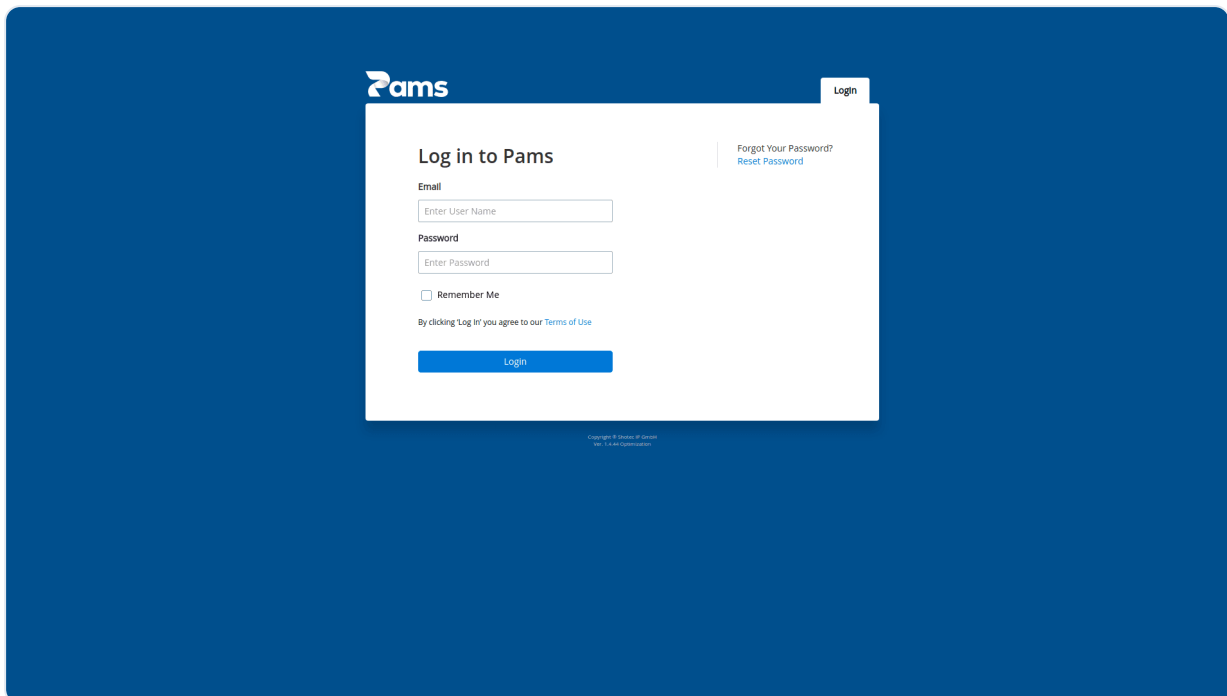


Projects

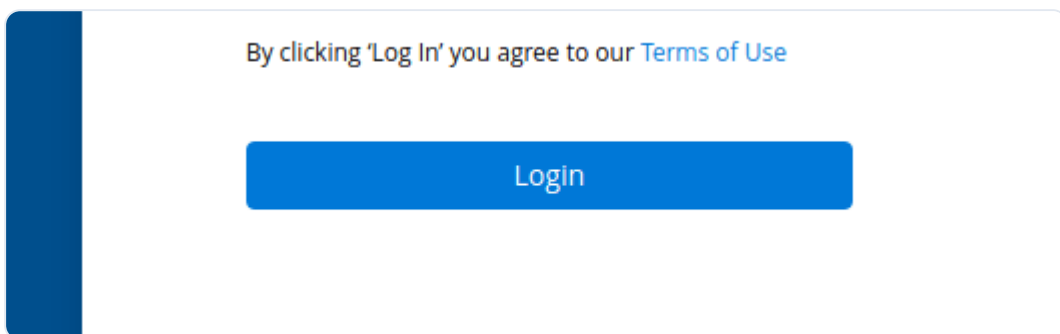
July 29, 2026

Projects

Applications > projects



projects



Overview

Use Projects to maintain project records and their associated project information. Sales representatives, account managers, project managers, purchasing officers, warehouse managers, and finance users can use this area to identify a project by its name and full name, select related items, and record available employee details. Use Projects whenever you need to create, review, update, or remove a project record.

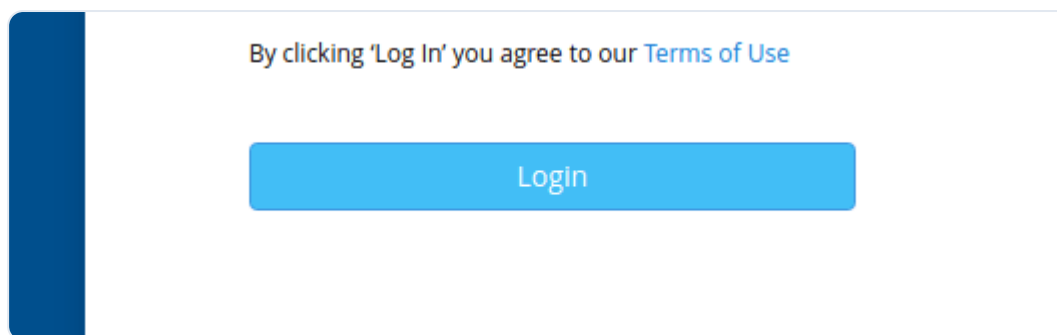
Workflow

1. Sign in before working with projects

1. Enter your credentials in **Enter User Name** and **Enter Password**.
2. Select **Login** to access the application.
3. If you cannot use your current password, select **Reset Password** and follow the available password-reset process.
4. Review **Terms of Use** when required before continuing.

