

# Quadpro Help Desk

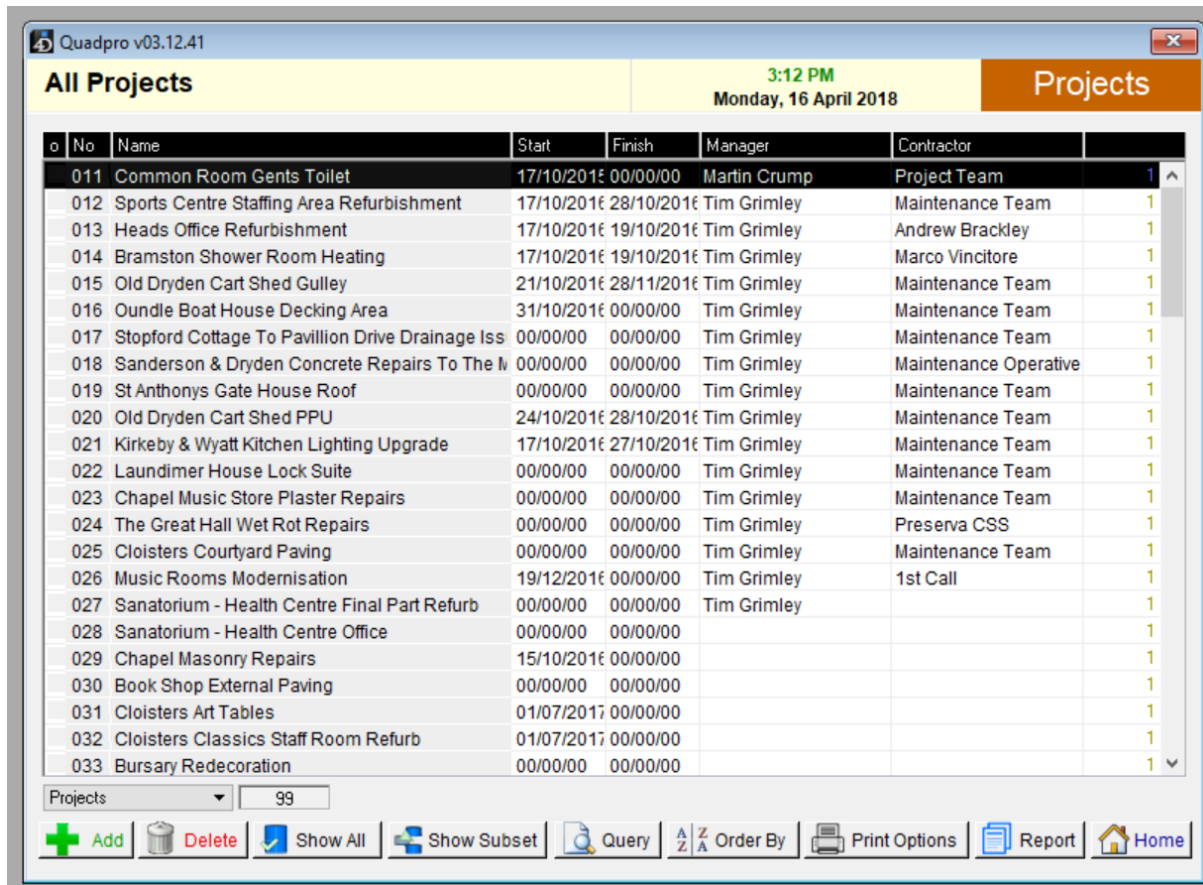
## **Setting up a Project**

## Setting up a Project:

Projects offer a means to group together several work items and manage them as one entity. This allows you and your teams to keep track of progress much easier.

To set up a new Project, access the menu from the Home Screen by selecting **'Projects'** from the right-hand establishment panel.

