



Projects Module

The Projects module is where Projects are created and maintained. A project consists of a set of phases and a phase consists of a set of work orders. This Chapter describes how to use the Web Work, Projects module.

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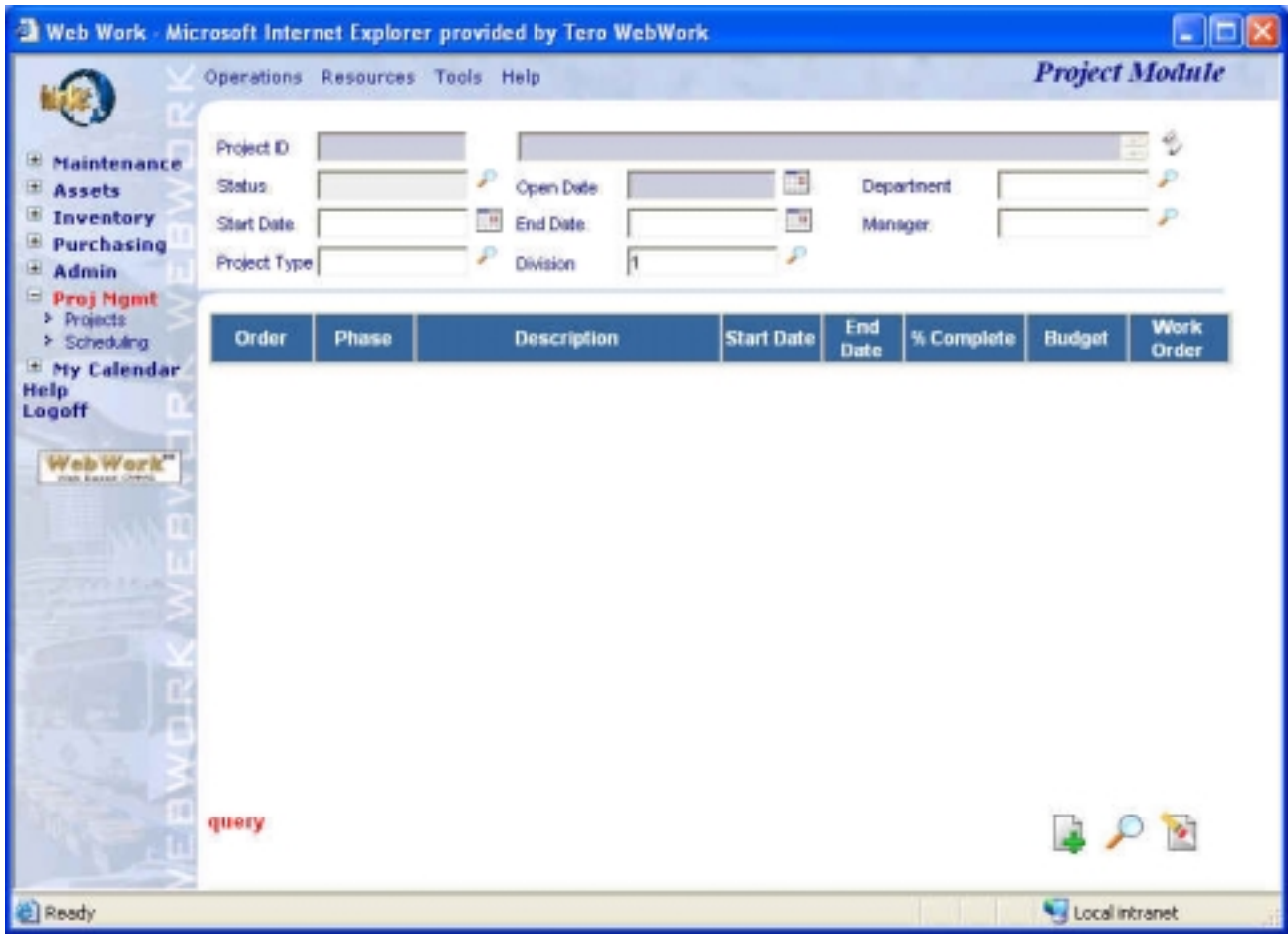
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19.1 Overview of the Projects Module

The Projects module is used to setup and query projects.

