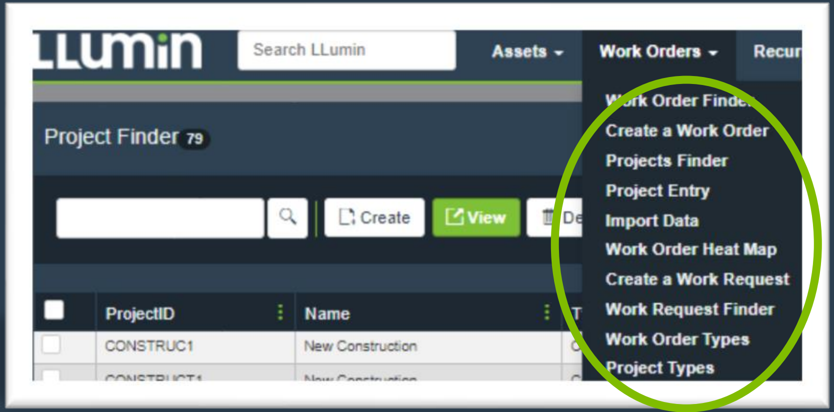
LLumin

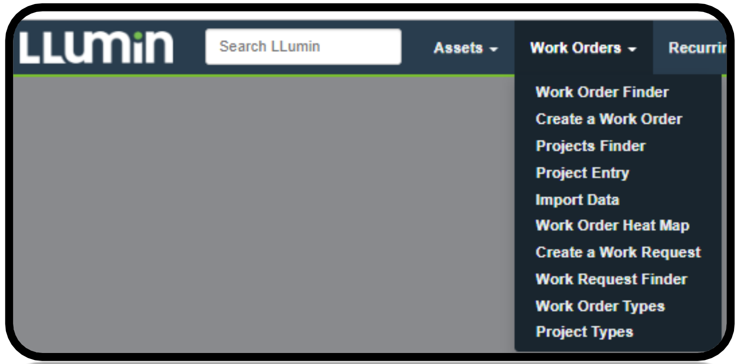
Know everything about your most critical assets



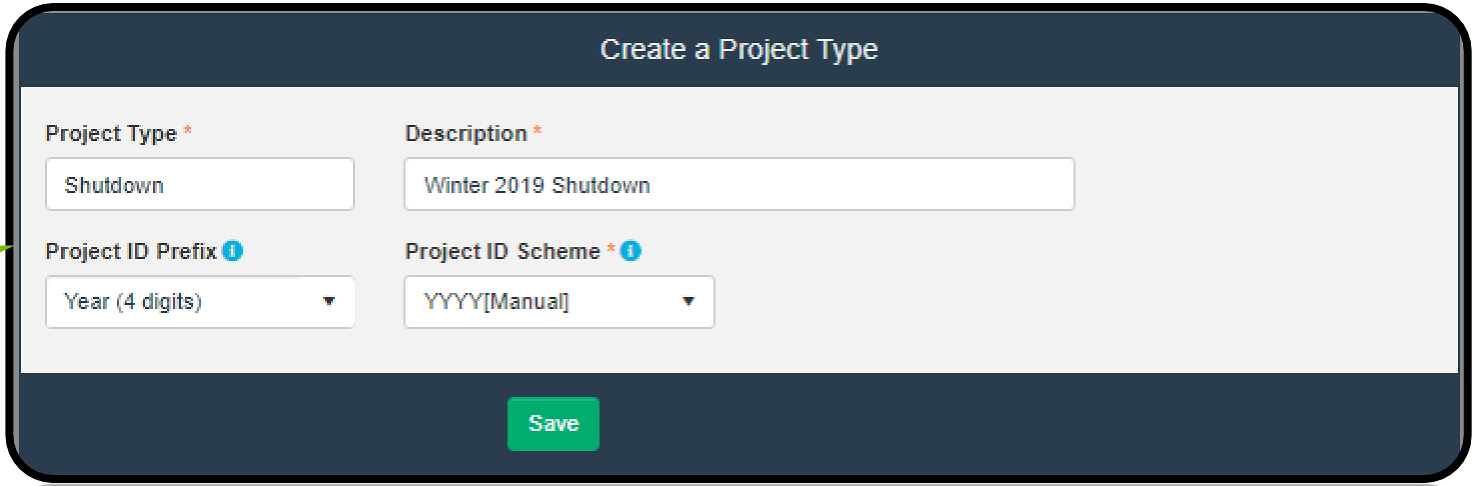
Project Tracking User Guide

The LLumin Project Tracking Module is used to track large projects that require multiple Work Orders, Purchase Orders as well as detailed tasks and project milestones. It also can be used to create capital entities including the creation of new assets or to enhance the value of existing assets.

