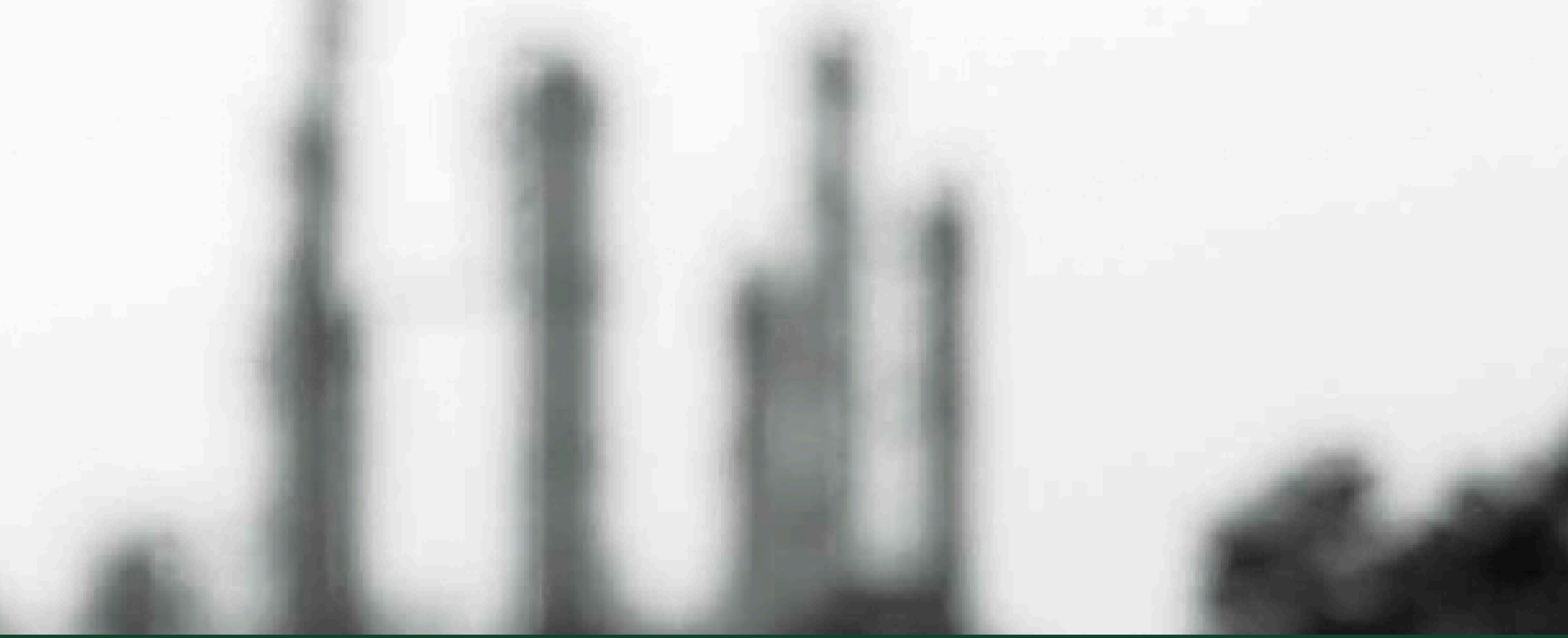

FRONTLINE
ENERGY SERVICES
A C2 INTEGRATED SOLUTIONS COMPANY

Project Application App

For Program and Project Tracking

Contents

App actions

App actions are specific steps that are done to accomplish larger tasks. For example, the app action “Search for project records” is done when updating the status of applications, preparing for a meeting, and in many other contexts.

App actions are grouped as Using the app, Finding projects, Managing applications, and Following programs.

Using the app

Sign in

Prerequisite: Username and password are required to open the Project Application App.

1 Open the Chrome™ browser ( ).

2 Open the Project Application App.

3 Click the username field and type a username.

4 Click the Password field and type a password.

5 Click Sign In.

Change your password

1 Click Settings (on the left menu).

2 Click Credentials ( ).

 a Click and type your current password.

 b Click and type a new password.

 c Click and type the new password again to verify.

