

AMERESCO @ ASSET SUSTAINABILITY

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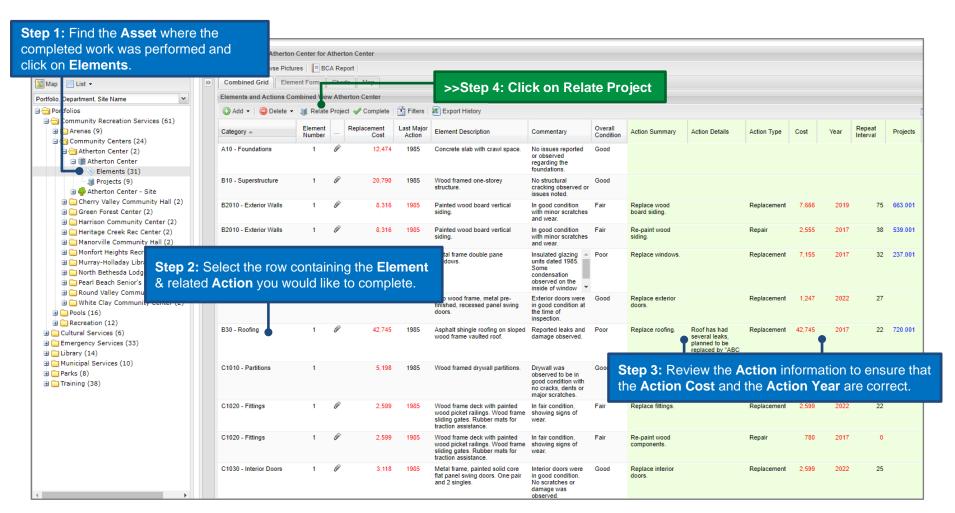
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Creating Projects: Relating Actions to Projects

To create a project we begin in the Asset Planning module as this allows us to link our project to action items within our capital planning dataset. Once linked the action will update automatically upon project completion.



Creating Projects: Relating Actions to Projects

When you click the Relate Project button a pop-up menu will appear with a number of options. You can create a link to a new project or relate it to an existing project by using the search function.

Step 1: Specify how you would like to relate the action to a project:

Create one new project for each selected action: Individual projects will be created for each selected action.

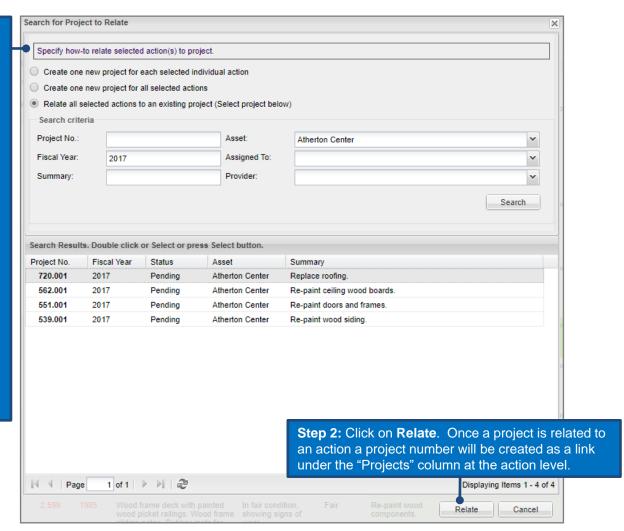
Works best when you want to track each action separately as a project.

Create one new project for all selected actions: One single project will be created for all selected actions.

Works best when you want to track a group of actions in a single project.

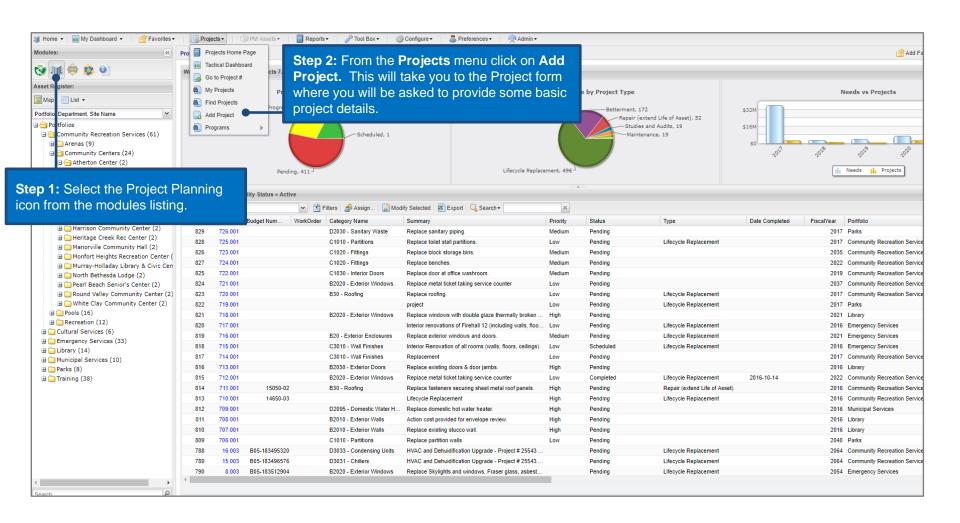
Relate all selected actions to an existing project: this option will relate all selected actions to a project that is already created.