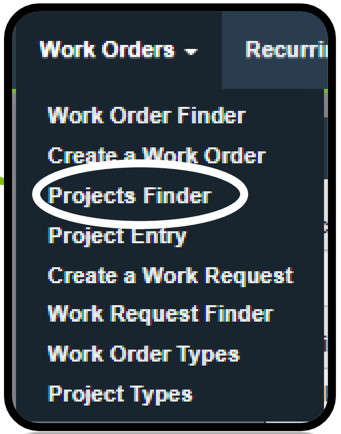
- ✓ The first step in creating a Project is to define a Project Type
- ✓ To do this, select **Work Order** and **Project Types**
- ✓ Then select the **Create Button**

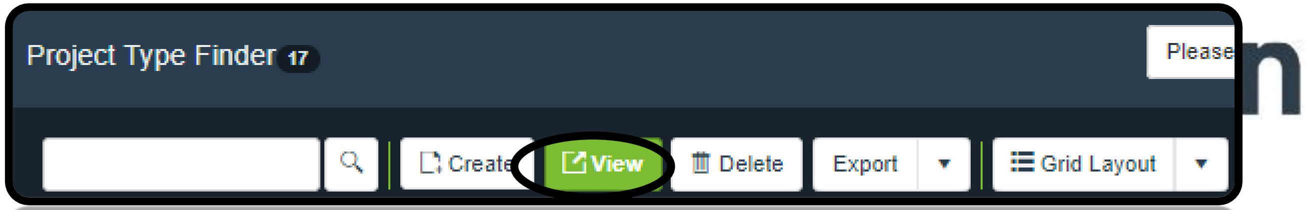


- ✓ Create a new **Project Type** by entering the following information:
  - ✓ Project Type
  - ✓ Description
  - ✓ Project ID Prefix
  - ✓ Project ID Scheme
  - ✓ Number of Digits
  - ✓ Next Value

