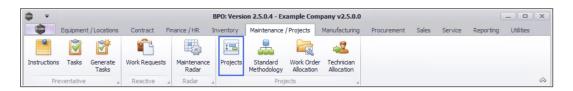


We are currently updating our site; thank you for your patience.

PROJECTS

PROJECTS - ADD SUB-PROJECT

Ribbon Access: Maintenance / Projects > Projects



- 1. The **Project Listing** screen will be displayed.
- 2. Select the **Site** where the Main Project can be located.
 - The example has **Durban** selected.
- 3. Click on the **row** of the project you wish to create a sub project for.
- 4. Click on Add.

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



Projects - Add Sub-Project

dd Edit % Save	spaces •	Project Methodology	Emplo	ct Time ess Report	Print Delivery Note	Export Durban My Proj	ects Current	Refresh Rep	ports	
iks #	Listing Hierarch	,		-		2			_	
er text to search	3					-				
	Ding a column head									
unctions	ProjectRef -	Description	Status	StatusDesc	EndDate	ManagerName	Notify	CustomerCode	CustomerName	DeptNam
	📌 📲	REC	88C	R B C	-	в∎с	REC	REC	A B C	n B C
Gantt	▶ DRJ0000408	Maintenance Project - SP400	0	Open	27/08/2021	David Rowe	No	HOP001	Hope Works (Pty) Ltd	
	PRJ0000407	OSU1001	0	Open	31/03/2021	Wesley Haynes	No	OFF001	Office Supplies Unlimited	
		B60004	0	Open	31/03/2021	Steven Cooper	No	BIG0001	Big Bargains	
Work Orders	PRJ0000405	8601010202	0	Open	12/02/2021	Wesley Haynes	No	PAN001	Panda Copiers	
		TT041 - Bi-annually, Mono 100	0	Open	17/07/2020	Belinda Sharman	No	DER001	Derton / Technologies	
		TT002 - Weekly - Call per WO	0	Open	06/03/2017	Belinda Sharman	No	HOP001	Hope Works (Pty) Ltd	
Work In Progress	PRJ0000402	test	0	Open	22/05/2020	Bianca Du Toit	No	DER001	Derton / Technologies	
		Implementation BPO2	0	Open	20/01/2019	Bianca Du Toit	Yes			
		Testing BPO2	0	Open	18/01/2019	Bianca Du Toit	No			
Documents		Developmemnt BPO2	0	Open	16/01/2019	Bianca Du Toit	Yes			
bocamenta		Design BPO2	0	Open	14/01/2019	Bianca Du Toit	Yes			
		Specification BPO2	0	Open	12/01/2019	Bianca Du Toit	Yes			
	PRJ0000396	Test BPO2	0	Open	20/01/2019	Bianca Du Toit	Yes			
Notes	PRJ0000395	BPO v2.2.0.1 Test Cyde	0	Open	08/02/2019	Bianca Du Toit	No			
		1234 - Test ctrt request creat	0	Open	14/08/2018	Bianca Du Toit	No	HOP001	Hope Works (Pty) Ltd	
		NDS Project	0	Open	30/07/2018	Bianca Du Toit	No	HOP001	Hope Works (Pty) Ltd	
Assignment History		credit validation check	0	Open	30/07/2018	Bianca Du Toit	No	OFF001	Office Supplies Unlimited	
	PRJ0000391	test new project	0	Open	22/08/2018	Ben Johnson	No			
		Sprint SP1912 New Deal Sale	0	Open	19/07/2018	Bianca Du Toit	No	DER001	Derton / Technologies	
Progress Chart	PRJ0000384	Default for SAM001 on 08 Feb	0	Open	09/02/2017	Bianca Du Toit	No	SAM001	Samanthas Diner	
			-	-						

ADD SUB-PROJECT

- 5. When you receive the **Add Project** message to confirm;
 - Is this a branch (a sub project) to the current project [project ref number]?
- 6. Click on **Yes** to create the sub-project.



