PAMS (V2 PIPELINE RUN)

Managing Registration Data

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Understand Where Registration Data Is Stored

Pams keeps **Registration Data** in two places: on the **Client** record and on the **Project** record. Choosing the correct location helps your team use the right registration information when working with a client, preparing a project, or reviewing existing work.

Use the **Client** record when the registration information applies to the organization as a whole. For example, information shown in the client's **Registration Data** area can be retained as reusable client information instead of being entered again for every new project. When several projects belong to the same client, the client record gives your team one place to review the organization-level registration details.

Use the **Project** record when registration information applies only to one project. A project may have its own registration requirement, a different **Registration Number**, or a project-specific **Registration Date** that should not replace the information held for the client. Entering those values in the project's **Registration Data** area keeps them tied to that individual project.

Before you consider registration information complete, review both records:

- Open the related **Client** record and check its **Registration Data**.
- Open the relevant **Project** record and check its separate **Registration Data**.
- Compare the values to confirm whether the project uses the client's general information or requires its own value.
- Keep project-specific information on the project even when similar information appears on the client record.

[SCREENSHOT: A Client record and a Project record shown side by side, with the Registration Data area highlighted on each record]

Registration Data is maintained separately from product information. Continue using the product records described in Managing Product Records for product-specific details, and use the **Client** and **Project** records for registration information.

Review Registration Requirements Before Editing Records

Start by confirming what registration information is required before changing anything in Pams. Registration requirements may apply to the client organization, to a particular project, or to both. Checking this first prevents a client-wide value from being entered only on one project, or a project-specific value from being saved on the general client record.

Collect the current registration details from the client contact, project owner, or the information provided for the work. Compare the information you receive with the values already displayed in the **Registration Data** area. Pay particular attention when a **Registration Number** or **Registration Date** has changed, because an older value may still be correct for an earlier project while no longer being correct for new work.

Before you begin, make sure you can open and save both of the following records when needed:

- The relevant **Client** record in **Clients**.
- The related **Project** record in **Projects**.
- The **Registration Data** area on each record.
- The **Save** option after making changes.

Use the following questions to decide where each value belongs:

Question	Where to maintain the information
Does the information apply to the client organization generally?	**Client** record
Does the information apply only to one project?	**Project** record
Does the project require a value that differs from the client's current information?	**Project** record, while keeping the client record accurate
Is the same information needed for the client and the project?	Review and maintain both records as required

Do not assume that an existing client value automatically answers a project requirement. Open the project and confirm what is shown in its own **Registration Data** area before moving forward with project work.

Maintain Registration Data on a Client Record

Use the **Client** record to maintain registration information that belongs to the client organization and can be reused across its work in Pams. This is the appropriate place for information that should remain available whenever your team works with that client.

1. Open **Clients** and select the client whose registration information needs attention. Confirm that the record shows the intended **Client** before editing any values.
2. Find the **Registration Data** area on the client record. Review the information already saved, including any visible **Registration Number** and **Registration Date**. Compare these values with the current registration details you collected.
3. Add the missing registration information or replace information that is no longer current. Enter only the values that apply to the client organization as a whole. If a value is unique to one piece of work, keep it for the related **Project** record instead.
4. Click **Save** after completing your changes. Wait for the client record to remain open or return to its saved view before leaving the page.
5. Review the **Registration Data** area again after saving. Confirm that the value you entered is visible on the correct client record and that no unrelated client information was changed.

[SCREENSHOT: A Client record with the Registration Data area highlighted, showing a Registration Number and Registration Date before Save is selected]

Maintaining reusable information on the **Client** record reduces repeated entry when the same client has multiple projects. It also gives colleagues a consistent place to check the organization-level registration details. When a project has a distinct requirement, do not overwrite the client-level value to make it fit one project; maintain that project's separate information in **Projects**.

Maintain Registration Data for an Individual Project

Use the **Project** record when registration information is required for one specific project. Project-level Registration Data remains associated with that project, allowing it to differ from the general registration information held on the related **Client** record.

1. Open **Projects** and select the project that requires registration information. Check the project details to confirm that it is associated with the intended **Client** before entering or changing any values.
2. Locate the project's **Registration Data** area. Review the values already shown there, then open or refer to the related **Client** record if you need to compare the client-level registration information.

3. Enter or update the registration value required specifically for this project. For example, update the visible **Registration Number** or **Registration Date** only when the project requirement is different from the information maintained for the client generally.
4. Click **Save** on the **Project** record. Keep the project open until the saved values are displayed in its **Registration Data** area.
5. Recheck the project's information after saving. Confirm that the project retains the value you entered and that the related **Client** record has not been changed by mistake.

[SCREENSHOT: A Project record with its Client association and Registration Data area highlighted]

Project-level Registration Data is useful when one client has several projects with different registration requirements. It lets you preserve the client's reusable details while recording the information needed for the individual project. If the project does not have a separate registration requirement, still review its **Registration Data** area so your team can confirm that the project record has been checked.

