

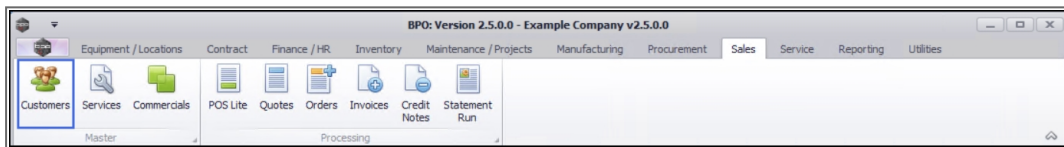
PROJECTS

PROJECTS - NOTES

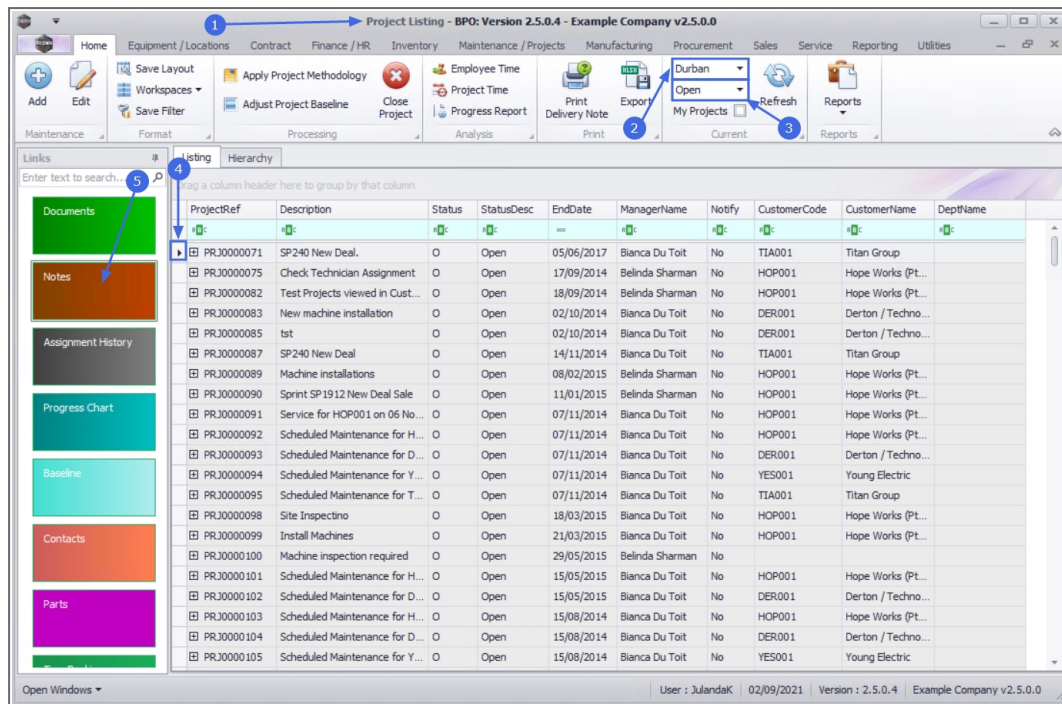
Project Notes can help everyone working on the project to immediately understand what is important and essential to the project.

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.

