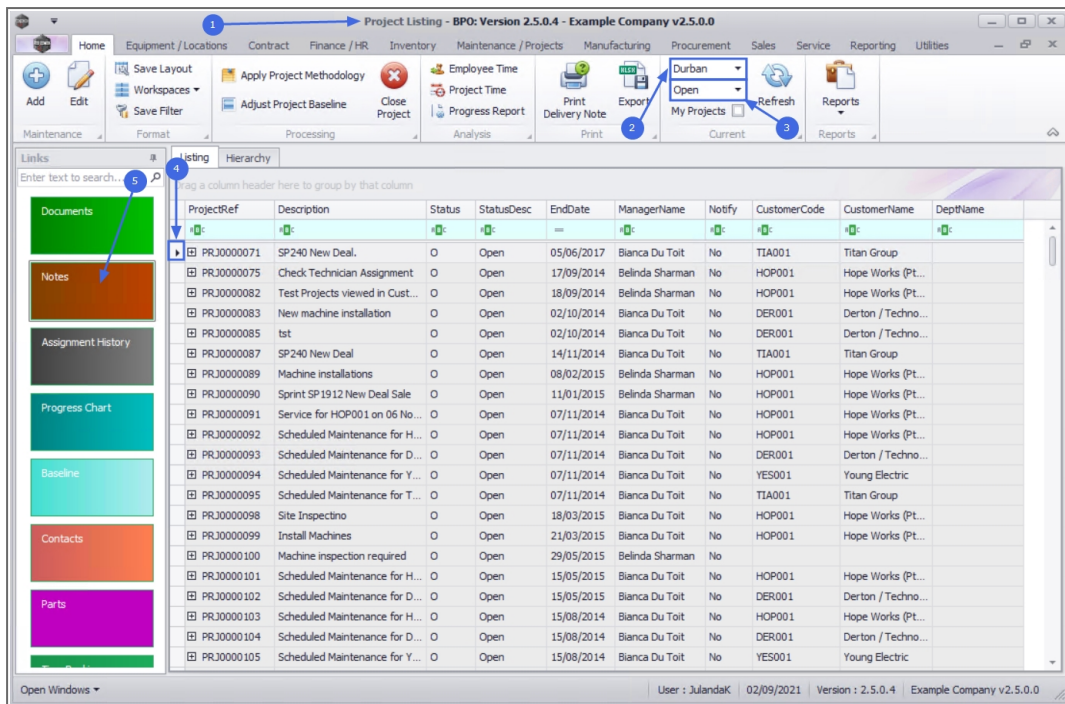
Project Notes can help everyone working on the project to immediately understand what is important and essential to the project.

Project Notes can be added to a Project that has been Closed.

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. Select the **Status** for the project.
 - The example has **Open** selected.
4. Click on the **row** of the project you wish to create a project note for.
5. Click on the **Notes** tile.

