

Project Container
Agency User Guide

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Introduction

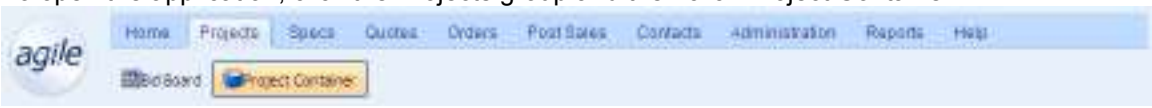
Overview
The Project Container application provides an interface to centrally track all aspects of a project through its entire life cycle.

Getting Help
This User Guide will be your first source for 'How To' information. For additional questions and concerns please contact the Lithonia Support Center at 1-800-241-3638 or via email at SuptCenReps@Lithonia.com .

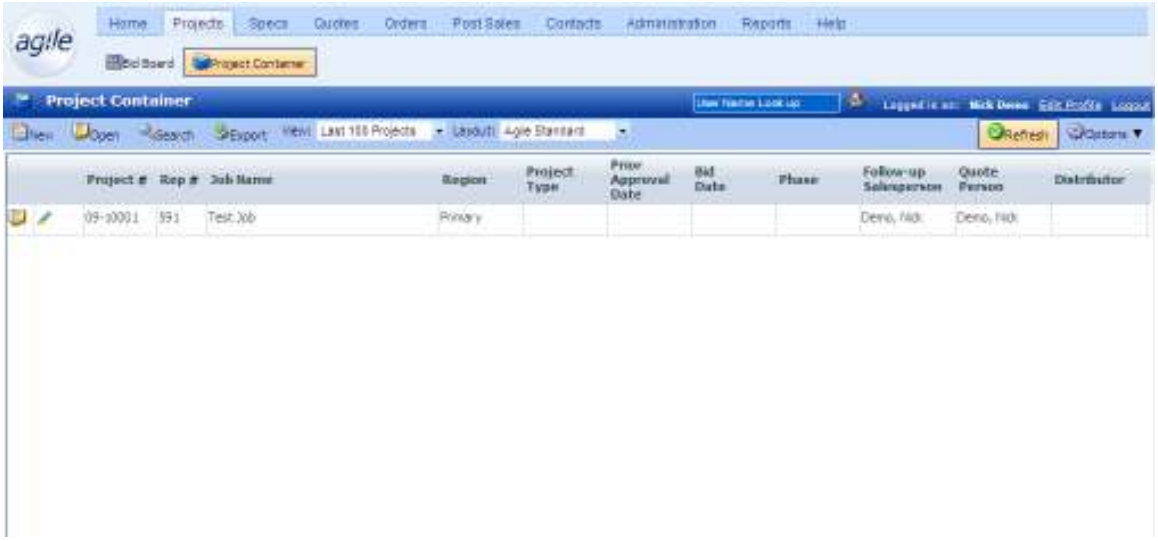
Opening the Application

Project Container must be accessed from the Agile Portal. For instructions on logging into the Agile Portal please see the *Agile Navigating the Portal User Guide*.

To open the application, click the Projects group and then click Project Container.



The application will load below the menu and your projects dashboard will be displayed (seen below).



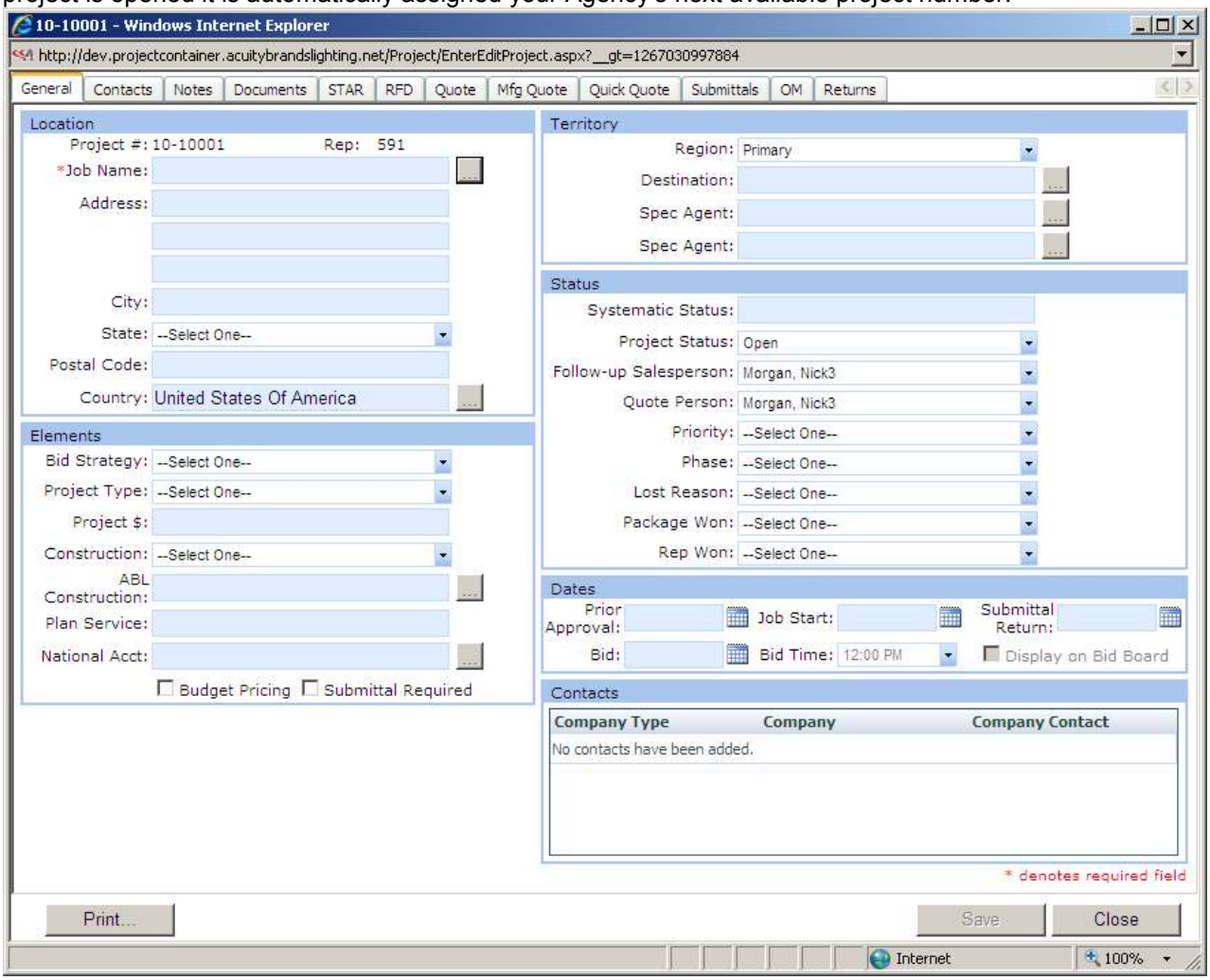
The dashboard will display your Agency's last 100 projects by default. Instructions on changing your default view can be found in the **Searching and Managing Views** section of this document.

Creating a Project

To create a new project click the New button - 

- from the top of the dashboard.

A new window will open displaying a blank project template (seen below). Each time a new project is opened it is automatically assigned your Agency's next available project number.



Note: Once you open a new project and are assigned a project number, that number cannot be reused. Even if the project is not saved the number will not be available again.

There are several tabs across the top of each project. By default, each project will open to the General tab. Below is a high level description of each tab. For more detailed information on a tab see its corresponding section in the **Editing a Project** section of this document.

General – This is the main tab. It contains the majority of your project information and should be updated throughout the life of a project.

Contacts – This tab can be used to associate contacts to a project (engineers, distributors, lighting designers, etc.)

Notes – This tab can be used to add notes to a project including critical and follow-up notes.

Documents – This tab can be used to add documents to a project. Documents can be either linked from your server or uploaded to an Acuity server for accessibility outside your office.
STAR – This tab can be used to link STAR requests to a project. Existing STAR requests can be linked or new STAR requests can be created and automatically linked.

RFD - This tab can be used to link RFD requests to a project. Existing RFD requests can be linked or new RFD requests can be created and automatically linked.

Mfg Quote – This tab can be used to add quote information to a project.

Quick Quote – This tab can be used to link Quick Quotes to a project. Existing Quick Quotes can be linked or new Quick Quotes can be created and automatically linked.

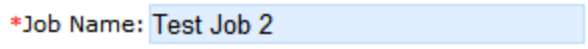
OM - This tab can be used to link OM orders to a project. Existing OM orders can be linked or new OM orders can be created and automatically linked.

Returns - This tab can be used to link Returns to a project. Existing Returns can be linked or new Returns can be created and automatically linked.

