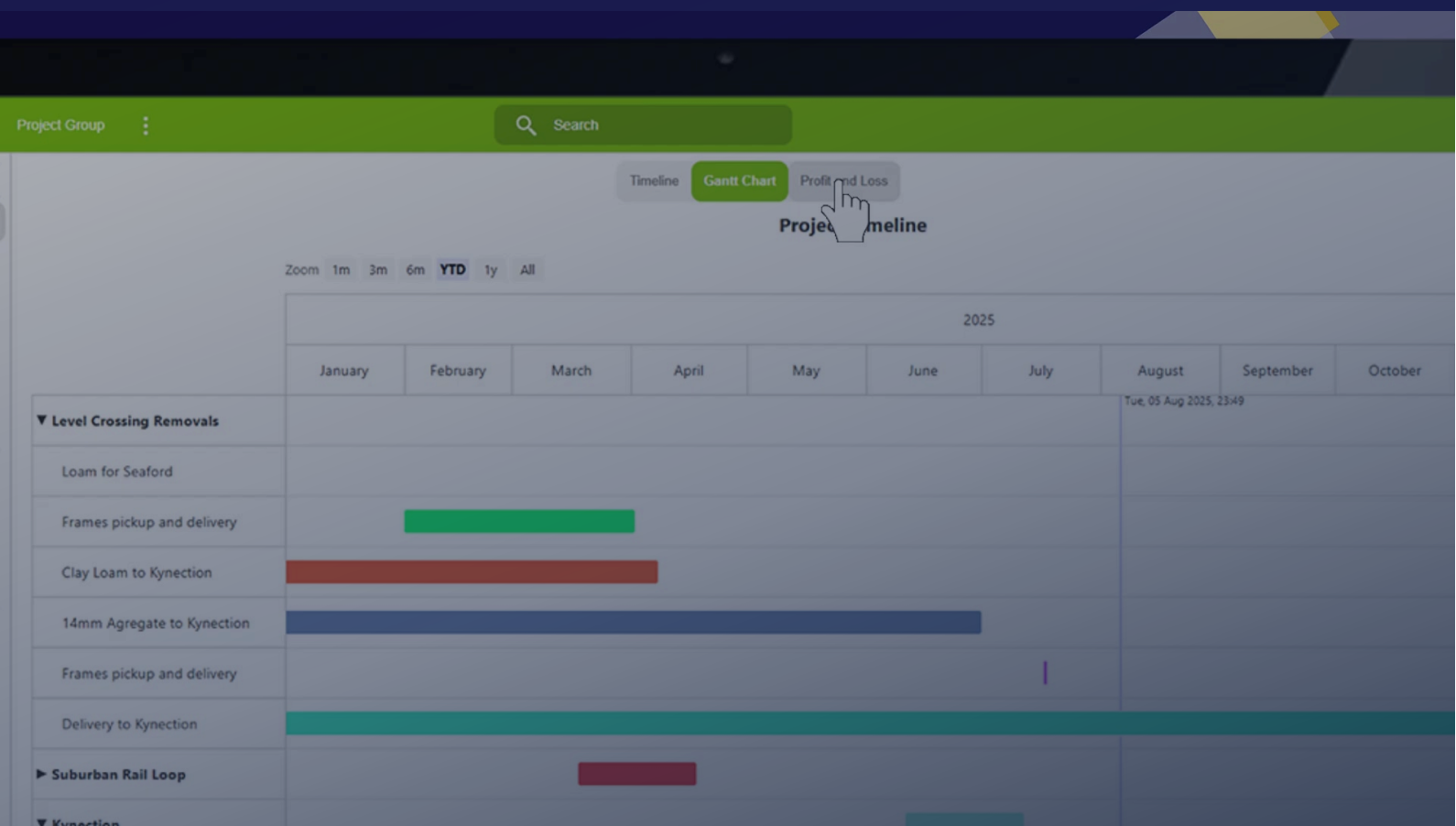




KYNECTION
KNOWLEDGE IN MOTION

FEATURE GUIDE

KYNECTION • PROJECTS • PART 2 OF THE PROJECTS MODULE

Navigate Projects, Gantt Charts and Project Info

Getting around the module: the projects list, the Gantt timeline, contract groups, and editing the commercial detail on a project record.

3 CHAPTERS

54 SEC

PROJECTS

WEB USERS • PROJECT MANAGERS

FEATURE GUIDE • 54 SEC

What this feature covers

Three stages, eight steps: navigating projects, working with contract groups, and editing project info and forms.

