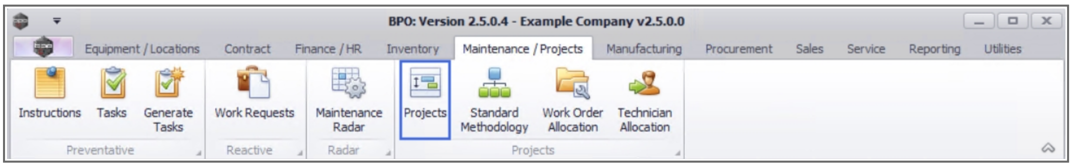
PROJECTS

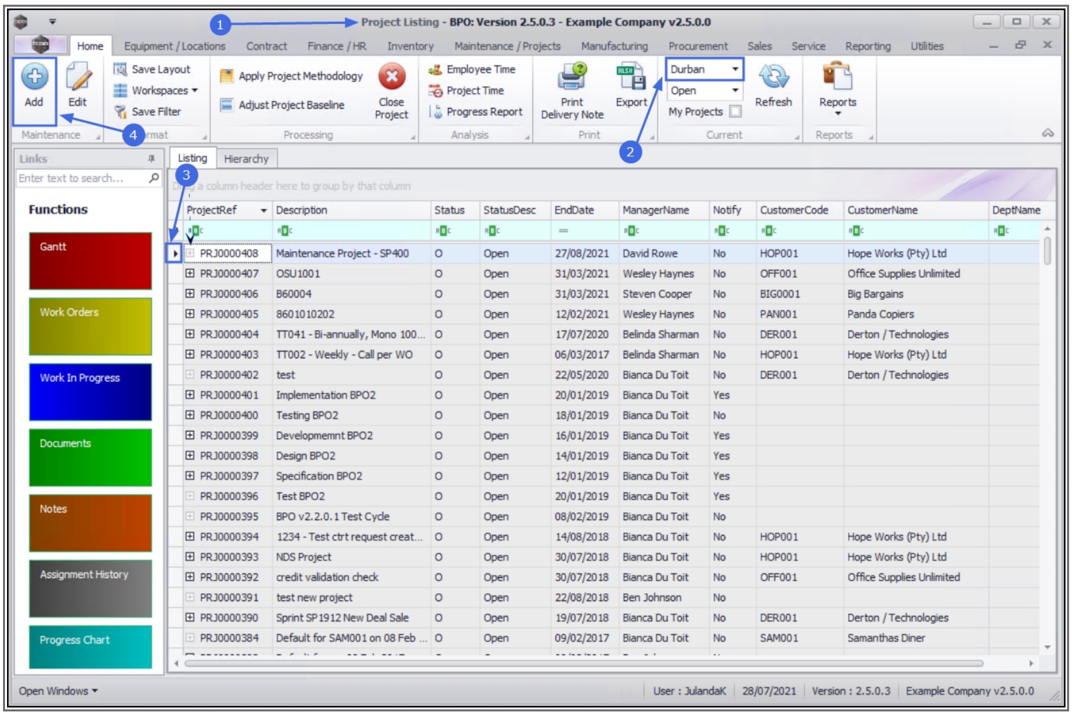
PROJECTS - ADD SUB-PROJECT

Ribbon Access: *Maintenance / Projects > Projects*



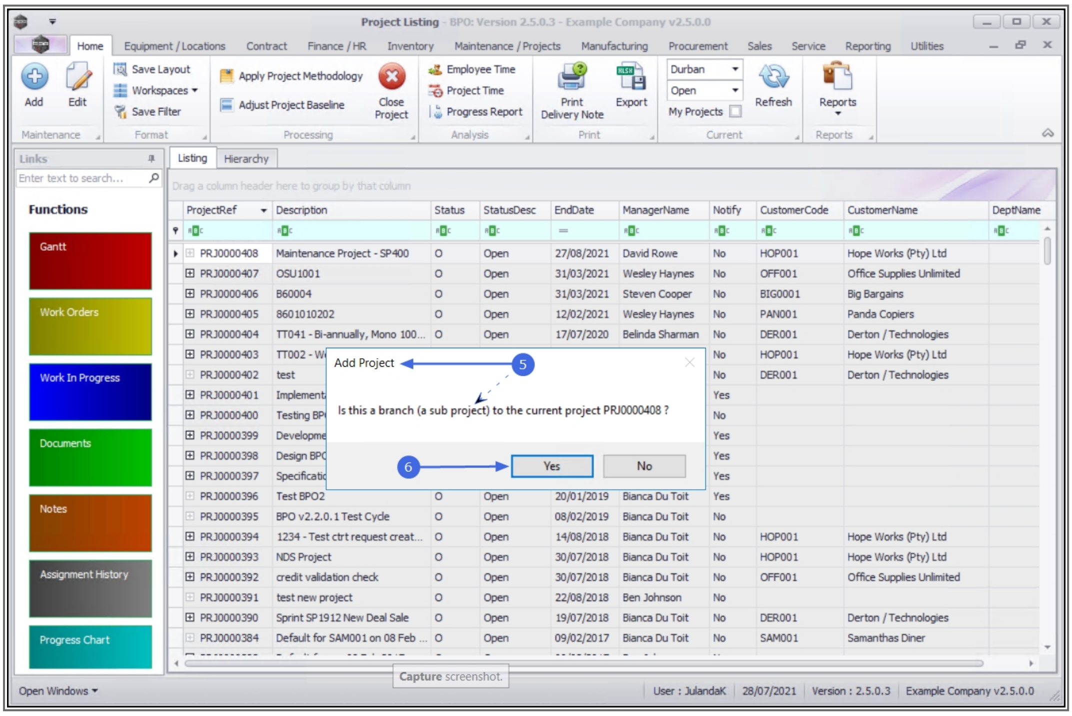
1. The ***Project Listing*** screen will be displayed.
2. Select the ***Site*** where the Main Project can be located.
    - The example has ***Durban*** selected.
3. Click on the ***row*** of the project you wish to create a sub project for.
4. Click on ***Add***.