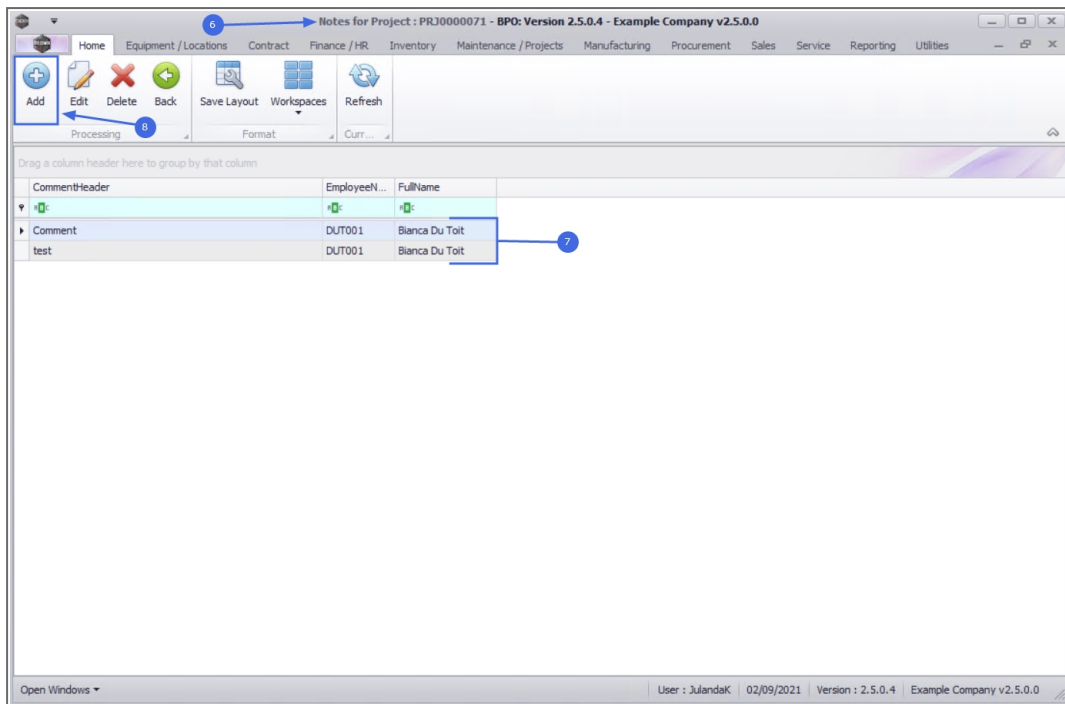


ADD A NOTES

6. The **Notes for Project** : [project ref number] screen will be displayed.
7. From this screen you can view all the Notes relating to the project.
8. Click on **Add**.



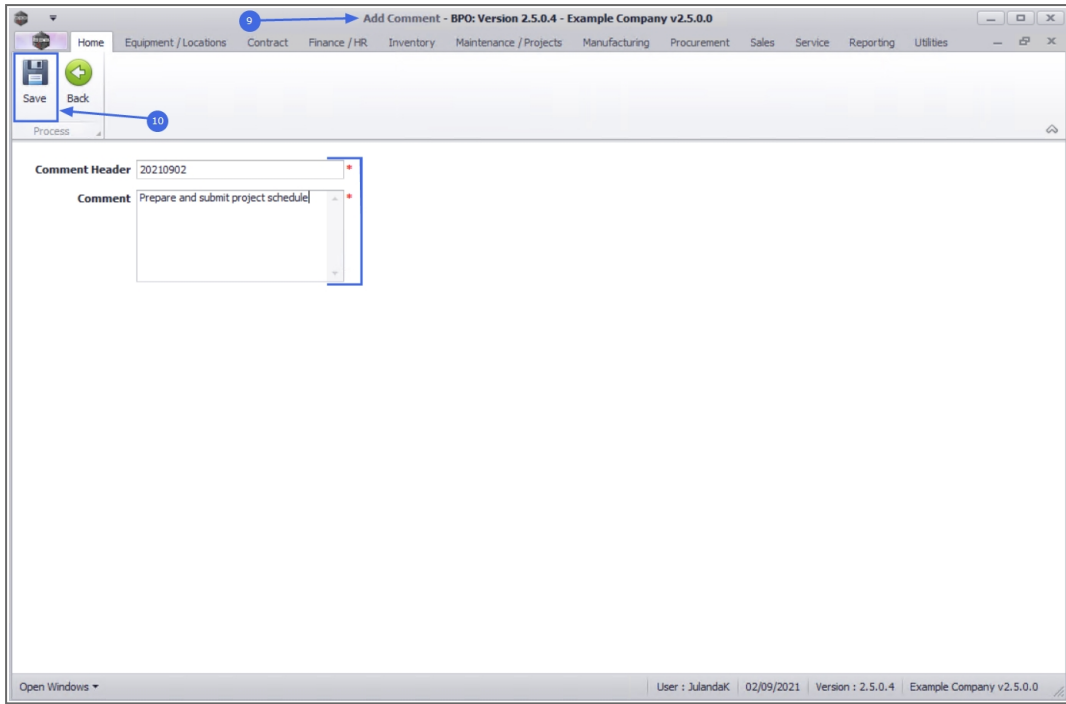
Short cut key: Right click to display the **Process** menu list. Click on **Add**.