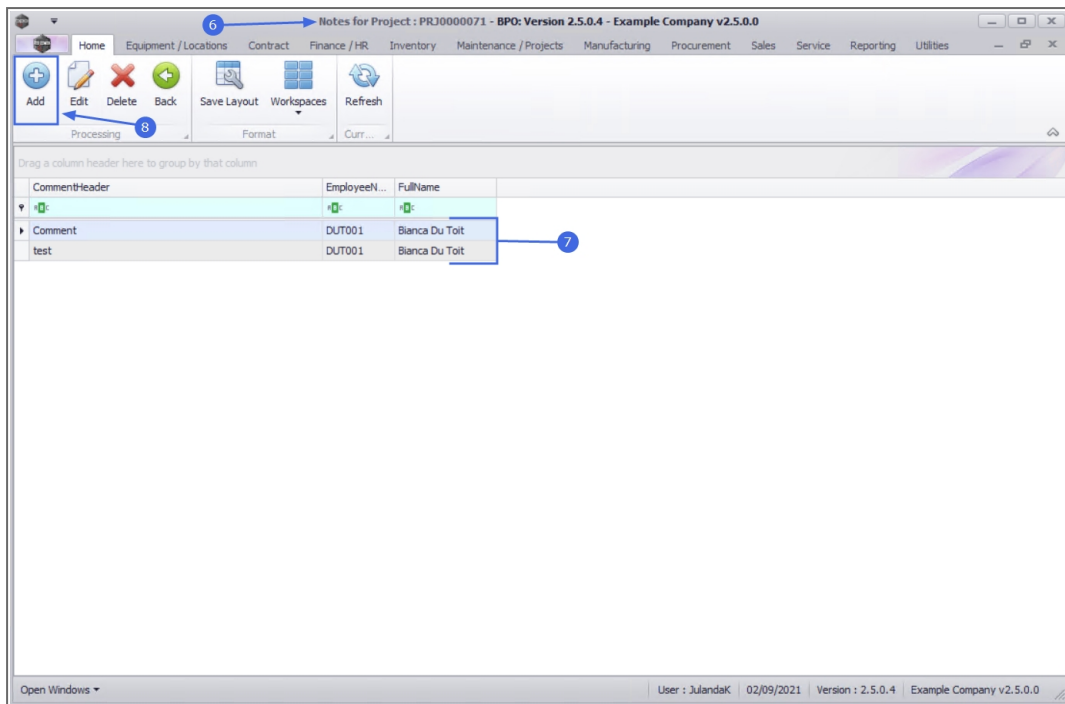


ADD A NOTES

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**.



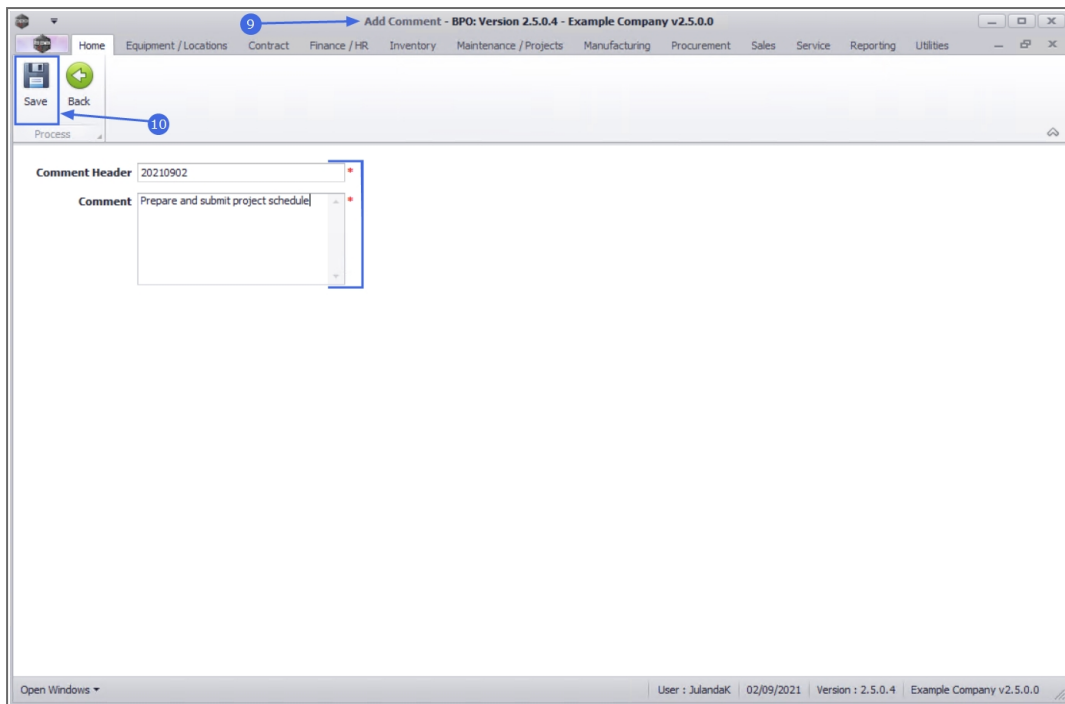
Short cut key: **Right click** to display the **Process** menu list. Click on **Add**.



