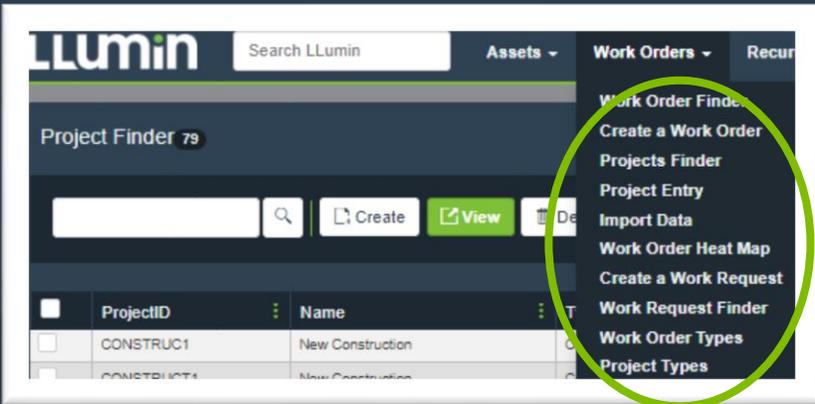
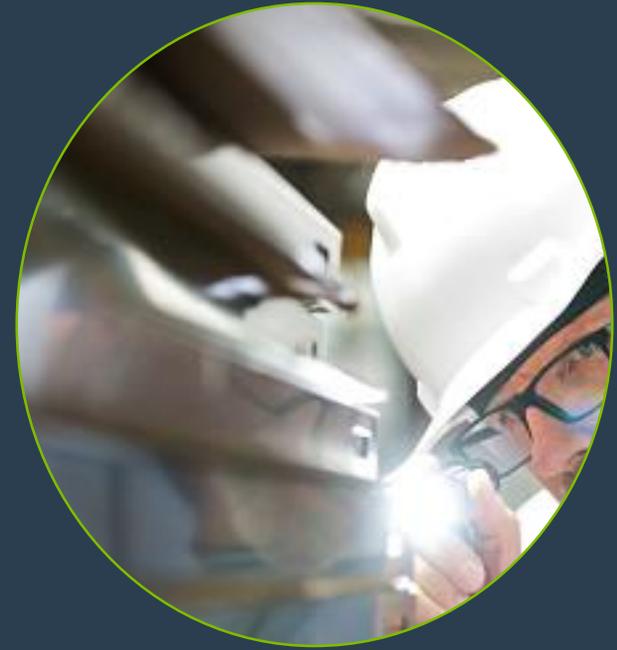


# LLumin

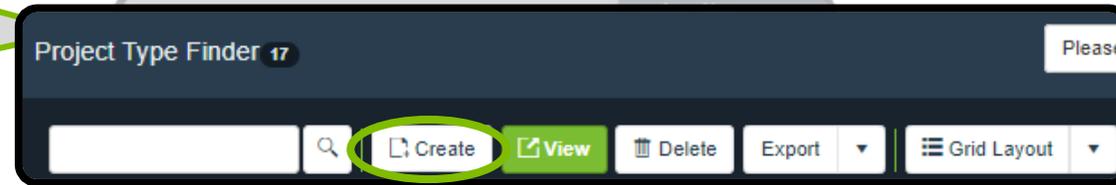
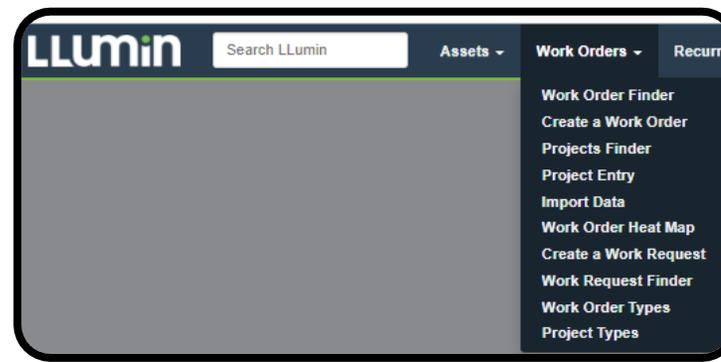
*Know everything about your most critical assets*



