PROJECTS

INTRODUCTION TO PROJECTS

A project is a collective group of jobs that need to be carried out.

The Project module is a tool for users to collectively view the work to be done under a project, to manage timelines and project schedules.

By monitoring the project, you can keep track of work that has been done and work that still needs to be done.

You can **invoice** a project when complete.

You can create a **New Deal Sale** or **New Deal Rental** Project from a Sales Order.

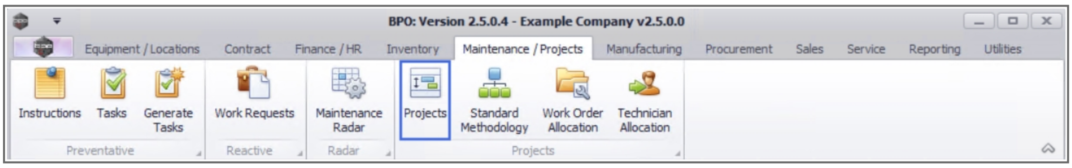
Projects are either **Open** or **Closed**. Once closed, a project cannot be re-opened.

Use BPO to Projects - Add Main Project or use Projects - Work Orders to create a project for Maintenance Planning work orders.

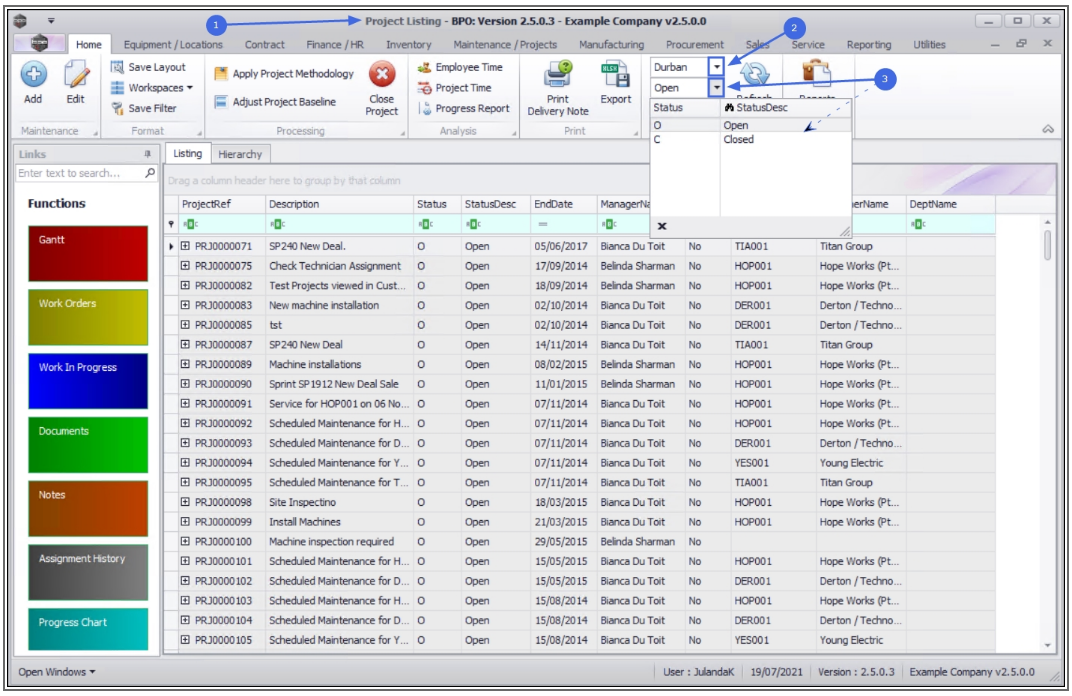
Project Static Data Setup

- Project Contact Type
- Project Methodology Class

Ribbon Access: *Maintenance / Projects > Projects*