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**.



Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back

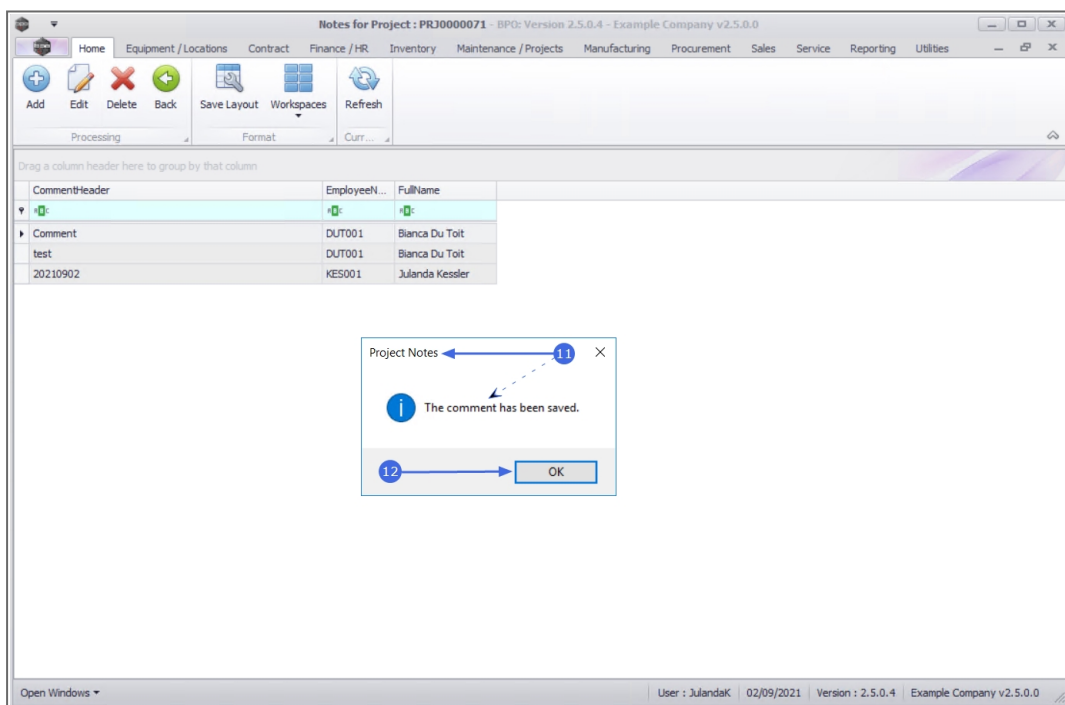
Process

Comment Header 20210902

Comment Prepare and submit project schedule

Open Windows User : JulandaK 02/09/2021 Version : 2.5.0.4 Example Company v2.5.0.0

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



Notes for Project: PRJ0000071 - BPO: Version 2.5.0.4 - Example Company v2.5.0.0

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete Back Save Layout Workspaces Refresh

Processing Format Curr...

Drag a column header here to group by that column

CommentHeader	EmployeeN...	Full Name
test	DUT001	Blanca Du Toit
20210902	DUT001	Blanca Du Toit
20210902	KES001	Julanda Kessler