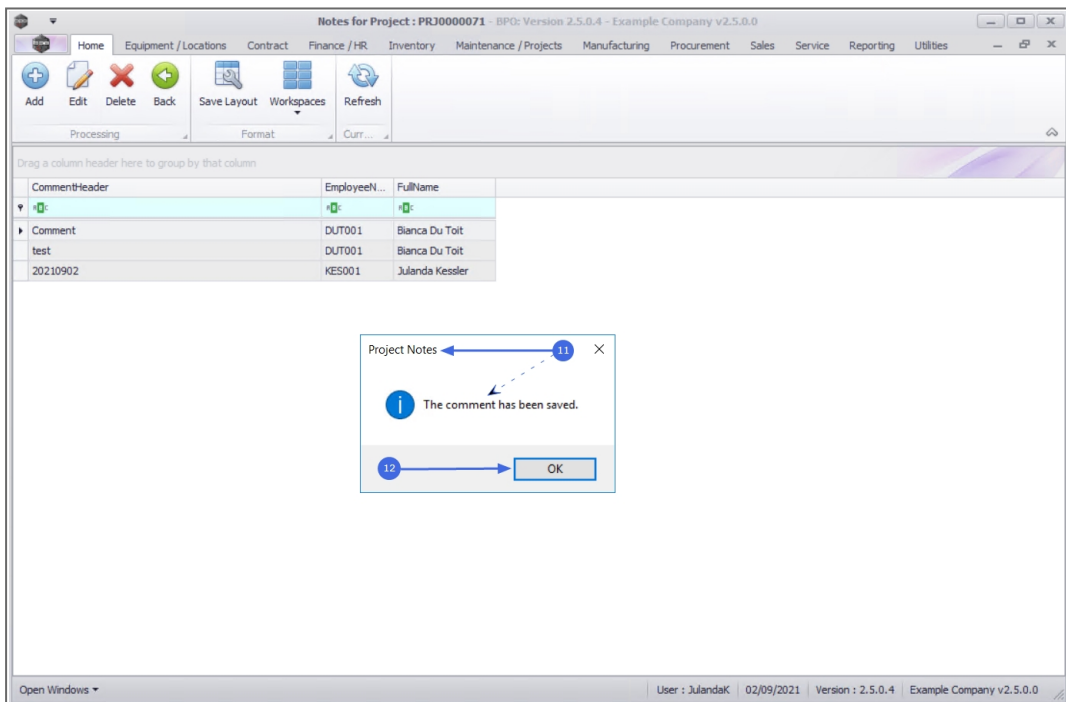
9. The **Add Comment** screen will be displayed.

- **Comment Header:** Type in the Comment Header for the Project Note. This information will display on the **Notes for Project** list screen to identify the Note.
- **Comment:** Type a simple Project Note related to the project, as required.

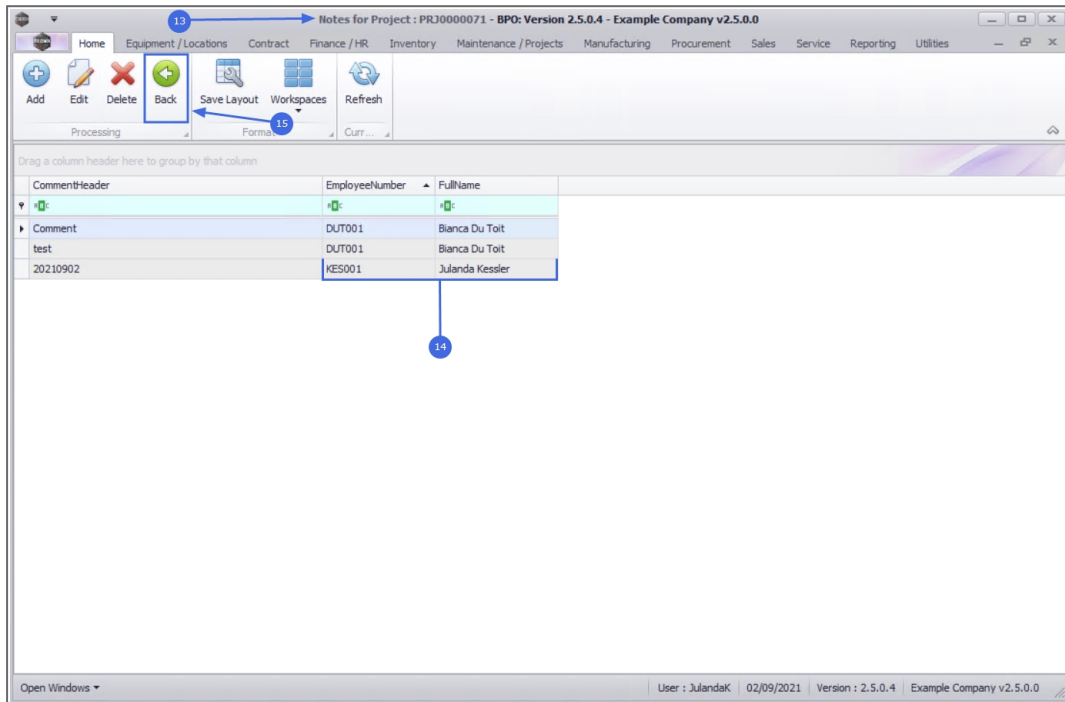
10. Click on **Save**.