You may also access this page from the Home Screen toolbar by clicking **'Maintenance > Projects'**



No	Name	Start	Finish	Manager	Contractor	
011	Common Room Gents Toilet	17/10/2016	00/00/00	Martin Crump	Project Team	1
012	Sports Centre Staffing Area Refurbishment	17/10/2016	28/10/2016	Tim Grimley	Maintenance Team	1
013	Heads Office Refurbishment	17/10/2016	19/10/2016	Tim Grimley	Andrew Brackley	1
014	Bramston Shower Room Heating	17/10/2016	19/10/2016	Tim Grimley	Marco Vincitore	1
015	Old Dryden Cart Shed Gulley	21/10/2016	28/11/2016	Tim Grimley	Maintenance Team	1
016	Oundle Boat House Decking Area	31/10/2016	00/00/00	Tim Grimley	Maintenance Team	1
017	Stopford Cottage To Pavilion Drive Drainage Iss	00/00/00	00/00/00	Tim Grimley	Maintenance Team	1
018	Sanderson & Dryden Concrete Repairs To The M	00/00/00	00/00/00	Tim Grimley	Maintenance Operative	1
019	St Anthony's Gate House Roof	00/00/00	00/00/00	Tim Grimley	Maintenance Team	1
020	Old Dryden Cart Shed PPU	24/10/2016	28/10/2016	Tim Grimley	Maintenance Team	1
021	Kirkeby & Wyatt Kitchen Lighting Upgrade	17/10/2016	27/10/2016	Tim Grimley	Maintenance Team	1
022	Laundimer House Lock Suite	00/00/00	00/00/00	Tim Grimley	Maintenance Team	1
023	Chapel Music Store Plaster Repairs	00/00/00	00/00/00	Tim Grimley	Maintenance Team	1
024	The Great Hall Wet Rot Repairs	00/00/00	00/00/00	Tim Grimley	Preserva CSS	1
025	Cloisters Courtyard Paving	00/00/00	00/00/00	Tim Grimley	Maintenance Team	1
026	Music Rooms Modernisation	19/12/2016	00/00/00	Tim Grimley	1st Call	1
027	Sanatorium - Health Centre Final Part Refurb	00/00/00	00/00/00	Tim Grimley		1
028	Sanatorium - Health Centre Office	00/00/00	00/00/00			1
029	Chapel Masonry Repairs	15/10/2016	00/00/00			1
030	Book Shop External Paving	00/00/00	00/00/00			1
031	Cloisters Art Tables	01/07/2017	00/00/00			1
032	Cloisters Classics Staff Room Refurb	01/07/2017	00/00/00			1
033	Bursary Redecoration	00/00/00	00/00/00			1

This landing page displays all the projects that have been set up within your sites.

To add a new site, click **'Add'** to open up a new dialog box.

Quadpro v03.12.41

3:14 PM  
Monday, 16 April 2018

Projects

Ref: 115

Name:

Project Manager:

Contractor Type:

Contractor:

Start Date: 00/00/00

Finish Date: 00/00/00

Building:

Notes:

Work Items

Ref	Order Ref	Element	Work Item	C	EOF	Year	Qty	Cost

Add Remove

General Prog. / Budget Documents

Documents

Save Exit Print Options

### **General Tab:**

In this new window you will need to input information about the project.

#### **Name:**

This is what the project title will be, for example 'changing room refurbishment'

#### **Project Manager:**

From a list of permitted users, you are able to choose the Manager for this Project.

#### **Contractor Type:**

Select who will be undertaking this project. This could either be your in house team directly employed by establishment or an external contractor.

#### **Contractor:**

Should you select your in house team, you can select the person for the project.

#### **Start Date/ Finish Date:**

Select the date the works are due to commence

You can also add a proposed finish date to this list.

Following completion of the project you can enter the actual completion date as needed.