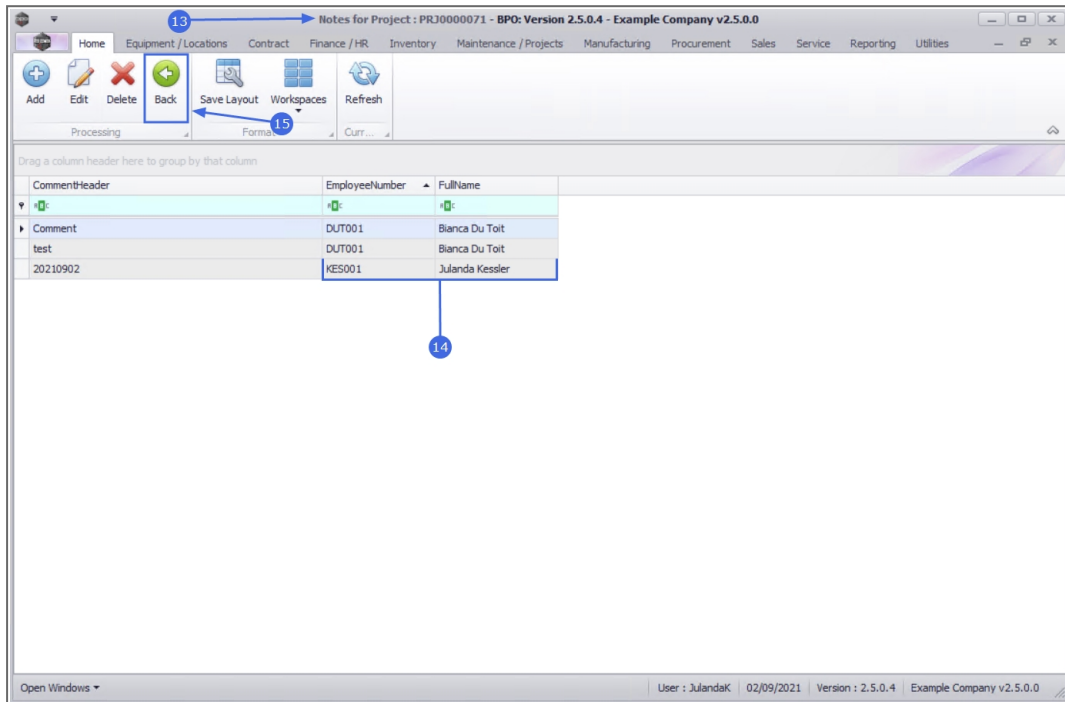
Project Notes

The comment has been saved.

OK

Open Windows User : JulandaK 02/09/2021 Version : 2.5.0.4 Example Company v2.5.0.0

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.