Saving a Project

The only information that is required to save a project is a Job Name. For instructions on adding additional project information see the **Editing a Project** section.

To save a new project, enter a job name.



Next, click Save and then click Close

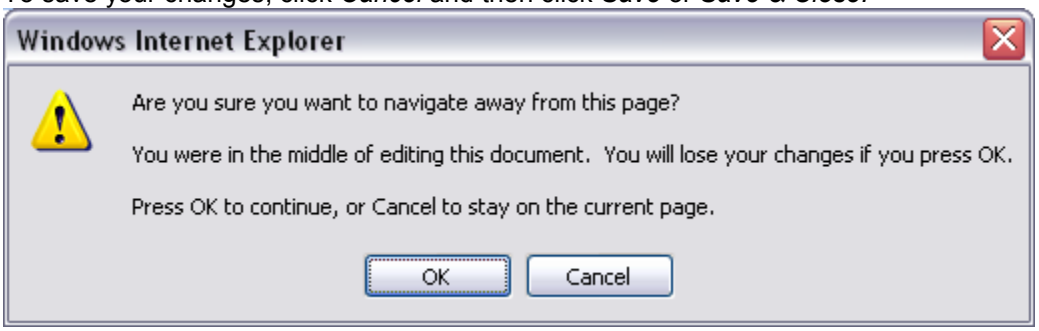


The window will close and the new project will appear in the dashboard



Note: A new project may not appear in the dashboard if you have changed your default view. For information on how to change your default view see the **Searching and Managing Views** section of this document.

Please Note:
If you make changes to a project and attempt to close the project before you save your changes, the message below will be displayed. If you click OK, your changes will be lost. To save your changes, click *Cancel* and then click *Save* or *Save & Close.*



Editing a Project

To open an existing project for editing, locate it on the dashboard and click the icon on the left. The project window will open and default to the General tab.

The General Tab

The general tab is the main tab of a project and contains a majority of the project information. It should be updated as a project progresses through its life cycle.

Textboxes and Dropdown lists

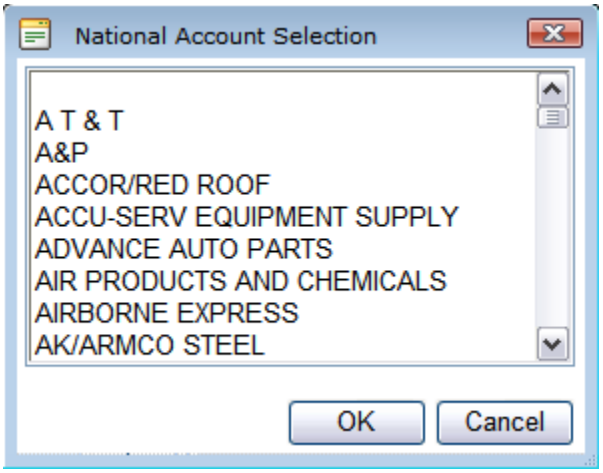
Most of the fields on the General tab are either textboxes or dropdown lists. These fields can be populated/updated by either typing inside the box or choosing an item from the list. The following dropdown lists are customizable for your agency: Bid Strategy, Project Type, Construction, Region, Priority, Phase, Lost Reason, Package Won and Rep Won. For instructions on customizing your Agency's dropdown lists, see the **Administration** section of this document.

Dates

The date fields have a icon. Clicking this icon will bring up a calendar where the correct date can be chosen.

Other Fields

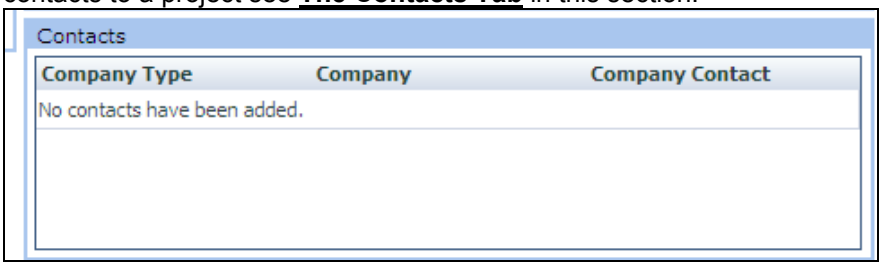
The fields with a icon next to them can be populated by clicking the icon. This will open a window where the correct item can be chosen. For example, the National Account Selection window:



The Systematic Status field will be updated automatically and cannot be changed.

Systematic Status:

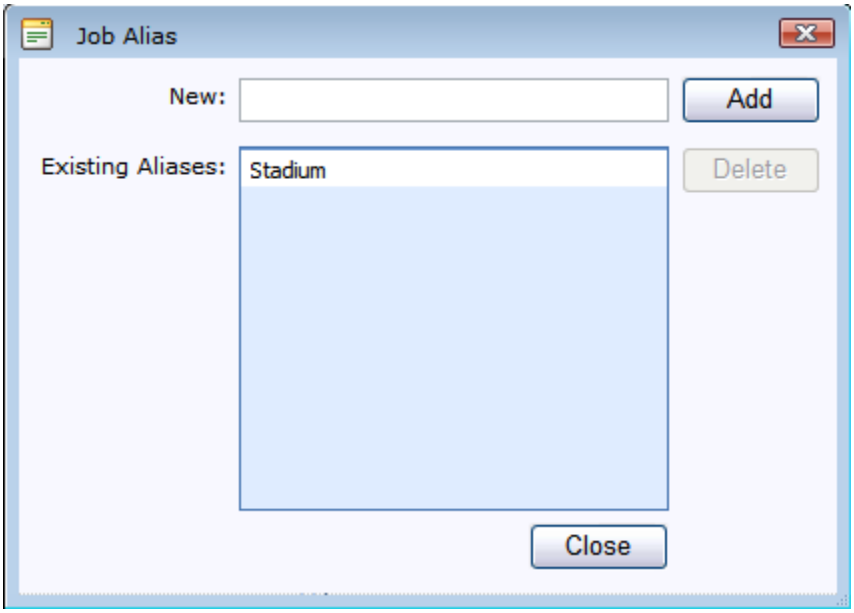
The Contacts section can be populated via the Contacts tab. For instructions on adding contacts to a project see **The Contacts Tab** in this section.



Adding Job Aliases

A project may take on multiple names during its life cycle. To accommodate for this, Job Aliases can be added in addition to the original job name.

To add a job alias, click the ... icon to the right of the Job Name textbox.
Enter an alias in the New box and click Add.



Multiple aliases can be added by repeating these steps. A project can be searched for and opened by any of its job aliases.

The Contacts Tab

Shared Contacts ties into existing Contact Management records allowing for the association of companies and contacts to Projects, Quotes, and Orders. Shared Contacts provides the ability to show company relationships for projects and orders while allowing for faster entry due to drag-and-drop company selection and the ability to set defaults for Company and Rep Contacts. In addition, access to Quick Views of company and contact details provides the ability to quickly add companies and contacts not in Contact Management.