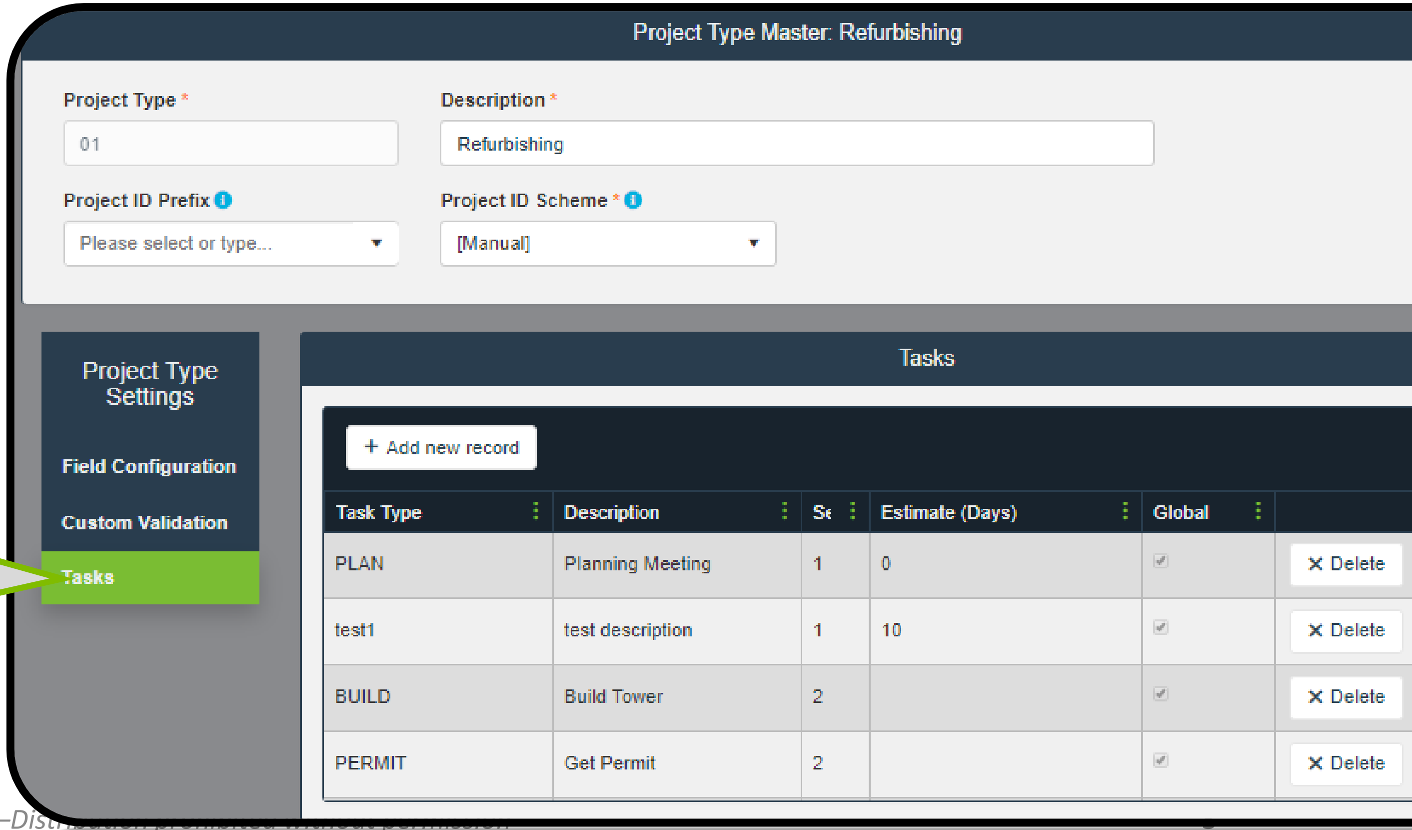


- ✓ Locate the Project Type in the Project Finder and select View

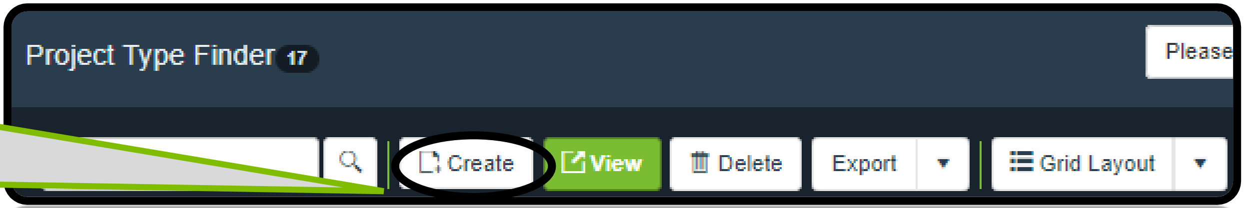


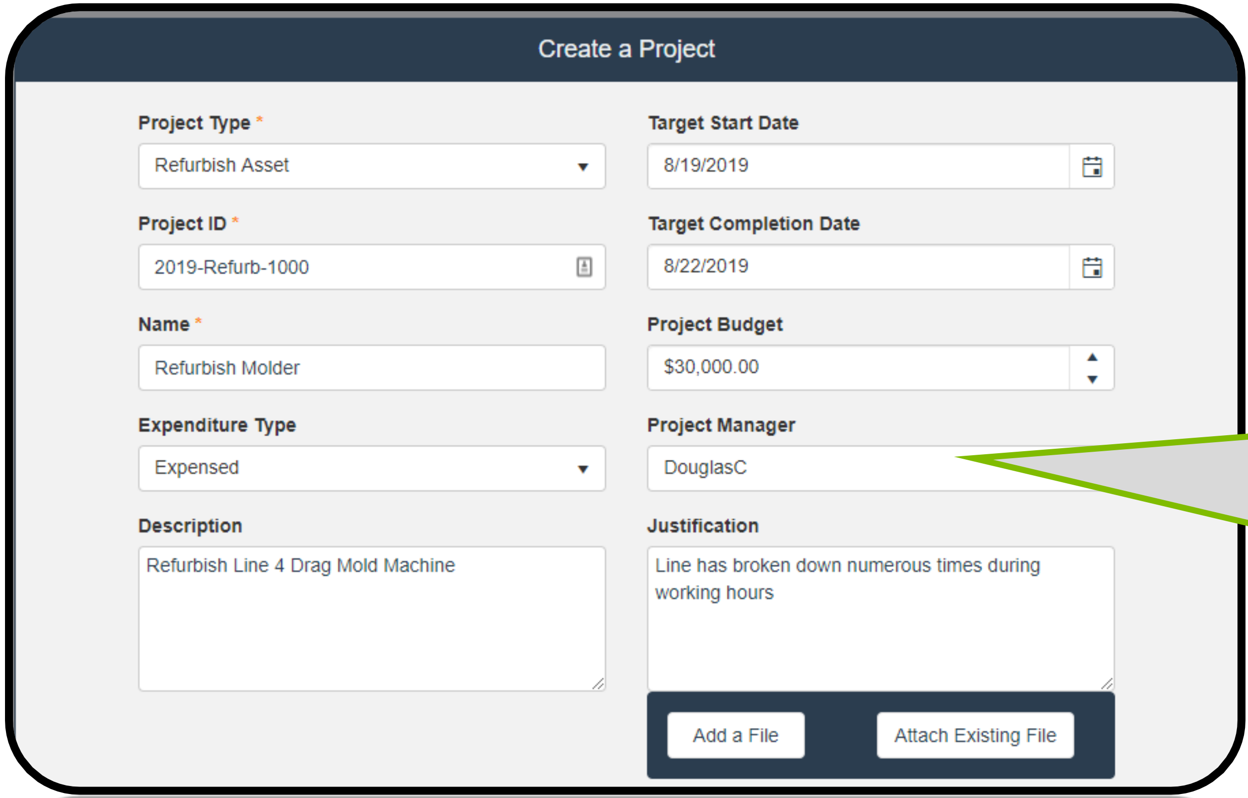


- ✓ Once a Project Type has been created, associated Project Tasks should be created as well
- ✓ When adding Tasks to a Project, it must be one of the listed task types on the project