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



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.



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

IDENTIFICATION

- **Description:** Type in a description[1] for the sub-project you are creating.

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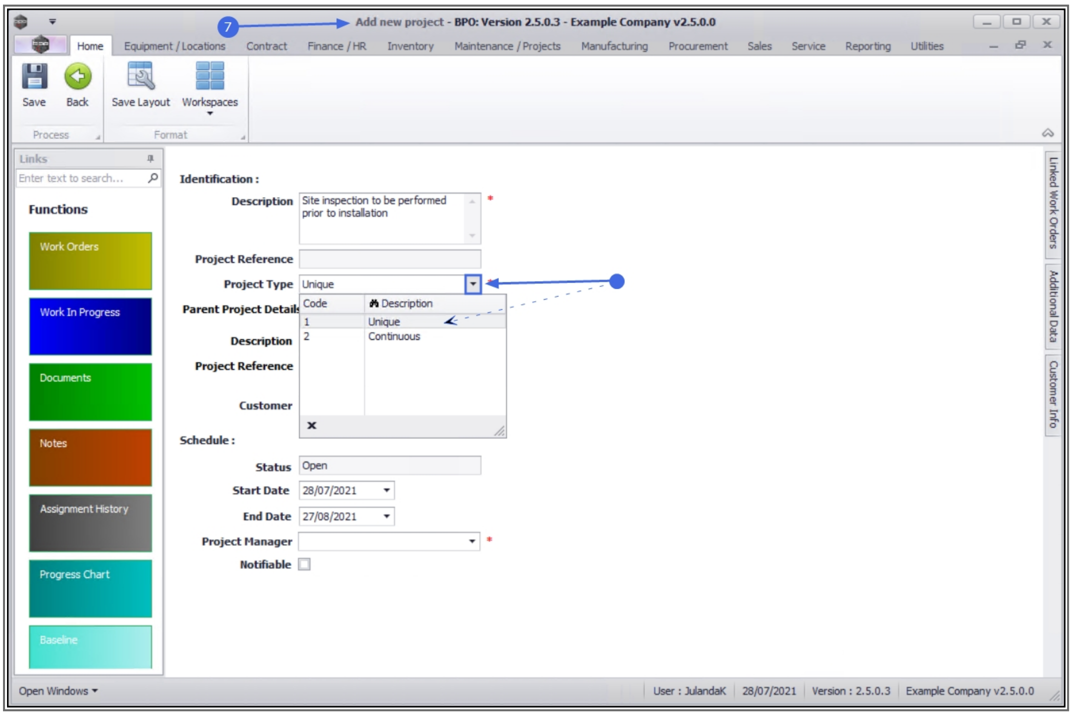
[1]The project description is a short explanation what the project is all about, e.g. Scheduled Maintenance that needs to be performed.