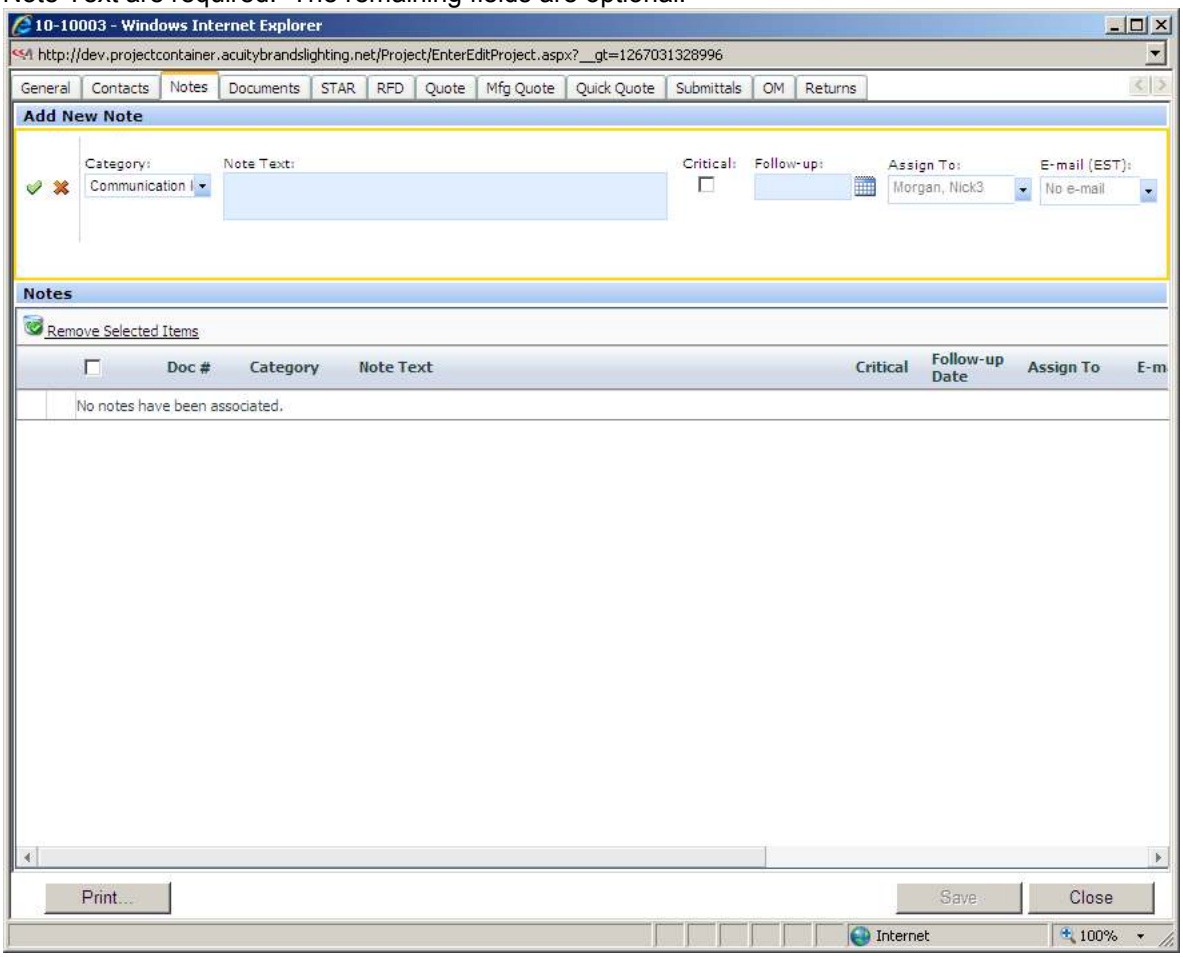
With Shared Contacts, users can:

- Add Companies and Contacts to Projects
- Modify and remove Companies and Contacts to Projects
- Quick View and Quick Add companies and contacts

For detailed instructions on using the Contacts tab, please see the *Shared Contacts User Guide* located in the Agile category of the Help Library.

The Notes Tab

The Notes tab is used to add notes to a project. For each note that is added, a Category and Note Text are required. The remaining fields are optional.



Adding Notes

1. Choose a Category. The Category list is customizable by your agency. For instructions on adding items to this list, see the **Administration** section in this document.
2. Enter the Note Text.
3. Optional – mark the note as critical. A critical note will display each time the project is opened by another user. You cannot read or edit the project until the note is read.
4. Optional – choose a follow-up date. On this date a follow-up will be generated for the person listed in the Assign To box. This follow-up will be viewable through the Follow-up application. For more information on the Follow-up application, see the **Agile Portal Agency User Guide**. This user guide can be found in the help section of Agile.
5. Optional – choose a person to assign the follow-up to. If a follow-up date is chosen, the person who it is assigned to can be changed. The follow-up will be generated for the person listed in this box.
6. Optional – choose an e-mail notification time. If a follow-up date is chosen, the note can also be marked for e-mail notification. An e-mail will be sent to the person listed in the assign to box at the chosen time, on the follow-up date.

7. Click the ✔ to add the note to the grid, as seen below.



Repeat the steps above to add additional notes.

To edit an existing note, click the ✎ icon. This will put the note in edit mode in the grid.



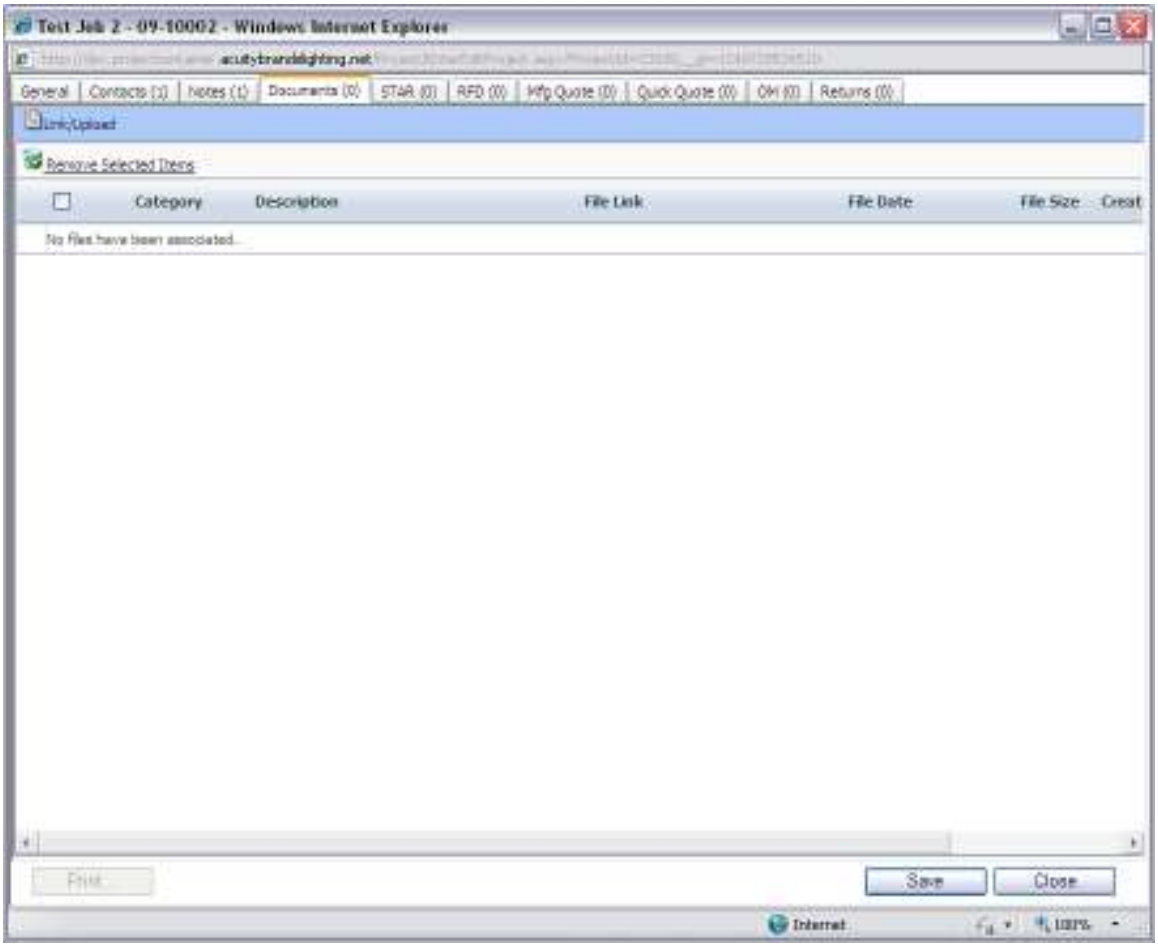
Once you have made changes click the ✔.

To delete an existing note, click the ☐ icon and then click 'Remove Selected Items'.

Note: The Notes tab will also display notes from other applications if they are linked to the project. For example, if there are notes on an order and the order is linked to the project via the OM tab, the order notes will show up on the notes tab within the project. Vice versa, the Project Container notes will show up on the notes tab within the order.

The Documents Tab

For instructions on using the documents tab, please see the **Document Upload User Guide.** This user guide can be found in the help section of Agile

