

Projects Webinar

Creating and Managing Project Tasks

This class teaches how to use the Projects Module to create and track Project Tasks and to manage the staff and costs associated with Project work.
30 Minutes of Instruction + Up to 15 minutes of Questions & Answers in a Go To Meeting Format

Learning Objectives:

1. Know how to use the Projects module to schedule project work, create project work orders, and analyze the associated costs.
2. Know how to manage a perpetual project schedule.
3. Know how to report Project hours and costs to effectively manage you staffing and budget.
4. Know how to use the Projects Menu to manage.

1. Know how to use the Projects tab to schedule project work

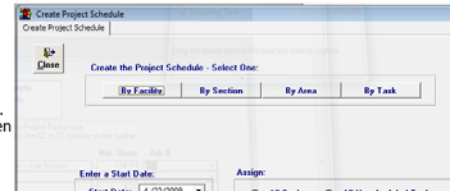
4 – Project Menu: 1 – Create Project Schedule

Create Project Schedule

Select the method for creating the Project Schedule - by Facility, Section, Area or Task. The most common choice is by Facility when the Project Schedule is first created.

Start Date

You may choose a start date according to



Additional Specific Skills Learned:

1. Why create Project Tasks and Project Schedules
2. Definition of a Project
3. Assigning employees to Project tasks
4. Important points when creating project schedules
5. Confirming a task was performed
6. Changing scheduled project dates
7. Printing Project To Do Lists
8. Deleting unconfirmed projects
9. Best practices for implementing the Projects module
10. Supervisor and data administrator to do list
11. Helpful data and reports

Important Points When Creating Project Schedules

! **IMPORTANT:** Should you add a new Project Task, you will need to create a Product Schedule for it. Come back to the Project Schedule (4-1) and chose "All Unassigned Tasks" for each Facility that has the New Project Task.

! **IMPORTANT:** A Project Task must be scheduled in order for it to

Format and Class Availability:

Individualized Instruction:

Customized training uses a combination of the group presentation documentation and your data to provide documentation for note taking and future reference and address the specific needs of your organization.

Call to schedule training date

Group Presentation:

Class size limited to five organizations, includes documentation for note taking and future reference, question and answer session ensures your questions are addressed.