- **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.

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



PARENT PROJECT DETAILS

- **Description:** The description field has been auto populated with the project description of the main project you have selected.

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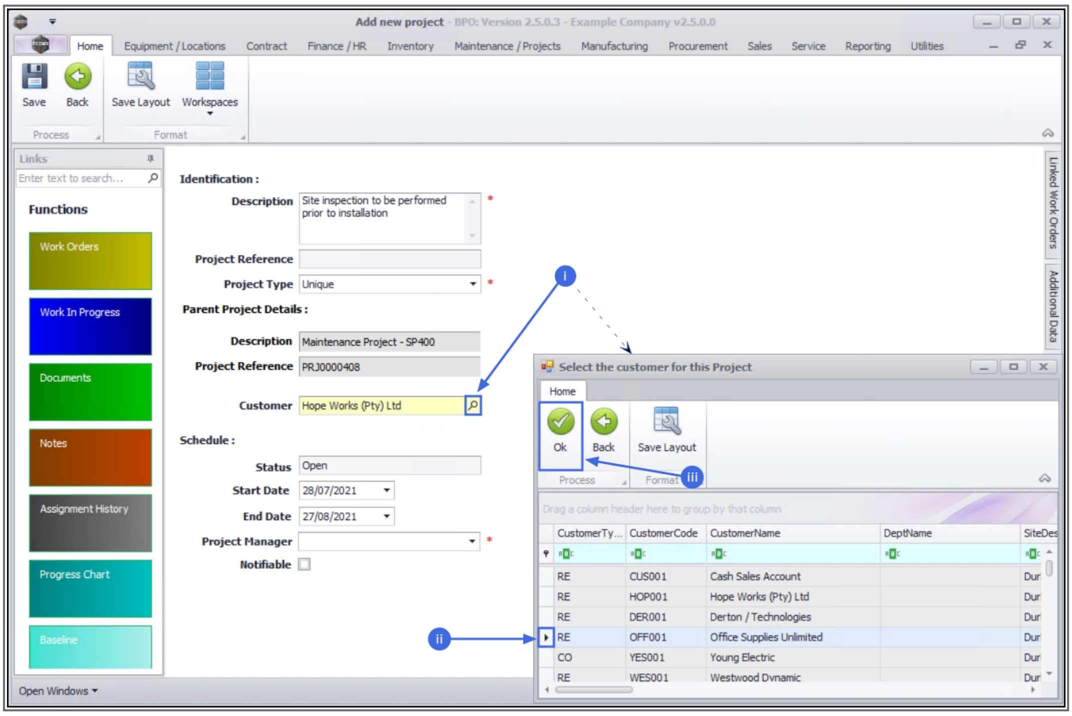
[1] Unique - Applies to a project that you will start work on and close, for instance a Customer Installation. Continuous - Applies to a project that will have an expanded duration, for instance a Service Agreement where maintenance needs to take place over the span of a few year.