3 To change your password, click Update Credentials.

 To cancel, click the dark gray area outside the boxes.

Sign out

To sign out, click the sign out symbol (in the lower-left corner).

Finding projects

Open a project record

To find and open a project record, see either Search for project records or Filter for project records.

Search for project records

1. Click Search (in the upper-left corner).

   A search box appears.

2. In the search box, type numbers which are either:

   - numbers from the beginning of a project number
   - numbers from an order description, such as street address

   Search results appear as you type, showing the project number.

3. To open a project record, click a search result.

   For information about the fields, see Table 1.

   To close the search box, click Search ().

Table 1. Project record fields

Field	Note
Description	
Project number	
Center	
Type	
Owner	
Start	
End	
Finish	
Division long	
Total	
Actual	
Electrical planned	
Electrical actual	
Gas planned	
Gas actual	
Applications	

Filter for project records

1 Click Projects (on the left menu).

The project table opens.

2 Click the filter tool (on the right edge).

A list of filters appears. For information about the filters, see Table 2.

3 Click a filter.

Projects appear in the project table, if any projects match the filter.

4 To open a project record, click a project in the project table.

To close a project record, click the project table (dark gray).

Table 2. Filters

Filter	Note
Applications needed for submission (30 days)	
Applications needed for submission (90 days)	
Applications that have goals (90 days)	
Favorite projects	Favorites () are marked by each user. Users see only their own favorite projects.

Sort the project table

1 To sort the project table, click a column heading.

For example, to sort by project number, click "NUMBER."

2 To reverse the sort order, click the column heading again.

Tag a project as a favorite

1 Find and open a project record.

For help see Search for project records or Filter for project records.

2 Click Favorite (in the top menu).

A white star means a favorite project.

A grey star means that a project is not tagged as a favorite.

To remove the tag, click Favorite () again.

Close a project record

A project record closes when you:

- click the project table (to the left of the project record).
- click a different project in the search results.

Managing applications

View applications

1 Find and open a project record.

For help see Search for project records or Filter for project records.

2 Click Applications (on the top menu).

The application table opens. For information about the fields, see Table 3.

If the application table is empty, then no applications have been added to the project record.

To return to the project record, click Info ().

Table 3. Application fields

Field	Note
Name	
Number	
Project	
Program	
Status	For information about application status, see Table 4.

Add an application

1 View applications for a project record.

2 Click Add (in the top menu).

3 Click Applications ().

a Click and type an application name.

b Click and select a program.

4 To add the application data, click Create Application.

To cancel, click the dark gray area outside the boxes.

Edit application data

1 View applications for a project record.

2 Click an application in the application table.

The application fields open. For information about the fields, see Table 3.

a Click and type an application name.

b Click and type an application number.

c Click and select an application status.

For information about application status, see Table 4.

d Click the program and click a new program.

3 To save the changes, click Update.

To cancel, click the dark gray area outside the boxes.

Table 4. Application status

Application status	Note
New	
Incomplete	
To be submitted	
Submitted	
Approved	
Rejected	
Expired	
Closed	
Cancelled	

View reviews

1 Find and open a project record.

For help see Search for project records or Filter for project records.

2 Click Reviews (in the top menu).

The reviews table opens. For information about fields, see Table 5.

If the reviews table is empty, then no reviews have been added to the project record.

To return to the project record, click Info ().

Table 5. Review fields

Field	Note
Application	
Review	
Type	
Status	

Add a review

1 View reviews for a project.

2 Click Add (in the top menu).

3 Click Review ().

a Click and type a description.

   b   Click and select an application.

   c   Click and select a level of severity.

       For information about severity, see Table 6.

4. To add the kickback, click Create Review.

   To cancel, click the dark gray area outside the boxes.

Table 6. Review severity

Severity	Note
Low	
Medium	
High	

Edit review data

1. View reviews for a project.
2. Click a review in the reviews table.

   The review fields open. For information about fields, see Table 5.

   a   Click and type a description.

   b   Click and select an application.

   c   Click and select a level of severity.