Click on PROJECTS from the Side Menu Bar Module List (In the Proj Mgmt group) on the left hand side of the screen to access the Projects module.

When you enter the Projects module you will be in Query mode as shown in the screen below:



The Module Options Menu, at the top of the screen **Operations Resources Tools Help** contains the drop down menus for features within the Projects module.



Web Work includes "help files" for all field names. To access these help files, click on the field name. A popup window will open displaying help for the field selected.



19.2 Creating New Projects Records

19.2.1 Adding New Project Records

To add a New Project Record (from the main Projects screen):

- Click on OPERATIONS on the Module option menu and select New Project from the drop down

OR

- Click on the  new icon at the lower right corner of the screen.
- Enter details in the fields noting that required fields are shaded blue and all others are optional fields.
- Click on the  save icon at the bottom right hand side of the screen to save the Project Record.
- Once you save the new project, you will then be in edit mode where you can edit and resave the project record.




The F12 key is a hot key and may be used to SAVE a record instead of clicking on the



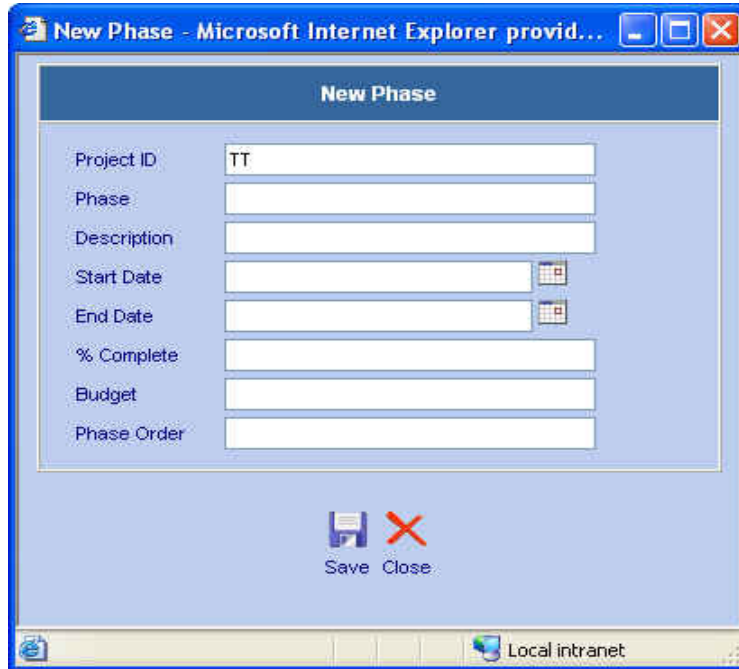
save icon.


19.2.2 Adding Phase to Project

A project can consist of one or more phases. To add a new phase to a selected project, click on OPERATIONS on the Module option menu and select Add Phase to Project from the drop down menu. In addition, you can click on the  add phase button to open the New Phase window.

A popup window will appear and you may enter information about the phase as shown below:

- Phase ID is a mandatory field and it must not duplicate other phase id's under the same project.
- The Phase Description is a free text field
- The Start Date and End Date are for the Phase dates
- % Complete is a manual entry for the percentage of the phase completed to date. There is no connection to the status of work orders.
- Budget is the amount that a Phase is expected to cost. There no connection with the work order costs.



After clicking  Save button, the popup window will close and the new created phase will appear on the main project screen.

19.2.3 Editing or Deleting a phase

A phase can be edited or deleted after created. To edit or delete a phase, click on the phase ID to be edited or deleted, the edit phase popup window will appear. You may edit the phase information and click Save button to save the changes or you may click on Delete button, to delete the phase from the project.






A Phase cannot be added, changed, or deleted if the project is Approved or Closed. A phase cannot be deleted if there are work orders under the phase.