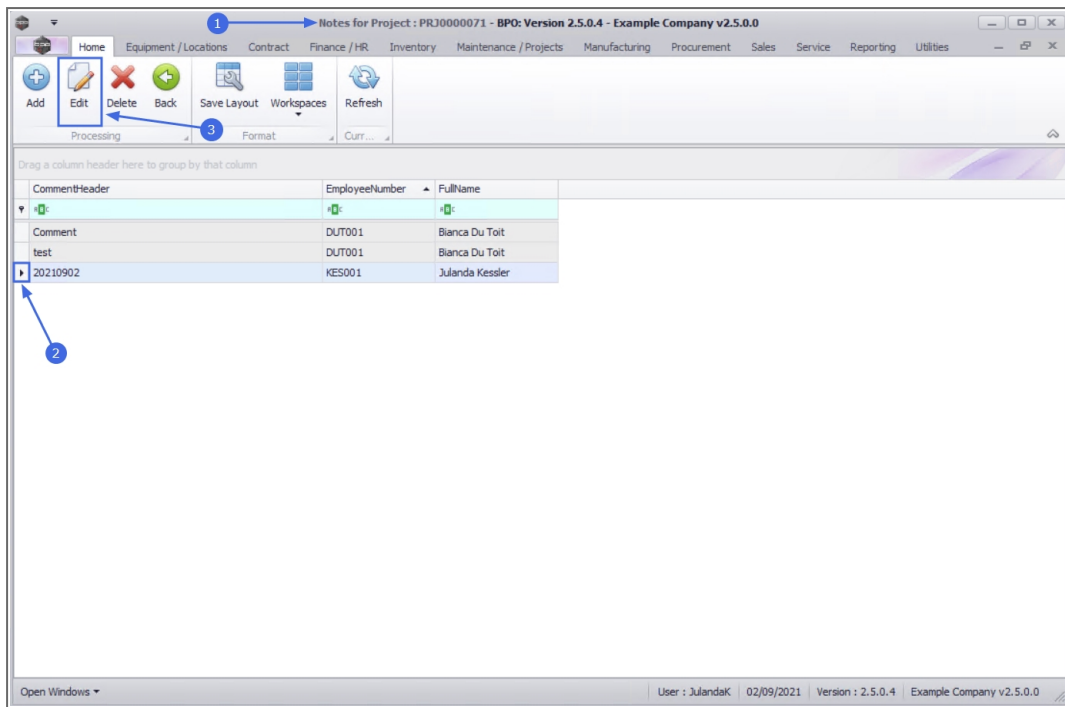


EDIT A NOTE

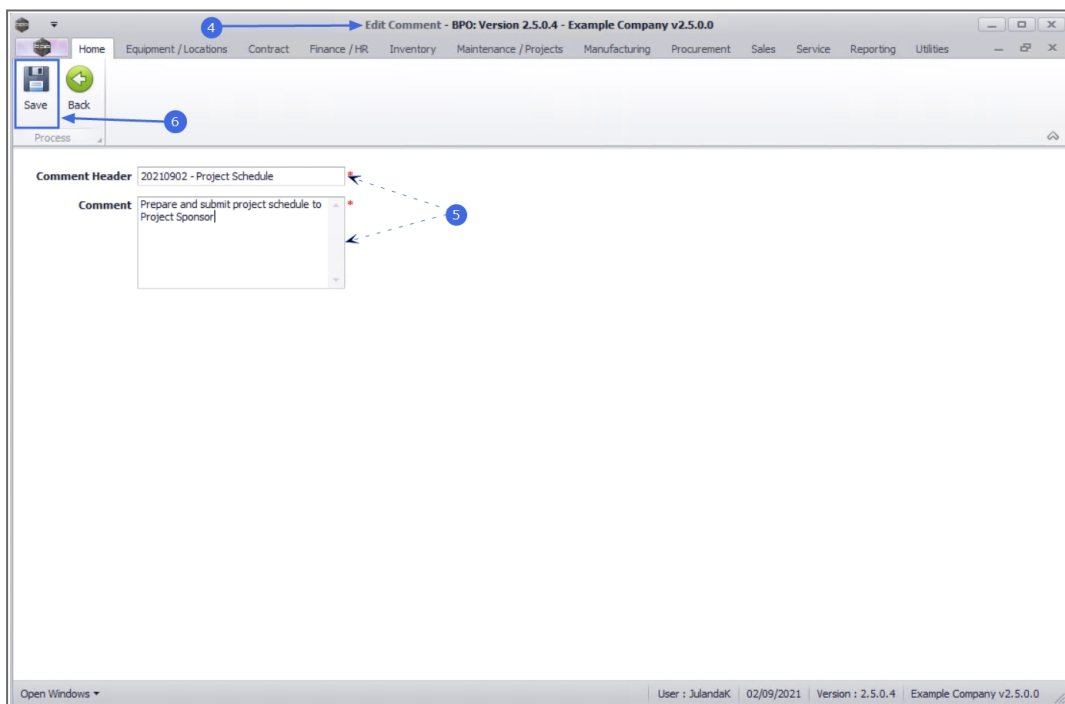
1. From the **Notes for Project : [project ref number]** screen,
2. Click on the **row** of the project note you wish to edit.
3. Click on **Edit**.