The screenshot shows the Pams login page. The form is titled 'Log in to Pams'. It has two input fields: 'Email' with the placeholder 'Enter User Name' and 'Password' with the placeholder 'Enter Password'. Both fields have a red outline and a red error icon. Below the password field is a 'Remember Me' checkbox. A blue 'Login' button is at the bottom. In the top right corner of the form, there are links for 'Forgot Your Password?' and 'Reset Password'. The Pams logo is in the top left, and a 'Login' tab is in the top right corner of the form area. Small copyright text is at the bottom center.

projects

A screenshot of a login interface. On the left is a solid dark blue vertical bar. To its right is a white rectangular box with rounded corners. Inside this box, at the top, is the text "By clicking 'Log In' you agree to our [Terms of Use](#)" in a small, dark blue font. Below this text is a large, light blue rectangular button with rounded corners and the word "Login" centered in a dark blue font.

Note: Keep your user name and password confidential. Do not save project changes while signed in under another employee's account.

2. Decide whether to review an existing project or create a new one

1. Select **All Projects** to view the available project records.
2. To work with an existing record, select the required project and review its **Project Name** and **Project Full Name**.
3. To create a project record, enter a value in **Project Name**.
4. Enter the complete descriptive name in **Project Full Name**.

Tip: Use a short, recognisable value for **Project Name** and use **Project Full Name** when the complete project description is needed.

3. Add available project information before saving

1. Where selection is required, choose **Select....**
2. Review the entries shown under **Selected items**.
3. Use **Enter** where the screen requires an entered value.
4. Complete available supporting fields as appropriate:
 - **files[]** for file information shown on the project screen.
 - **Title** for the available title value.
 - **Employee Name** for the employee name.
 - **Position** for the employee position.
 - **Department** for the employee department.
5. Select **Save** to create the project record.

At this decision point, choose one of the following:

- Select **Save** when the project name, full name, and required available information are ready to be recorded.
- Select **Cancel** when you do not want to keep the current entries.
- Select **Close** when you have finished reviewing the screen and do not need to continue editing.

4. Decide whether to update or remove a project

1. From **All Projects**, select the project that requires attention.
2. Review **Project Name** and **Project Full Name** to confirm that you have opened the correct record.
3. Update the available project details, selected items, file information, or employee information as required.
4. Select **Save changes** to retain the revisions.

If the project record should no longer be retained, select **Delete** instead of saving changes.

Warning: Confirm the project name and full name before selecting **Delete**. The screen provides a deletion action but does not display a separate project status or approval stage.

Examples

Create and update a project record

A project manager needs to record a project for a customer delivery programme.

1. Sign in by completing **Enter User Name** and **Enter Password**, then select **Login**.
2. Select **All Projects** and begin a new project entry.
3. In **Project Name**, enter `DELIVERY-2026`.
4. In **Project Full Name**, enter `Customer Delivery Programme 2026`.
5. Select **Select...** and review the resulting entries under **Selected items**.
6. Complete the available employee details:
 - **Title:** `Project Manager`
 - **Employee Name:** `Jordan Lee`

- **Position:** Project Manager
- **Department:** Projects

7. Add any available file information in **files[]**.

8. Select **Save** to record the project.

Later, the project manager opens **DELIVERY-2026** from **All Projects**, updates the employee or selection information as needed, and selects **Save changes**. If the entry was created in error, the manager selects **Delete** after confirming the project identity.

Tips

Tip: Review **Selected items** after using **Select...** so that the project record contains the intended selections.

Note: Use **Cancel** when you decide not to retain new or edited information. Use **Close** when you only need to exit the screen.

Warning: Do not use **Delete** as a substitute for correcting a project name. Update the record and select **Save changes** when the project should remain available.

Troubleshooting

Symptom	Likely cause	Fix
You cannot access Projects.	The user name or password has not been accepted.	Re-enter Enter User Name and Enter Password , then select Login . If necessary, select Reset Password .
The required project is not open.	You are not viewing the correct project record.	Select All Projects and choose the project by reviewing Project Name and Project Full Name .
Your edits are not retained.	The record was closed or cancelled without being saved.	Reopen the project, make the required updates, and select Save changes . For a new project, select Save .
The selected information is not as expected.	The selection has not been reviewed after using the selection control.	Select Select... again and verify the entries under Selected items before saving.

Related pages

- [projects — Overview](#)
- [projects — Learning Path](#)