


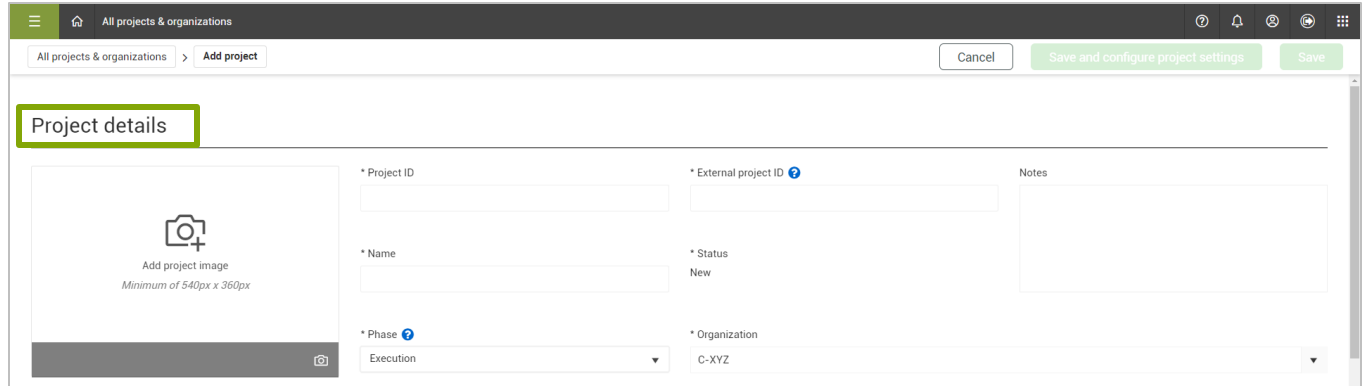




ADD/CREATE A NEW PROJECT

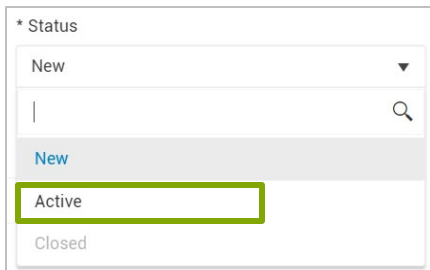
For a user to create a project, the user role must be assigned to the **root org level**.

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.





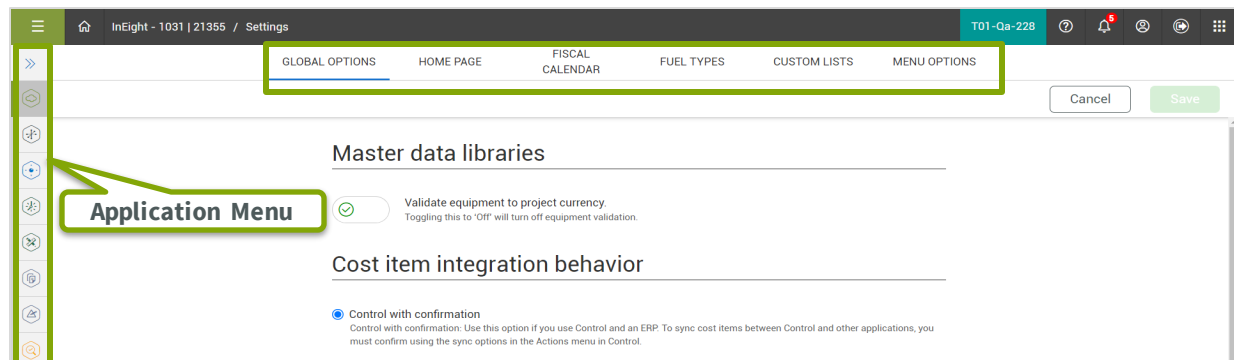
CHANGING PROJECT STATUS

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

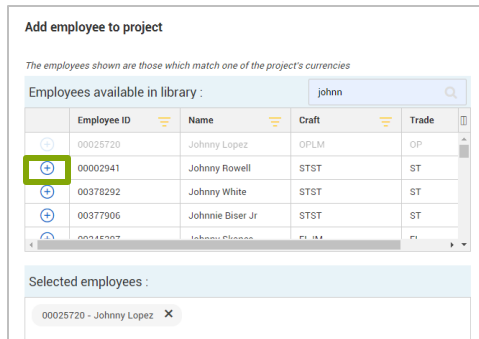
1. In the **Main menu** , select  **All projects & organizations**. The page opens to the **Projects tab** or select a project saved in **Favorites**.
2. Select a project from the list, and then click the **project name link** to open to the **Project home page**.
3. Select **Settings** In the left navigation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



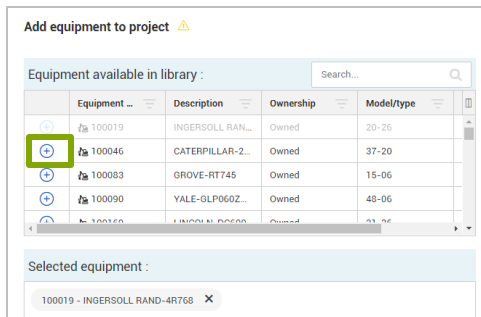


ADD EMPLOYEES AND EQUIPMENT

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.

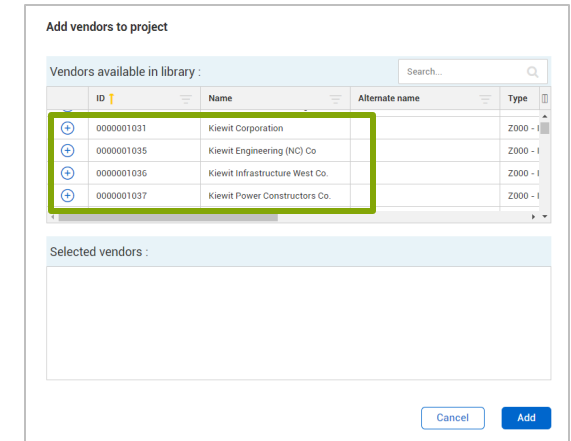


ADD VENDORS TO PROJECT

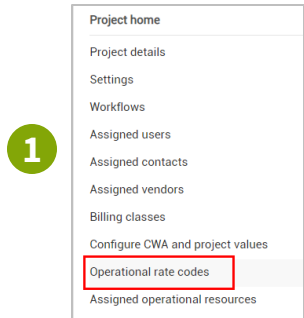
To access list of vendors, from the **Main menu** ☰, select **Master Data Libraries > Vendors**. Vendors can be added to the system via UI maintenance pages or by import from your **ERP system**.

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

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.

2

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		