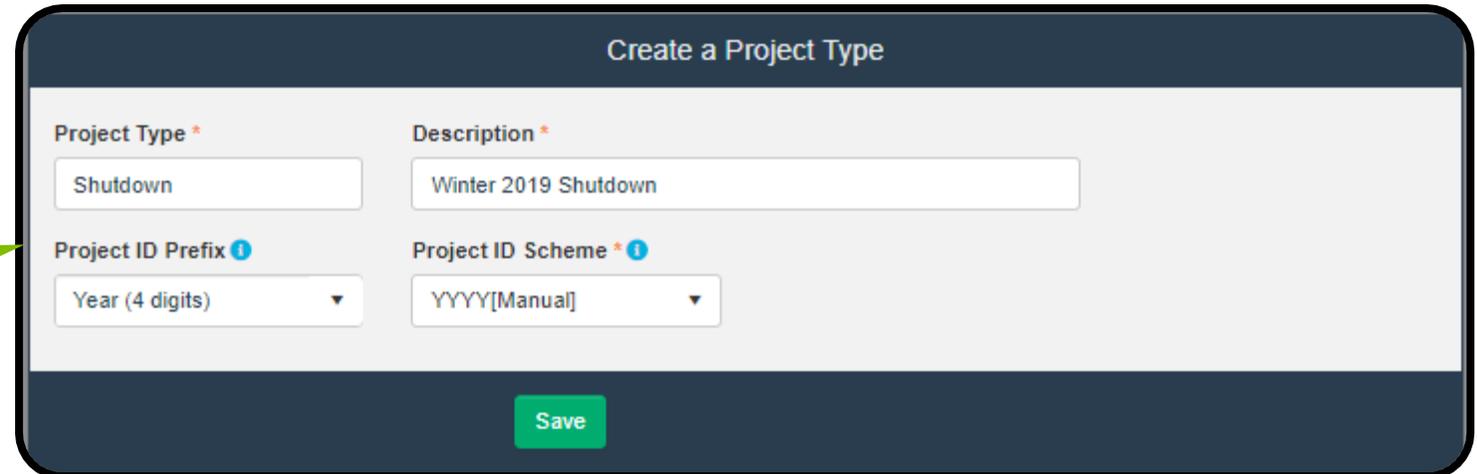
## Project Tracking User Guide

*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

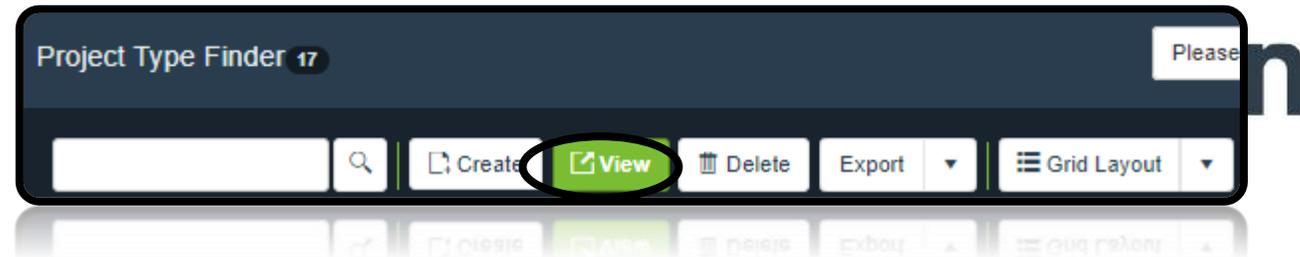
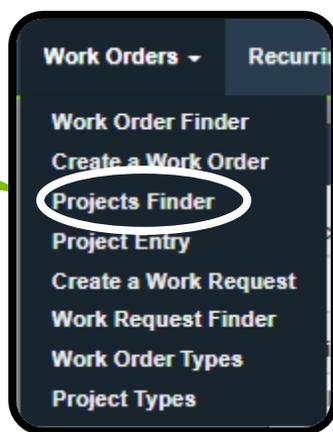


A screenshot of the 'Create a Project Type' form. The form contains the following fields:

- Project Type \***: Text input field with the value 'Shutdown'.
- Description \***: Text input field with the value 'Winter 2019 Shutdown'.
- Project ID Prefix <sup>i</sup>**: Dropdown menu with the value 'Year (4 digits)'.
- Project ID Scheme \* <sup>i</sup>**: Dropdown menu with the value 'YYYY[Manual]'.

A green 'Save' button is located at the bottom right of the form.

✓ 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

### Project Type Master: Refurbishing

Project Type \* 01 Description \* Refurbishing  
Project ID Prefix [Please select or type...] Project ID Scheme \* [Manual]

Project Type Settings  
Field Configuration  
Custom Validation  
**Tasks**

#### Tasks

+ Add new record

Task Type	Description	Set	Estimate (Days)	Global	
PLAN	Planning Meeting	1	0	<input checked="" type="checkbox"/>	<a href="#">X Delete</a>
test1	test description	1	10	<input checked="" type="checkbox"/>	<a href="#">X Delete</a>
BUILD	Build Tower	2		<input checked="" type="checkbox"/>	<a href="#">X Delete</a>
PERMIT	Get Permit	2		<input checked="" type="checkbox"/>	<a href="#">X Delete</a>