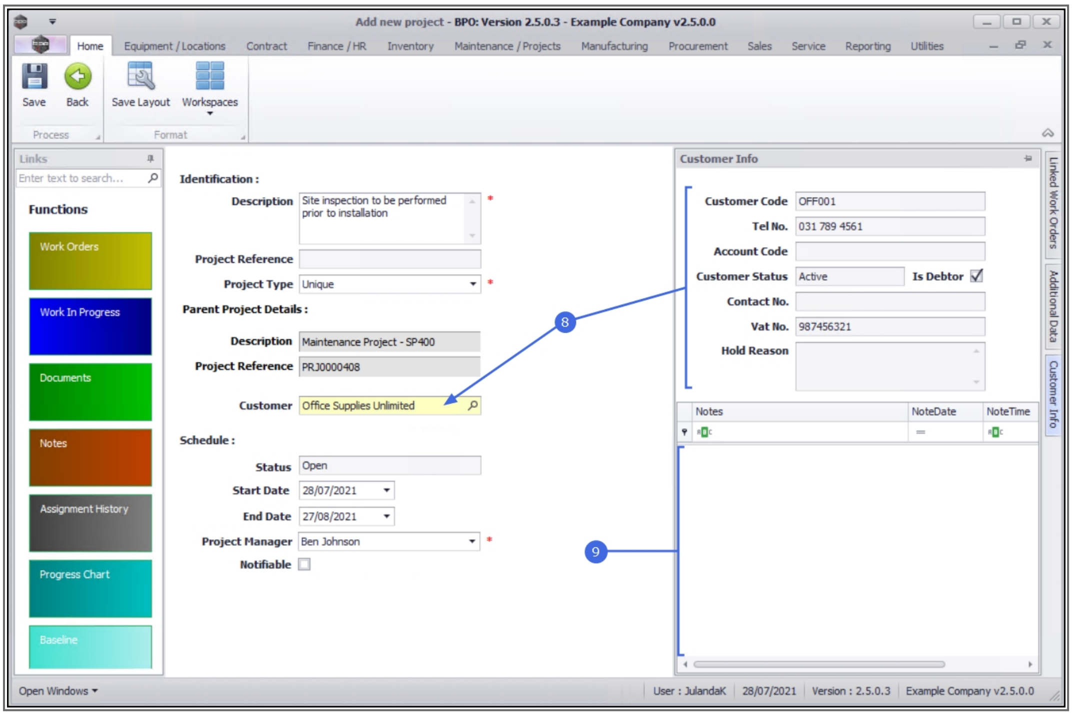
- **Project Reference:** The project reference has been auto populated with the project reference of the main project you have selected.
- **Customer:** The customer field has been auto populated with the customer selected on the main project. You may wish to change the customer for the sub-project,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



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.

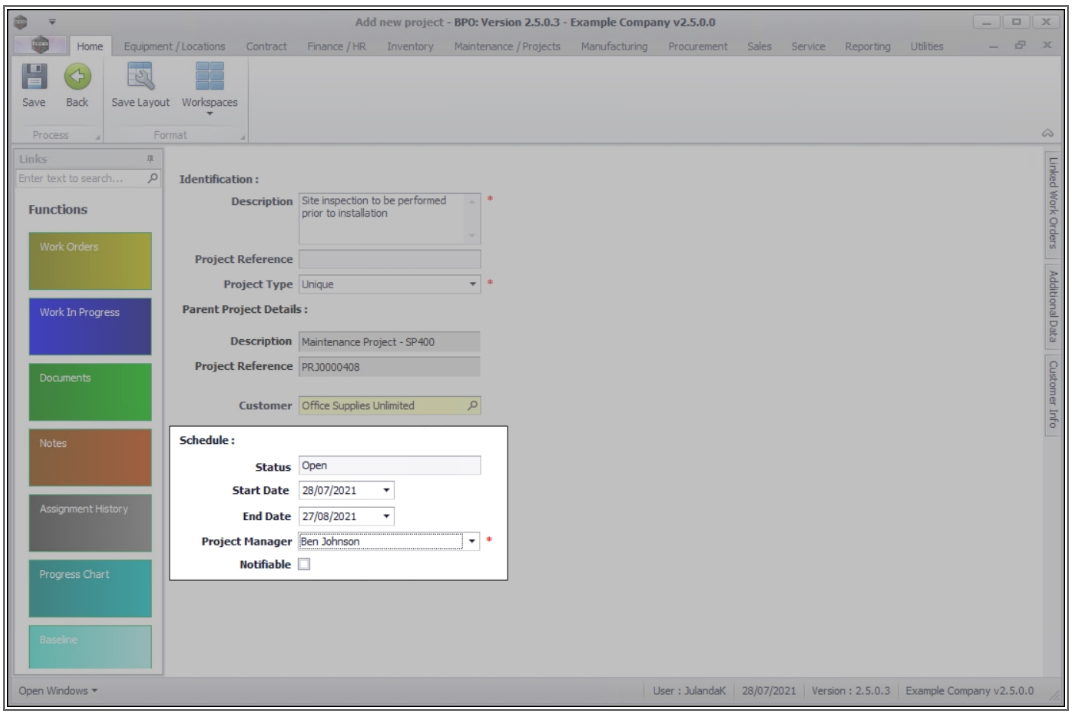


SCHEDULE

- **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.

