



# QUICK GUIDE

# PROJECT MANAGEMENT





## ADD/CREATE A NEW PROJECT


For a user to create a project, the user role must be assigned to the **root org level**.

1. In the **Main Menu** , click **All projects & organizations** and the page opens to the Projects tab.
2. Select the **Add project icon**  to open the **Project details** page opens.
3. Fill out the **Project details** and fill out as much information as possible as best practice.

## CHANGING PROJECT STATUS

1. Find the project in the **Projects List tab** and click anywhere in the row to highlight the selection .
2. Right-click on the row and window pops up. Click the **Edit project**  to open the **Project details** page.
3. In the **Status box**, click the drop-down menu and select from **New**, **Active**, and **Closed**. Select **Save** when done.

## PROJECT GENERAL SETTINGS

1. In the **Main menu** , select **All projects & organizations**. The page opens to the **Projects tab** or select a project saved in **Favorites**.
2. Select a project from the list, and then click the **project name link** to open to the **Project home page**.
3. Select **Settings** In the left navigation menu. The project settings **General page** opens to the **Global Options tab**.
4. The **Project settings** for each application are accessed from the left **navigation menu**.

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## ADD EMPLOYEES AND EQUIPMENT

1. On the **Project home page**, click the **Add icon** (+) on the **Assigned employee tile** to open the dialog box.
2. Click the **Add icon** (+) then select employees in the list. Click the **Add button** when finished.

**Add employee to project**

The employees shown are those which match one of the project's currencies

Employees available in library: johnn

Employee ID	Name	Craft	Trade
00025720	Johnny Lopez	OPLM	OP
00002941	Johnny Rowell	STST	ST
00378292	Johnny White	STST	ST
00377906	Johnnie Biser Jr	STST	ST

Selected employees:

00025720 - Johnny Lopez

3. Back to the **Project home page**, click the **Add icon** (+) on the **Assigned equipment tile** to open the dialog box.
4. Click the **Add icon** (+) then select equipment in the list. Click the **Add button** when finished.

**Add equipment to project**

Equipment available in library:

Equipment ID	Description	Ownership	Model/Type
100019	INGERSOLL RAND-4R768	Owned	20-25
100046	CATERPILLAR-2...	Owned	37-20
100083	GROVE-RT745	Owned	15-06
100090	YALE-GLP060Z...	Owned	48-06

Selected equipment:

100019 - INGERSOLL RAND-4R768

## ADD VENDORS TO PROJECT

To access list of vendors, from the **Main menu**, select **Master Data Libraries > Vendors**. Vendors can be added to the system via UI maintenance pages or by import from your **ERP system**.

1. In the **Main Menu**, click **All projects & organizations** and the page opens to the Projects tab.
2. Select a project, then go to the **Project home page**.
3. On the **Assigned Vendors tile**, click **Manage vendors** and the dialog box opens.

4. Click the **Add icon** (+) to open the window and then select **Vendors** from the library and click the **Add button** when finished.

**Add vendors to project**

Vendors available in library:

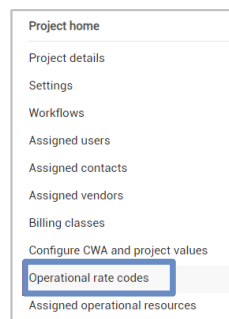
ID	Name	Alternate name	Type
0000001031	Kiewit Corporation		2000 - I
0000001035	Kiewit Engineering (NC) Co		2000 - I
0000001036	Kiewit Infrastructure West Co.		2000 - I
0000001037	Kiewit Power Constructors Co.		2000 - I

Selected vendors:

Cancel Add

## VIEWING OPERATIONAL RATE CODES

1. To view the assigned rate codes, select either the level one or level two menus or from the left side menu on the **Project home landing page**.
2. This opens the **Operational rate codes register**, where you can view the rate codes assigned.
3. Note that they are assigned at a **craft level**, which your project employees will generate their rates from.



EMPLOYEES										EQUIPMENT		
Rate code	Vendor	Union	Override	ST rate	Use bas	OT fac	DT f	OT rate	DT rate	UoM	Craft	
ABAC1-LEX	ABAC - ABACUS DATAGRAPH...		<input type="checkbox"/>	\$0.00000	<input type="checkbox"/>			\$0.00000	\$0.00000	Hour	ABAC1-LEX - Techn...	
ALLP-LEO	ALLP - ALL POINTS TOWING ...		<input type="checkbox"/>	\$0.00000	<input type="checkbox"/>			\$0.00000	\$0.00000	Hour	ALLP-LEO - Labour	