Projects - Add Sub-Project

Home Equipment	it / Locations Contr		-	: Version 2.5.0 ntenance / Proje		Company v2.5.0. cturing Procure		Sales Service	Reporting Utilities		:
Add Edit Save La	aces •	Project Methodology	🚜 Emplo	ct Time	Print Delivery Note	Export Durban Open My Proj	•	Refresh Rep	borts		
laintenance " Format	4	Processing "	Analy	ysis "	Print		Current	, Rep	orts 🔺		
inks #	Listing Hierarchy										
nter text to search P											
Functions		Description	Status	StatusDesc	EndDate	ManagerName	Notify	CustomerCode	CustomerName	DeptNam	ne
	P #0:	RDC	REC	REC .	=	non ager Hame	REC	REC	REC	all c	10
Gaott	PRJ0000408	Maintenance Project - SP400	0	Open	27/08/2021	David Rowe	No	HOP001	Hope Works (Ptv) Ltd		
	PR30000407 PR30000407	OSU1001	0	Open	31/03/2021	Wesley Haynes	No	OFF001	Office Supplies Unlimited		
		B60004	0	Open	31/03/2021	Steven Cooper	No	BIG0001	Big Bargains		
Work Orders	E PR30000405	8601010202	0	Open	12/02/2021	Wesley Haynes	No	PAN001	Panda Copiers		
	E PR30000404	TT041 - Bi-annually, Mono 100	-	Open	17/07/2020	Belinda Sharman	No	DER001	Derton / Technologies		
		TT002 - W/	-				No	HOP001	Hope Works (Pty) Ltd		
Work In Progress	PRJ0000402	test Add Project -		5			No	DER001	Derton / Technologies		
nonk arr rogi cas	PR30000401	Implement		L'			Yes				
	E PRJ0000400	Testing BP Is this a branch (a	sub proje	ect) to the curr	rent project PR	J0000408 ?	No				
Documents	PRJ0000399	Developme					Yes				
Documents		Design BPC					Yes				
		Specificatio			Yes	No	Yes				
	PRJ0000396	Test BPO2	0	Open	20/01/2019	Bianca Du Toit	Yes				
Notes	PRJ0000395	BPO v2.2.0.1 Test Cyde	0	Open	08/02/2019	Bianca Du Toit	No				
		1234 - Test ctrt request creat	0	Open	14/08/2018	Bianca Du Toit	No	HOP001	Hope Works (Pty) Ltd		
		NDS Project	0	Open	30/07/2018	Bianca Du Toit	No	HOP001	Hope Works (Pty) Ltd		
Assignment History		credit validation check	0	Open	30/07/2018	Bianca Du Toit	No	OFF001	Office Supplies Unlimited		
	PRJ0000391	test new project	0	Open	22/08/2018	Ben Johnson	No				
		Sprint SP1912 New Deal Sale	0	Open	19/07/2018	Bianca Du Toit	No	DER001	Derton / Technologies		
Progress Chart	PRJ0000384	Default for SAM001 on 08 Feb	0	Open	09/02/2017	Bianca Du Toit	No	SAM001	Samanthas Diner		
	4		-	-						> +	ļ

7. The **Add new project** screen will be displayed.

IDENTIFICATION

- **Description:** Type in a description¹ for the sub-project you are creating.
- **Project Reference:** Type in the Project reference Number.

If the field is greyed out, then the Project Reference has been set to automatically issue the project reference number. Refer to project configuration for more information.

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



• **Project Type:** Click on the down **arrow** to select the **project type**¹ that applies to the sub-project you are creating.

