

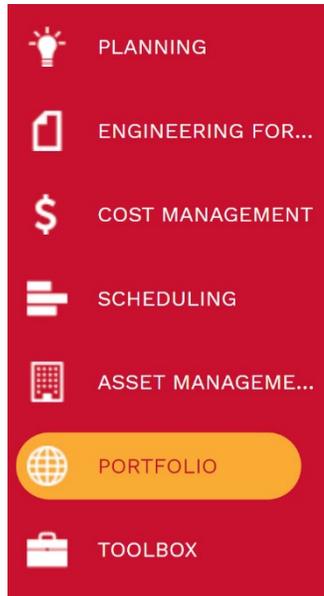
PM

Generating Project Notes

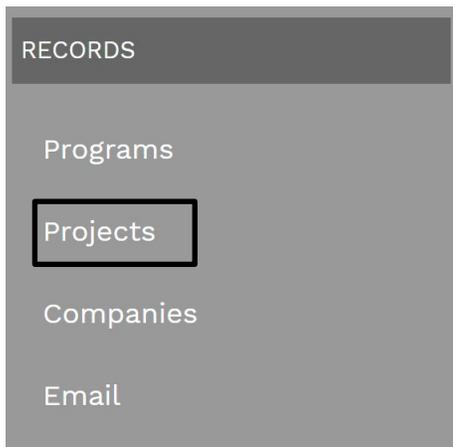
Overview: Project notes are an important tool as a record for PMs on their projects and for other members of FPC to know basic project status when the PM is unavailable. PMs should provide project notes at a minimum monthly.

Reference: n/a

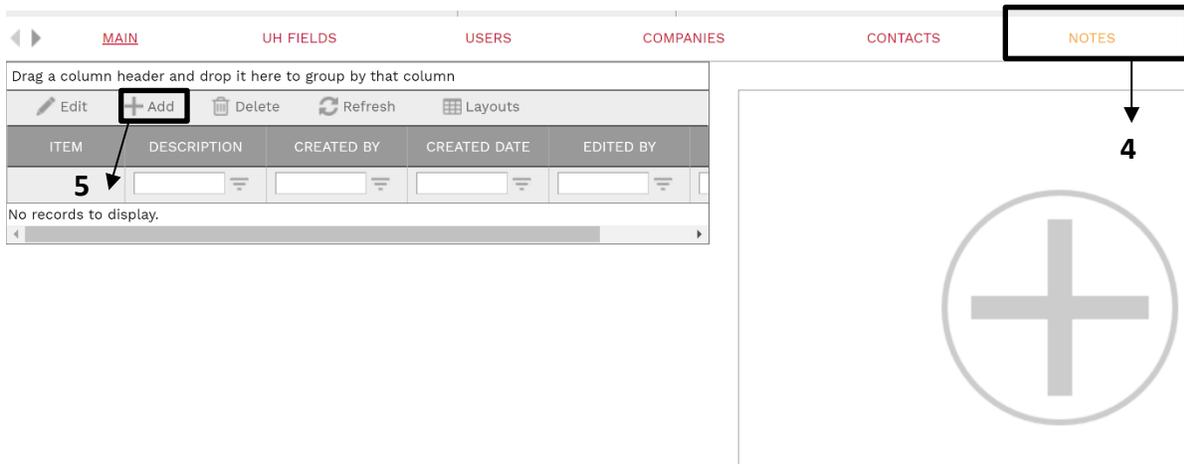
1- Click on **PORTFOLIO** from the buttons on the left.