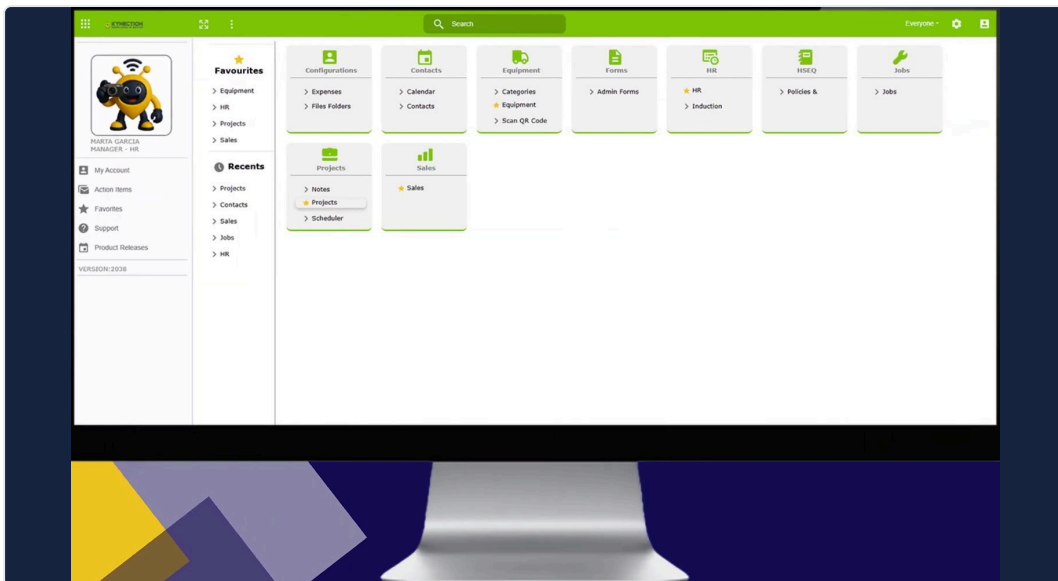
CH 01	Navigate the module List, timeline and profit and loss are three views of the same portfolio.	00:00–00:20
CH 02	Contract groups Groups are how a programme of related projects is organised.	00:20–00:30
CH 03	Project info and forms The info tab carries the commercial terms; the forms tab controls visibility.	00:30–00:54

- **The Gantt is the same data.** Switching view does not filter anything out; it just puts the work on a calendar.
- **Contracts group projects.** A contract group holds several projects, which is how a programme of work is managed as one.
- **Forms are restricted by group.** Limiting project and asset forms to chosen groups controls what each party can see and submit.

READ AS Screens are captured from the walkthrough video at the timestamp shown on each step. Project names, addresses and dollar values are demonstration data.

Navigate the module

List, timeline and profit and loss are three views of the same portfolio.

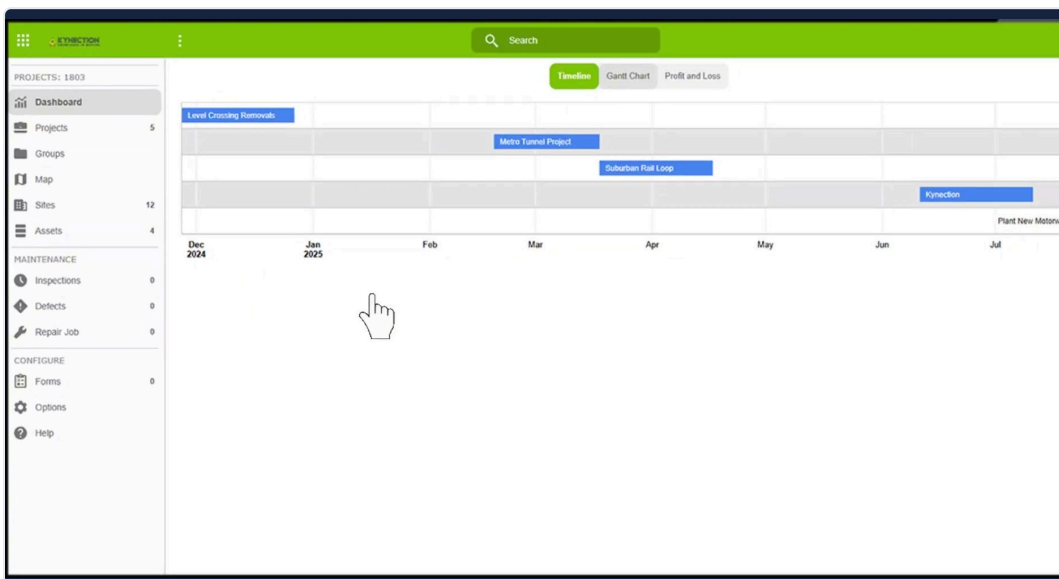


STEP 1 • 00:06 IN THE VIDEO

Open the projects list

The module opens to every project you have access to.