#### **Building:**

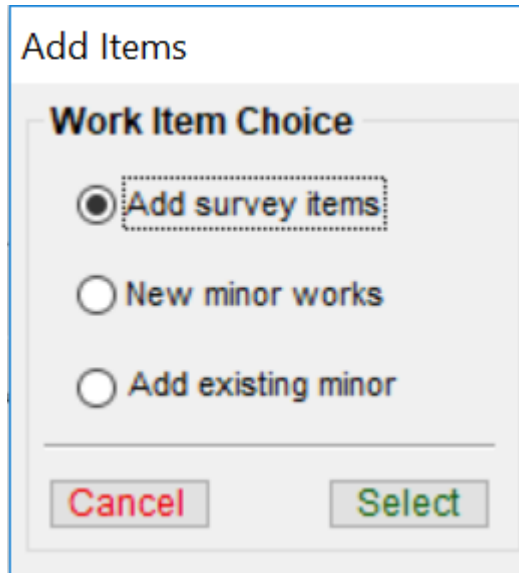
Select which building your project is scheduled to take place in.

**Notes:**

Within this section you can write up a description of the planned works

**Work Items:**

Click '**Add**' to add a new works item to the project. A new box will appear with the following.

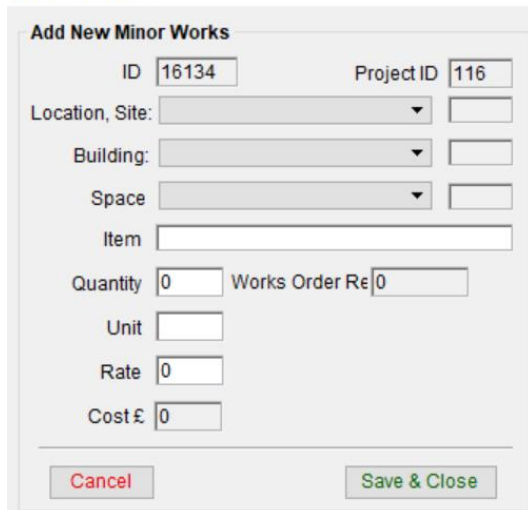


The 'Add Items' dialog box has a title bar 'Add Items'. Inside, there is a section titled 'Work Item Choice' containing three radio button options: 'Add survey items' (which is selected), 'New minor works', and 'Add existing minor'. At the bottom of the dialog are two buttons: 'Cancel' and 'Select'.

Survey item means to add a building item to the project, for example – an Asphalt roof finish

New Minor Works:

Add Minor Work



The 'Add New Minor Works' form contains the following fields: 'ID' (text box with '16134'), 'Project ID' (text box with '116'), 'Location, Site:' (dropdown menu), 'Building:' (dropdown menu), 'Space' (dropdown menu), 'Item' (text box), 'Quantity' (text box with '0'), 'Works Order Re' (text box with '0'), 'Unit' (text box), 'Rate' (text box with '0'), and 'Cost £' (text box with '0'). At the bottom are 'Cancel' and 'Save & Close' buttons.

From here you can add the location of the works, the building and space it is specific to.

Item: describe what is being done, this could mean for example , a new building item in a space such as replacing cupboards or replacing furniture.

Quantity: How much of the item are you ordering

Unit: Kilograms, Each etc..

Rate: How much per item is this

Cost: The total cost of this works item added up.

Once you have entered the information related to the work item, select '**Save and Close**'.

### **Add Existing Minor Works:**

If you are already planning to replace an existing part of a building but would like to include this as a part of the planned project, you may do so by selecting it from 'Existing Minor Works'

When you choose to enter an existing minor work, the following screen will appear.

