I.Project

Note: Objectives:

1. To understand how projects are used to organize a group of similar products and clients.
2. To understand Roles and how to assign them
3. To add information needed for the training project

A. Project Overview

1. **SAY: Click the Project menu. A Project allows you group together a number of products and clients under a common Project Title. Each Project is assigned its own team members who can be assigned specific duties for the project. These groupings help keep things organized in the Master Batch Records and Batch Production Record areas.**

2. **If the Quality Manager is still logged on, you will not see an Add New Record that will let you create a new project. Only Project Managers can create or edit Projects. Quality Manager – please log off and Project Manager – please log on and click the Project Menu item.**

3. **Click the Add New Record to bring up the Project Definition screen with four tabs. Click the "General" tab. The Title of your project is created as part of Project Definition. It is something you chose to help you remember what you will be producing. You can add a description to help you distinguish one project from another. Enter "Training Project" in the Project Title.**

B. Project Definition – WIP/FG Part

4. **Click the "WIP/FG Part #" tab. This is where you can add in the products you want to manufacture. This is different from naming the Project. You can create as many projects as you like and you can add in as many products as you like into each project.**

5. **Click the "WIP/FG Part #" button to bring up the Product Name Selection screen. Click the blue hyperlink Part # to bring up the screen where you will define your product name. The Product Name is the combination of the material name, strength, container and suffix. Any of the strength, container and suffix fields can be left blank. Each product name combination can be used only once so each combination has to be unique.**

6. **Enter "6 mg/mL" in the Strength field. Click the update icon under Primary Container and select "1 oz. Amber glass bottle". Press confirm to create your complete Product**

Name. The Product Name can be edited or deleted from the Project up until the time it is used in an approved Master Batch Record.

C. Project Definition – Client

7. **Click the "Client" tab. You should see your company in the list. In this practice session, you will be making a product for your company so your company is also your Client. You can add as many Clients as you like. When you create a Master Production Record, you will associate any of the Product Names in this Project with any of the Clients in this Project.**

D. Project Definition - Personnel

8. **SAY: Click on the Personnel tab. For each project, you will select the personnel that will be assigned to that project and you will select their job function. This is where you assign responsibilities and permissions for each person. You should see your Project Manager and your Quality Manager on this list. The system automatically adds every person with the Primary Role of Project Manager or Quality Manager to this list. You can modify or delete any one on this list at any time.**

9. **Click the update icon next to the person with the role of Project Manager. Click the check box next to MPR Approver. This will allow them to approve or reject a Master Production Record. Click the check box next to BPR Reviewer. This will allow them to sign that a completed Batch Production Record has been reviewed. Press the Confirm button.**

10. **Click the update icon next to the person with the role of Quality Manager. Click the check box next to MPR Approver. Click the check box next to BPR Reviewer. Press the Confirm button.**

11. **Now press the Confirm button at the bottom right of the screen. This will save all of your changes to this Project and bring you back to the Projects summary screen.**

12. **At this point you have completed all the prerequisite activities needed to create a Master Production Record. In the next video, you will start the MPR process.**