19.2.4 Adding Work Order To A Phase

After a phase is created, it will appear on project main screen as below:


The screenshot displays the 'Project Module' interface. At the top, there are navigation tabs: 'Main', 'Estimate', 'Actual', and 'Status History'. Below these, project details are shown for Project ID 'TT' (Test). Fields include Status 'MTAPPR', Open Date '8/30/2004', Department, Start Date '3/1/2005', End Date '10/2/2005', Manager, Project Type, and Division '1.8'. A left sidebar contains a navigation menu with categories like Maintenance, Assets, Inventory, Purchasing, Admin, Proj Mgmt, and My Calendar. The main area features a table with columns: Order, Phase, Description, Start Date, End Date, % Complete, Budget, and Work Order. The table lists three phases: 'three' (Order 0), 'One' (Order 1), and 'two' (Order 2). Each phase has a sub-table of work orders with columns: WO#, WO Type, Description, Status, Craft, Crew, Target Date, and Target End Date. For example, under 'three', there are three work orders with descriptions like 'Out of order. Cannot make ice...' and 'Routine inspection and lubrication'. At the bottom of the table, there are icons for editing and adding work orders.


On the right side of the phase record, there are two buttons:  and  known as the “Add Work Order” button and “New Work Order” button, respectively.


Clicking on  will bring a "Select Work Order" popup window as below:

- Search for work orders and then click on the  filter button
- You may setup the filter and select a work order from work order list.
- To select multiple work orders, click on the checkbox in front of each work order number.
- Click on the  save button and the work orders will be added to the project.




If you want to create a work order and add it to phase, click on , "New Work Order" button.

Clicking on  button will lead you directly to Work Order module, in New Work Order mode. The only difference you may notice is on the main screen, Project Id and Phase fields are already filled with the corresponding data.

After typing in the work order information and saving work order, you may click on the  button beside Project Id field to return to Project module.

After a work order is added to a phase, it will appear on the main screen, under the corresponding phase.

19.2.5 Editing Work Order

To edit a work order in a project, simply click on the work order record id. You will be in Work Order module automatically, with the work order opened in edit mode. You may edit the work order data and after saving the changes, to return to project module, simply click on the  button beside Project Id field.

19.2.6 Deleting Work Order From A Phase

To delete a work order from a phase, click on the  button. There will be a popup window asking for confirmation. If you are sure to delete it, click on OK button if this is what you want.



Deleting a work order will set the work order's Project Id and Phase to null. The work order record is NOT actually deleted from the database because you cannot delete a work order.




In the Work Order module, Project Id and Phase are both read only fields. The only method to change Project and Phase information for a work order is to make the changes in project module.

19.3 Change Project Status

As a project flows through the system of your organization, the project status might be changed a number of times. i.e.: From new project, to approved project, to completed project. The Web Work Change Status functionality is used to make these project status changes.

To change status on an existing project:

- Perform a projects query to locate and retrieve the projects you want to change a status to.
- Click on the Operations menu and select Change Status from the drop down menu.
- The Change Project Status screen comes up (refer to sample graphic to the right):
- Select "What do you want to do". You can either change the status to a new code, unapproved the project, or close the project.
- Click on the down arrow and select the appropriate status code fro the project/.
- Add status change comments into the Status Remarks section, if any.
- Click on the  Save button beside your selection to update the project status. The Change Project Status window will close and you will be returned to the main screen of the project.

19.4 Deleting Projects

Caution should always be used when deleting any records from the Web Work database. However, there may be times when this is necessary.

To delete a project (from the main Project screen):

- Recall an existing project record, in EDIT mode.
- Click on OPERATIONS in the Module Option Menu at the top of the page and select Delete Project from the drop down menu.
- A message box will appear asking if you are sure you want to delete the project record.