	2	Add	new project	- BPO: Version 2.5.0	3 - Example Compa	my v2.5.0.0					
Home Equipment	nt / Locations Contract	Finance / HR	Inventory	Maintenance / Projec	ts Manufacturing	Procurement	Sales	Service Repo	rting Utilities		₽ X
	t Workspaces										
-	rmat a										~
Enter text to search	Identification :										Linke
Functions		Site inspection t prior to installat	o be performed on	*							Linked Work Orders
Work Orders	Project Reference			Ŧ							ers
	Project Reference Project Type	Unique		•							
Work In Progress	Parent Project Detail	-	Description								dition
Work in Progress		1 0	nique -	4							al Dat
	Description	2 0	orrandous								2
Documents	Project Reference										Additional Data Customer Info
	Customer										mer Ir
Notes	Schedule :	×		11.							fo
Notes	Status	Open									
	Start Date		•								
Assignment History		27/08/2021	•								
	Project Manager			* *							
Progress Chart	Notifiable										
Baseline											
Open Windows 🕶						User : JulandaK	28/07/202	1 Version : 2.5	.0.3 Example 0	Company v2.5	.0.0 //

PARENT PROJECT DETAILS

- **Description:** The description field has been auto populated with the project description of the main project you have selected.
- **Project Reference:** The project reference has been auto populated with the project reference of the main project you have selected.
- **Customer:** The customer field has been auto populated with the customer selected on the main project. You may wish to change the customer for the sub-project, if you are linking the sub-project

¹Unique - 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 needs to take place over the span of a few year.



to a different customer.

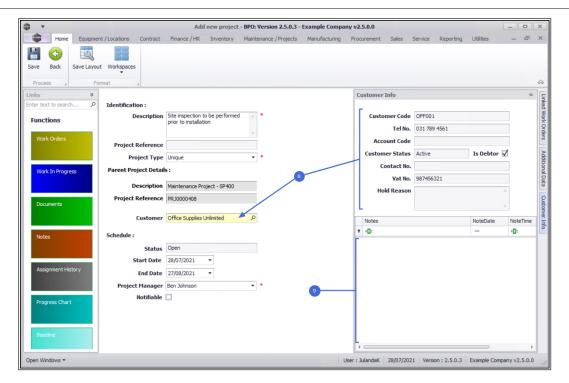
- i. Click on the **search** button to display the **Select the customer for this Project** screen.
- ii. Click on the **row** of the Customer you wish to link to the sub-project.
- iii. Click on **OK**.

		Add new p	oroject - BPO: Version	2.5.0.3 - 1	Example Co	mpany v2.5.0	.0			x
Home Equipmen	t / Locations Contract	Finance / HR Inve	ntory Maintenance / F	Projects	Manufactur	ing Procure	ment Sales	Service Repo	rting Utilities	 8 X
Save Back Save Layout	Workspaces									
Process For	mat									\Diamond
Links 4										-
Enter text to search P	Identification :									inked
Functions	Description	Site inspection to be pe prior to installation	rformed							Linked Work Orders
Work Orders	Project Reference									
	Project Type	Unique	• •)					Additional Data
	Parent Project Detail			/	1					dition
Work In Progress	Farent Project Detail				12					al Da
	Description	Maintenance Project -	SP400		Ľ					ta
Documents	Project Reference	PRJ0000408		Sel	lect the cus	tomer for this	s Project			 x
Documenta	Customer	Hope Works (Pty) Ltd	٩	Home		2				
Notes	Schedule :			Ok	Back	Save Layout				
	Status	Open								
	Start Date	28/07/2021 -		Pro	cess 🦼	Format				 ~
Assignment History	End Date	27/08/2021 -		Drag a						11
	Project Manager			Cus	tomerTy C	CustomerCode	CustomerName		DeptName	SiteDes
	Notifiable			۲		BC.	R C		8 DC	* O C ^
Progress Chart				RE		CUS001	Cash Sales Acco			Dur
				RE		IOP001	Hope Works (Pt			Dur
				RE RE		0ER001	Derton / Techno Office Supplies			Dur
Baseline				CO		ES001	Young Electric	Jimmed		Dur
				RE		VES001	Westwood Dvn	amic		Dur *
Open Windows 🕶				4)					 - F

CUSTOMER INFO

- 8. The **Customer Info** frame will auto populate with the customer information you have selected as the Parent Project Details.
- 9. Any **Notes** linked to this customer can also be viewed from this screen.