- ✓ To create Tasks associated with Project Types, select the Tasks Card, and "+Add new record"
- ✓ The Global Checkbox allows a user to have this task type available for all Project Types
- ✓ Task Types are purely categorial, i.e. they don't dictate any functionality, just allow you to categorize the tasks that will be on the project



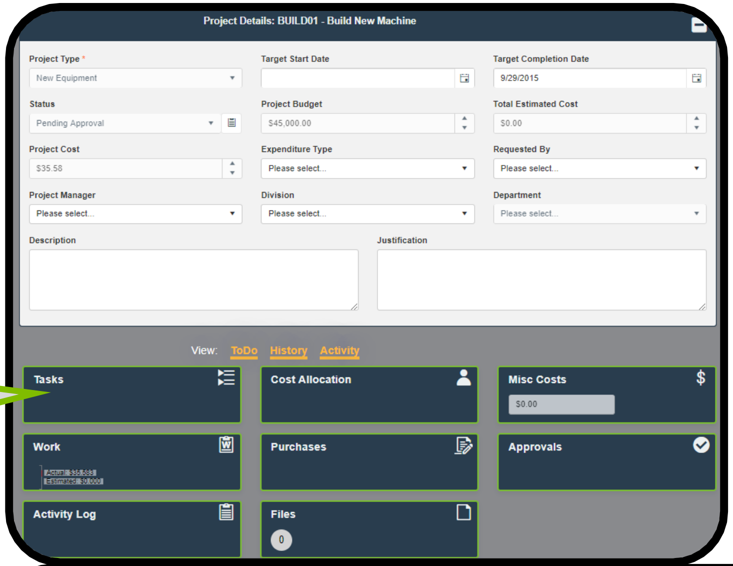
- ✓ To create a **Project**, select the **Create Button** in the Project Finder