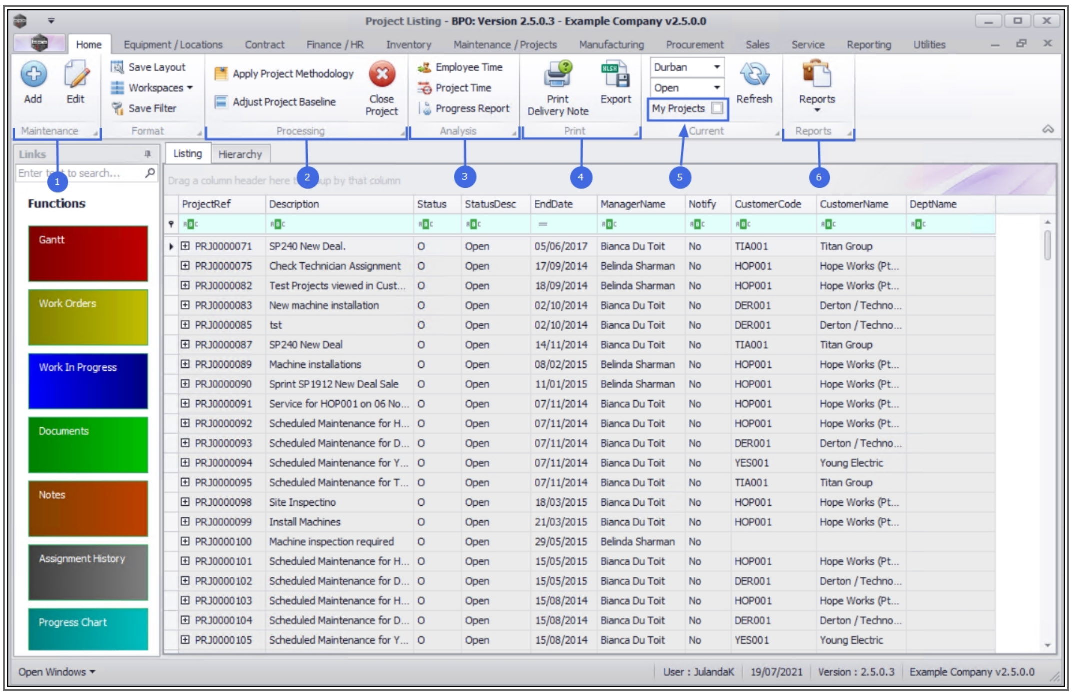
1. The ***Project Listing*** screen will be displayed.
2. Select the ***Site*** that you wish to work in by clicking on the down arrow and selecting the required site
    - The example has ***Durban*** selected.
3. The Project ***Status*** can either be set to ***Open*** or ***Closed***.
    - The screen will open by default in the Open status as you will most likely be working in this status.



PROJECT RIBBON

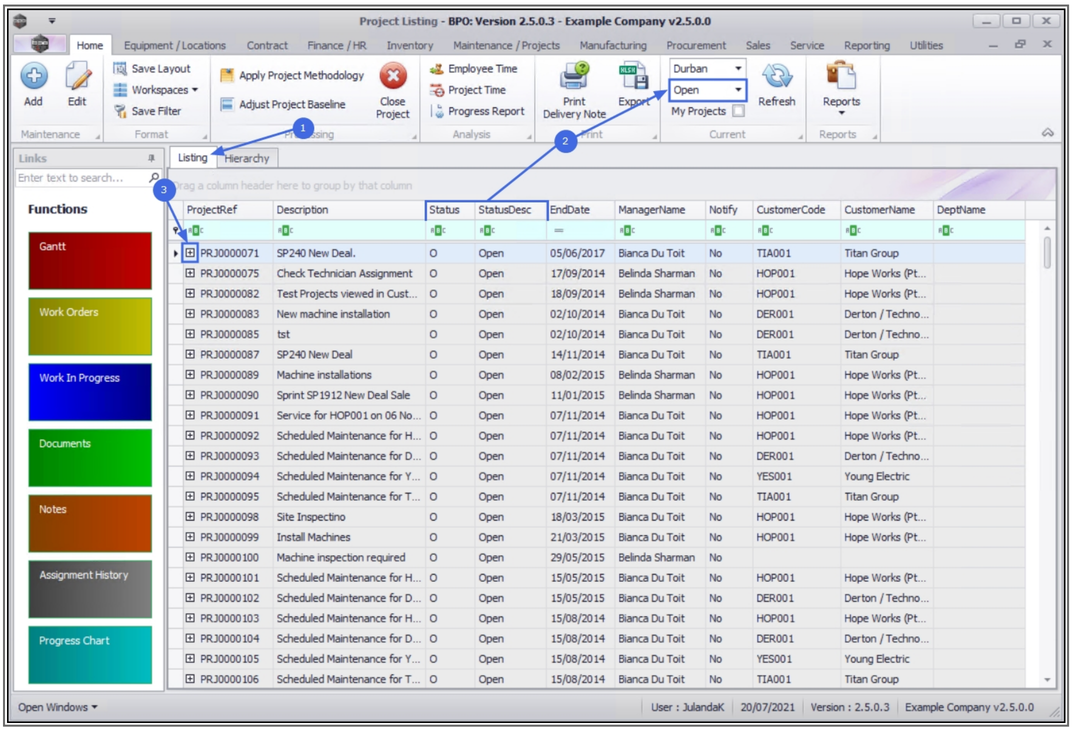
1. From the **Maintenance section** you can Projects - Add Main Project and / or Projects - Add Sub-Project. The Projects - Edit Project function allows you to make changes to project information as well as link digital documents, invoices, book time, etc. to the project.
2. From the **Processing section**, you may choose to Projects - Apply Project Methodology, Projects - Adjust Project Baseline or Projects - Close Project.