Keep Client and Project Registration Information Accurate

Registration information stays reliable when you treat the **Client** and **Project** records as related but separate places to maintain data. A change should be made where the information actually belongs, rather than where it happens to be easiest to find.

Use the **Client** record when the client organization has updated registration information that should be reused across current and future work. Updating the client's **Registration Data** changes the reusable information on that client record. It does not replace values that have been entered separately for individual projects.

Use the **Project** record when a project has its own registration requirement. Updating **Registration Data** on a project keeps the change with that project and does not change the underlying **Client** record. This distinction is important when one project has a different registration value, while other projects for the same client continue to use the general client information.

Apply this review practice during regular work in Pams:

- When opening a new **Project**, check the related **Client** record and the project's **Registration Data** area.

- When client registration details change, update the **Client** record and review active projects to identify any project-specific values that may need attention.
- When updating project information, compare its **Registration Data** with the related client information before replacing a value.
- When work is being completed or closed, review the relevant **Client** and **Project** records to ensure the registration information remains accurate for the record history.

[SCREENSHOT: A project linked to a client, with callouts showing that Registration Data can be reviewed separately on both records]

Do not copy a project-specific value back to the **Client** record unless it has become the correct general registration information for the entire client organization.

Resolve Missing or Incorrect Registration Information

When registration information is missing or appears incorrect, first identify which record should contain it. Open both the related **Client** record and the **Project** record instead of assuming the missing value belongs in only one location.

Use the following checks to resolve common situations:

- **Registration Data is missing on a project:** Review the project's **Registration Data** area first. Then review the associated **Client** record to see whether the value is maintained as reusable client information. If the project requires a distinct value, enter it on the **Project** record and click **Save**.
- **Registration Data is missing on a client:** Open the relevant record in **Clients** and inspect its **Registration Data** area. Add the current client-level value only if it applies to the client organization generally.
- **A project displays an outdated value:** Compare the project's **Registration Data** with the current information shown on the associated **Client** record. Keep the project value if it remains correct for that project; otherwise, update the project value and select **Save**.
- **Your change is not visible afterward:** Confirm that you edited the intended **Client** or **Project** record, then check that you selected **Save**. Reopen the record and review the **Registration Data** area to confirm the stored value.
- **You cannot make changes:** Check whether you can save changes on the relevant **Client** or **Project** record. If Pams does not allow editing, ask the person

responsible for Pams access to confirm that you can maintain the required client-level or project-level record.

[SCREENSHOT: The Registration Data area on a Project record, showing where to verify saved information]

Record only confirmed registration information. If the current value is not available, leave the existing verified information unchanged until the correct registration details can be confirmed.

Overview

Registration Data in Pams helps your team keep required registration information with the correct business record. The key decision is whether a value belongs to the client organization generally or to one specific project.

Use the **Client** record in **Clients** for information that should remain available as reusable client information. This supports consistent work when the same client has more than one project. The client’s **Registration Data** area is the place to review and maintain those organization-level values.

Use the **Project** record in **Projects** when the registration information is tied to that individual project. The project’s **Registration Data** area can contain information that differs from the related client record without changing the client’s general information.

The two locations serve different purposes:

Registration Data location	Use it for
Client record	Registration information that applies across the client’s work
Project record	Registration information required only for one project
Both records	Situations where client-level information and a separate project requirement must both be maintained

When reviewing registration information, always confirm the **Client** association on the **Project** record. Then compare the project’s **Registration Data** with the information shown on the related client record. This helps prevent a project-specific value from being treated as client-wide information.

The work is complete only when the correct values are visible after selecting **Save** on the record where they belong. Pams keeps client-level and project-level Registration Data separate, so updating one record does not replace information held on the other.

Prerequisites

Before maintaining **Registration Data** in Pams, have the information and record access needed to update the correct location. Preparing these items before opening **Clients** or **Projects** helps avoid entering incomplete or incorrect values.

Make sure you have:

- The current registration details provided for the client organization or the individual project.
- The correct **Client** record in **Clients**.
- The correct **Project** record in **Projects**, when the registration requirement is project-specific.
- Confirmation of which **Client** is associated with the project.
- Access to edit and **Save** the relevant **Client** record, **Project** record, or both.
- A clear decision on whether the value belongs in client-level **Registration Data**, project-level **Registration Data**, or both locations.

Review existing values before replacing them. In particular, check any visible **Registration Number** and **Registration Date** against the current information you received. A value that appears outdated on one **Project** record may still be correct for another project or may reflect a project-specific requirement.

If the work involves a project that already exists, open the **Project** record and review its **Registration Data** before making changes on the related **Client** record. If the project requires different information, prepare to maintain that value directly on the project rather than changing the reusable client information.

After you have the confirmed details and the right records, use **Save** on each record you update and reopen the **Registration Data** area to verify that the values remain visible.