11. When you receive the **Project Notes** message confirming;
 - **The comment has been saved.**
12. Click on **OK**.



13. The **Notes for Project** screen has been updated with the new note.
14. The **Employee Number** and **Employee Full Name** of the person logged onto to system has been recorded as the employee who created the note.
15. Click on **Back** to return to the **Project Listing** screen.

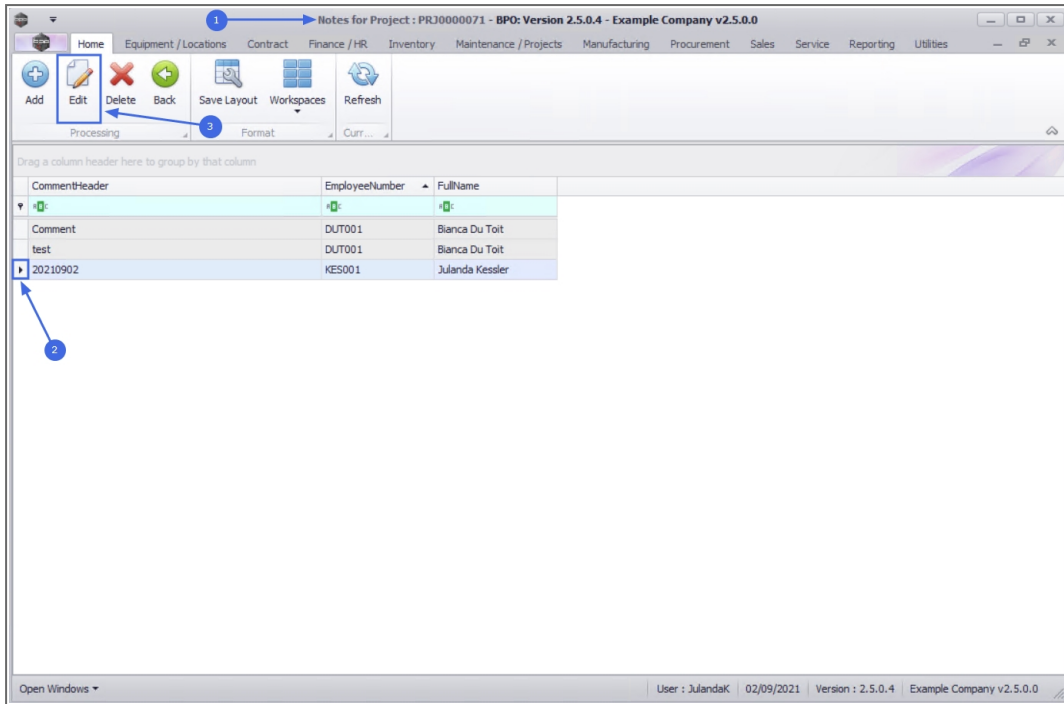


EDIT A NOTE

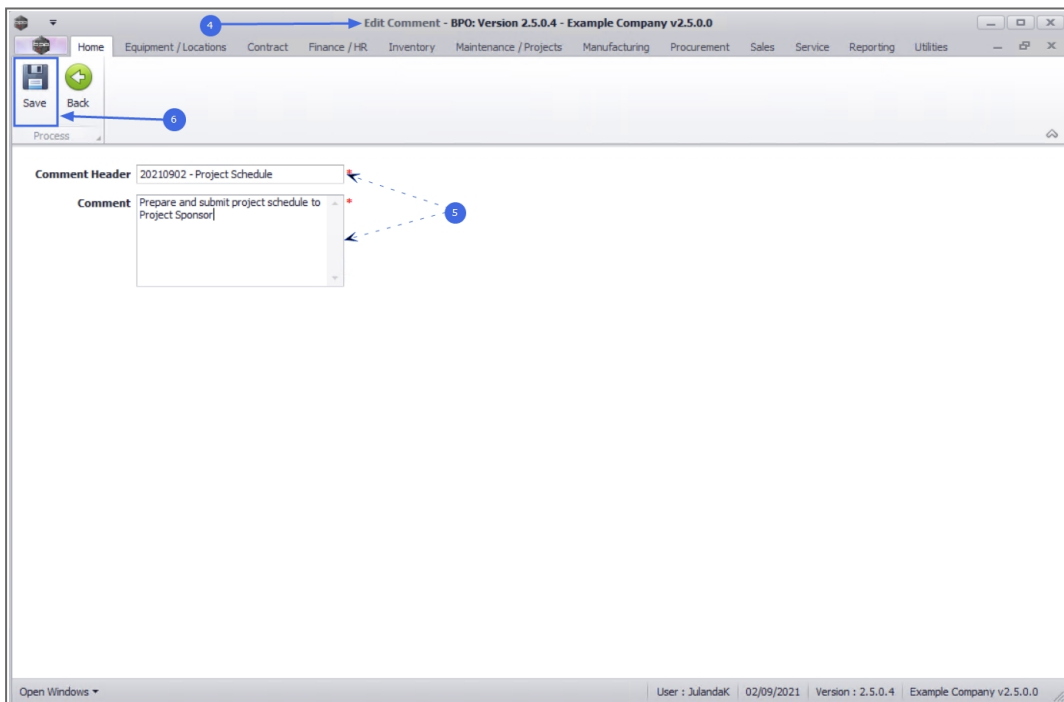
1. From the **Notes for Project : [project ref number]** screen,
2. Click on the **row** of the project note you wish to edit.
3. Click on **Edit**.



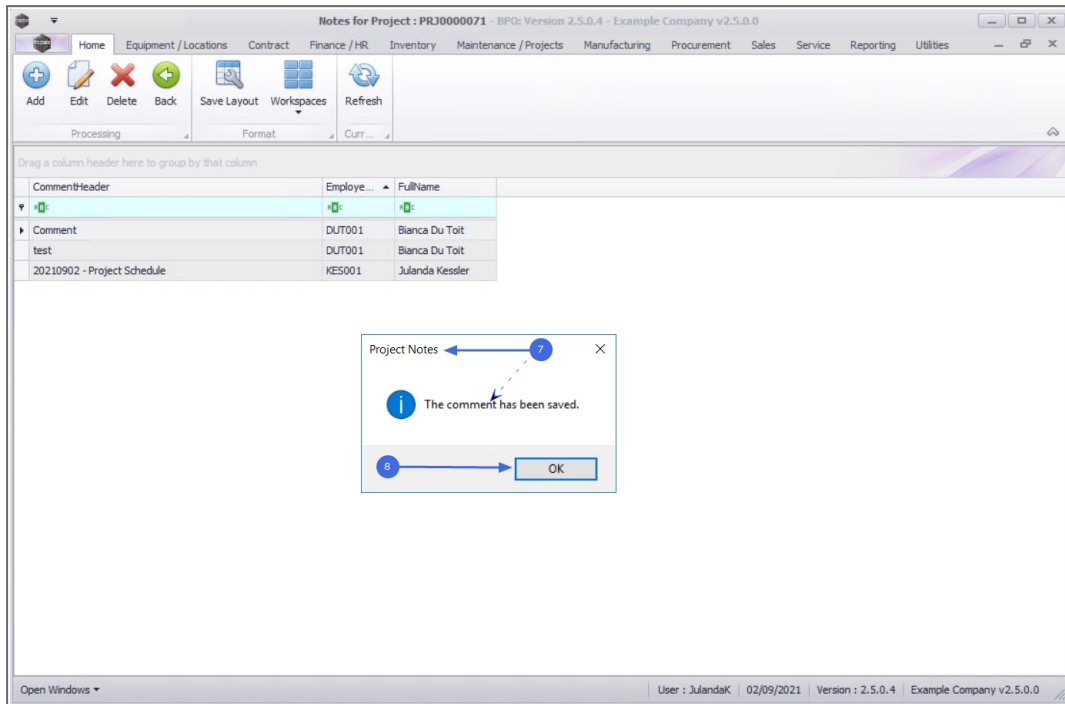
Short cut key: Right click to display the **Process** menu list. Click on **Edit**.