3. From the **Analysis section**, you can generate and view the Projects - Employee Time Sheet, the Projects - Project Time Report or generate a Projects - Progress Report for the project.
4. From the **Print section**, you can Projects - Print Delivery Note for the Project, or Export the Project list to an Excel Spreadsheet.
5. From the **Current section**, click on the Projects - My Projects check box to filter the project list by the projects that are ***assigned to you*** (the person currently logged on the system).
6. **Reports** allow you to print Project Reports.

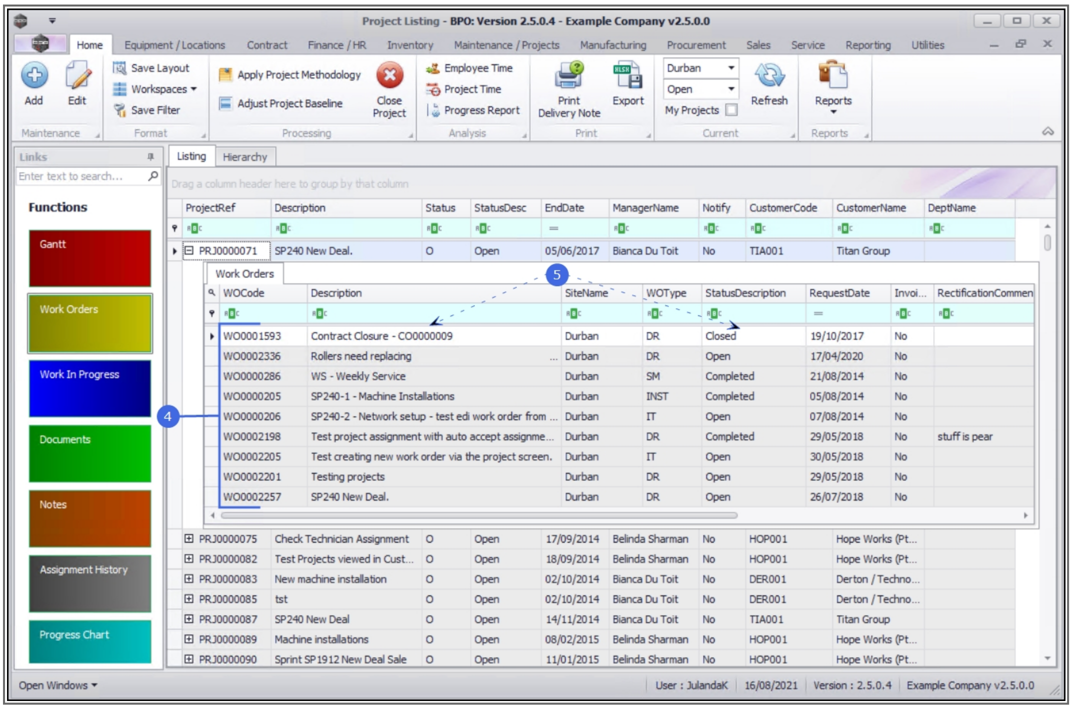


PROJECT LISTING FRAME

1. The Project Listing screen will by default open on the ***Listing frame***.
2. The projects listed in this frame will be filtered using the ***Status filer*** that was selected.
3. You can click on the ***expand button*** in front of a project to ***view*** the work orders linked to the project.