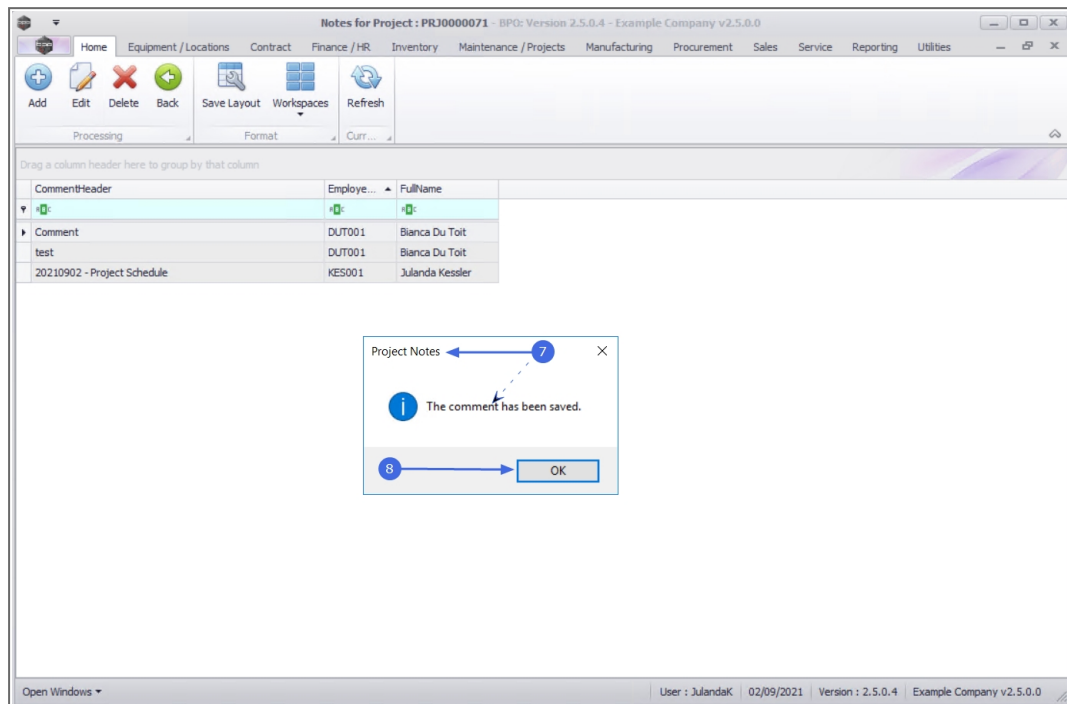
Short cut key: **Right click** to display the **Process** menu list. Click on **Edit**.



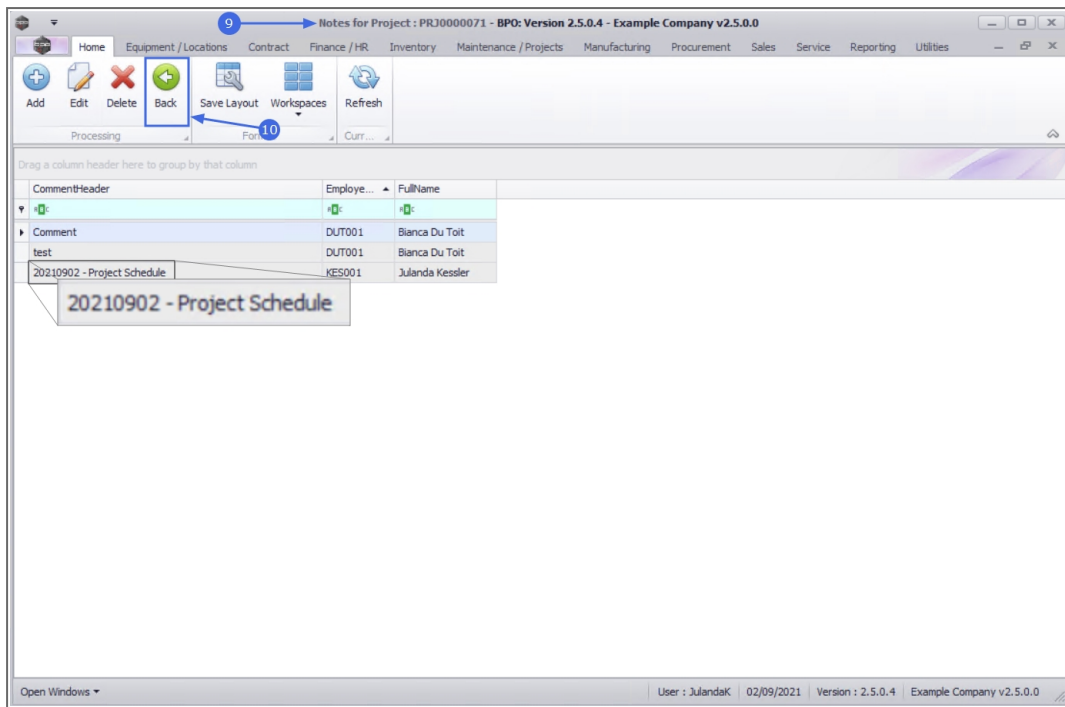
4. The **Edit Comment** screen will be displayed.
5. Make changes to the **Comment Header** and **Comment**, as required.
6. Click on **Save**.