Project Type Finder 17 Please

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

Create a Project

<b>Project Type *</b> Refurbish Asset	<b>Target Start Date</b> 8/19/2019
<b>Project ID *</b> 2019-Refurb-1000	<b>Target Completion Date</b> 8/22/2019
<b>Name *</b> Refurbish Molder	<b>Project Budget</b> \$30,000.00
<b>Expenditure Type</b> Expensed	<b>Project Manager</b> DouglasC
<b>Description</b> Refurbish Line 4 Drag Mold Machine	<b>Justification</b> Line has broken down numerous times during working hours

✓ 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)

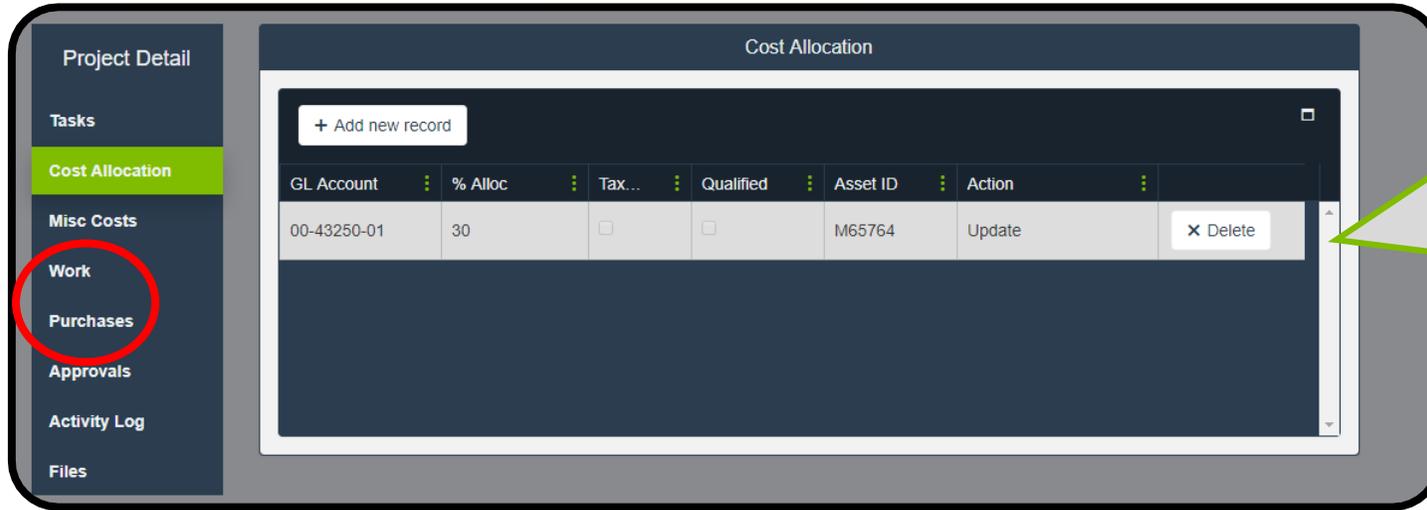
Work Request Details: 101672

<b>Asset ID *</b> <input type="text" value="M65764"/>	<b>Work Order Type *</b> <input type="text" value="Repair"/>
<b>Reason For Work</b> <input type="text" value="Planned Maintenance"/>	<b>Requested By</b> <input type="text" value="Please select or type..."/>
<b>Craft</b> <input type="text" value="Maintenance Technician"/>	<b>Priority</b> <input type="text" value="medium"/>
<b>Project</b> <input type="text" value="Refurbish Molder"/>	<b>Task</b> <input type="text" value="Repair"/>
<b>Estimate(Hours)</b> <input type="text" value="5.00"/>	<b>Problem Description</b> <input type="text"/>

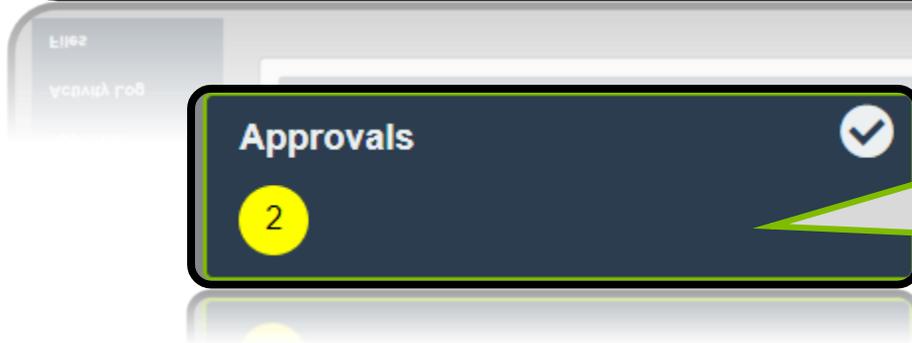
- ✓ When creating a Work Order, notice that the Project field is disabled
- ✓ If you select a Task, the Work Order will be associated to that Task
- ✓ If you do not select a Task, it will not be associated