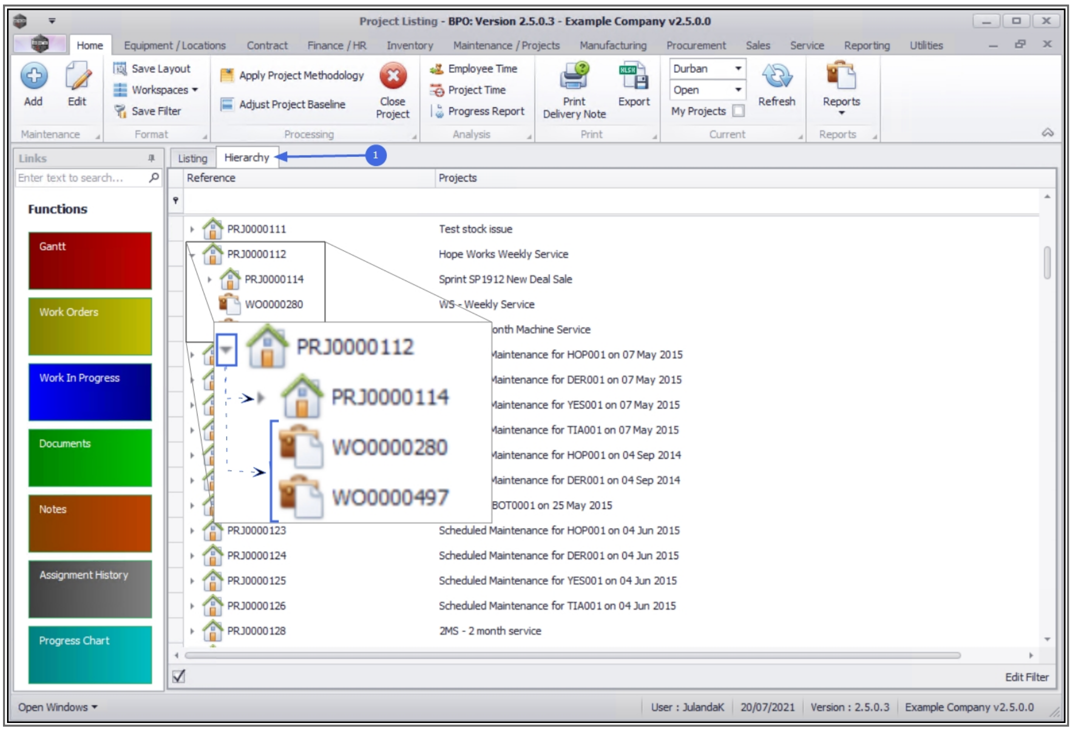
4. The ***Work Orders*** frame will expand to display the list of work orders.
5. ***Double click*** anywhere in the ***row*** of the work order, to open the ***Maintain Work Order*** screen where you can view more details for the work order.



PROJECT HIERARCHY FRAME

1. The ***Hierarchy*** tab allows you to view the projects in a ***tiered*** order.
2. Click on the ***tree view chevron*** node in front of a project to expand any sub-projects[1] and Work Orders attached to the project.

[1]A sub-project may also be referred to as a nested relationship project



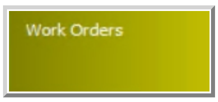
FUNCTIONS TILES

The ***Functions*** tiles will direct you to further information for a selected project.

These tiles are available from the ***Project Listing*** as well as the ***Edit project*** screen.

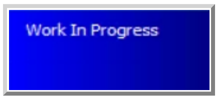
When using the function tiles from the *Project Listing* screen, ensure that you have selected the correct project before you click on a tile.

The Gantt tile will direct you to ***Project Gantt View*** screen where you can view the Gantt chart, which assists in the planning and scheduling of projects.



The WO History tile will direct you to the ***Work Orders for Project Ref*** listing screen where you can view a list of all the Projects - Work Orders linked to the selected project.

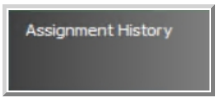
Depending on the status of the project, you can ***Add***, ***Edit***, ***Delete***, ***View***, ***Close***, ***Complete*** or ***Reinstate*** a selected work order.



The Work In Progress tile will direct you to the ***Work in Progress for Project*** screen you can view a list of the ***issued parts*** requested against this project, create a Return Request for a selected part, or a ***Customer Invoice*** for the work order linked to a selected part, as well as a ***Customer Invoice*** for the project. Refer to Projects - Work in Progress (WIP)

The Documents tile will direct you to the ***Documents for Project*** screen where you can view a list of the ***digital documents*** linked to the selected project, as well as ***Add***, ***Edit***, ***Delete*** or ***View*** project documents. Refer to Project - Documents.

The Notes tile will direct you to the ***Notes for Project*** screen you can view a list of the ***notes and / or comments*** linked to the selected project as well as Projects - Notes, or and / or comments.

