⬡ 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**.

⬡ 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.

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 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.

⬡ 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.
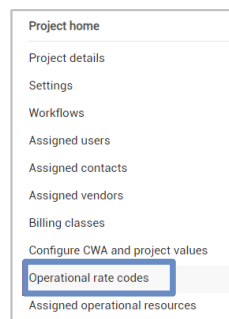
Rate code	Vendor	Union	Override ...	ST rate	Use bas...	OT fac...	DT f...	OT rate	DT rate	UoM	Craft
ABAC1-LEX	ABAC - ABACUS DATAGRAPH...		☐	$0.0000	☐			$0.0000	$0.0000	Hour	ABAC1-LEX - Techn...
ALLP-LEO	ALLP - ALL POINTS TOWING ...		☐	$0.0000	☐			$0.0000	$0.0000	Hour	ALLP-LEO - Labour

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Quick Guide Last Updated: 5/19/2025