Projects

September 10, 2026

Projects

Projects overview

A project record is the saved information managed through the Projects list and its record surfaces. Use the list to find a project or start a new one; use the record surface to review or maintain its information and related tabs.

If you need to…	Go to
Reach the list and choose an existing project or a new one	Find a project
Review fields, options, tabs, and registration surfaces	Understand the project record
Enter or change project information	Create or update project information
Interpret differences between new and saved records	Handle project surface variations
Correct a Projects validation message	When project work goes wrong
Continue with jobs, contacts, files, or registrations	Continue from the project record
Work in the project-management workspace	Project management workspace
Work with contacts	Contacts overview
Work with files	Libraries and files
Work with registrations	VL registrations

Before you start

Prerequisites

- You are signed in and have access to the Projects feature.
- Your company subscription includes Projects. The project surfaces are shown when
  the Projects feature is included.

- To use a saved record's tabs, open an existing project record. The record tabs are shown when the project has been saved.
- To use a registration form, the registration feature must be available to your company and you must have access to edit the project.
- Have the project name and the information you want to enter ready before you open
  the form.

The form can show required markers for some fields according to your company's setup.
Treat a field with a required marker as mandatory before saving. The new and saved record surfaces can therefore show different fields or requirements.

Find a project

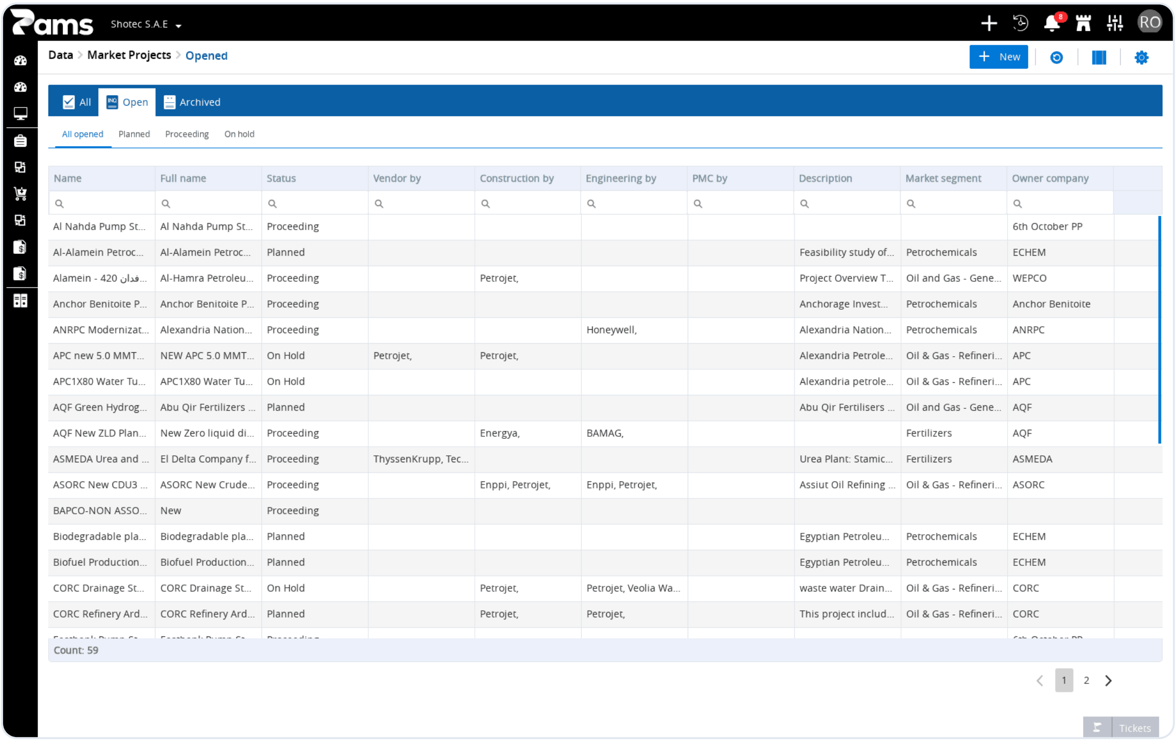
The Projects list is where you locate an existing project or open the new-project surface. Its current list state and visible headers tell you which records and information you are viewing.