CHAPTER 01 • STEP 1 OF 3



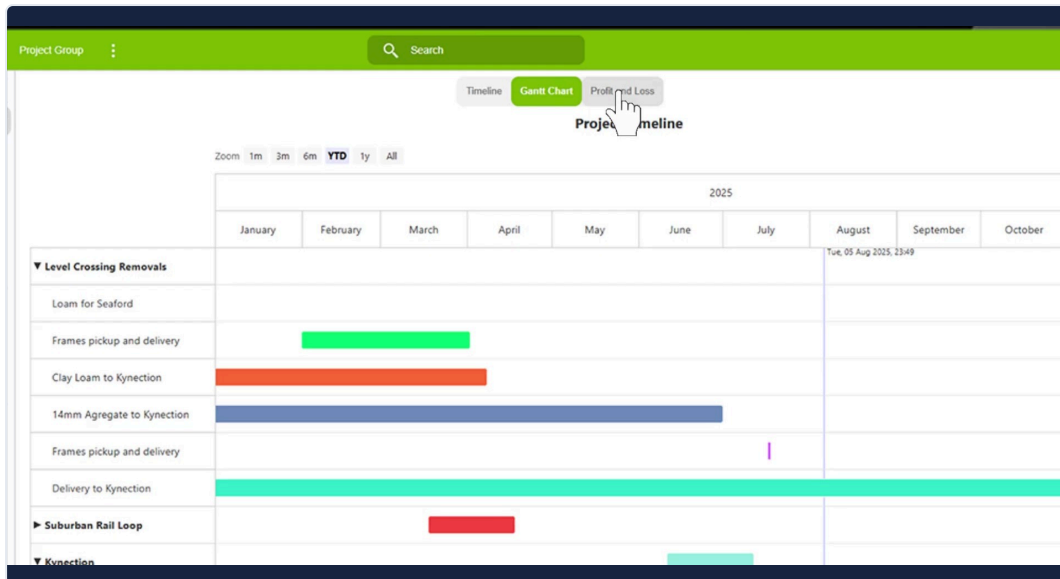
STEP 2 • 00:08 IN THE VIDEO

Switch to the Gantt chart

The timeline puts projects and their milestones on a calendar.

CHAPTER 01 • STEP 2 OF 3

Navigate the module



STEP 3 • 00:15 IN THE VIDEO

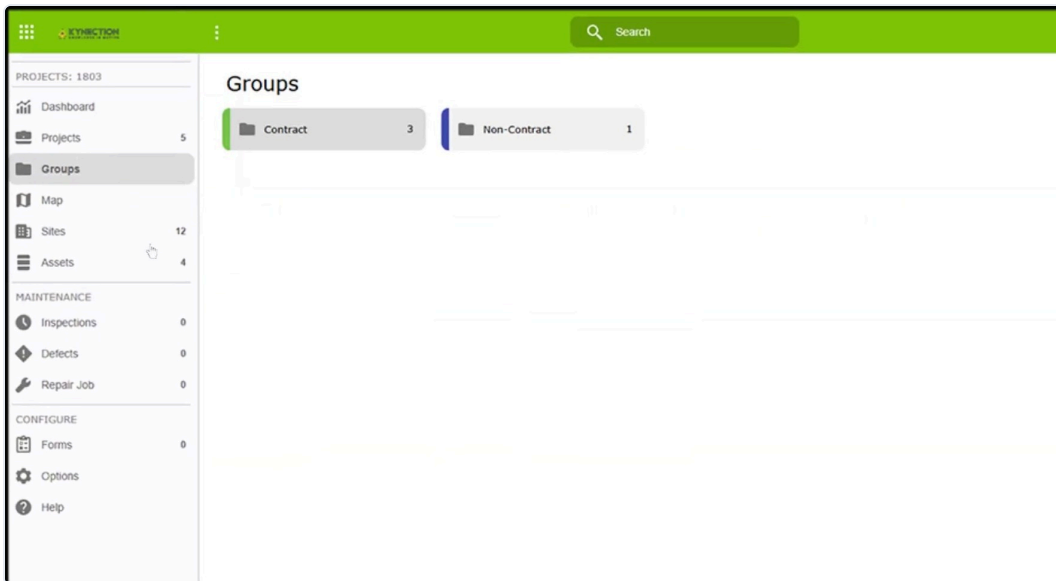
Read the timeline

Milestones show as coloured bars across the months, so overlap and slippage are obvious.