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.

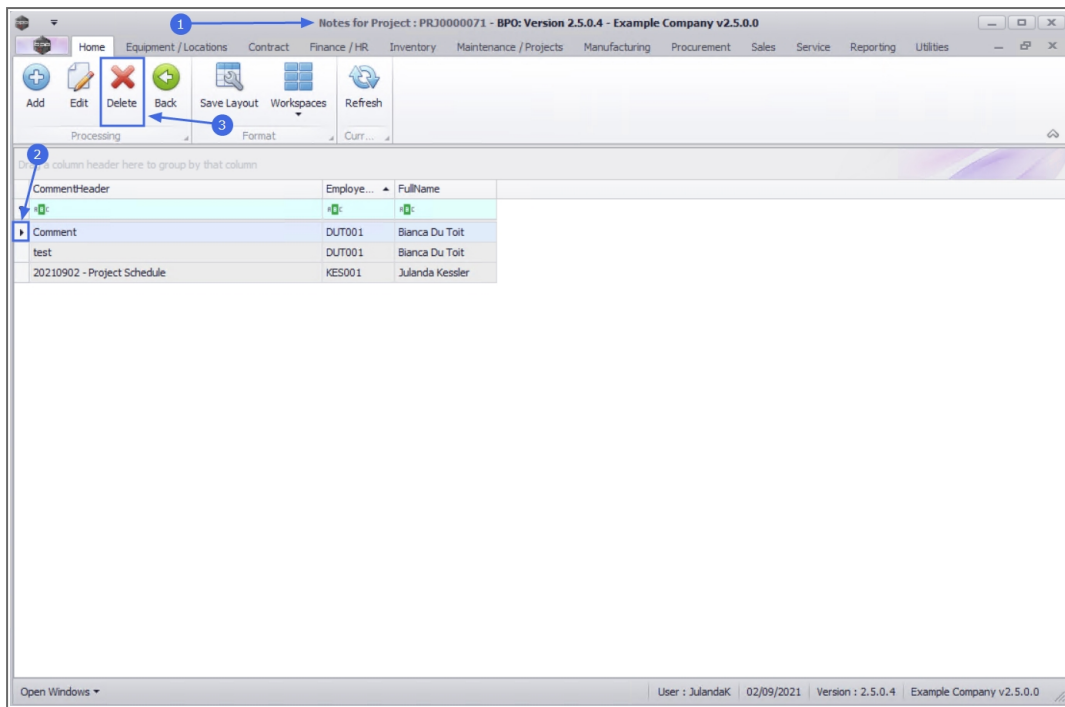


DELETE A NOTE

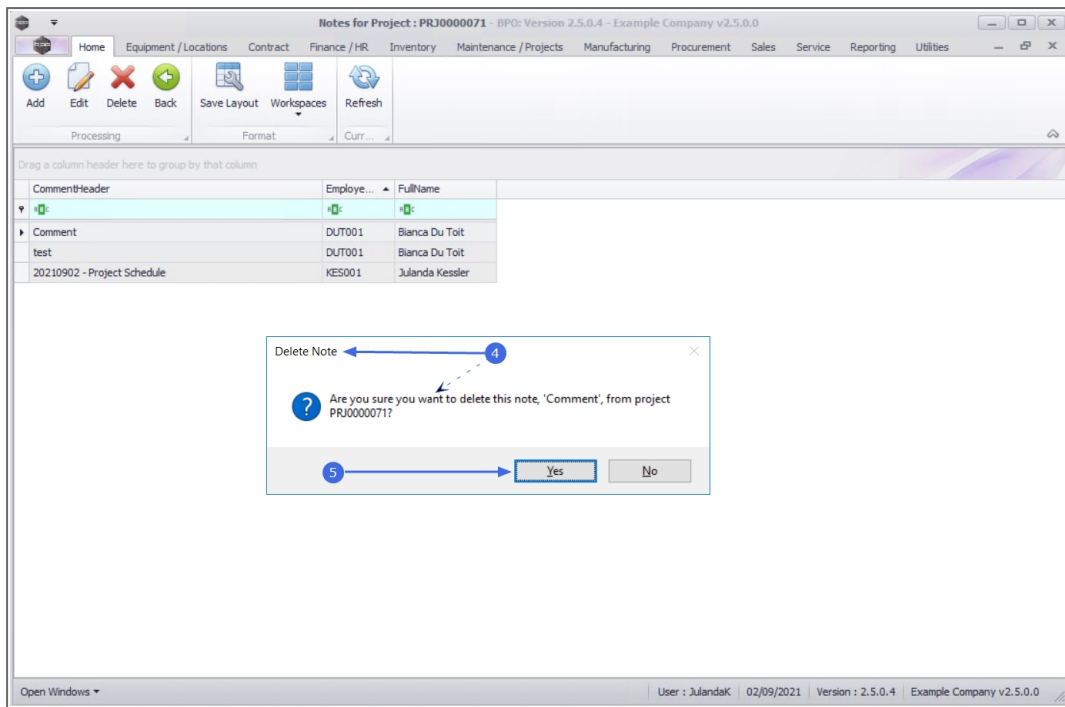
1. From the **Notes for Project : [project ref number]** screen,
2. Click on the **row** of the project note you wish to remove.
3. Click on **Delete**.