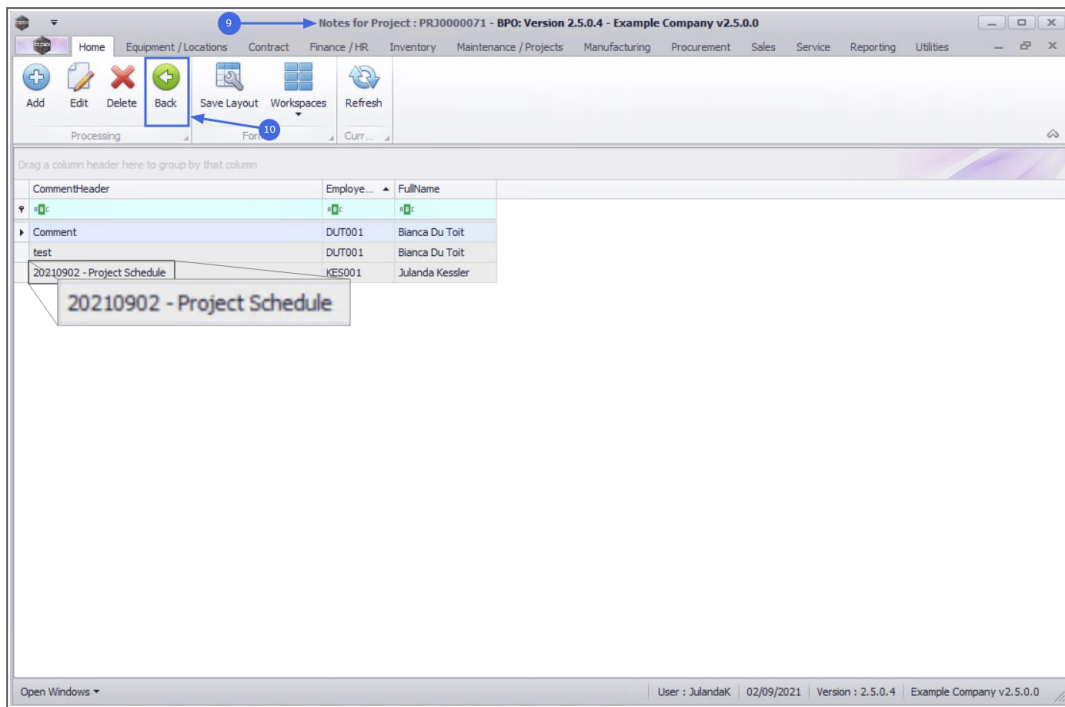
4. The **Edit Comment** screen will be displayed.
5. Make changes to the **Comment Header** and **Comment**, as required.
6. Click on **Save**.



7. When you receive the **Project Notes** message to confirm;
 - **The comment has been saved.**
8. Click on **OK**.



9. You will return to the **Notes for Project** screen where you can view the changes made to the **Comment Header**.
10. Click on **Back** to return to the **Project Listing** screen.