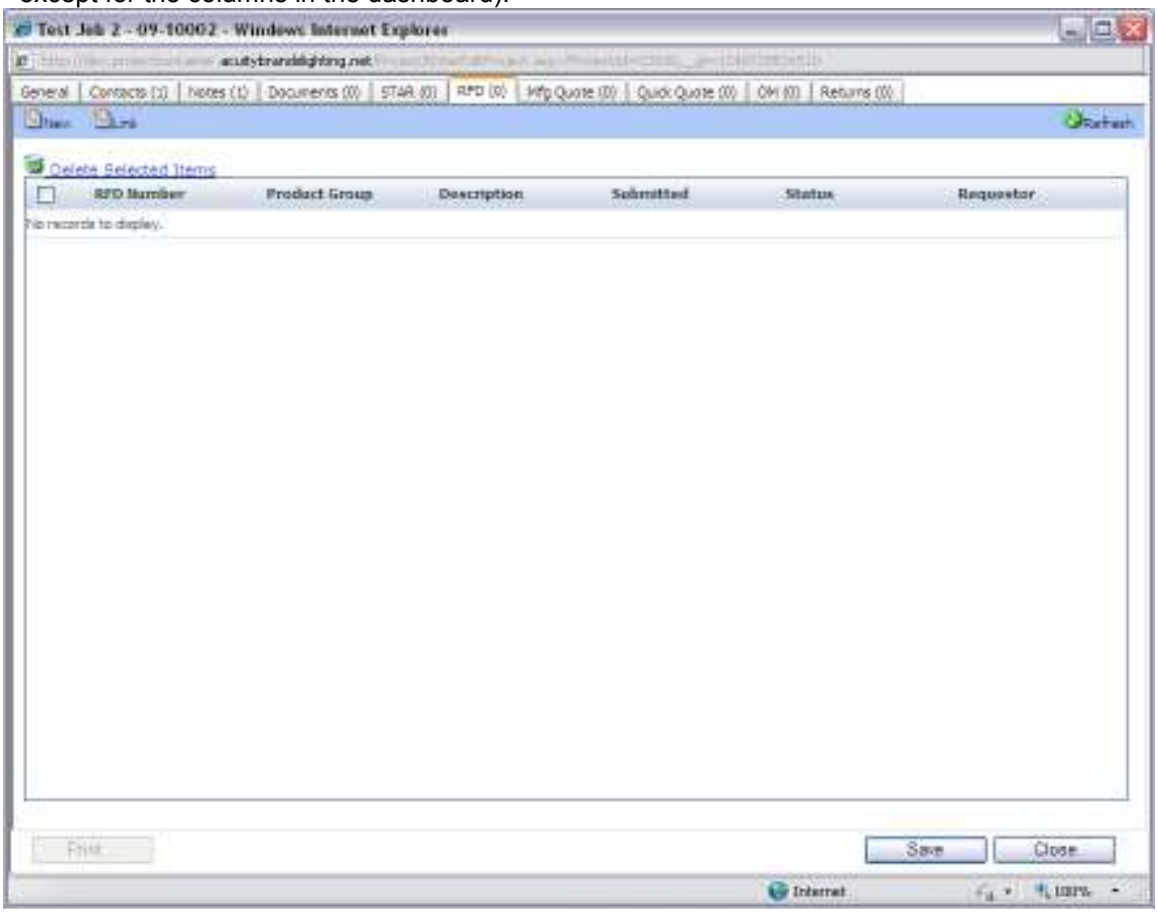


Note: The Documents tab will also display documents from other applications if they are linked to the project. For example, if there are documents on an order and the order is linked to the project via the OM tab, the order documents will show up on the documents tab within the project. Vice versa, the Project Container documents will show up on the documents tab within the order.

The STAR, RFD, Quick Quote, OM and Returns Tabs

These tabs are used to link requests from other applications to a project. This provides a central location for tracking everything related to a project. Each of these tabs functions in the same basic way. This document will use the RFD tab as an example.

When the RFD tab is clicked it displays the screen below (the other tabs look identical to this - except for the columns in the dashboard).



Linking Existing Requests

Use this function if you have previously submitted an RFD through the RFD application and would like to link it to a project.

1. Click the Link button. This will open the RFD search screen in a separate window.
2. Enter the appropriate search criteria to locate the request you would like to link and click Search.
3. Locate the request in the 'Search Results' and click the box in the Linked column (far left). Multiple requests can be linked at once if desired.



4. Once the linked boxes have been checked click Save & Close.

5. The search screen will close and the linked requests will appear in the grid as seen below.

	RFD Number	Product Group	Description	Submitted	Status	Requestor
☐	82627	Emergency	elm	7/17/2008 8:39:21 AM	Submitted	nick_test
☐	82620	AEL	test	7/16/2008 11:23:58 AM	Submitted	nick_test
☐	82617	AEL	Test Description	7/16/2008 11:06:00 AM	Submitted	nick_test

Repeat the steps above to link additional requests at anytime throughout the project.

To open a linked request click the icon.

To delete a linked request click the ☐ icon and then click 'Delete Selected Items'.

Follow the steps above to link requests on the STAR, Quick Quote, OM, Configurations and Returns tabs.

Linking New Requests

Use this function if an RFD does not already exist, but needs to be submitted and should be linked to the project.

1. Click the New button. This will open the RFD entry screen. For instructions on entering RFDs, see the **RFD Agency User Guide**. This user guide can be found in the Help section of Agile.

2. Once the RFD has been entered and submitted it will appear in the grid as seen below.

☐	82617	AEL	Test Description	7/16/2008 11:06:00 AM	Submitted	nick_test

Note: The RFD will also appear in the dashboard of the RFD application.
Note: If an RFD is submitted from the RFD tab in Project Container, but the project is **NOT** Saved before closing, the RFD will **not** be linked to the project, but the RFD **WILL** be submitted and will appear in the dashboard of the RFD application.

Repeat the steps above to create and link additional requests at anytime throughout the project.

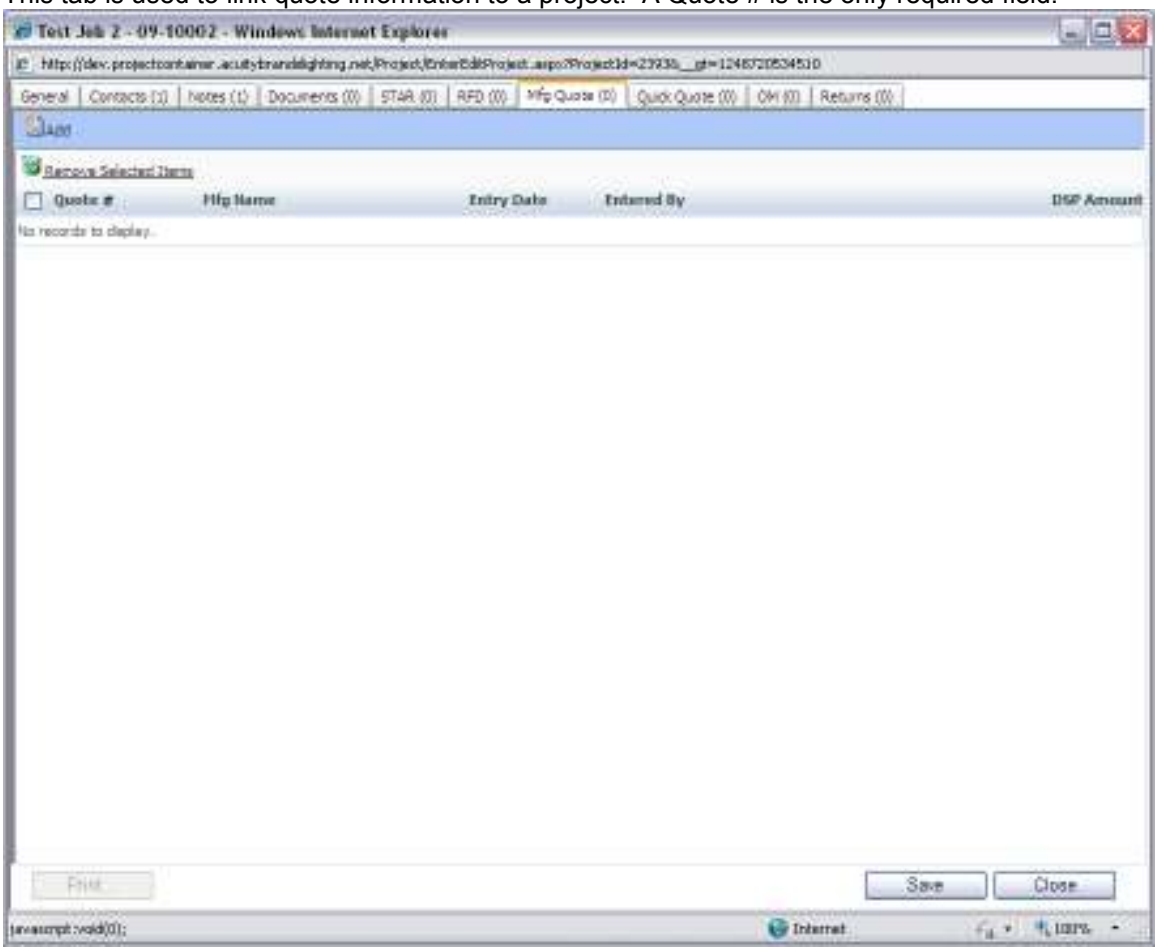
To open a linked request click the icon.

To remove a linked request click the ☐ icon and then click 'Delete Selected Items'.

Follow the steps above to create and link requests on the STAR, Quick Quote, OM, Configurations and Returns tabs.