CHAPTER 01 • STEP 3 OF 3

Contract groups

Groups are how a programme of related projects is organised.

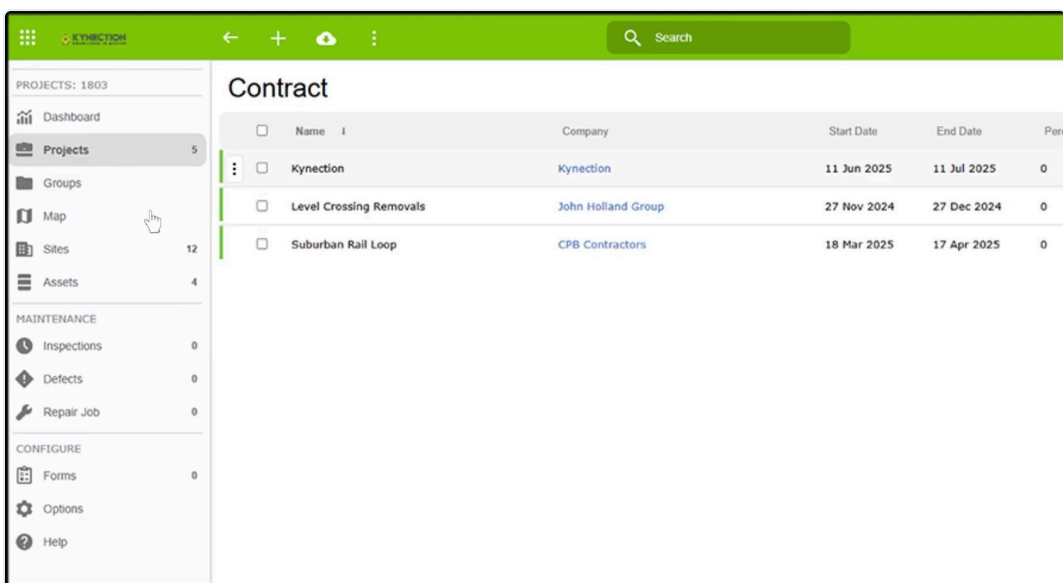


STEP 1 • 00:22 IN THE VIDEO

Open the groups

Groups organise work by contract, with a new contract created from the same screen.

CHAPTER 02 • STEP 1 OF 2



STEP 2 • 00:27 IN THE VIDEO

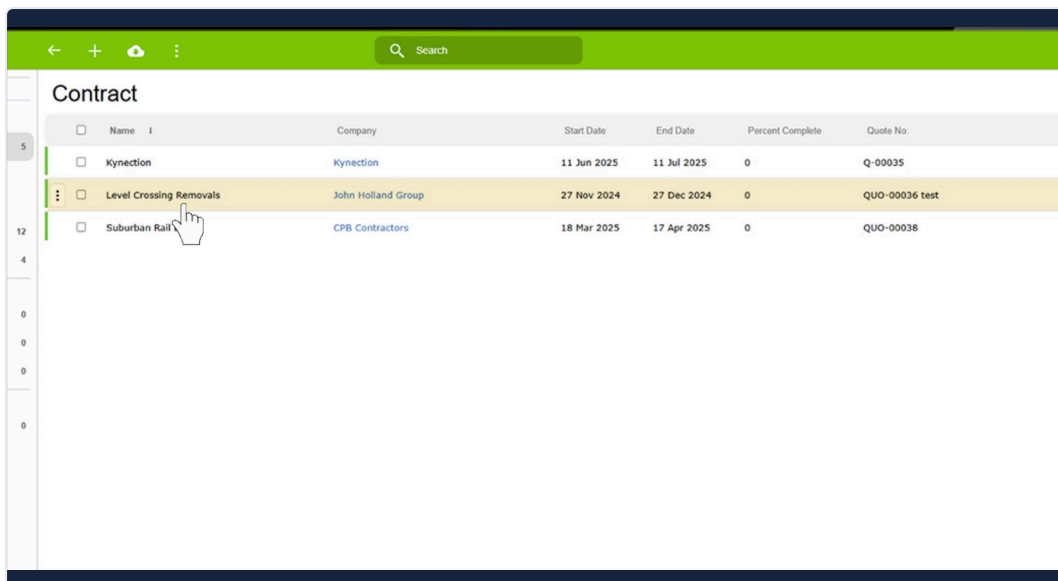
Read the contract list

Contracts list with their company, dates and value.