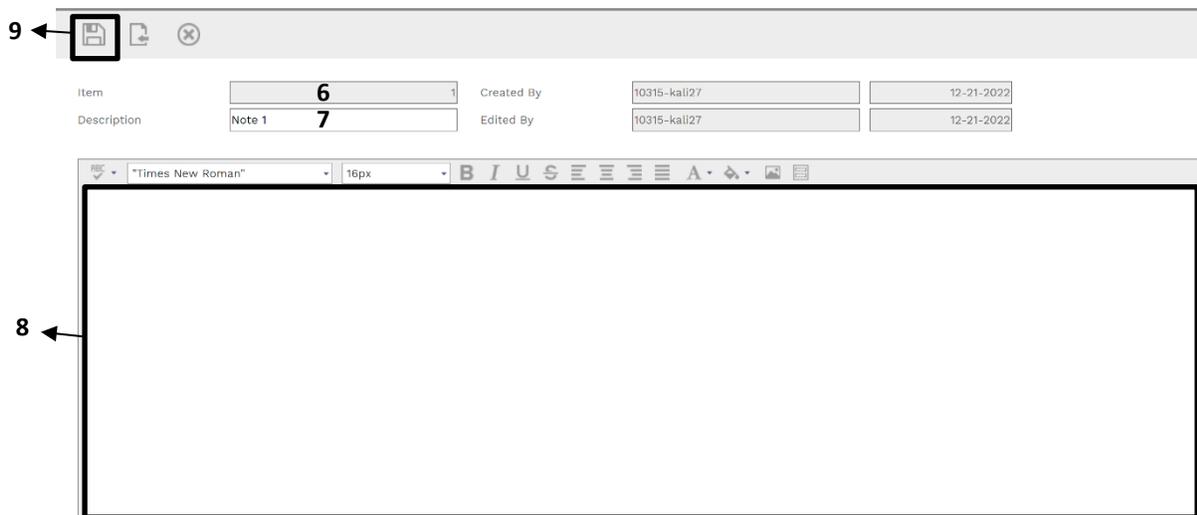
2- Under **Records**, select **Projects**



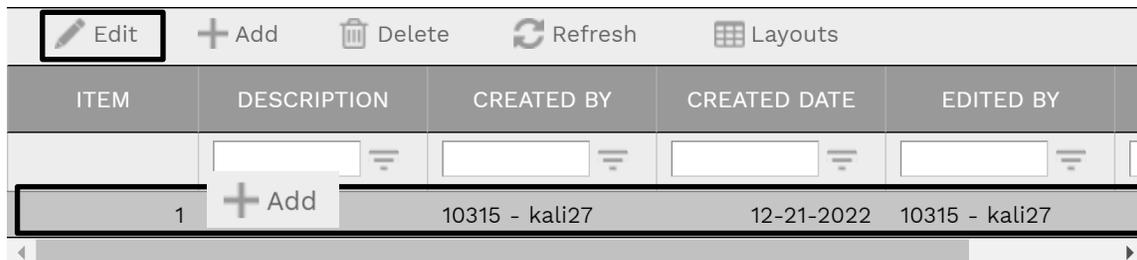
- 3- Select the desired Project.
- 4- Select the **Notes** tab in the top navigation bar.
- 5- Click on **+ Add** button under the tab which will open up a notes box



- 6- **Item** field – Will auto populate with next sequential number. Edit if desired
- 7- **Description** field - Enter an appropriate description. For example, for July’s end of month report, an appropriate description would be ‘July 2021 Project Update’
- 8- In the **text box**, provide an update of the project status. It is important to ensure the update is objective and suitable for sharing with all stakeholders including the client and internal F/CM stakeholders.
- 9- Click on the **save button** at the top left.



- 10- For subsequent monthly updates, click  button which will again open up a notes box.
- 11- Repeat steps 6 and 7.
- 12- In the text box, you can use the prior month's notes as a starting point, or start from scratch.
- 13- If using the prior month's notes, select that note prior to clicking the add button. Click on the **Edit** button. Highlight and copy the notes.



ITEM	DESCRIPTION	CREATED BY	CREATED DATE	EDITED BY
1		10315 - kali27	12-21-2022	10315 - kali27

- 14- Click on the button after copying the notes.
- 15- For adding the notes, click on the text box then then use **Ctrl V** to paste in the prior notes. Edit the notes to reflect the current status.
- 16- **Process Complete.**