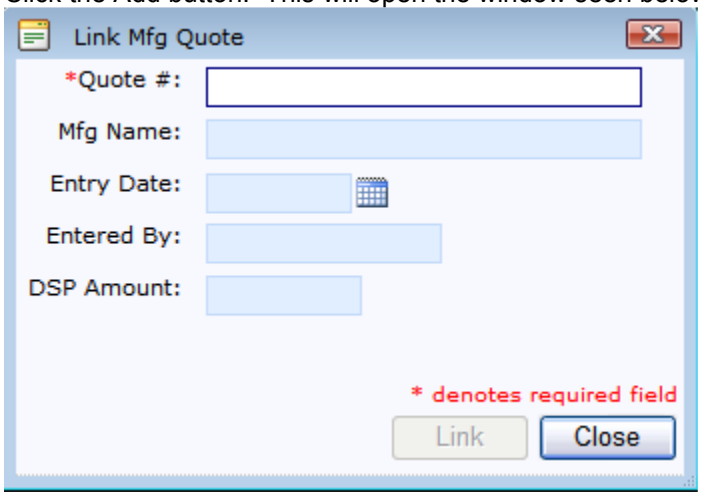
The Mfg Quote Tab

This tab is used to link quote information to a project. A Quote # is the only required field.



Adding Quotes

1. Click the Add button. This will open the window seen below.



2. Enter a Quote #.
3. Optional – enter an Mfg Name.
4. Optional – choose an Entry Date.
5. Optional – enter the person who entered the quote.
6. Optional – enter a DSP Amount.
7. Click the Link button. The link will be added. To add additional quotes, repeat the steps above. When finished click the Close button. The quotes will appear in the grid as seen below.

Quote #	Mfg Name	Job Name	Entry Date	Entered By	DSP Amount
12345	Test mfg	Studio	08/27/2008	Nick	$6,000.00
55689	Test 2	Mall		Nick	$2,300.00

To remove an existing quote click the  icon and then click 'Remove Selected Items'.

Editing Fields from the Dashboard

Certain fields on the General tab can be updated directly from the dashboard. To put a project in edit mode on the dashboard, click the icon. This will put the line in edit mode as seen below. The fields that can be updated in this mode will be displayed as either textboxes or dropdown lists.

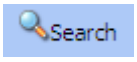


Once you have made changes click the to Save.

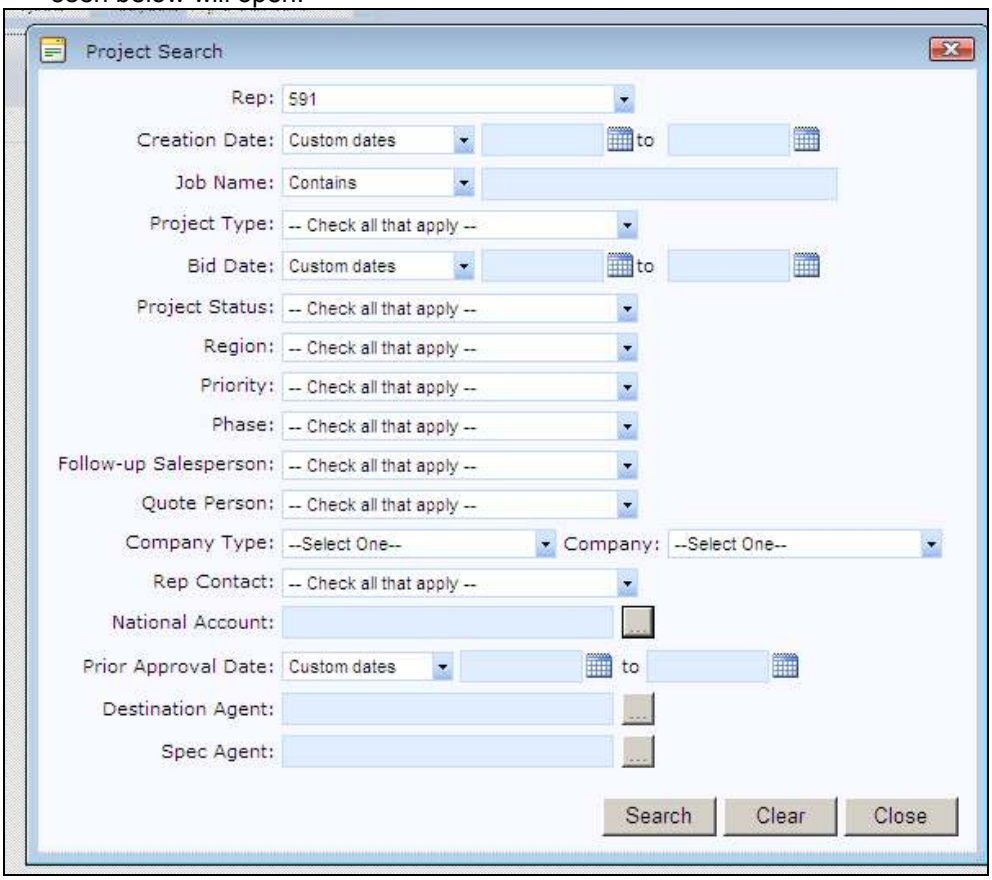
Searching and Managing Views/Layouts

When you search for projects in Project Container the results are displayed in the dashboard. The results of any search can be saved as a custom view. Custom views can be filtered to by changing the Current View dropdown at the top of the dashboard. For instructions on saving custom views please see the **Managing Views** portion of this section.

Searching

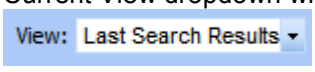
1. To begin a search, click the 

button at the top of the dashboard. The screen seen below will open.



2. Fill in the fields you would like to search by (fill in as few/many fields as you would like).
3. Click Search.

The search screen will close and the search results will be displayed in the dashboard. The Current View dropdown will filter to 'Last Search Results'

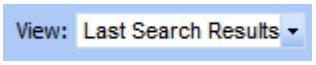


To Export your search results to Excel, click the Export button.

To save your search results as a custom view, see the **Managing Views** portion of this section.
To perform another search, follow the steps above.

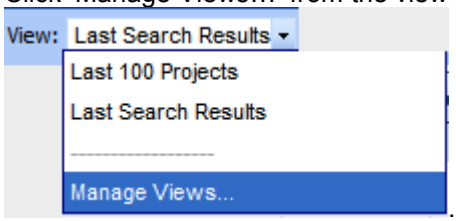
Managing Views

Each time a search is performed, the criteria for that search are saved as 'Last Search Results' in the Current View dropdown list.

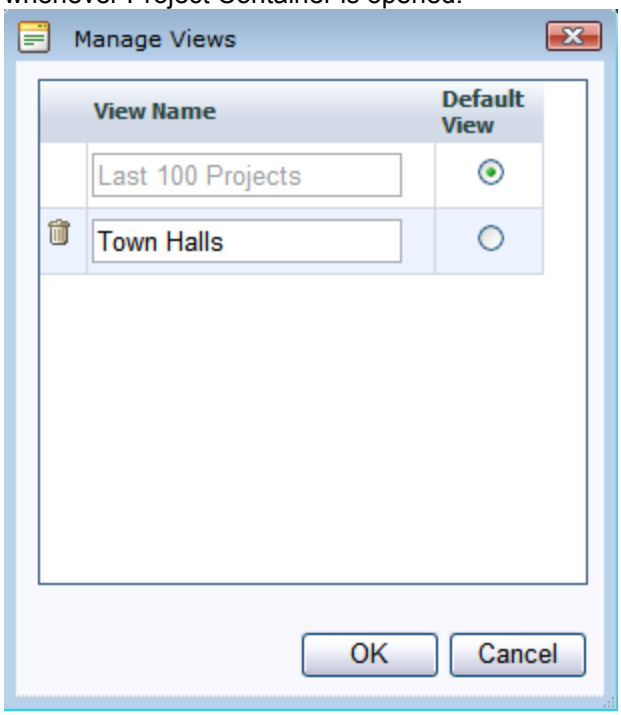


Follow the steps below to save the last search results as a custom view.

1. Click 'Manage Views…' from the view dropdown list.

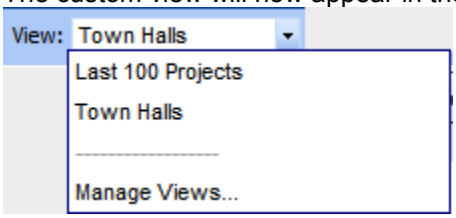


2. Locate 'Last Search Results' and rename it. To set the search as your default view, click the circle in the Default View column. The Default View will automatically display whenever Project Container is opened.



3. Click OK.

The custom view will now appear in the Current View dropdown.



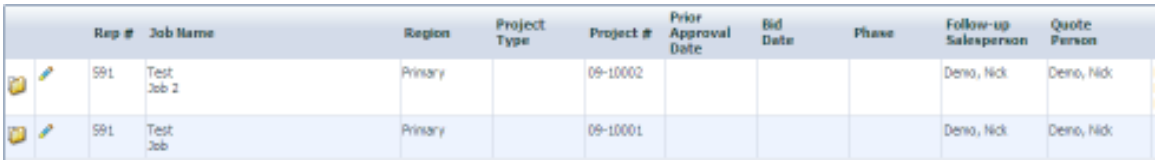
Follow the steps above to save additional search criteria/results as custom views.