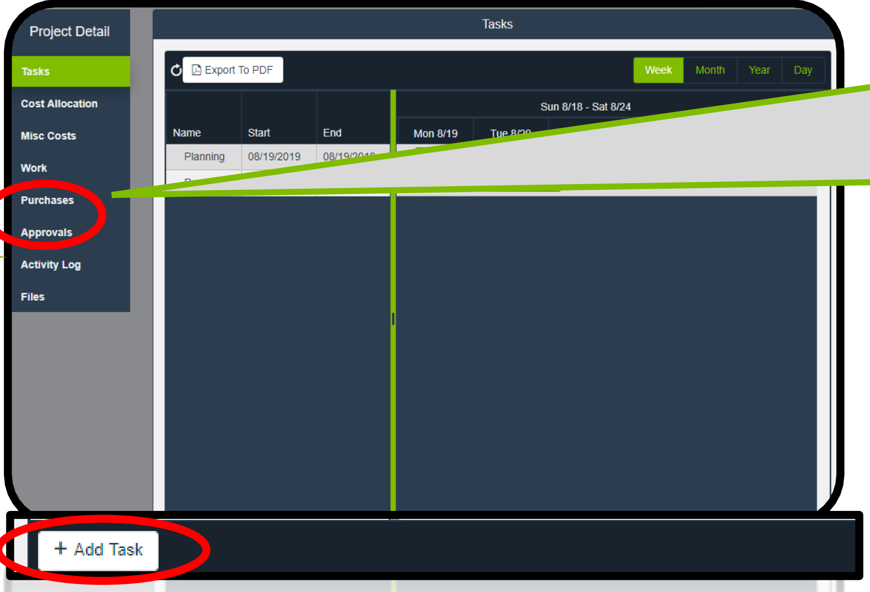


- ✓ The **Project Manager** defaults to whoever is Creating the Project
- ✓ This can be over-written

- ✓ Once a Project is created, you can add Tasks by selecting the **Task Card**
- ✓ Tasks capture a variety of attributes such as target date, task budget, assigned by and to, etc.



- ✓ A user can create a **Work Order** or **Purchase Order** not directly associated to a Task
- ✓ Those **Work Orders** or **Purchase Orders** will be shown by clicking on the **Work** or **Purchases Tab**