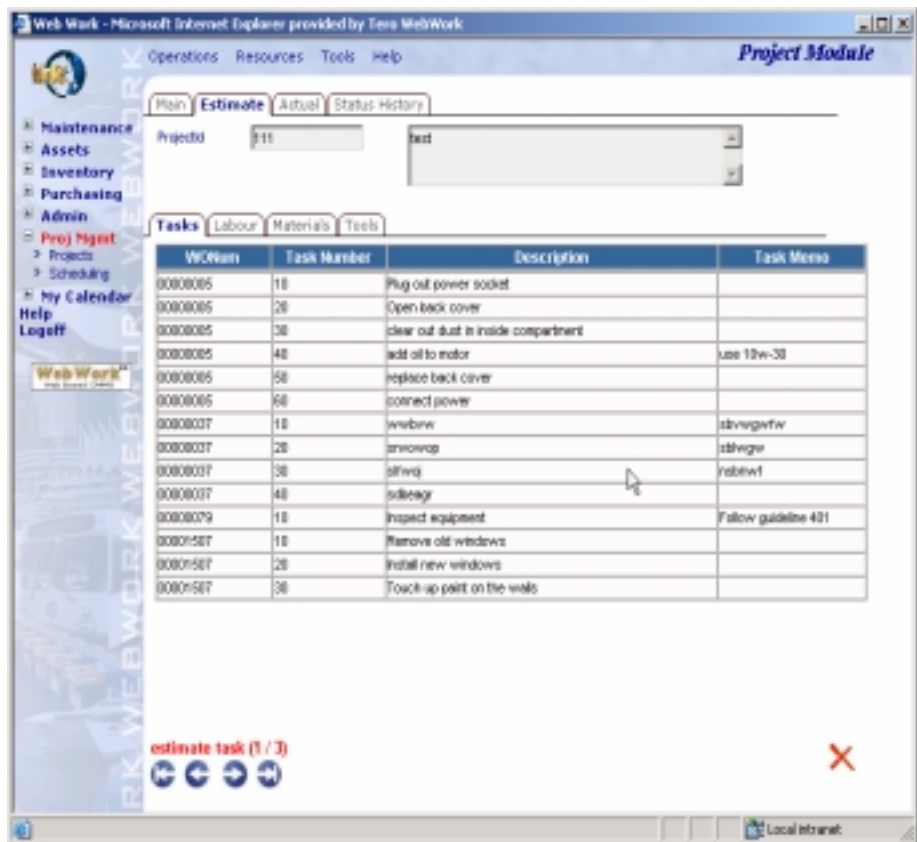
An approved project cannot be deleted.

19.5 View Estimated Resource

Estimate resource can be reviewed in a project.

To review estimates:

- Move mouse over Resource menu and select Estimate or click on the Estimate tab button. Now you will be in the Project Estimate screen. By default the first resource you see is Tasks.
- Click on Labour, Material, or Tools tab button to review corresponding estimate resource. For labour, material, and tools, there will be summary cost shown on the bottom.



19.6 View Actual Resource

Actual resource can be reviewed in a project.
To review Actual:

- Move mouse over Resource menu and select Actual or click on the Actual tab button. Now you will be in the Project Actual screen. By default the first resource you see is Tasks.
- Click on Labour, Material, or Tools tab button to review corresponding actual resources. For labour, material, and tools, there will be summary cost shown on the bottom.

Web Work - Microsoft Internet Explorer provided by Toro WebWork

Operations Resources Tools Help **Project Module**

Main Estimate **Actual** Status History

ProjectId: [111] test

Tasks **Labour** Materials Tools

WONum	Transaction Date	Employee	Description	Account	Rate	Additional Cost	Hours	Total Cost	
00000005	12/31/99	TA	follow work procedure		\$27.00	\$0.00	1	\$27.00	
00000005	1/6/2000	TA	test		\$27.00	\$0.00	2.2	\$59.40	
00000005	5/19/2000	3555	Labor Testing		\$32.00	\$31.00	11	\$383.00	
00000005	5/25/2000	DAGLUS			\$20.00	\$2.00	2	\$42.00	
00000037	1/21/2000	OS	spgrhvr		\$30.00	\$0.00	1.544332	\$46.33	
00000037	1/21/2000	JFF			\$11.15	\$0.00	2	\$22.30	
00000037	1/21/2000	DF			\$17.00	\$0.00	2	\$34.00	
00000037	10/19/2000	DF		FN	\$17.00	\$2.55	3	\$67.95	
							Total	24.744332	\$702.88