Managing Layouts

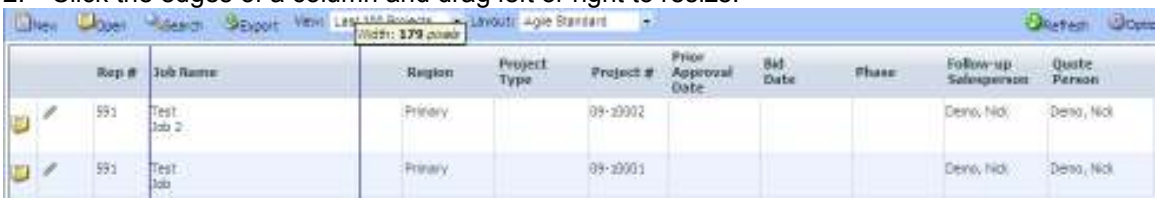
The columns on the dashboard can be rearranged and resized. The results can be saved as a custom layout. You can save multiple custom layouts by following the steps below.

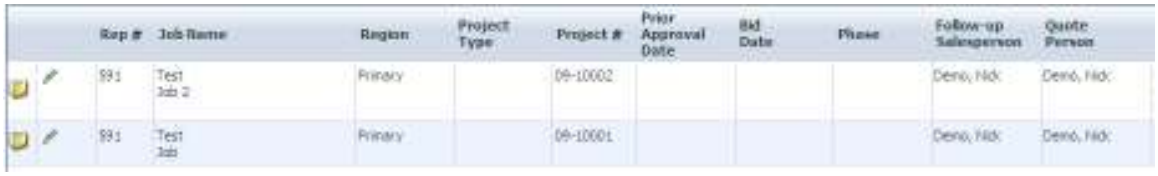
1. Click a column header, drag it to the desired location and let it go.



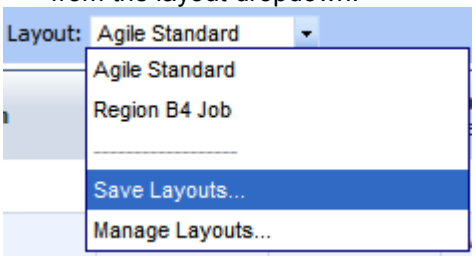


2. Click the edges of a column and drag left or right to resize.

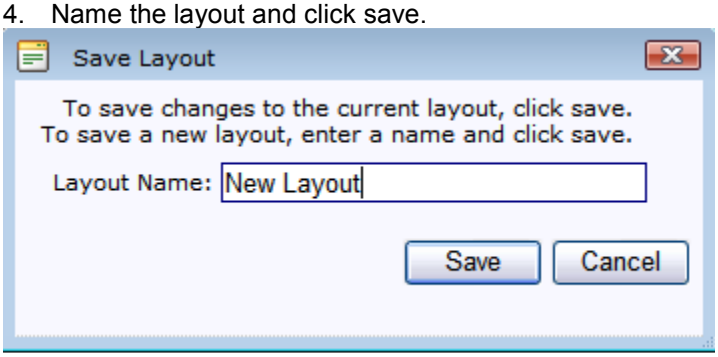




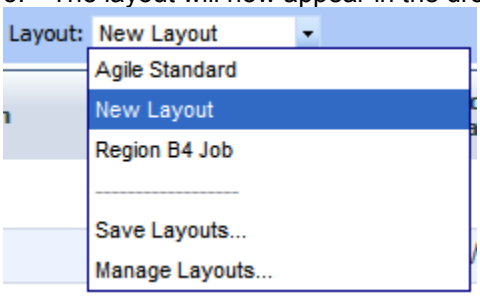
3. Once all columns are in the desired locations at the correct size, click 'Save Layouts…' from the layout dropdown.



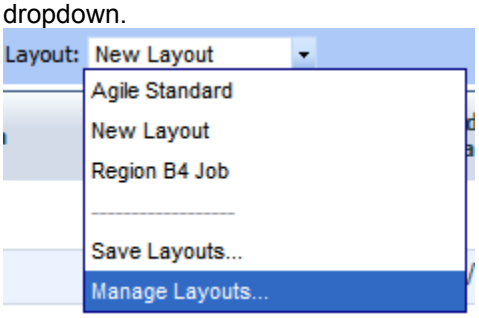
4. Name the layout and click save.



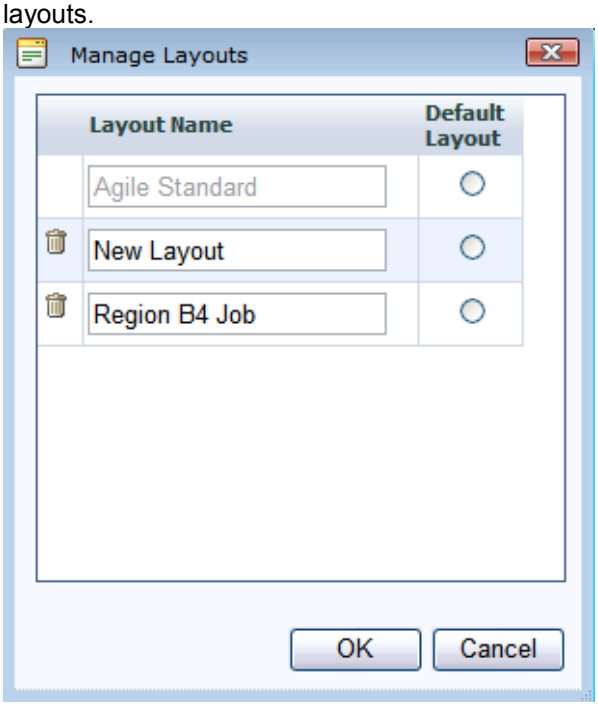
5. The layout will now appear in the dropdown and can be switched to at any time.



To rename or delete previously saved layouts, click the 'Mannage Layouts…' button from the dropdown.

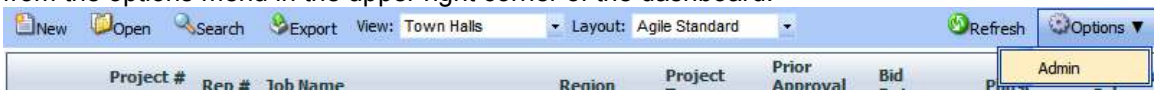


A window similar to the Manage Views window will open where you can rename or delete layouts.