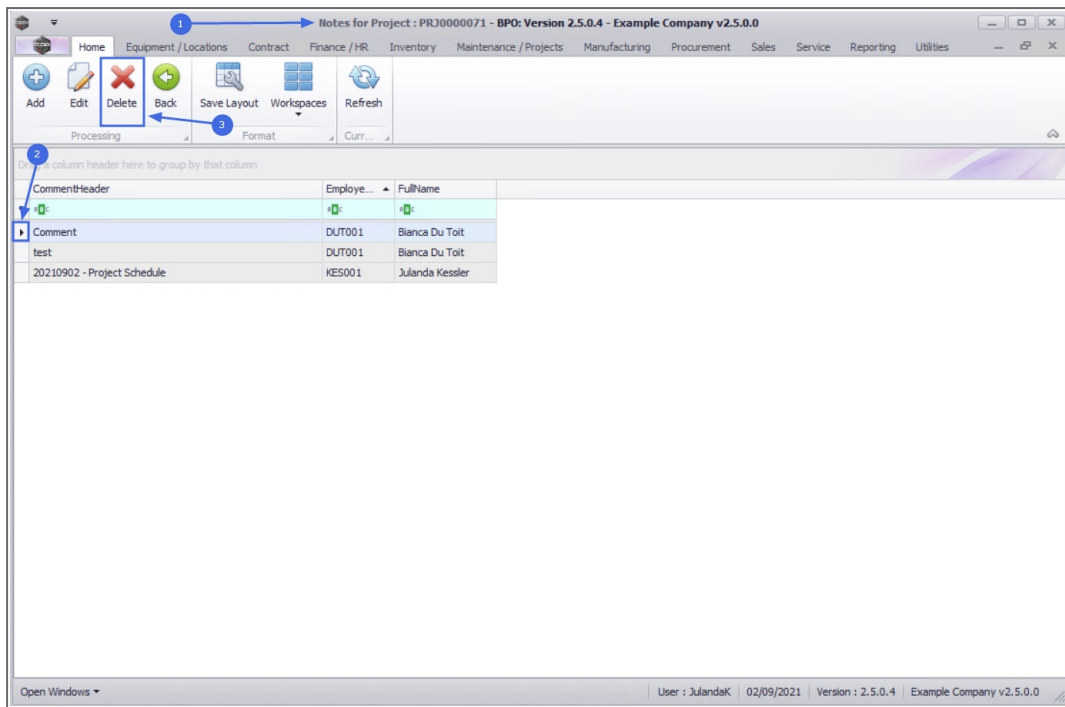


DELETE A NOTE

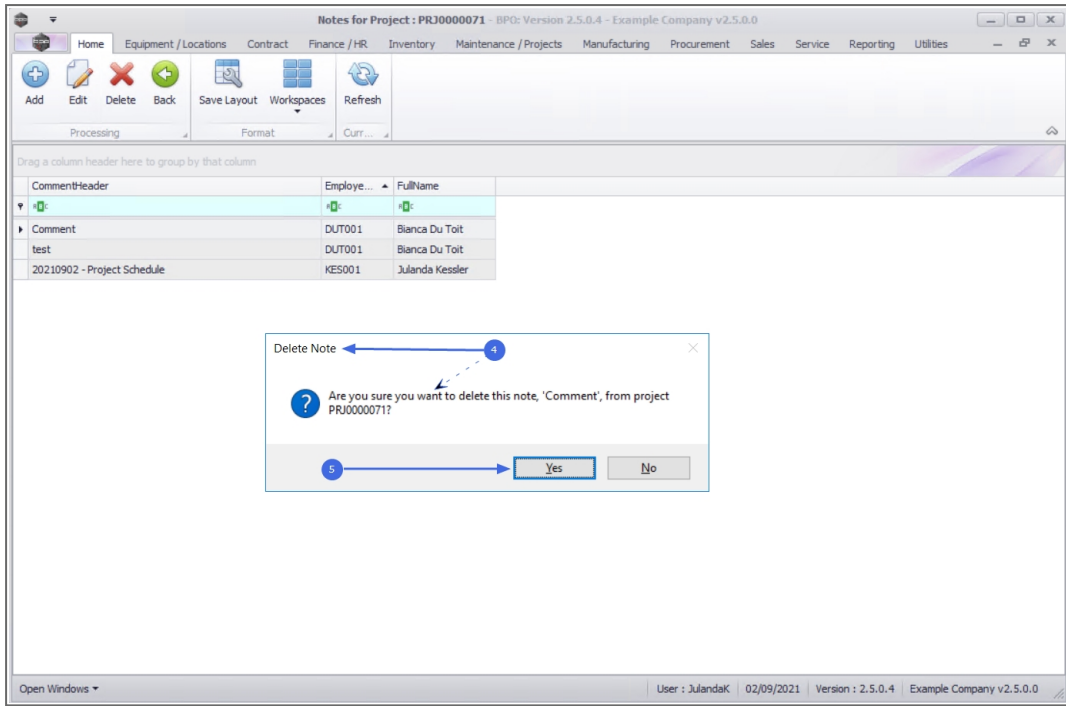
1. From the **Notes for Project** : [project ref number] screen,
2. Click on the **row** of the project note you wish to remove.
3. Click on **Delete**.