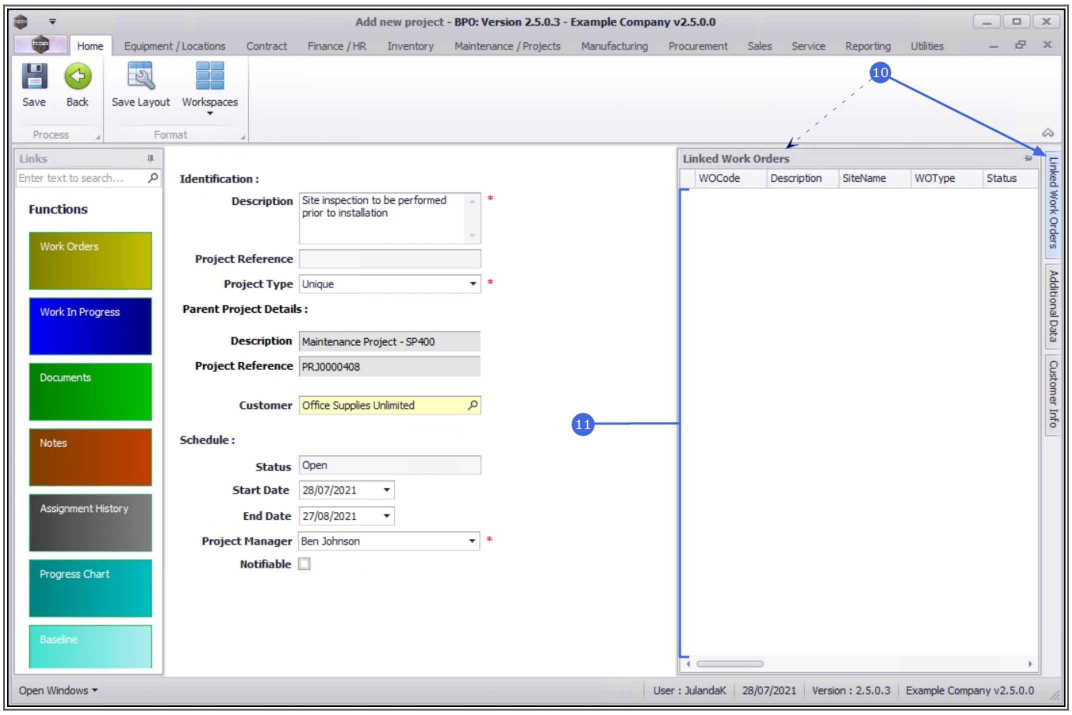


LINKED WORK ORDERS

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

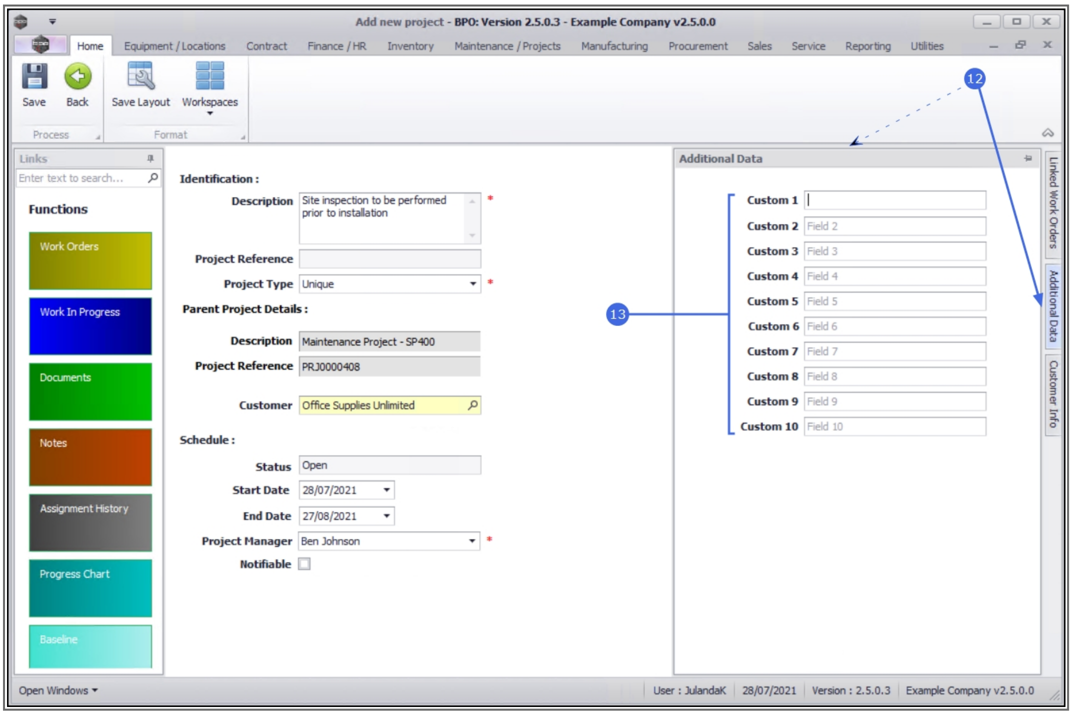
> This panel can be docked to leave it expanded on the screen, which will make it easier to work in.