SCHEDULE

- **Status:** This is the current status for the sub-project and will display as **Open** by default. This field cannot be changed on this screen.
- Start Date: This date will auto populate with the current date.
 Type in or click on the down arrow to select an alternative starting date for the sub-project using the Calendar function.
- End Date: The end date will be set a month from the start date.
 Type in or click on the down arrow to select the expected end date for the project using the Calendar function.
- **Project Manager:** Click on the down **arrow** to select the name of the project manager for the project.



• Notifiable: This option is not used by the system.

Note For notifications, use the Assign Technician to the project work order(s) function. If the Company Configuration is set up correctly, then the technician will receive an email for the assignment.

•	Add new project	- BPO: Version 2.5.0.3 -	Example Compar	ny v2.5.0.0						x
Home Equipment / Locations Contract	Finance / HR Inventory	Maintenance / Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities		×
Save Back Save Layout Workspaces										
Process Format										\diamond
Links A										5
Enter text to search P Identification :										nked
Functions Description	Site inspection to be performed prior to installation	· ·								Work
										Orders
Work Orders Project Reference										
Project Type	Unique	* *								Additional
Work In Progress Parent Project Detail	s:									onal [
Description	Maintenance Project - SP400									Data
Documents Project Reference	PRJ0000408									Cus
	Office Supplies Unlimited	Q								istomer Info
	Office Supplies Offinitieu									Info
Notes Schedule :										
Status										
Assignment History										
End Date	27/08/2021 •									
Project Manager Notifiable		•								
Progress Chart										
Baseline										
Open Windows 👻			U	iser : JulandaK	28/07/202	1 Versio	on : 2.5.0.3	Example Cor	mpany v2.5.0	0.0

LINKED WORK ORDERS

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

This panel can be docked to leave it expanded on the screen, which will make it easier to work in.

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



		Add new proje	ect - BPO: Version 2.5.0	3 - Example Compa	ny v2.5.0.0					x
Home Equipmen	nt/Locations Contract	Finance / HR Inventor	y Maintenance / Projec	ts Manufacturing	Procurement	Sales Service	Reporting	Utilities	- 8	х
							10			
Save Back Save Layou	t Workspaces						1			
Process Fo	rmat					1				\$
Links 4					Linked Wo	rk Orders			+	
Enter text to search P	Identification :				WOCode		SiteName	WOType	Status	inked
Functions	Description	Site inspection to be perform prior to installation	ned 🔺 *							Linked Work Orders
Work Orders	Project Reference		¥							
	Project Type	Unique	* *							Additi
Work In Progress	Parent Project Detail	s:								Additional Data
	Description	Maintenance Project - SP40	D							
Documents	Project Reference	PRJ0000408								Customer Info
	Customer	Office Supplies Unlimited	Q							er In
Notes	Schedule :			<u> </u>						fo
	Status									
	Start Date	28/07/2021 -								
Assignment History	End Date	27/08/2021 -								
	Project Manager		* *							
Progress Chart	Notifiable									
Baseline					·				Þ	
Open Windows 🕶				U	Jser : JulandaK	28/07/2021 Vers	ion : 2.5.0.3	Example Com	pany v2.5.0.0	1.

ADDITIONAL DATA

- You may wish to include information not covered in the sub-project frames. Click on the Additional Data tab to expand the Additional Data frame.
- 13. Any **extra** information can be added in the Custom 1 10 fields. These field names can be re-named to suit your company requirements.
 - Please contact your BPO Analyst or CO3 Support for assistance.