Prerequisites

- Know whether you need an existing project or a new project.
- For an existing project, have a project name or another identifying value visible in the list.

Steps

1. Open the Projects list.



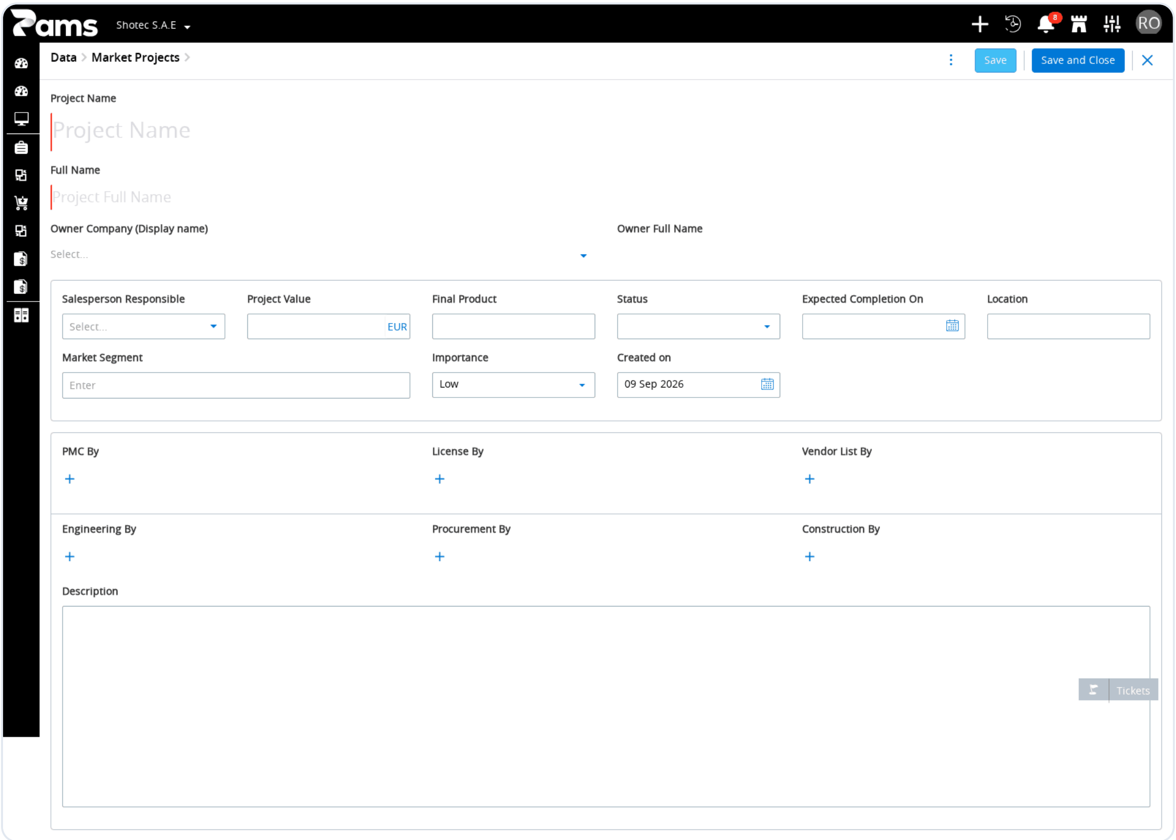
2. Select **Open** to view the open-project list.

3. Use the visible headers to identify a row.

   The current list shows `Name`, `Full name`, `Status`, `Vendor by`, `Construction by`, `Engineering by`, `PMC by`, `Description`, `Market segment`, and `Owner company`.

4. Choose the path that matches your task.

If you need to…	Select
Open an existing project	The project row
Start a new project	**New**



Result: The existing project record or the new-project surface is open.