       For information about severity, see Table 6.

3. To save the changes, click Update Review.

   To cancel, click the dark gray area outside the boxes.

View notes

1. Find and open a project record.

   For help see Search for project records or Filter for project records.

2. Click Notes ().

   The notes table opens.

   If the notes table is empty, then no notes have been added to the project record.

   To return to the project record, click Info ().

Add a note

1. View notes for a project record.
2. Click Add (in the top menu).
3. Click Note ().

a Click and type a title.

b Click and type a note.

c Click and select a type.

   For information about note types, see Table 7.

4 To add the note, click Update Log.

   To cancel, click the dark gray area outside the boxes.

Table 7. Note types

Note type	Description
Email	
Phone	
Message	

View contacts

1 Find and open a project record.

   For help see Search for project records or Filter for project records.

2 Click Contacts (on the top menu).

   The contacts table opens.

   If the contacts table is empty, then no contacts have been connected to the project record.

   To return to the project record, click Info ().

Following programs

View and edit programs

1 Click Programs (in the left menu).

The program table opens. For information about the fields, see Table 8.

Table 8. Program fields

Field	Note
Name	
Division	
Customers	
Website	
Type	
Submittals	
Process	
Response	
Comments	

2 To open a program record, click a program in the program table.

3 To edit program information, click Edit (in the top menu).

The program fields open.

a Click and type in the fields for name, county, website, fees, payment, method, response time, type, and comments.

b Click and select a division.

c To save the changes, click Update Program.

To cancel, click the dark gray area outside the boxes.

4 To close a program record, click the program table (dark gray).

Delete a program

1 Click Programs (in the left menu).

2 Click a program in the program table.

3 Click Settings (on the top menu, in the upper-right corner).

4 Click and type the program name.

5 To delete, click Delete Program.

To cancel, click the dark gray area outside the boxes.

View, add, and edit program personnel

1. Click Programs (in the left menu).

   The program table opens.

2. Click a program in the program table.

   The program record opens.

3. Click List (in the top menu).

   The list of personnel opens. For information about fields, see Table 9.

   If the list is empty, no personnel have been added to the program's list.

Table 9. Program personnel fields

Field	Note
First name	
Last name	
Phone	
Email	
Notes	

4. To add program personnel, click Add (in the top menu).
   a. Click Person ().
   b. Click and type a first name and a last name.
   c. Click and type an email and a phone number.
   d. Click and select a preferred contact method (email or phone).
   e. Click and type a note.
   f. To add the person, click Create.

      To cancel, click the dark gray area outside the boxes.

5. To edit, click a person in the list of program personnel.

   The program personnel fields open.
   a. Click and type a first name and a last name.
   b. Click and type an email and a phone number.
   c. Click and select a preferred contact method (email or phone).
   d. Click and type a note.
   e. To save the changes, click Update.

      To cancel, click the dark gray area outside the boxes.

6. To return to the program record, click Info ().

   To return to the program table, click the program table (dark gray).

View, add, delete, and edit goals

1. Click Programs (in the left menu).

   The program table opens.

2. Click a program in the program table.

   The program record opens.

3. Click Goals (in the top menu).

   The goal table opens. For information about fields, see Table 10.

   If the goal table is empty, no goals have been added to the program record.

Table 10. Goal fields

Field	Value	Note
Subject		
Goal		
Status	Low Medium High	

4. To add a goal, click Add (in the top menu).

   a. Click Goal ().

   b. Click and type a title.

   c. Click and type a description.

   d. Click and select a status.

   e. To add the goal, click Create Goal.

      To cancel, click the dark gray area outside the boxes.

5. To delete a goal, click a goal in the goal table.

   The goal fields open.

   a. Click Delete Goal.

6. To edit a goal, click a goal in the goal table.

   The goal fields open.

   a. Click and type a title.

   b. Click and type a description.

   c. Click and select a status.

   d. To save the changes, click Update Goal.

      To cancel, click the dark gray area outside the boxes.

7 To return to the program record, click Info (ℹ).

To return to the program table, click the program table (dark gray).