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



ADDITIONAL DATA

12. 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.

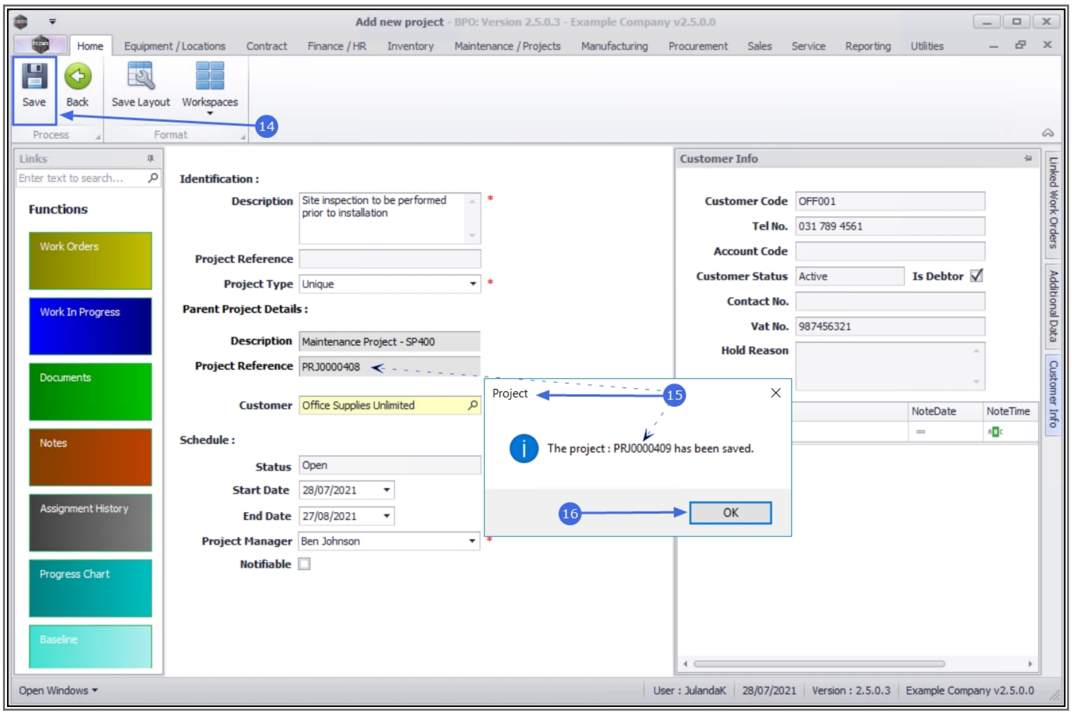


SAVE SUB-PROJECT

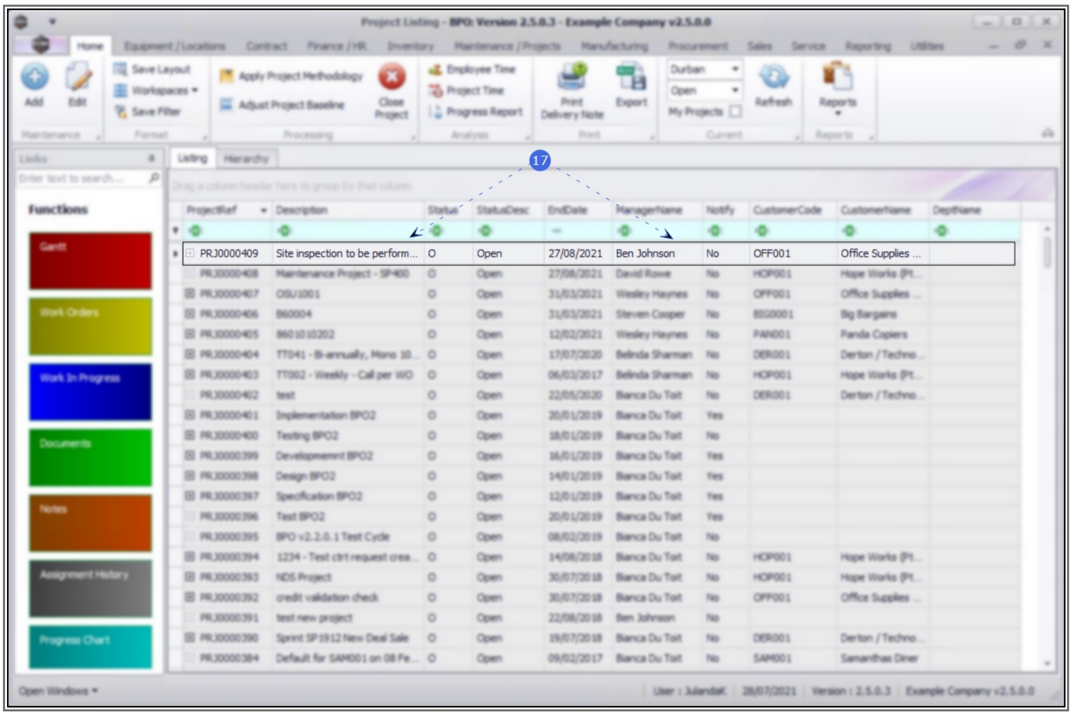
14. After adding the relevant information for creating the Sub-Project, click on ***Save***.
15. When you receive the ***Project*** message screen informing you that;