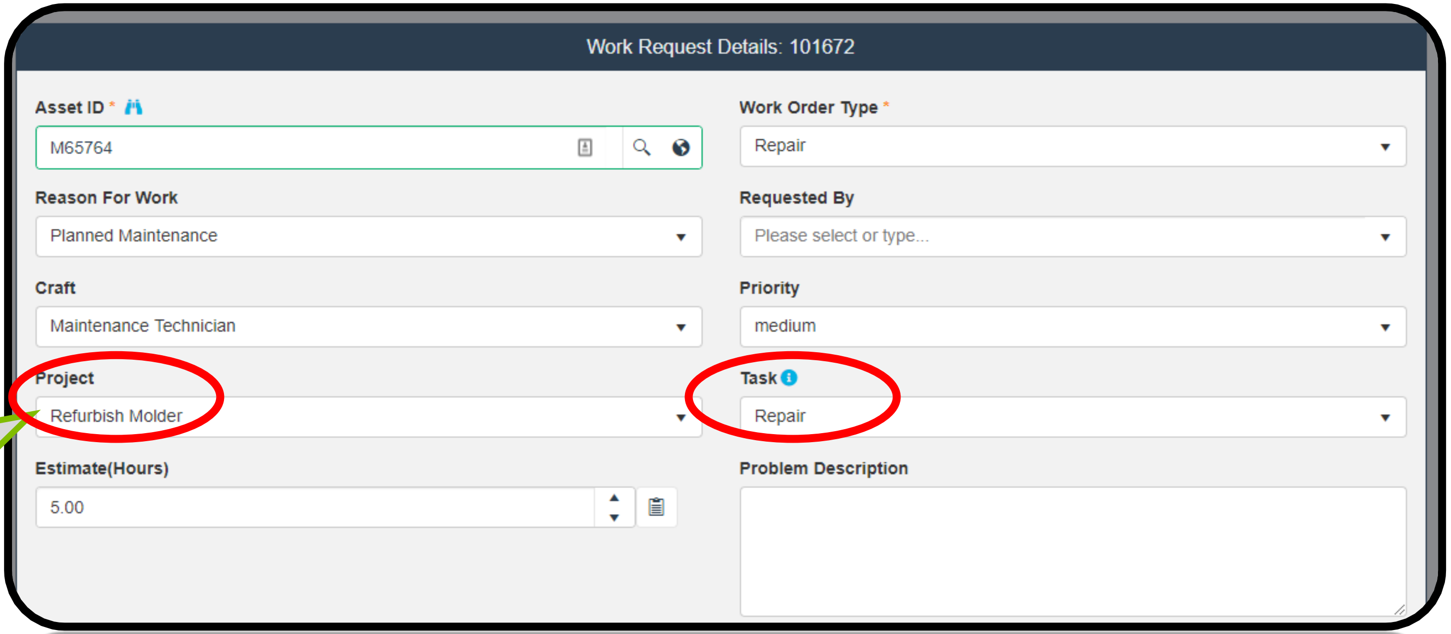


- ✓ As **Tasks** are added, they will be shown on the calendar view

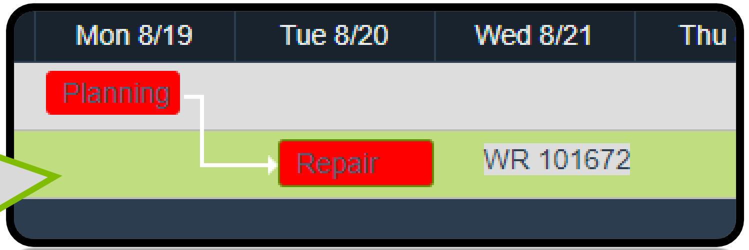
- ✓ When a user creates a **Work Order** or a **Purchase Order** they can also associated those to a Task, which will be shown in the calendar view

(Details on the next few slide)

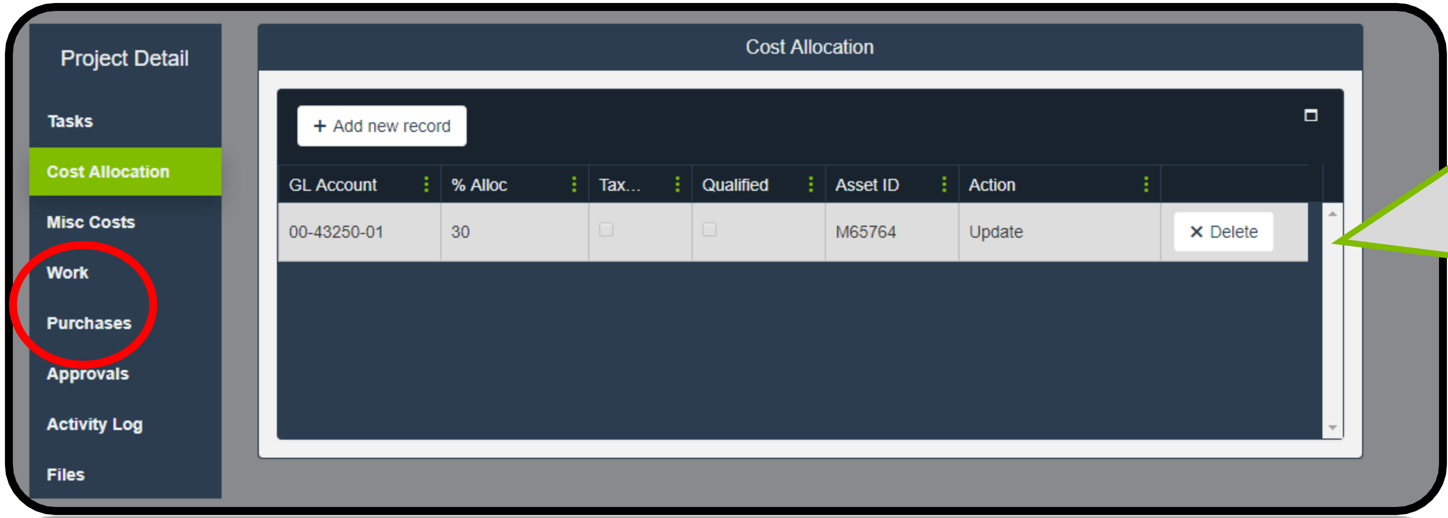
- ✓ When creating a Work Order, notice that the Project field is disabled
- ✓ If you select a Task, the Work Order will be associated to that Task
- ✓ If you do not select a Task, it will not be associated