Understand the project record

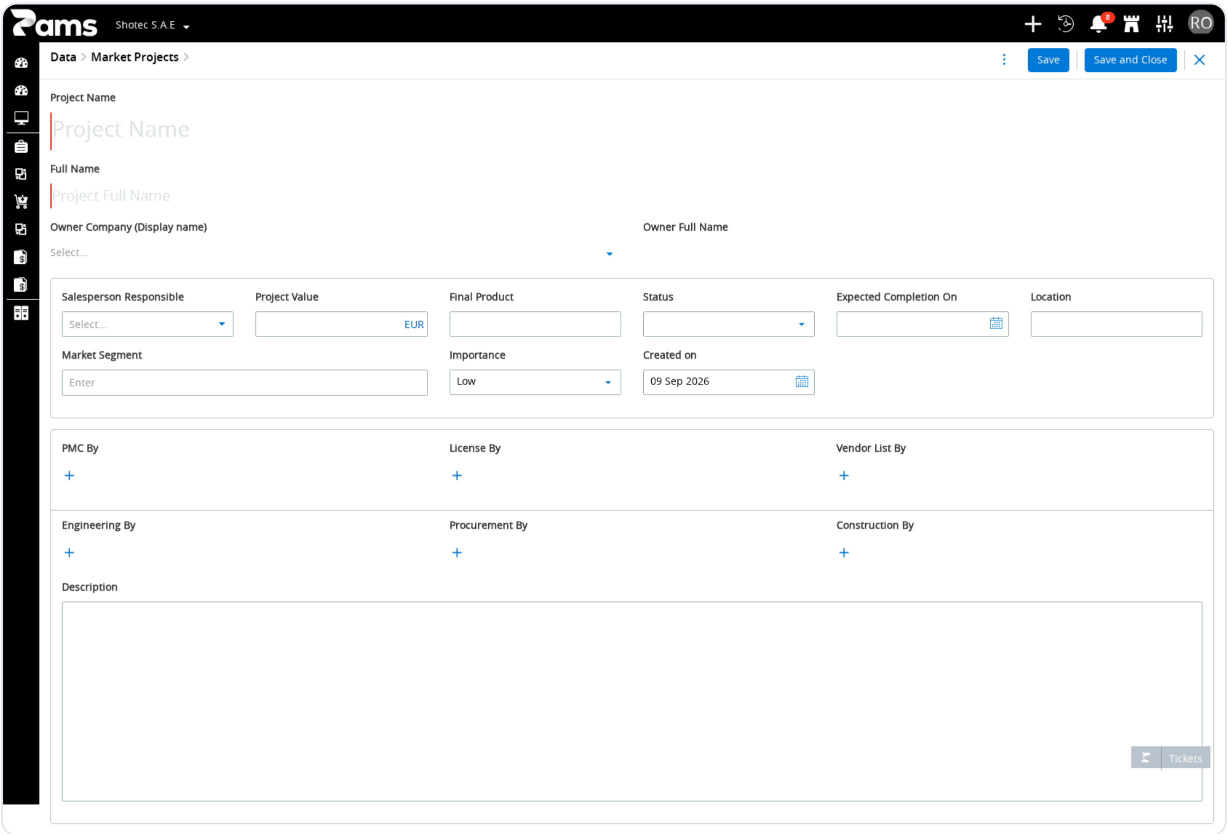
The project record holds project details first, then saved-record tabs for related work. A registration is a related project entry with its own vendor, status, registration number, and registration date.

Project details

The main details area includes the following fields:

Field	What to enter or choose
Project Name	The project's name. It is required on a new project and required only where your company configures it on an existing project.
Full Name	The full project name. This field is required only when your company setup marks it as required.
Sales Responsible	The responsible salesperson.
Estimated Cost	The estimated cost. The value cannot be below `0`.