CHAPTER 02 • STEP 2 OF 2

Project info and forms

The info tab carries the commercial terms; the forms tab controls visibility.



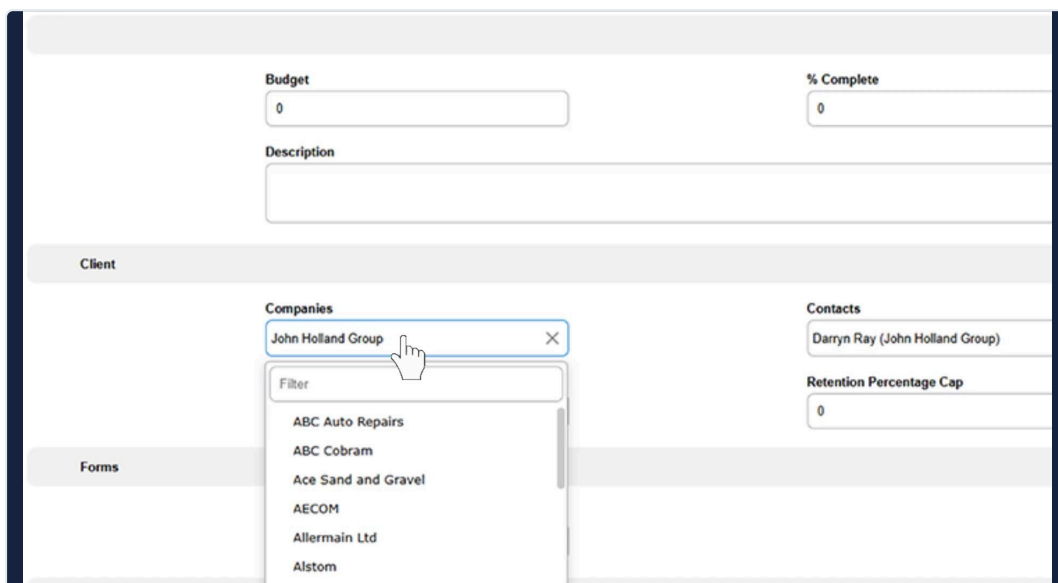
	Name	Company	Start Date	End Date	Percent Complete	Quote No.
	Kynecton	Kynecton	11 Jun 2025	11 Jul 2025	0	Q-00035
	Level Crossing Removals	John Holland Group	27 Nov 2024	27 Dec 2024	0	QUO-00036 test
	Suburban Rail	CPB Contractors	18 Mar 2025	17 Apr 2025	0	QUO-00038

STEP 1 • 00:35 IN THE VIDEO

Open the project

Selecting a project opens its record with the tabs across the top.

CHAPTER 03 • STEP 1 OF 3



Budget: 0

% Complete: 0

Description:

Client:

Companies:

John Holland Group

Filter:

- ABC Auto Repairs
- ABC Cobram
- Ace Sand and Gravel
- AECOM
- Allermann Ltd
- Alstom

Contacts:

Darryn Ray (John Holland Group)

Retention Percentage Cap:

0

Forms:

STEP 2 • 00:45 IN THE VIDEO

Edit the details

Info holds budget, percent complete, description, client companies and contacts, and the retention percentage with its cap.

CHAPTER 03 • STEP 2 OF 3

Project info and forms

Description

Client

Companies

John Holland Group

Contacts

Darryn Ray (John Holland Group)

Retention Percentage

0

Retention Percentage Cap

0

Forms

Restrict Project & Asset Forms to these groups

Custom Fields

CPR

Working at Heights

All Clear Apply

First Aid

Confined Space

STEP 3 • 00:52 IN THE VIDEO

Restrict the forms

Custom fields sit alongside a setting to restrict project and asset forms to chosen groups.

CHAPTER 03 • STEP 3 OF 3

Where to go next

This guide covers one part of the projects module. The rest of the series covers the module end to end.

NEXT UP - Projects Web 03

Track milestones, budgets and profit and loss

BACK TO Projects Web 01

Manage projects, track milestones and analyse finances (module overview)

THE REST OF THE PROJECTS MODULE

Ask your Kynnection account manager for the other guides in this series

MORE IN THIS MODULE

Projects Web 01	Manage projects, track milestones and analyse finances (module overview)
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Projects Web 03	Track milestones, budgets and profit and loss
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Projects Web 04	Sites, assets and maintenance logging
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