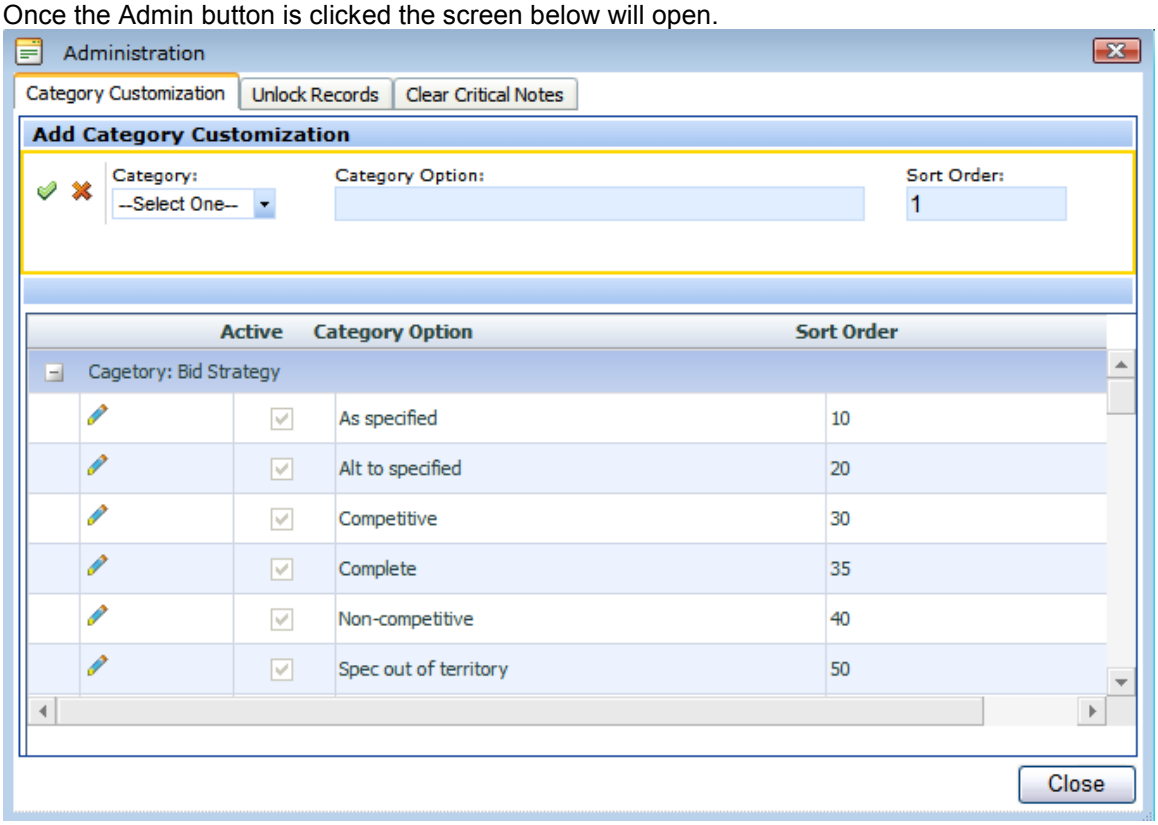
Administration

The Project Container Administration screen is accessed from the upper right corner of the dashboard. This screen allows you to customize certain dropdown lists in Project Container. These lists are: Bid Strategy, Project Type, Construction, Priority, Phase, Region, Lost Reason, Package Won, Rep Won, Notes Category and Documents Category. The Administration screen also allows you to unlock records that are locked by other users and clear critical notes from projects. To open the Administration screen, click the Admin button from the options menu in the upper right corner of the dashboard.



Note: You will only see the Admin button if your LAN administrator or principal has given your account the role of Project Container Administrator.

Once the Admin button is clicked the screen below will open.



Customizing Dropdown Lists

Project Container was released with a standard set of items in each dropdown. Existing items can be changed and new items can be added at your discretion.

Note: Items that are inactivated will still appear in the dropdown list with an ***inactive*** notation at the end. For this reason it is recommended that, whenever possible, you modify the names of existing items instead of adding new items. Instructions on editing existing items can be found later in this section.

Editing Existing Items

1. Locate the item you would like to modify and click the icon. This will put the line in edit mode.

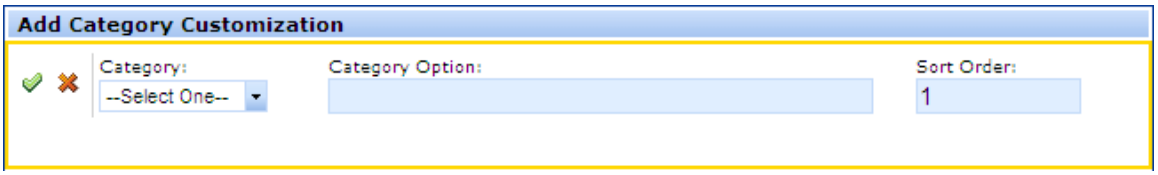


2. Change the category option and/or sort order.

3. Click to save your changes.

Note: Once you update an existing category name, any record with the previous label will be automatically updated to the new category name. If you want to keep a record of the initial category option, you should add a new record and inactivate the first.

Adding New Items



1. Choose a category

2. Enter the Category Option (what you want to appear in the dropdown)

3. Optional – enter a sort order (items will appear in the dropdown in numerical order)

4. Click

Repeat the steps above to add additional items.

Inactivating Existing Items

1. Locate the item you would like to inactivate and click the icon. This will put the line in edit mode.

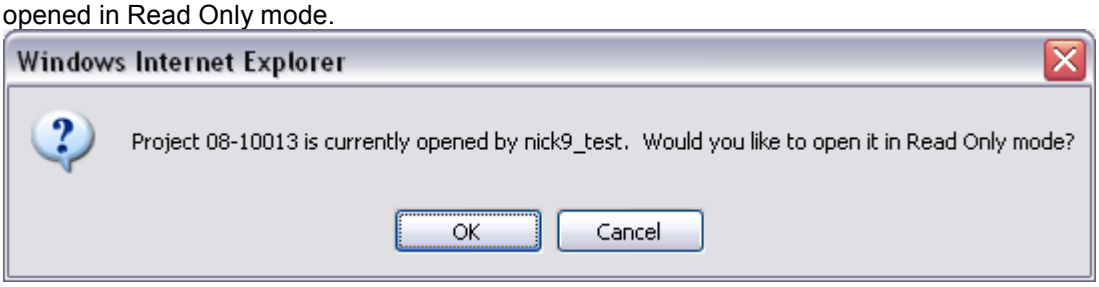


2. Uncheck the box in the active column and click to save your changes. Follow the same steps to activate an item that was previously inactivated.

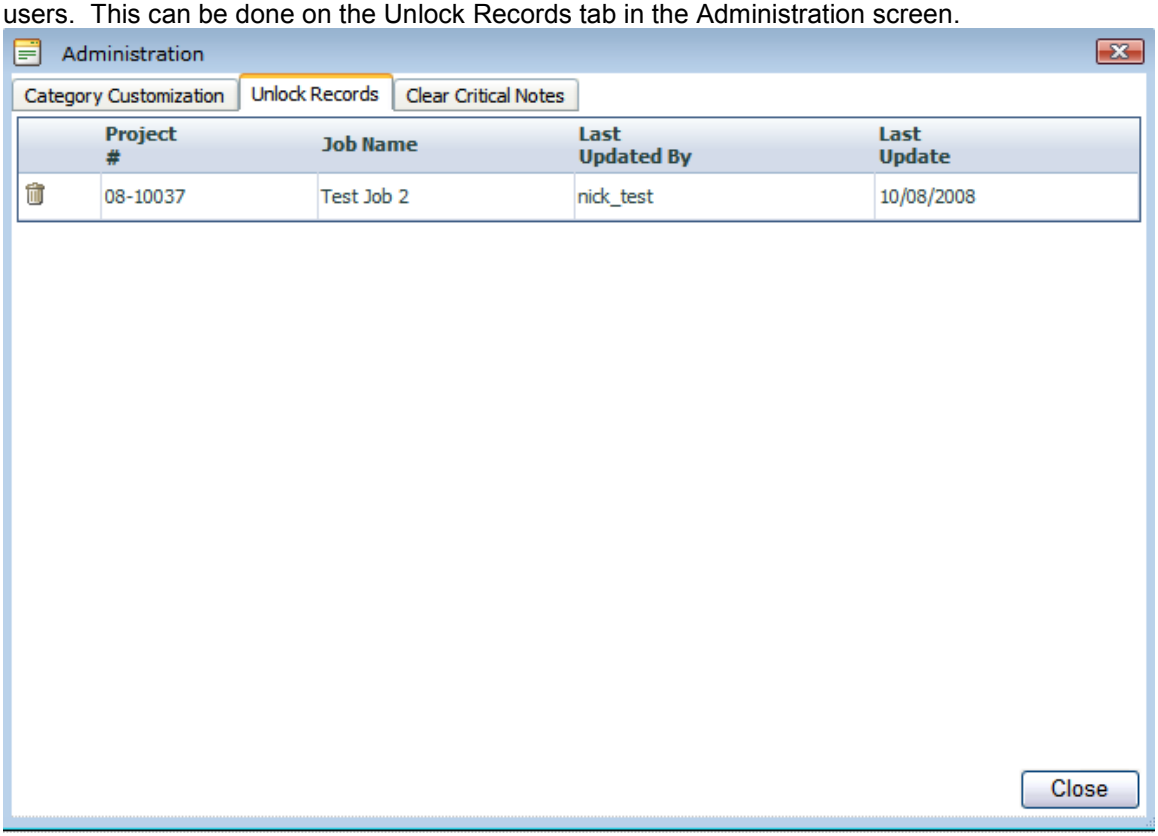
Note: As stated at the beginning of this section, Inactive items will still appear in the dropdown. It is recommended that you change the names of existing items instead of inactivating old items and adding new.

Unlocking Records

Two users cannot edit a project at the same time. If another user has a project open at the time you try and open it the following message will be displayed and the project will be opened in Read Only mode.



If you are an administrator you have the ability to unlock records that are locked by other users. This can be done on the Unlock Records tab in the Administration screen.