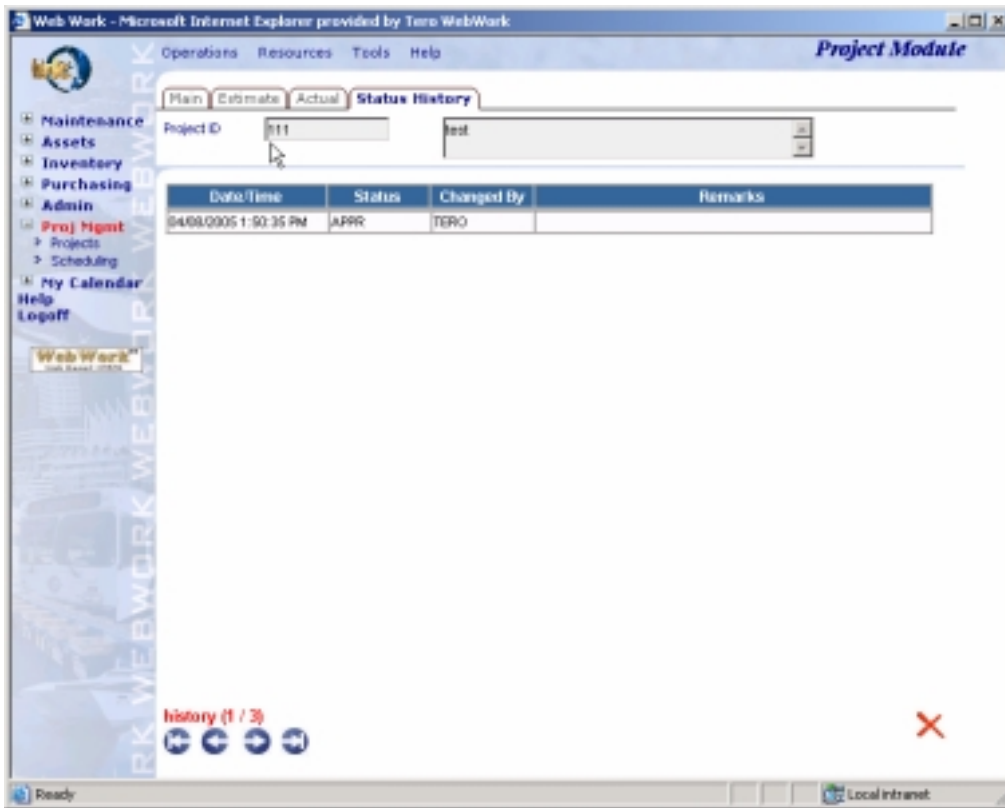
actual labour (1 / 3)

19.7 Viewing Status History

When the project's status is changed, a history record will be created. User can review the project's status history.

To view the project's status history:

- Recall an existing project.
- Move Mouse over Resource menu and select Status History or click on Status History tab button.
- A screen similar to the one shown below will open, showing the project's status history.




19.8 Printing Project Records

There are two ways to print project records. You can print any one individual project record at one time or multiple project records that you have selected and retrieved at one time.

19.8.1 Printing Individual Project Records

To print only the location retrieved to the project screen:

- Recall an existing project on the main project screen, in EDIT mode.
- Click on  print icon at the bottom right hand side of the screen.
- The selected record will open in a new browser window in a form of a project report. This step is referred to as Print to screen.
- If you wish to print the project report to the printer, click on the File pull down menu and select print to proceed with printing through the standard printing procedure of your operating system.

19.8.2 Printing Selected Project Records

To print selected projects retrieved to the Location screen:

- Perform a Location query to retrieve a group of Location records you wish to print.
- Click on OPERATIONS in the Module Option Menu and choose Print Selected Project from the drop down menu.
- The selected records will open in a new browser window in a form of a Project report. This step is referred to as Print to screen.
- If you wish to print the Project report to the printer, click on the File pull down menu and select print to proceed with printing.