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 \oplus 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 *∨*.
- Right-click on the row and window pops up. Click the California 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.

Status	
New	Ŧ
	Q
New	
Active	
Closed	

☐ All projects & organizations			@ \$ @		
All projects & organizations > Add project		Cance	Save and configure project settings	Save	
					-
Project details					
					- 1
	* Project ID	* External project ID 😮	Notes		
~					
	* Name	* Status			
Add project image	Name	New			- 1
Minimum of 540px x 360px					
	* Phase 🕜	* Organization			
බ	Execution 🔻	C-XYZ		•	

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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QUICK GUIDE PROJECT MANAGEMENT



ADD EMPLOYEES AND EQUIPMENT

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

10103	rees available in libr	ary :	johnn		
	Employee ID 📃	Name	Craft	Trade	α
Ð	00025720	Johnny Lopez	OPLM	OP	1
Ð	00002941	Johnny Rowell	STST	ST	
Ð	00378292	Johnny White	STST	ST	
Ð	00377906	Johnnie Biser Jr	STST	ST	
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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**.

- 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.

endo	rs available in lib	rary :			Search	
	ID <mark>†</mark> DI	\overline{z}	Name	Alter	mate name	Туре
Ð	0000001031		Kiewit Corporation			Z000 -
Ð	0000001035		Kiewit Engineering (NC) Co			Z000 -
Ð	0000001036		Kiewit Infrastructure West Co.			Z000 -
Ð	0000001037		Kiewit Power Constructors Co.			Z000 -
-	ed vendors :			_		•

VIEWING OPERATIONAL RATE CODES

- 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** \oplus then select equipment in the list . Click the **Add** button when finished.

quipr	ment available in l	ibrary :		Search.		
	Equipment 😑	Description	Ownership	Ξ	Model/type	Π
(+)	An 100019	INGERSOLL RAN	Owned		20-26	
÷	Al 100046	CATERPILLAR-2	Owned		37-20	
÷	A 100083	GROVE-RT745	Owned		15-06	
÷	/월 100090	YALE-GLP060Z	Owned		48-06	
	N: 100100	LINCOLN DOGOD	Owned		01.06	

Project home Project details Settings Workflows Assigned users Assigned contacts Assigned vendors Billing classes Configure CWA and project values Operational rate codes Assigned operational resources
Assigned operational resources
Rate code - Vendor

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- 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												
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Rate code	Vendor	Union 😑	Override 👳	ST rate 📃	Use bas 😑	OT fac 😑	DT f 👳	OT rate 📃	DT rate 😑	UoM 👳	Craft	
ABAC1-LEX	ABAC - ABACUS DATAGRAPH			\$0.00000				\$0.00000	\$0.00000	Hour	ABAC1-LEX - Tec	chn
ALLP-LEO	ALLP - ALL POINTS TOWING			\$0.00000				\$0.00000	\$0.00000	Hour	ALLP-LEO - Labo	our