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

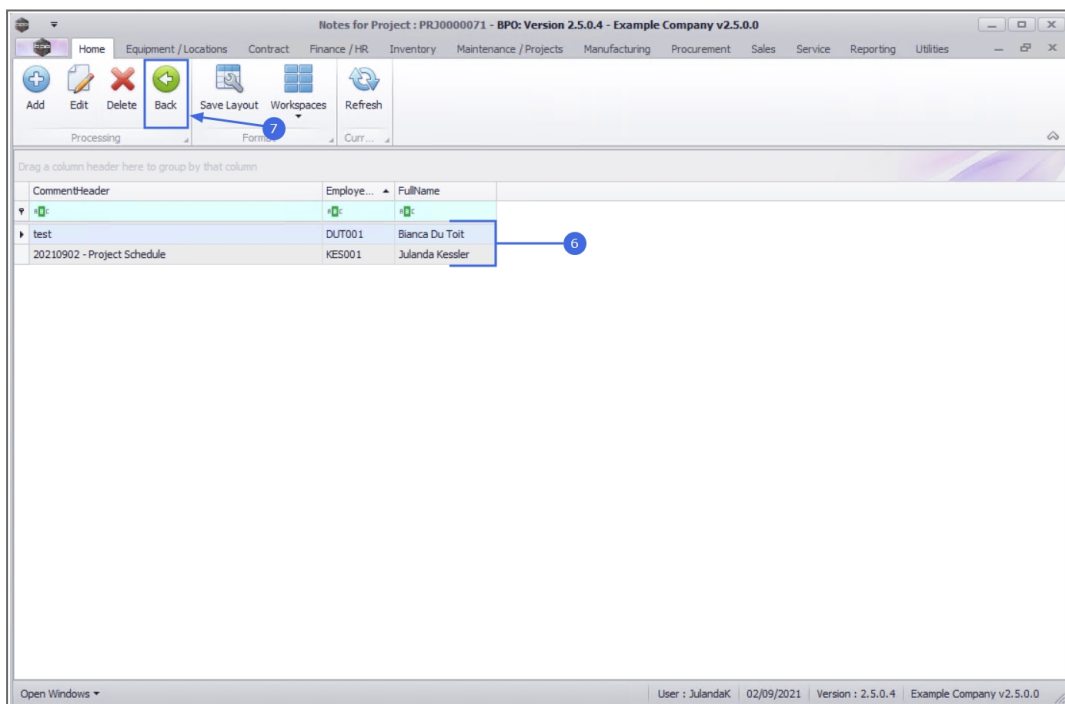


4. When you receive the **Delete Note** message to confirm;
 - ***Are you sure you want to delete this note, from project [project ref number]?***
5. Click on **Yes**.



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

