# Webinar – 21st November

## Projects

**Introduction**

The session will be covering the set-up of projects, project related transactions and project reporting.

**Project Groups**

- Add project Group (Events) going through different options (Tick include address, include milestones, allow disbursements, enforce number series, completion date required)
- Add Custom fields for Location (linked to X_location catalog), Department (linked to department attribute and with department posting value set) and Value

**Projects**

- Add new parent project under events project group called "Fundraising Events" (Note how it creates the Code automatically)
- Add new project under Fundraising Events parent called "Sponsored Run"
- Enter Project Manager
- Explain and enter Contact (Yellow Mellow)
- Explain Start Date, completion date, revised completion date and Legacy ref
- Add in milestones – Planning, fundraising, Delivery
- Enter Resource for Adam Clark. Explain that Project: View All and Project Entry group (View all) roles would need to be removed from user to prevent access.
- Enter Address and custom fields.
- Save project
- Log in as Adam Doe and show that you can't see project.
- Export projects, change project Code and other columns and re-import

**Transactions**

- Enter Purchase invoice and show it has gone to project and is included in documents, P/L and TB (explain project would need to be in COA rule)
- Enter Purchase Order and show it has gone to project and is included in PO tab, committed and committed TB. Show it can be shown in documents if you remove the GL tick box.
- Enter Expense for rechargeable hotels and rechargeable mileage and show this has posted to project.
- Enter sales disbursement – project invoice against sponsored run project and click on disbursements button to select expenses just entered.
- Show links button and that original expense is shown.
- Enter timesheet using consultancy and project management as example. Show timesheets and timesheets TB view on project. Explain that it gets the cost from the timesheet product and drill into timesheet product.
- Enter timesheet sales invoice and click on timesheets button to bring in timesheets just entered. Explain that the sales price comes from timesheet product and show timesheets tab of sales invoice.
- Click on email button to show that invoice can include timesheet.

**Enquiries**

- Show project P/L
- Show Project Budget Vs Actual Enquiry for AC project and AC project forecast
- Show project Budget Vs Actual (YTD) Enquiry for AC project and AC project forecast
- Go into standard P/L and show that project can be added to standard enquiries.