Field	What to enter or choose
Final Product	The final product.
Status	Choose one of `Proceeding`, `Completed`, `OnHold`, `Planned`, `Canceled`, or `Closed`.
Expected Completion On	The expected completion date. This field is required only when your company setup marks it as required.
Location	The project location.
Market Segment	Choose one or more of `Oil and Gas - General`, `Chemicals`, `Petrochemicals`, `Fertilizers`, `Water and Waste water`, `Electricity and Power`, `Food and Beverage`, `Engineering and Contracting`, `Service & Maintenance`, `Pharmaceutical`, `Paper & pulp`, `Iron & Steel Industry`, `Automotive`, `General Industries`, `Military Defense`, `Military Production`, `Oil & Gas - Upstream`, `Oil & Gas - Refineries`, `Oil & Gas - Marketing`, `Oil & Gas - Pipeline`, `Cement Industry`, `Sugar Industry`, `Mining`, `Oil & Gas Down Stream`, `Agriculture`, `Textile & leather products`, `Construction`, `Computer-Software`, `Marine`, `Ceramic`, or `ZZ-doc-Enter-Market-Segment-Nam`.
Importance	Choose `Low`, `Normal`, `High`, or `Highest`.
Created on	Enter a date when your company setup marks **Created on** as required.
Description	The project description.



Saved-record tabs

After the project is saved, the record can show **Comments**, **Attachment**, **Contact Persons**, **Project Jobs**, **Registrations**, and **Last Modifications**. These tabs organize related work around the project rather than changing the main project details.

Registration dialog

In **Registrations**, select **New** to open `New Registration`. The dialog contains **Vendor**, **Status**, **Registration Number**, and **Registration date**.

The **Status** list contains `Registered`, `Proceeding`, and `Not Registered`.

Create or update project information

Enter project information on a new project or change the details of an existing project with this procedure.

Prerequisites

- Open the new-project surface or an existing editable project record.
- Have the project information ready.

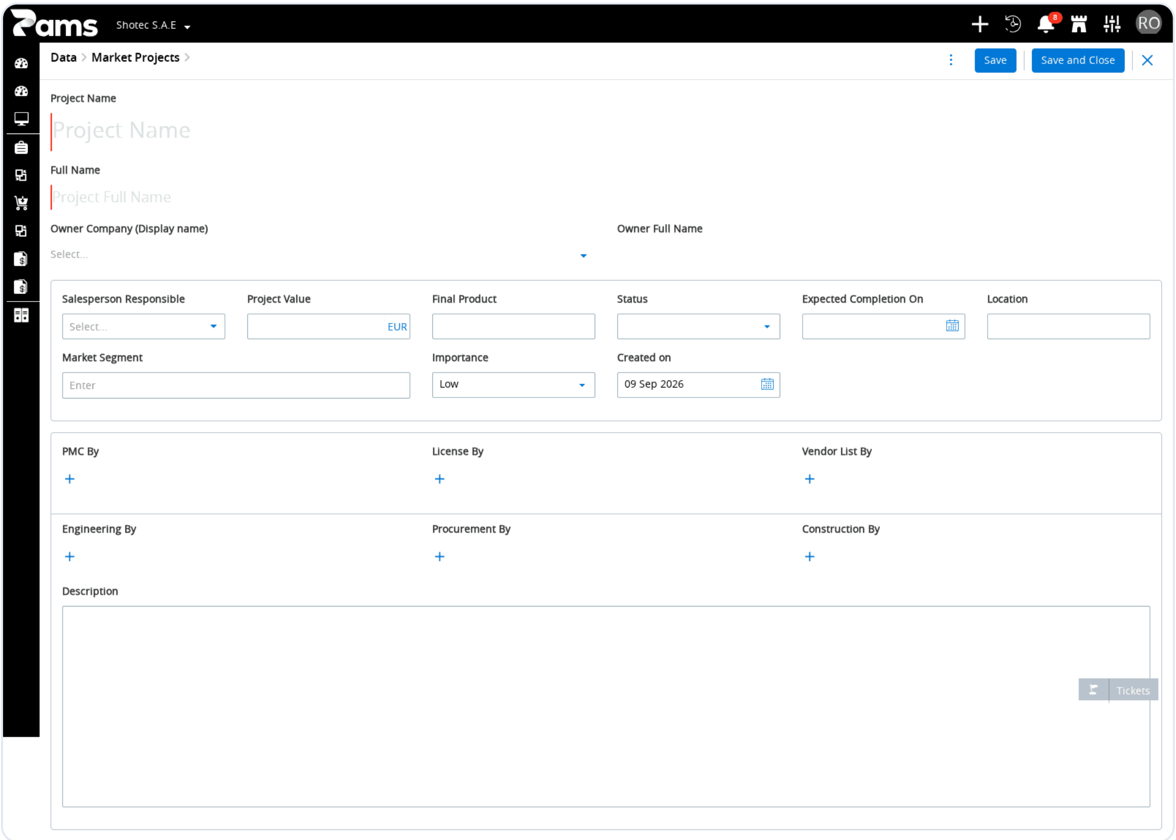
- Use the required markers currently shown on the form; some requirements depend on
  your company's configuration.