- ✓ 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



Project Detail

- Tasks
- Cost Allocation
- Misc Costs
- Work
- Purchases
- Approvals
- Activity Log
- Files

Activity Log

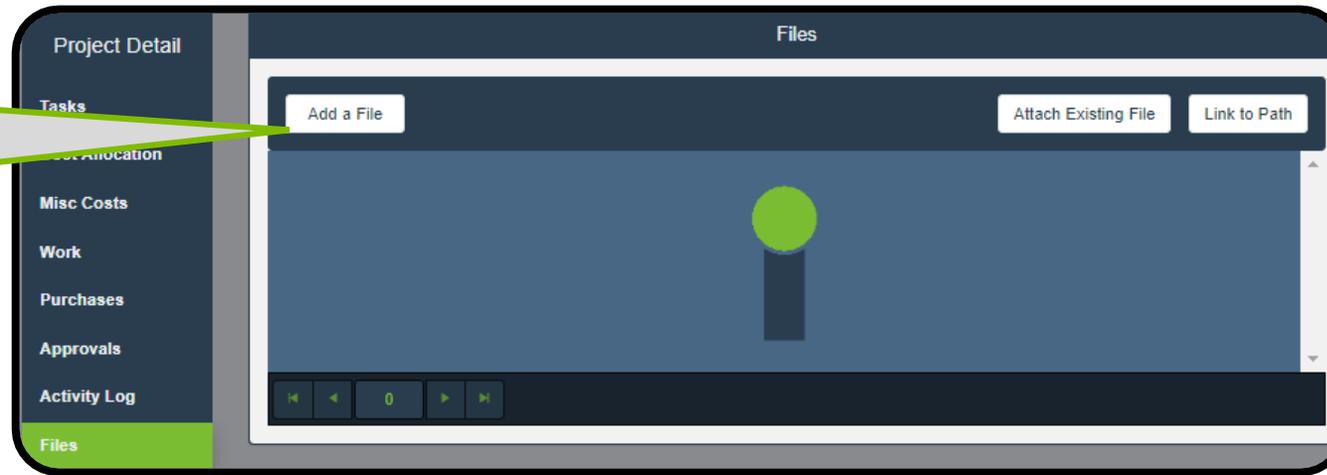
	Tran Date ↓	UserID	Description
<input type="checkbox"/>	08/15/2019 11:37:27 AM	Doug	DateStarted was changed from nothing to 8/15/2019 3:37:27 PM
<input type="checkbox"/>	08/15/2019 11:33:11 AM	Doug	Account '00-43250-01' was deleted
<input type="checkbox"/>	08/15/2019 11:32:55 AM	Doug	Account '00-43250-01' was created
<input type="checkbox"/>	08/15/2019 11:31:31 AM	Doug	Workflow was Approved.
<input type="checkbox"/>	08/15/2019 11:31:30 AM	Doug	Workflow was Approved.
<input type="checkbox"/>	08/15/2019 11:27:55 AM	Doug	RequestedBy was changed from System to Doug

Actual Start Date

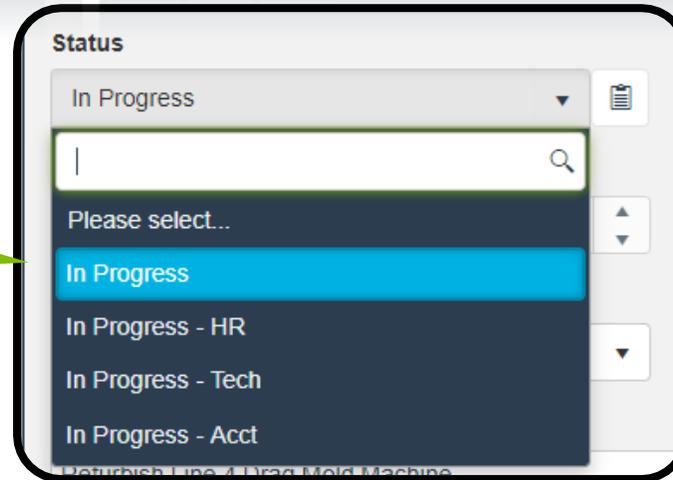
Actual Completion Date

- ✓ 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

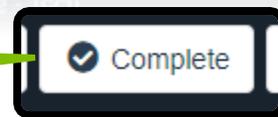
✓ Click the **Files Tab** and then the **Add a File Button** to attached files to the **Project**



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



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



The LLumin logo is centered within a black rectangular box that has a thin green border. The logo itself is rendered in white, with the dot above the letter "i" being a green circle.

Know everything about your most critical assets