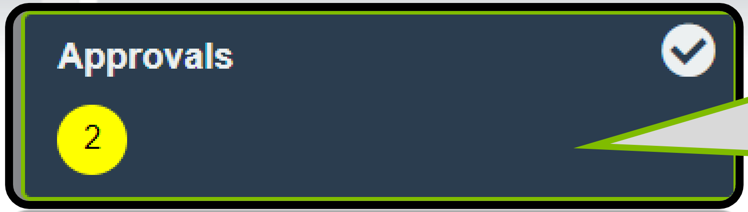


- ✓ An associated **Work Request** will show next to the task in the calendar view
- ✓ Or it will be shown by selecting the Work Tab



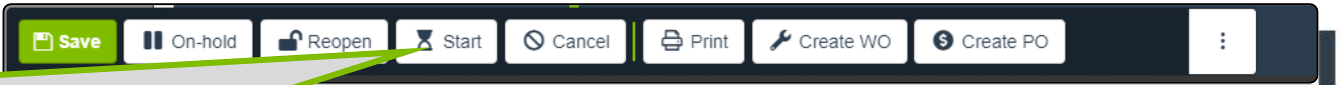
- ✓ A user can also add new items to the **Cost Allocation** screen using "+ Add new record"
- ✓ In the example shown, the asset's value will be updated (M65764) by 30% of the project's final cost automatically after project completion

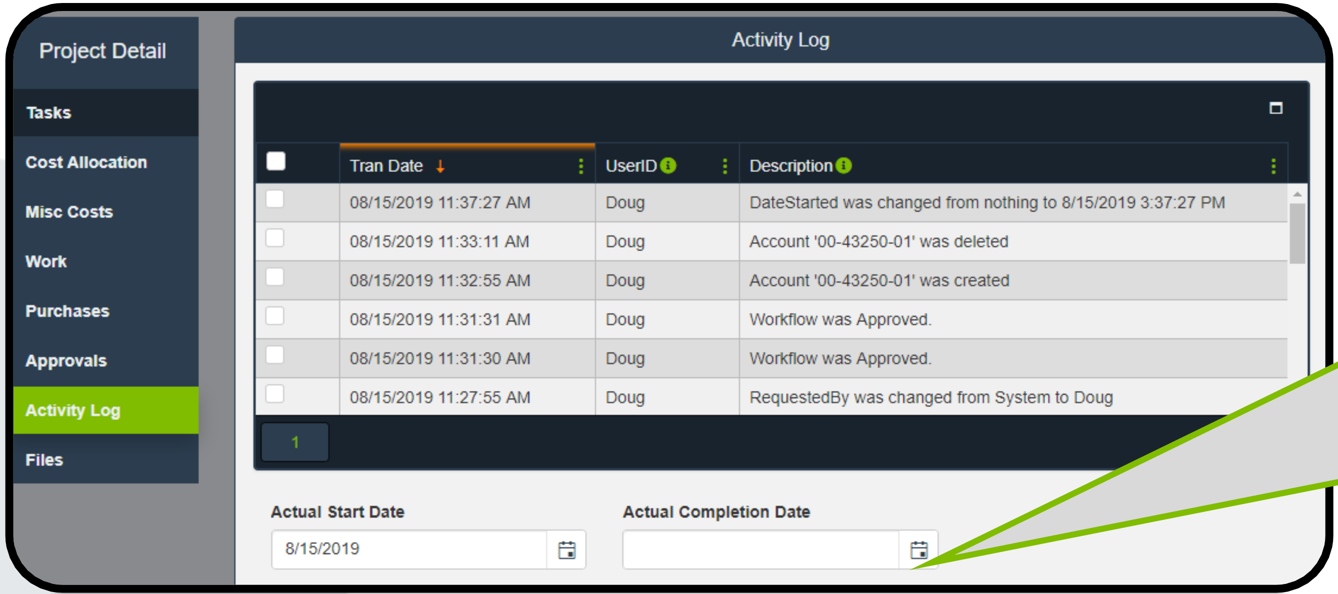




- ✓ After a Project has been finalized, if any approvals are required (via workflow approvals) they will show here
- ✓ In this case 2 approvals are still required
  - ✓ Green is approved
  - ✓ Yellow is pending
  - ✓ Red is rejected

