

3.1.1.1. Main Parameters

Adding a Project: The Main Parameters Tab

This tab contains the main information related to the project, including the entity, customer, project manager, and planned start and finish dates. As the project progresses through its life cycle, actual start and finish dates can also be entered.

The required fields are: **Description and Entity**

The screenshot shows a software interface for project management. At the top, there's a breadcrumb trail: 'Interior of the Villa (Project)'. Below that are navigation tabs: 'Main', 'Accepted Variation Rows', 'Budget Estimates Versions', 'Cash Flow Plan Versions', 'Project Estimates Versions', 'Project Notifications', 'Project Schedule Versions', and 'Project Statuses'. A toolbar contains buttons for 'Save and close', 'Save', 'Generate', and a pencil icon. The 'Main Parameters' tab is active, showing various input fields. The 'Customer' field is 'Yakub Trading L.L.C', 'Contract' is 'Main Contract', and 'Description' is 'Interior of the Villa'. The 'Project Manager' field is empty. The 'Invoicing Method' is set to 'Progressive'. The 'Status' is 'Active'. The 'Folder' is empty, and the 'Code' is '0000000044'. The 'Entity' is 'MRB Engineering and Contracting'. The 'Project Type' is empty. The 'Project Schedule' is 'Main Schedule'. The 'Planned Start Date' is empty, 'Finish' is empty, and 'Duration' is '0'. The 'Actual Start Date' is '5/16/2025', 'Finish' is '<Auto>', and 'Duration' is '<Auto>'. There are checkboxes for 'Manual Project Tasks Statuses Tracking' (unchecked) and 'Use Advanced Project Planning' (checked). At the bottom, there's an 'Additional Information' text area.

Main Parameters Tab – Field Details

This tab contains key project attributes that define the structure and initial setup of the project.

- **Customer:** Specifies the client for whom the project is intended.
- **Contract:** Optionally links a specific contract relevant to the project.
- **Description:** A clear and concise description that serves to identify the project in various project lists.
- **Project Manager:** Indicates the responsible employee overseeing the project.
- **Manual Project Tasks Statuses Tracking:** When enabled, allows progress to be manually updated by modifying the status of individual project tasks.
- **Invoicing Method:** Choose between the Progressive or Milestone method.
 - **Progressive** – Based on % of BOQ progress
 - **Milestone** – Based on predefined payment stages
- **Status:** Represents the current stage of the project. The default is **New**, and can be changed as the project advances through different life cycle stages. Available statuses: **Active, Completed, Cancelled**.
- **Folder:** Allows grouping the project under a specific folder. New folders can be created directly from the field if required.
- **Code:** A unique identifier automatically assigned to the project.
- **Entity:** Specifies the legal entity of the company managing the project.
- **Project Type:** Indicates the project classification, selected from predefined types in the **Project Types** form.
- **Planned Start / Finish Date:** Shows the scheduled dates for starting and completing the project. The **Duration** is automatically calculated in days.
- **Actual Start / Finish Date:** These fields reflect the real dates of commencement and completion. When the project status changes from **New** to **Active**, the **Actual Start Date** is filled in automatically (indicated by <Auto>). Likewise, the **Finish** date is updated upon switching to **Completed**. If needed, the pencil icon (**Edit**) enables manual input of actual dates.
- **Use Advanced Project Planning:** When enabled, it allows tracking of project schedule history and allows multiple project schedule versions for better control and comparison. If this is enabled, Project schedule field is available.
- **Additional Information:** A free-text field for entering any extra details relevant to the project.

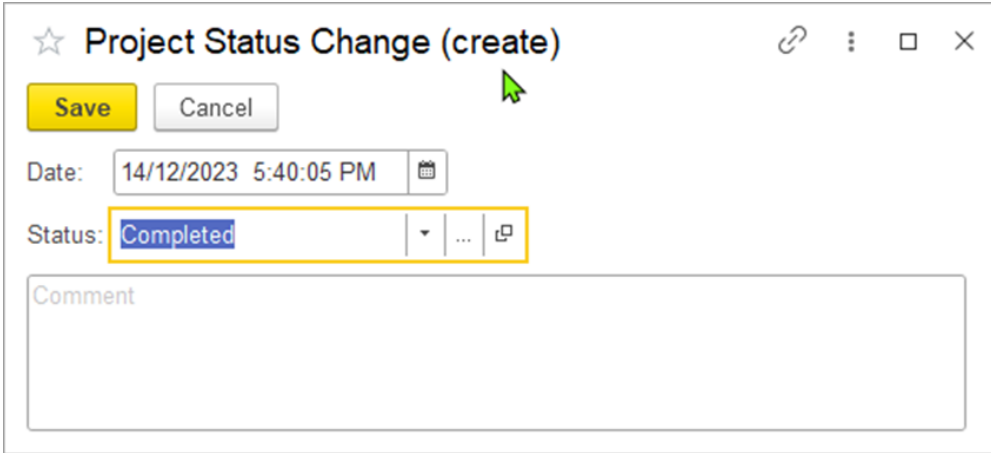
The toolbar buttons

After filling out the tab, click the **Save** button to save the project. Click **Save and close** to save the project with all the changes and close the form.

Project Status Changes

You can change the project status by using the *Change status* link to the right of the current project status. The link appears once you save the project.

The **Project Status Change (create)** form appears when you click the Change status link.



☆ Project Status Change (create)

Save Cancel

Date: 14/12/2023 5:40:05 PM

Status: Completed

Comment

Select a new status for the project in the **Status** field. Optionally, you can edit the date of the status change.

Then, click **Save** to assign the selected new status.

To add a new status, go to the **Project Costing** (the left panel) **Master Data Project Statuses**.

This will display the list of all project statuses. If needed, a new status can be created by clicking the **Create** button, which opens the New (Project Statuses) form.

☆ Project Statuses

Select Create More actions

Description	Code
Active	00-000002
Canceled	00-000004
Completed	00-000003
New	00-000001

☆ Step 2 (Project Statuses)

Save and close Save More actions

Code:

Description:

Predefined Status:

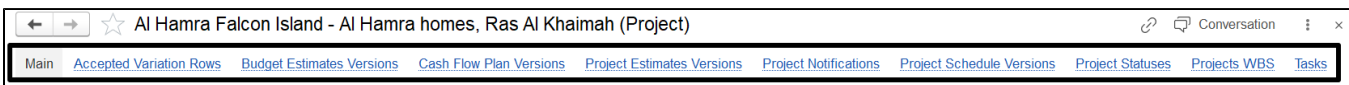
Sequence Number of Status:

The **New (Project Statuses)** form lets you create a custom project status.

- **Save and Close / Save:** Save the status and close the form, or just save and stay on the page.
- **Code:** A unique code for the status.
- **Description:** The name of the status is shown in the project.
- **Predefined Status:** Choose a standard status type, like Proposed or Completed, from the list
- **Sequence Number:** Sets the order of the status in the workflow.

Available links

The following links are available at the top of the form under the project title:



- **Accepted Variation Rows** – Approved changes to project scope, cost, or schedule.
- **Budget Estimates Versions** – History of budget changes.
- **Cash Flow Plan Versions** – Versions of projected cash inflows/outflows.
- **Project Estimates Versions** – History of project cost/resource estimates.
- **Project Notifications** – Alerts or updates related to the project.
- **Project Schedule Versions** – Timeline changes tracked over time.
- **Project Statuses** – Log of project status changes.
- **Project Task Pipelines** – Current status of tasks.
- **Project WBS** – Work Breakdown Structure; hierarchy of project tasks.
- **Task** – Individual unit of work in the project.