Project List

Module Guide: Project List (Project Master & Lifecycle)

Module Location

Project > Project List

Module Objective

The **Project List** module serves as the center for creating, managing, and tracking the lifecycle of the company's formal projects. This is where a project is officially defined, linked to a customer, started, and closed with a formal handover.

1. Main View (Project List)

The main page of this module displays a list of all formal projects that exist in the system.

View and Key Button Functions

- **View**: This page is a list of all projects. You can see the **Project Code, Project Name, Project Manager, Project Status,** and other important information.
- **Action Buttons**:
  - **[New]**: To create a new formal project document.

- **[Start]**: Likely used to officially change the project's status to 'started' or 'active'.
- **[Print Handover Document]**: To print the official handover document after the project is completed, which will be given to the customer.

2. Steps to Create a New Project

Step 1: Create a New Project

From the Main View, click the **[New]** button to open the **Add Project** form.

Step 2: Fill in Project Information

On the form that appears, fill in all the important details regarding the project:

- Select the **Project Type** and **Project Category**.
- Fill in the **Project Code** and **Project Name**.
- Select the **Customer** and assign the **Project Manager**.
- Define the project's **Start Date**.
- Select from **Take From** if this project is based on an existing **Project Design**.

Step 3: Save the Project

After all data is filled in, click **[Save]** or **[Next]** to save. The new project will appear in the main list and be ready for further management.

Tips & Important Notes

- This module is the center for formally managing the project lifecycle, from **initiation to closure**.
- The **[Print Handover Document]** button is a crucial feature for the **project closure** process and serves as formal proof that the project results have been handed over to the customer.
- This is the primary work module for **Project Managers and Project Administration**.

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