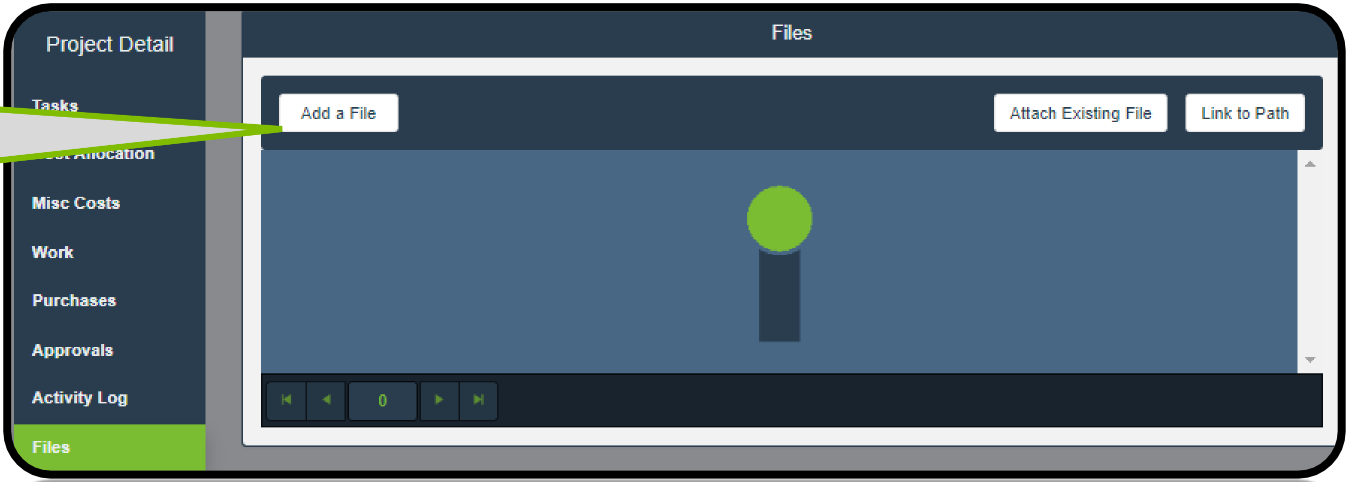
- ✓ The **Start Button** is used to start the Project
- ✓ **Create WO** and **Create PO** are used to create WO's and POs associated with the project
- ✓ Work Requests already linked, when approved, will auto link the resulting WO/PO to the Project



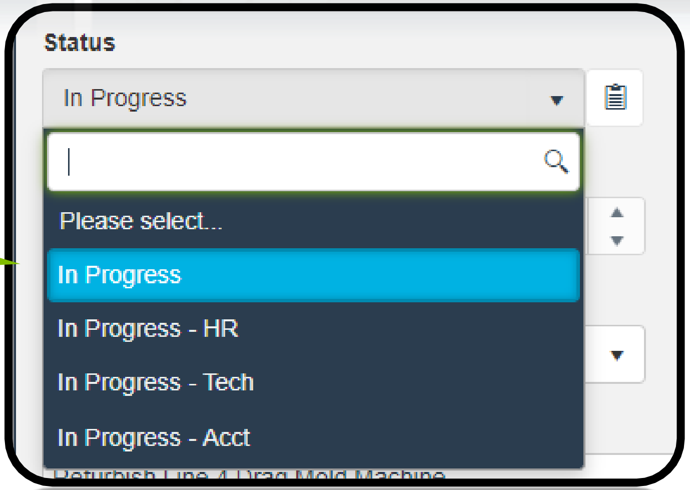


- ✓ Actual Start date is set when the start button is pushed, not based on labor values on WOS
- ✓ Project Cost is the sum of misc. costs on WOs and totals on POs
- ✓ Estimated costs are estimated labor costs on Work Requests, and totals on Purchase Requisitions
- ✓ When a WR is converted to a WO, the WR # number no longer shows on the tasks, it gets replaced with the WO number

- ✓ Click the **Files Tab** and then the **Add a File Button** to attached files to the **Project**



- ✓ A user can change the user-defined status as long as the Project is not **Complete**



- ✓ Click the **Complete Button** to complete the Project

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