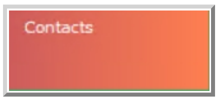


The Assignment History tile will direct you to the ***Assignment Listing for Project*** screen you can view a list of the ***assignments*** linked to the selected project as well as Assign Technician, Unassign Technician or Force Accept a selected assignment. Refer to Projects - Assignment History

The Progress Chart tile will direct you to the Projects - Progress Chart for Project screen you can view a chart displaying the project status, the start and end times and percentage of the work completed.

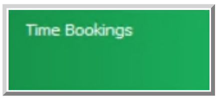
The Baseline tile will direct you to the ***Baseline Adjustments for Project*** screen , where you can view a list of any

Projects - Baseline***adjustments*** (new project start and end dates) that have been applied to the selected project as well as ***Add*** an adjustment, if required.



The Contacts tile will direct you to the ***Contacts for Project*** screen where you can view a list of any ***contacts*** that have been linked to the selected project as well as ***Add***, ***Edit*** or ***Delete*** a contact as required. Refer to Projects - Contacts

The Parts tile will direct you to the ***Parts for Project*** screen where you can view a list of the Projects - Parts that have been requested for the selected project, as well as print the ***Project Picking Slip***.



The Time Bookings tile will direct you to the ***Time Bookings for Project*** screen you can view a list of any Projects - Time Bookings linked to the selected project.

The Services tile will direct you to the ***Services for Project*** screen, where you can view a list of any Projects - Services linked to the selected project.

The Third Party Services tile will direct you to the ***Third-Party Services for Project*** screen where you can view a list of any ***third-party services*** linked to the selected project.

The Travel tile will direct you to the ***Travel for Project*** screen, where you can view a list of any Projects - Travel ***costs*** linked to the selected project.

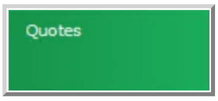
The Expenses tile will direct you to the ***Expenses for Project*** screen, where you can view a list of any Projects - Expenses linked to the selected project.

The Finance tile will direct you to the ***Finance Analysis for Project*** screen you can view a breakdown of the **Items / Parts** required as well as the **Planned Actual** and **Invoiced** costs of the selected project.

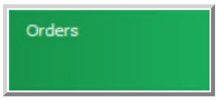
The For Contract tile will direct you to the ***Items Awaiting Contract for Project*** screen. This screen is divided into a ***Parts*** and a ***Contracts*** frame. You can select a part to be linked to a specific contract or a new contract by dragging and dropping a selected part line into a contract line.

The Time Review tile will direct you to the ***Time Not Billed for Project*** screen will be displayed where you will be able to Invoice a Work Order or Project, Flag Reviewed time, SLA Time and View Work Order or Project. Refer to Projects - Time Review

PROCESSING TILES

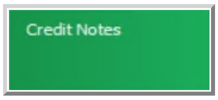


The Quotes tile will direct you to the ***Sales Quotes for Project*** screen where you can view a list of all the Projects - Quotes linked to the selected project. You can ***Accept*** and ***Reject*** a quote or ***Convert a quote to an order***. You can also ***Add***, ***Edit***, ***Delete*** and ***View*** a quote.



The Orders tile will direct you to the ***Sales Orders for Project*** screen where you can view a list of all the Projects - Sales Orders linked to the selected project. From this screen you can ***Add / Create*** an order, ***Edit***, ***Delete*** and ***View*** an order. You can also ***Create an invoice***, ***Create a New Deal***, ***Add Items to the Work Order*** as well as ***Create a New Deal Project***.

The Invoices tile will direct you to the ***Sales Invoices for Project*** screen you can view the Project Invoices. You can also ***Add*** , ***Edit*** and ***View*** a Tax Invoice as well as record a Comment and Reference for an invoice. From the ***Issues*** tile you can view a list of all the ***items issued*** against the selected sales invoice. Refer to Invoice a Project



The Credit Notes tile will direct you to the ***Sales Credit Notes for Project*** screen where you can view a list of all the ***sales credit notes*** linked to the selected project. You can also Raise Project Credit Note, ***Edit***, ***Delete*** and ***View*** a credit note. From this screen you can also ***Release*** a credit note for approval, ***Remove*** a credit note from approval, ***Approve*** a credit note and ***Reject*** a credit note. From the ***Returns*** tile, you can view a list of all the ***return items*** linked to the selected sales credit note.

Related Topics

- Creating a New Project
- Technician Allocation - Technician Projects
- Creating a New Work Order
- Link a Work order to a Project
- Link a Work order to a New Project
- Link a Work order to a Current Project
- Work Order Allocation
- Closing a Project

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