₩ ×	Add new project - BPO:	Version 2.5.0.3 - Example Compan	y v2.5.0.0			x
Home Equipment / Locations Contrac	t Finance / HR Inventory Maint	enance / Projects Manufacturing	Procurement Sales Se	ervice Reporting Utilities	- 8	х
Save Back Save Layout Workspaces					12	\$
Process / Format /				L'		1
Links 4 Enter text to search P Identification :			Additional Data		+	Linke
	n Site inspection to be performed prior to installation	•	Custom 1 Custom 2			Linked Work Orders
Work Orders Project Referen	ce		Custom 3	Field 3		
Project Ty		*	Custom 4	Field 4	\neg	Additional Data
Work In Progress Parent Project Det			Custom 5	Field 5		itiona
		13	Custom 6	Field 6		I Dat
	Maintenance Project - SP400		Custom 7	Field 7		9
Documents Project Referen	ce PRJ0000408		Custom 8	Field 8		Custo
Custom	er Office Supplies Unlimited P		Custom 9	Field 9		Customer Info
Notes Schedule :			Custom 10	Field 10		nfo
State	IS Open					
And an and blickness	e 28/07/2021 •					
End Da	e 27/08/2021 •					
Project Manag		•				
Progress Chart Notifiab Baseline	le 🔲					

SAVE SUB-PROJECT

- 14. After adding the relevant information for creating the Sub-Project, click on **Save**.
- 15. When you receive the **Project** message screen informing you that;
 - The project: [project ref number] has been saved.

Note that the sub-project number is different from the main project number.

16. Click on OK.



\$ •		Add new project - B	PO: Version 2.5.).3 - Example Compan	y v2.5.0.0					x
Home Equipmen	t / Locations Contract	Finance / HR Inventory M	laintenance / Proje	cts Manufacturing	Procurement Sales	Service	Reporting	Utilities	- 6	x
Save Back Save Layout	t Workspaces									
	rmat 14									\Diamond
Links #					Customer Info					+
Enter text to search P	Identification :									INCU.
Functions	Description	Site inspection to be performed	· •		Customer Cod	e OFF001				WOIN N
			.		Tel No	031 789 4	561			Linked Work Orders 車
Work Orders	Project Reference				Account Cod	e				
	Project Type	Unique	* *		Customer Statu	s Active		Is Debtor 🗸		Additional Data
Work In Progress	Parent Project Detail	s:			Contact N	D.				tional
	Description	Maintenance Project - SP400			Vat N	98745632	1			Data
	Project Reference				Hold Reaso	n				
Documents			Project					Ŧ		ustom
	Customer	Office Supplies Unlimited	Pioject	,	••••			NoteDate	NoteTin	Customer Info
Notes	Schedule :			رُبل The project : PRJ000040	09 has been saved.			=	ROC	8
	Status	Open								
	Start Date	28/07/2021 -		•						
Assignment History	End Date	27/08/2021 -		16	ОК					
	Project Manager		•							
Progress Chart	Notifiable									
Baseline					4					F
Open Windows -				U	ser : JulandaK 28/07/20	021 Version	: 2.5.0.3 E	xample Compan	y v2.5.0	.0