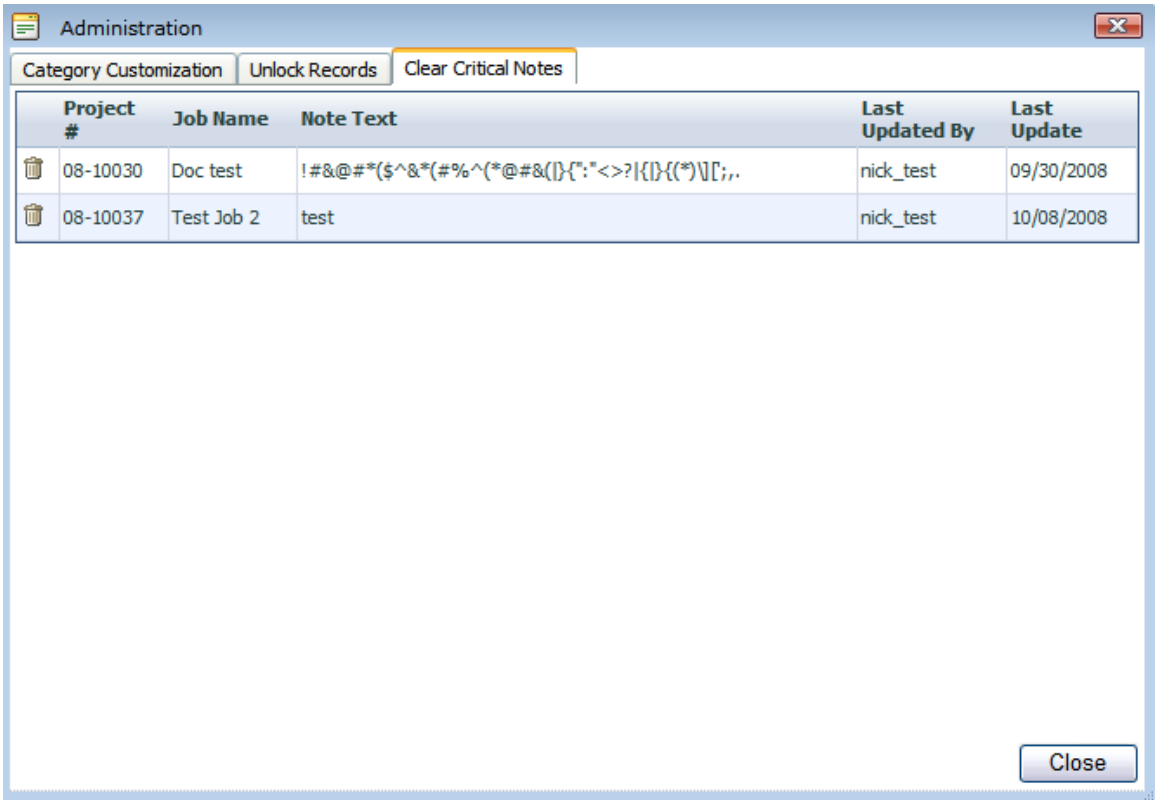
To unlock a record, locate it in the grid and click the 🗑.

The following message will be displayed. Click OK if you wish to delete the unsaved changes of the user who has the project open.



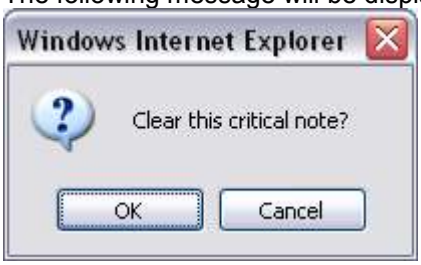
Clearing Critical Notes

Notes can only be edited or deleted by the user that entered them. Therefore, if a note is marked as critical it can only be marked as not critical by the user who entered it. However, if you are an administrator you have the ability to clear critical notes. This can be done on the Clear Critical Notes tab in the Administration screen.



To clear a critical note, locate it in the grid and click the 🗑.

The following message will be displayed. Click OK to mark the note as not critical.

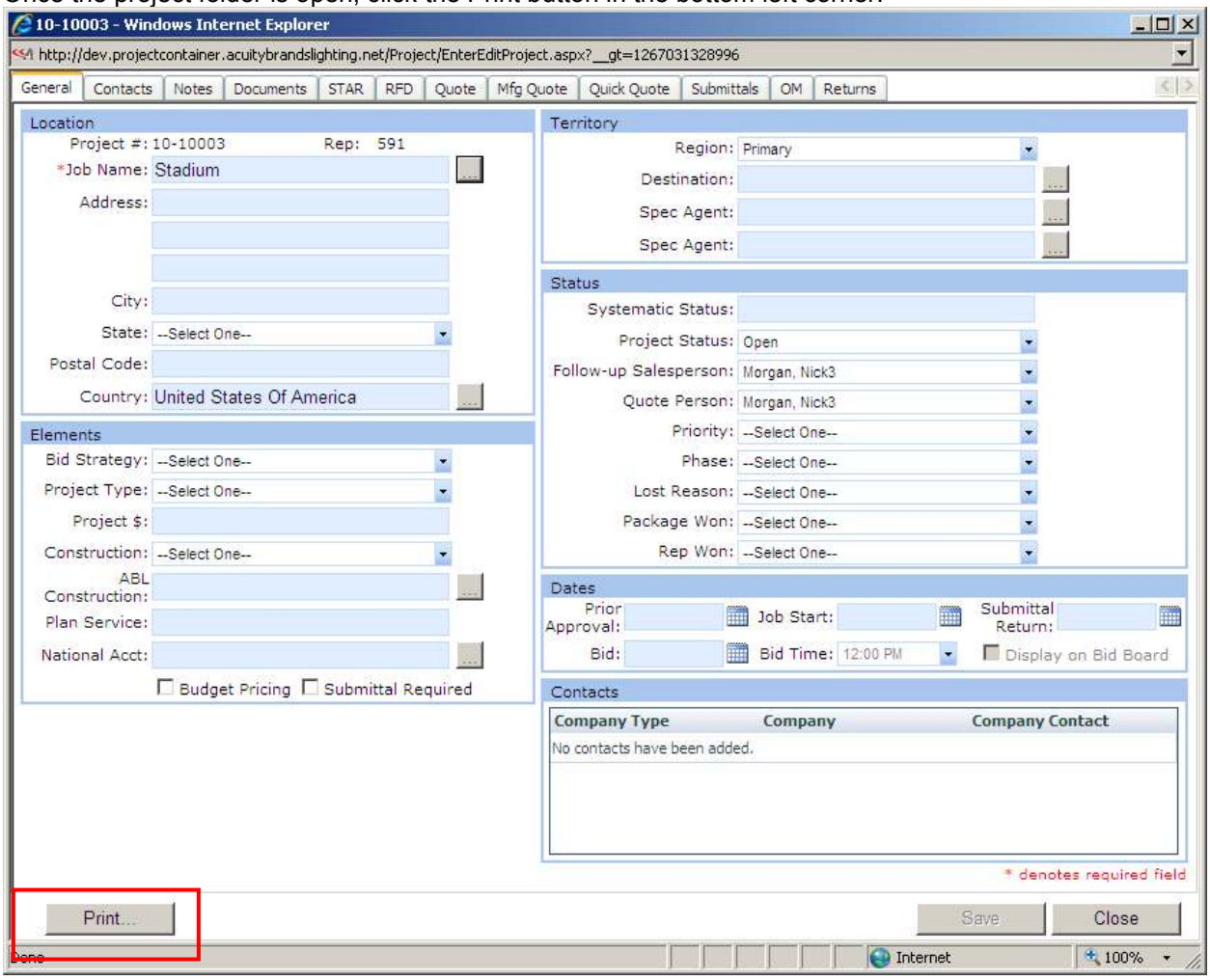


Note: Clearing a critical note will ***not*** delete the note. It will only mark the note as not critical.

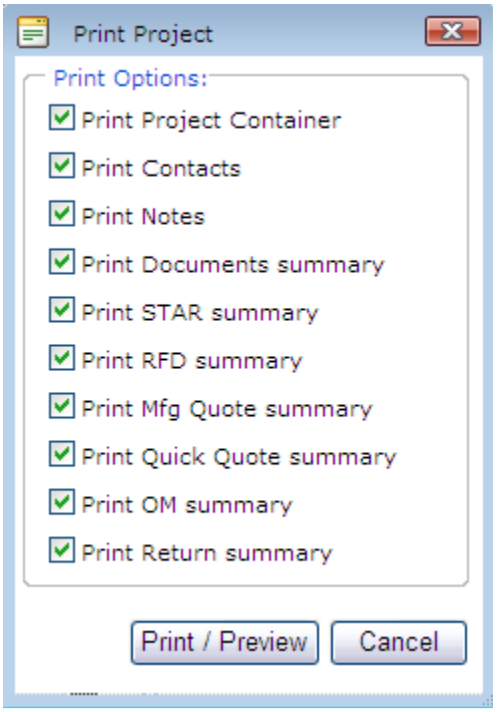
Printing

A project folder can be exported to a PDF file for printing/filing purposes. To export a specific project folder to a PDF, first locate and open the project from the dashboard.

Once the project folder is open, click the Print button in the bottom left corner.



Next, check the tabs you do not want to be included in the PDF and click the Print/Preview button.



Once the file has been prepared you will be presented with a dialog to Open or Save the file.