Use the search function to find the existing project you would like to relate.



Creating Projects: Not Linked to Actions

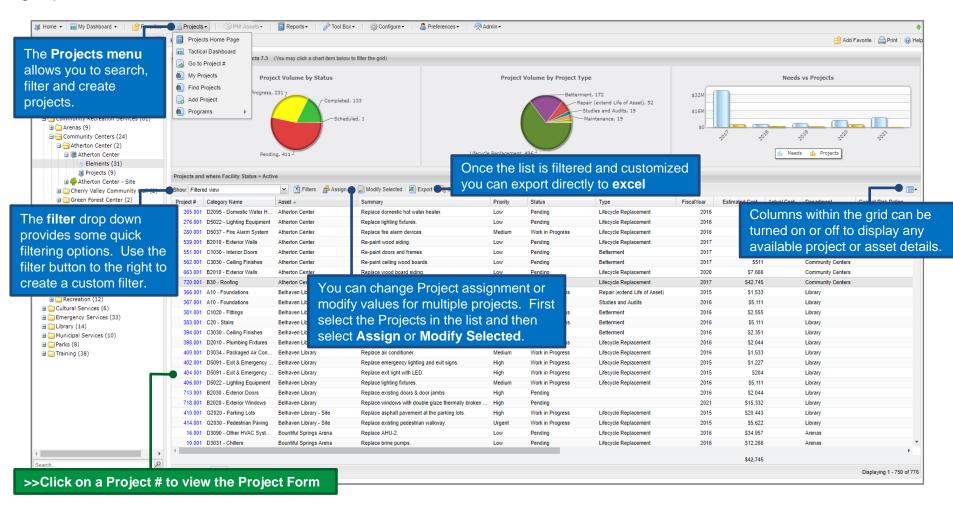
In the Project Planning module you can create projects that are not linked to an action. Once the Project is created you will still have the ability to link to an action(s) at a later point using the Related Actions tab.



Navigation

Project Planner Home Page

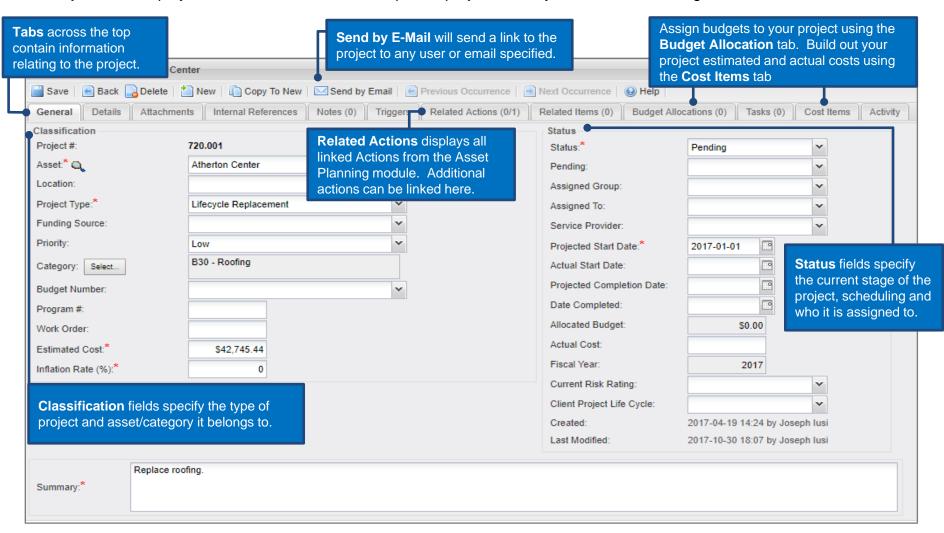
The Project Planner home page displays Project summary charts across the top and a listing of Projects below. Similar to the Asset Planning home page you can use the asset tree to the left to filter down the charts & project listing to a specific asset or group of assets.