#### **Add existing minor work to project**

Site	<input type="text"/>				
Building	<input type="text"/>				
<b>Minor Works</b>					
<input type="checkbox"/>	ID	Item	Unit	Quality	Rate
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
Number of selected work items			<input type="text" value="0"/>		
<input type="button" value="Cancel"/>			<input type="button" value="Select"/>		

Add existing minor work to project

Site

All Sites

Building

All Buildings

Minor Works

o	ID	Item	Unit	Quality	Rate
	3782			0	0
	16143	Repair Chimney over entrance	Each	1	200
	7463			0	0
	12073	Plaster	Item	1	1.5
	12074	Plumbing Supplies	Each	1	1958.14

Number of selected work items

0

Cancel

Select

Once you have selected options from the drop down menu a list of work items will appear for you. You may select one or many by clicking in the far left column to tick and mark the ones you wish to use. To add the work items to the project click **'Select'** to confirm the project.

## Progress/Budget Tab:

The screenshot shows the Quadpro v03.12.42 software interface. The title bar indicates the version and a close button. The main window has a header with the project name 'Replace Roofs On Tower 1 Vauxhall Acaden', the time '4:36 PM' and date 'Monday, 30 April 2018', and a 'Projects' tab. The interface is divided into two main sections: 'Milestone Dates' and 'Project Status'. Each section contains a table with columns for 'Activity', 'Base', 'Latest Est', and 'Actual'. The 'Milestone Dates' table has two rows: 'Planning Application' and 'Appoint Contractor'. The 'Project Status' table has two rows: 'Design Period' and 'Project Commencement'. To the right of these tables are dropdown menus for 'Budget Year' (set to 2017), 'Main Budget' (set to E100 Routine Maint...), and 'Sub Budget' (set to E100 Contractors). Below these are buttons for 'Add', 'Delete', and 'Current Budget Position'. At the bottom of the window are tabs for 'General', 'Prog. / Budget' (selected), and 'Documents', along with buttons for 'Save', 'Exit', and 'Print Options'.

Activity	Base	Latest Est	Actual
Planning Application	10/03/2018	10/03/2018	00/00/00
Appoint Contractor	10/04/2018	10/04/2018	00/00/00

Activity	Base	Latest Est	Actual
Design Period	10/02/2018	05/03/2018	00/00/00
Project Commencement	10/05/2018	10/05/2018	00/00/00

### Milestone Dates:

In this tab you can enter the planned milestone dates that need to be achieved for the project. These can be arranged so the rest of your team can monitor and adhere to them. It is also a good way of keeping track of the project's progress so you can report on it regularly.

You can put the start date, estimated finish date and the actual finish date within these columns.

To add a milestone activity, click 'Add'.

A list will appear with a group of activities that you have added.

*To learn how to add new milestone activities, [click here](#).*

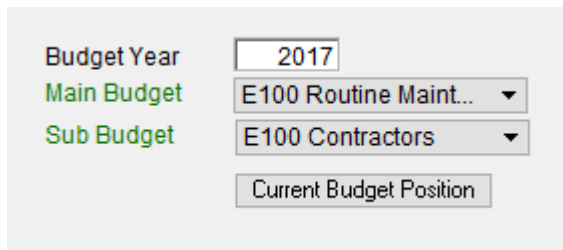
### **Project Status:**

Here you can enter the status of the project, for example you can enter the start date of the design period and when it started along with its planned completion date.

You can put the start date, estimated finish date and the actual finish date within these columns.

*To add a new project status, [click here](#).*

### **Budget:**



The screenshot shows a form with the following fields:

- Budget Year:** A text input field containing the value "2017".
- Main Budget:** A dropdown menu with the selected value "E100 Routine Maint..." and a downward arrow.
- Sub Budget:** A dropdown menu with the selected value "E100 Contractors" and a downward arrow.
- Current Budget Position:** A text input field.

In this section you will need to choose the budget that oversees this project.

Select the budget year which this project is associated with.

**Main Budget:** Select the Main Budget of which funds are allocated for the project.

**Sub Budget:** If there is a specific sub budget to cover this project, select it to ensure the correct funds are deducted from the finances.

### **Documents Tab:**

In this section you can access any documents relating to the project. They will all be stored in one designated folder so you can reference them as needed.

To find out how to add documents, [click here \(XXXXX\)](#)