Commencement of new Project
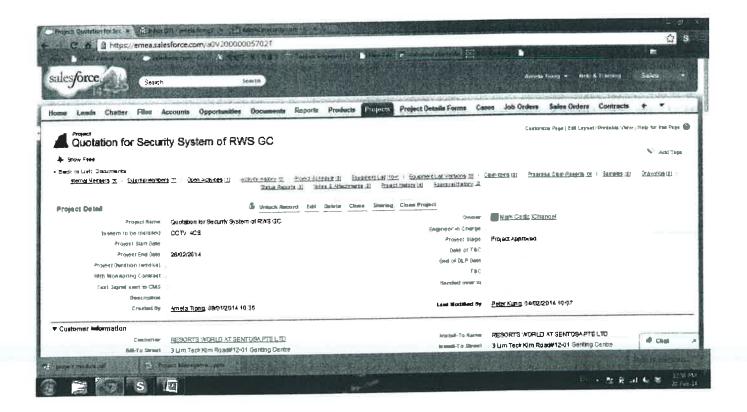
-Project will be assigned to PE by the PM.

-The project stage will be at "Project Engineer Assigned".

-PE will receive a task alert when he logs on to SFDC notifying him of the new project assigned.

-Click on the link to go to the project that is assigned.

-Once in the project, pls complete the "Project Start Date" & tentative "Project End Date".

Project in Progress

Status of the project must be changed accordingly to project progress to "In Progress" or "Ready for Completion" or "Completion Pending" at any stage of the project before completion.

Project completed

When the project is completed and the project stage is in either one of the following stages, "In Progress", "Ready for Completion", "Completion Pending", the PE should

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1a) If project has monitoring, pls tick "With monitoring contract" under the section Project Detail.
This will send an email to inform CS & CMS.
Pls note that the T&C cert or svc report must already be uploaded under Notes & Attachment as CS will need the relevant documents.

1b) If any test signals have been sent during T&C to our CMS, pls indicate the date and time sent in the field, "Test signal sent to CMS".

If 1a or 1b is not applicable, pls leave the fields empty.

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Click "Submit for approval",

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At the bottom of the project page under Approval History, click "Approve/Reject". It will bring you to another page. Then click "Approve" again.   ~~Approved~~
The project status will then be auto updated to "Completed ^Approved by Project Owner".

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Once the status is auto updated, system will send an email to PM to final approve the project to be closed.