Steps

1. In **Project Name**, enter the project name.
2. In **Full Name**, enter the full project name when the field is shown.
3. In **Sales Responsible**, choose the responsible salesperson when one is needed.
4. In **Estimated Cost**, enter a value of `0` or more.
5. Complete the remaining project fields that apply to your work.
6. In a choice field, use the option set shown for that field.

Field	Options
Status	`Proceeding` ; `Completed` ; `OnHold` ; `Planned` ; `Canceled` ; `Closed`
Market Segment	The 30 values listed in Project details
Importance	`Low` ; `Normal` ; `High` ; `Highest`

7. Select **Save** to save the project and remain on the record.
8. Select **Save and Close** to save the project and leave the form.



Result: The project form shows the available save controls **Save** and **Save and Close** for completing the project-information task.

Handle project surface variations

The project surface changes with the record state and your company's setup. A new project uses the new-record form; an existing project uses the saved-record form and can expose related tabs.

What changes	What you see
New versus existing record	**Project Name** is shown for a new record and a separate existing-record version is used for a saved record.
Company subscription	The project details surface is available when Projects is included in the subscription.
Required-field configuration	**Full Name**, **Expected Completion On**, **Created on**, and the existing-record version of **Project Name** are required only where configured.
Saved-record state	**Comments**, **Attachment**, **Contact Persons**, **Project Jobs**, **Registrations**, and **Last Modifications** are associated with a saved project.
List setup	The Projects list uses the headers visible in your current list layout.

What changes	What you see
Related-data setup	The registration and contact areas use the choices and rows available for your company.

The list layout can present columns selected for your account. Work from the headers you can see rather than expecting every project list to have the same columns.

> **Note:** The headers in your Projects list are the headers to use when you identify a project row.

When project work goes wrong

The Projects surface reports the following messages for the listed conditions:

What you see	What it means	What to do
`Just '_' '-' And '.' Characters Accepted`	A project name or related value contains a character outside the accepted pattern.	Remove the unsupported character and enter the value again.
`Forbidden characters detected. Please remove them and try again.`	The list filter contains a forbidden character.	Remove the forbidden character from the filter and apply it again.
`You already have a contact with this name`	The Contact Persons surface already has a contact with this name.	Use a different contact name or review the existing contact in Contacts overview.
`Your request was completed successfully`	The shared file or contact surface completed the requested operation.	Continue from the surface you opened.
`Just '_''‘-''.' And '&' Characters Accepted`	The shared file surface rejected a name containing an unsupported character.	Remove the unsupported character and enter the file or folder name again in Libraries and files.

Continue from the project record

The project record is the starting point for related project work. Choose the surface that matches the next job instead of repeating the project-information procedure.

If you need to…	Use
Review or manage project jobs	Project management workspace

If you need to…	Use
Work with people associated with the project	Contacts overview
Add or review attachments	Libraries and files
Review project registrations	VL registrations
Read comments or modification history	**Comments** or **Last Modifications** on the saved project record

Prerequisites

- Open a saved project record to use its related tabs.
- Select the tab that matches the work you need to continue.

Steps

1. Select the tab for the work you need to continue.

If you need to…	Select
Review or manage project jobs	**Project Jobs**
Work with people associated with the project	**Contact Persons**
Add or review attachments	**Attachment**
Review or add project registrations	**Registrations**

2. Select **Comments** or **Last Modifications** to review the related record history.

Result: The selected companion surface is open for the next project-related task.