17. You will return to the **Project Listing** screen where you can view the sub-project.

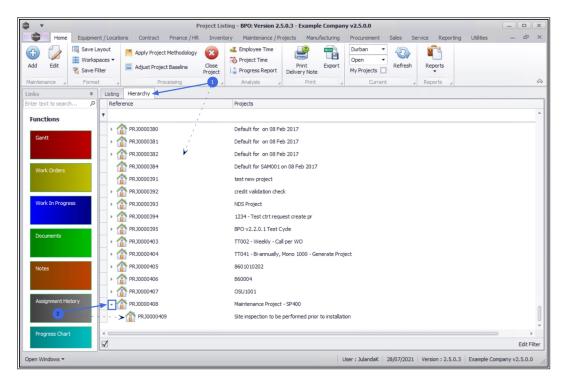
tone Estone	nt/Locations Cont			D: Version 2.5 intenance / Pro		e Company v2.5.0 facturing Procur	t.0 ement	Sales Service	Reporting Uti		e x
Add Edit Save Li Save Fi	NOES *	Project Methodology Oose Project Baseline Close Project	To Prop	koyee Time ect Time press Report	Print Delivery Note	Export My Pro	ipects	Refresh Re	ôa.p		
Maintenance a Formal		Processing a	Are	dysis a	Print		Current	2 Re	ports a		-
Links #	Listing Herarchy	r		(7						
inter text to search P				110	124						
Functions	Projectilef +	Description	Status	StatusDesc	EndDate	ManagerName	Notify	CustomerCode	CustomerName	Depthane	
		• 4	0	•	-	• ` `	•	•	•	•	
Gantt	PRJ0000409	Site inspection to be perform	0	Open	27/08/2021	Ben Johnson	No	OFF001	Office Supplies		
	PR.30000-408	Maintenance Project - SP400	0	Open	27/08/2021	David Rowe	No	HOP001	Hope Works (Pt		-
	E PR.30000-407	OSU3001	0	Open	31/03/2021	Wesley Haynes	No	OFF001	Office Supplies		
Work Orders	E PR.30000-406	860004	0	Open	31/03/2021	Steven Cooper	No	8050001	Big Bargains		
	E PR.30000-405	860 10 10 20 2	0	Open	12/02/2021	Wesley Haynes	No	PAN001	Panda Copiers		
	E PR.30000404	TT041 - Bi-annually, Mono 10	0	Open	17/07/2020	Beinda Sharman	No	DER001	Derton / Techno		
Work In Progress	E PR.30000-403	TT002 - Weekly - Call per WO	0	Open	06/03/2017	Beinda Sharman	No	HOP001	Hope Works (Pt		
	PR.30000402	test	0	Open	22/05/2020	Bianca Du Toit	No	DER001	Derton / Techno		
	E PR.30000-401	Implementation BPO2	0	Open	20/01/2019	Bianca Du Toit	Yes				
Documents	E PR.30000-400	Testing BPO2	0	Open	18/01/2019	Bianca Du Toit	No				
	E PR.30000.399	Developmennt BPO2	0	Open	16/01/2019	Bianca Du Toit	Tes				
	E PR.30000398	Design BPO2	0	Open	14/01/2019	Bianca Du Toit	Yes				
	E PR.30000397	Specification BPO2	0	Open	12/01/2019	Bianca Du Toit	Yes				
Notes	PR.30000396	Test BPO2	0	Open	20/01/2019	Bianca Du Toit	Yes				
	PR.30000395	BPO v2.2.0.1 Test Cycle	0	Open	08/02/2019	Bianca Du Teit	No				
	E PR.30000394	1234 - Test cirt request crea	0	Open	14/08/2018	Bianca Du Toit	No	HOP001	Hope Works (Pt		
Assignment History	E PR.30000393	NDS Project	0	Open	30/07/2018	Bianca Du Toit	No	HOP001	Hope Works (Pt		
	E PR.30000392	credit validation check	0	Open	30/07/2018	Bianca Du Teit	No	OFF001	Office Supplies		
	PR.30000391	test new project	0	Open	22/08/2018	Ben Johnson	No				
Progress Chart	E PR.30000.390	Sprint SP1912 New Deal Sale	0	Open	19/07/2018	Bianca Du Toit	No	DER001	Derton / Techno		
	PR.30000384	Default for SAM001 on 08 Fe	0	Open	09/02/2017	Bianca Du Toit	144	SAM001	Samanthas Diner		

Help v2024.5.0.7/1.0 - Pg 10 - Printed: 04/07/2024



VIEW IN HIERARCHY VIEW

- 1. Click on the **Hierarchy** tab to display the Project Listing screen in Hierarchy view.
- 2. **Scroll** to the parent project number and click on the **tree view node** to expand the parent project hierarchy.
- 3. The linked **sub-project number** and description can now be viewed.



Related Topics

- Projects Add Main Project
- Projects Edit Project
- Projects Close Project
- Assign Technician

MNU.058.006