Review & Modify

Reviewing & Modifying in the Project Form

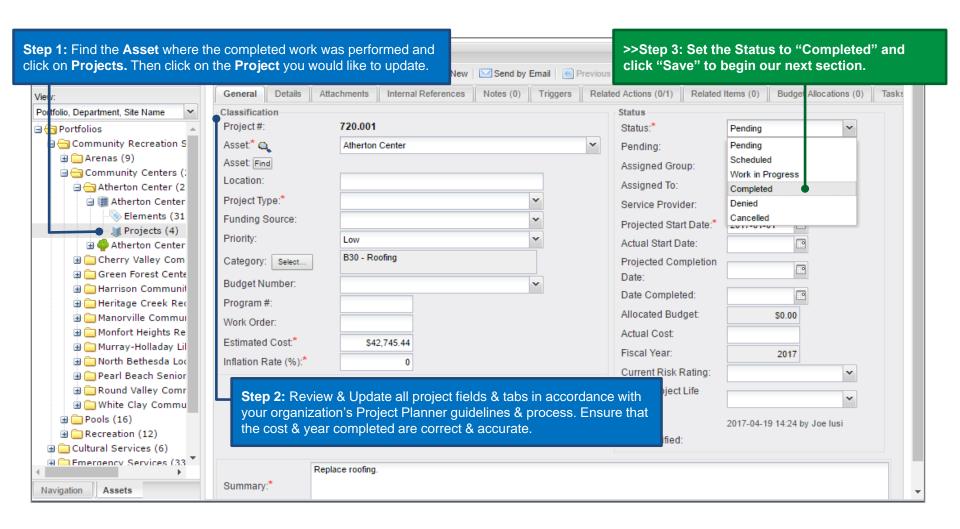
The Project form displays all information related to a specific project. Once you have made changes click Save.



Completing Projects

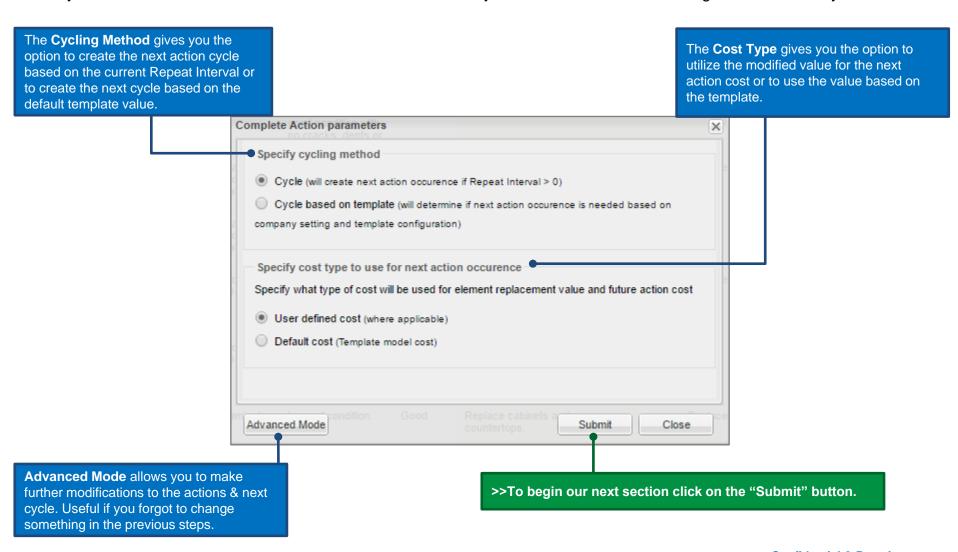
Completing Projects

Once a Project has been fully completed the next step is to review & update the information in the Project form (based on actuals) and then update the Status field to Completed.



Action Cycling Options

When you set the status to Completed in Project Planner and click Save you will be presented with a pop-up box with a few options. These options allow you to specify how you would like the software to create the next life cycle of the action. In most cases you will want to use the default selections which will use any modified values when creating the next action cycle.



Final Steps

Once you have completed a Project the software will automatically archive the original action & project and it will generate a new replacement action based on the cycling method selected. Some final data management steps in Asset Planner are outlined below.