Short cut key: Right click to display the **Process** menu list. Click on **Delete**.

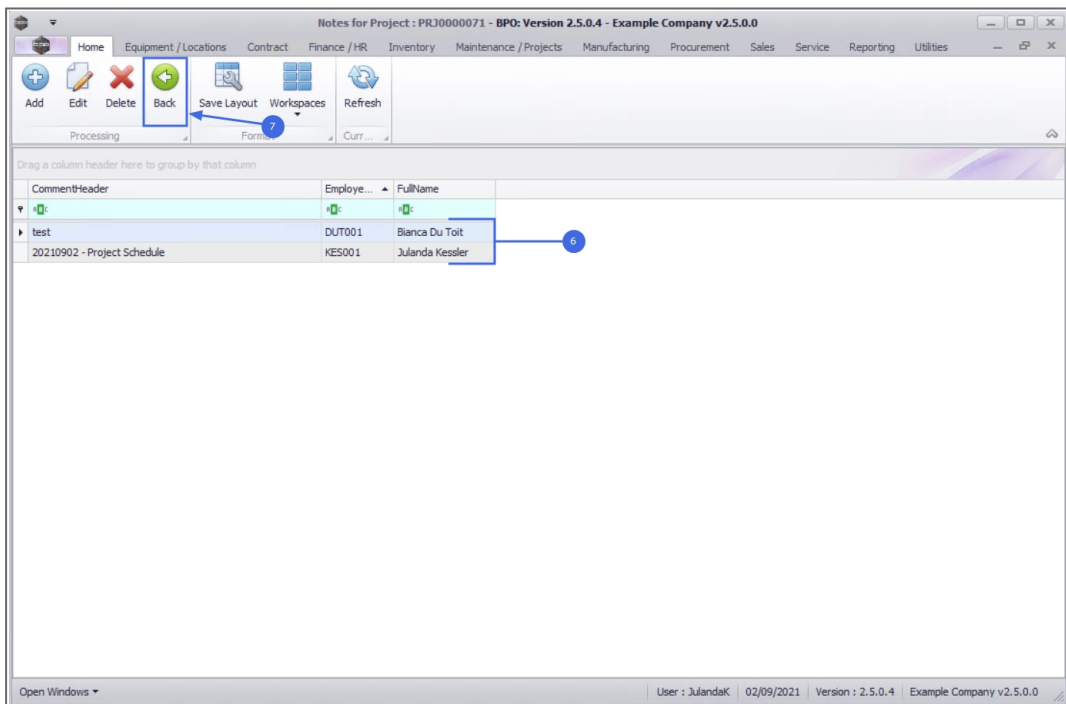


4. When you receive the **Delete Note** message to confirm;
 - **Are you sure you want to delete this note, from project [project ref number]?**
5. Click on **Yes**.



6. You will return to the **Notes for Project** screen and the Project Note has been removed.

7. Click on **Back** to return to the **Project Listing** screen.





MNU.058.050