    - ***The project: [****project ref number****] has been saved.***

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

16. Click on ***OK***.

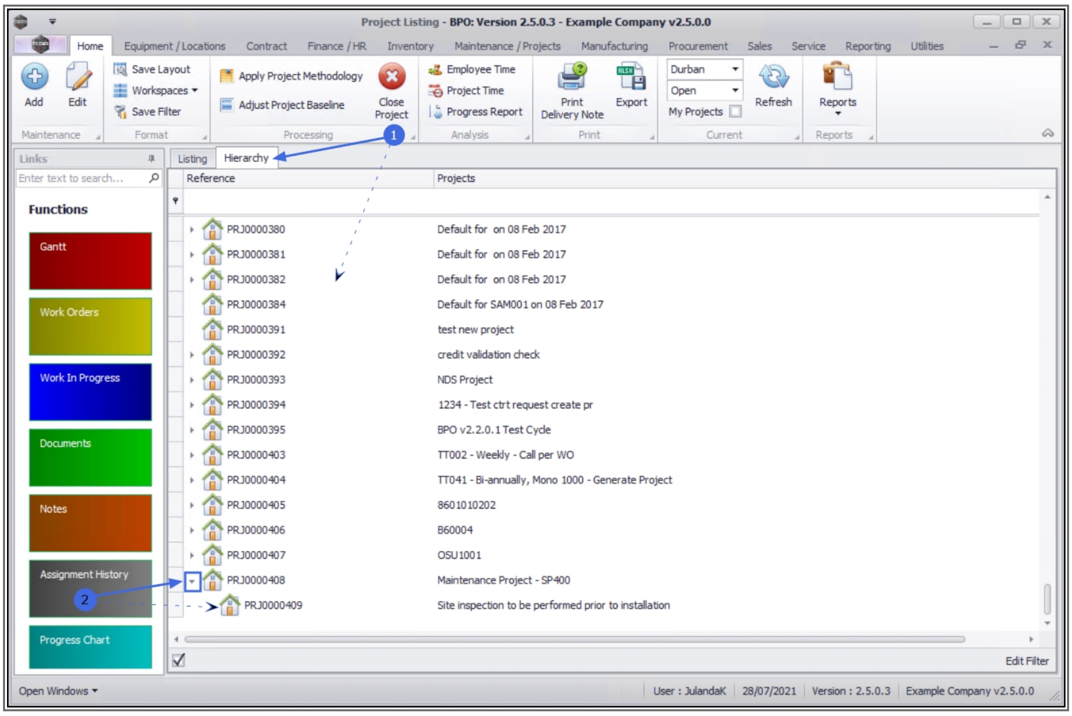


17. You will return to the ***Project Listing*** screen where you can view the sub-project.



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

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