Project Management

SIMMS Inventory Management Software 2012

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Project Management

The Project Management module is used to coordinate projects where you may not know the project's exact components or their quantities before you begin the project.

You organize your project by using milestones and dividing your project into stages. For each stage you assign materials, book time and if required record your vendor's invoices.

Each project you create can be linked to a specific sales order.

Setting Up a Project

Before you can begin using the Project Manager, you need to set up your project's stages and milestones.

Stages

A project is divided into stages. For example if you where building a house the following: foundation, floor, framing, and electrical could be the name of unique stages in that process.

Costing for a project is calculated for each stage. So, you can track the cost of each stage of your project. The costs that are tracked for a stage are materials, labor, and vendor invoices.

Set Up Stages

1. Open the **Manufacturing** menu, open the **Project Manager** submenu, and then click **Stages Setup**.

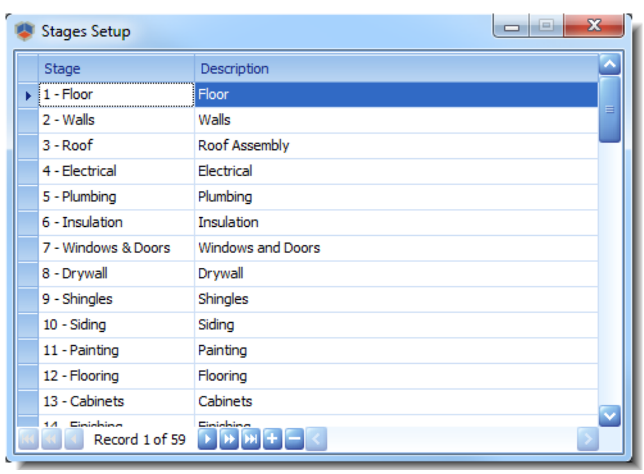

Figure 1: Set up stages for your projects.

2. Click the **Plus** sign (+) to add a line item to the window.
3. In the **Stage** field, type the name of your stage.
4. In the **Description** field, type a short description for the stage.

Delete a Stage

- In the **Stages Setup** window, select the stage you want to delete, and then click the **Minus** sign (-).

Note: *You cannot delete a stage if it has been used in a project. All stages used in a project become part of a permanent list of stages you can choose from to add to your project.*

Milestones

Milestones are tasks that you complete as part of your project, but are not directly related to the building process. For example, when building a house, tasks such as getting a permit or house inspection are required in order to build your house, but are not part of the actual construction of the house.

Milestones are a way for you to organize and track these indirect tasks.

Setup Milestones

1. Open the **Manufacturing** menu, open the **Project Manager** submenu, and then click **Milestone Setup**.

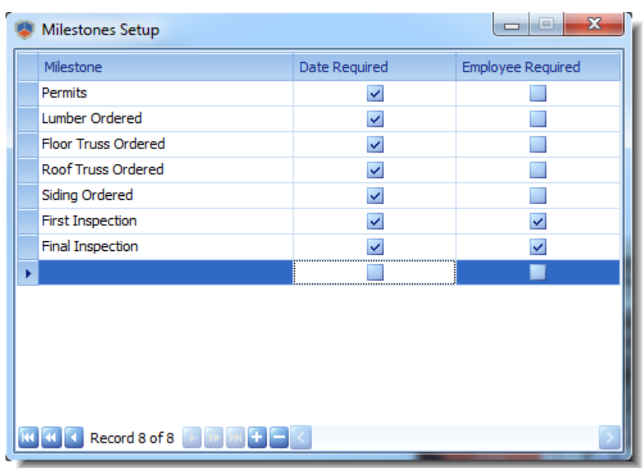

Figure 2: Milestones

2. Click the **Plus** sign (+) to add a line item to the window.
3. In the **Milestone** field, type the milestone's name.
4. (Optional) In the **Date Required** field, click the check box.

If selected, you are required to enter a date when you check off a milestone.

5. (Optional) In the **Employee Required** field, click the check box.

   If selected, you are required to enter the name of the employee responsible for the milestone.

Delete a Milestone

In the **Stages Setup** window, select the stage you want to delete, and then click the **Minus** sign (-).

Note*: You cannot delete a milestone if you have used that milestone in a project. The list of milestones you create are permanent and are added to project your create.*

Although all your milestones are added to a project you do not have to use all of them.

Creating a Project

Creating a project is a five step process:

- You enter your project's basic details in the Project Manager.
- You add a stage to your project in the Project Detail window.
- You assign materials to the stage.
- You book time for the employees working on the stage.
- And if required you create your manual vendor invoices.

About the Project Manager

After you have completed setting up your stages and milestones, you can begin using the Project Manager. Listed in the Project Manager's window are all your projects, whether open or closed, that have been created. It is in the Project Manager's window that you enter a project's basic details, such as its project number, start date, and the customer the product you are building is for. In addition, you view a project's milestones and check them off in the Project Manager.

Enter a Projects Basic Details

1. Open the **Manufacturing** menu, open the **Project Manager** submenu, and then click **Project Manager**.
2. Click the **Plus** sign (+) to add a line item in the window, and then enter the details of your project.

See “Table 1: The Project Manager” for an explanation of each field.

Table 1: The Project Manager

Label	Explanation
Project No	The project number.
Creation Date	The date the project is created.
Sales Order #	(Optional) The sales order linked to a project. You select the sales order from the field’s list of available sales orders.
Customer	The customer on the sales order associated with a project. If there is no sales order associated to this project, you can select a customer from the field’s list.
Sales Price	The net price from the associated sales order. If no sales order is associated to the project the field’s value is zero.
Payment	The sum of deposits made on the sales order associated to the project.
Vendor Invoice	The total costs of all manual vendor invoices associated to a project.
Cost To Date	The total costs of the project to date. This is the sum of a project’s labor and material costs.
Close Date	The date the project was closed. SIMMS enter this date automatically after you close your project.
Project Closed?	This field reads either Yes if the project is closed, or No if the project is open.

Table 1: The Project Manager

Label	Explanation
Item Code	The item code for the item built. SIMMS enters the item code automatically after you close a project.

Production Details

After you create your project you can enter your production details for a project, such as it's stages, materials, and labor.

Add a Stage to a Project

You divide your project into stages. For each stage that you add to your project you can assign materials, book time, and associate a vendor's invoice for that specific stage.

1. Open the **Manufacturing** menu, open the **Project Manager** submenu, and then click **Project Manager**.
2. Select a project, and then click **Detail**.
3. Click in the **Stage** field, and then select a stage from the field's list.

Assign Materials to a Stage

After you have added a stage to your project you can assign materials to that stage.

1. Select your project's stage, on the **Assign Material** tab, click the **Plus** sign (+).
2. In the **Code** field, click the **Search** icon .

   The Enhanced Search window opens.
3. Type your item's description in the **Description** text box, and then click **Find**.
4. Select your item, and then click **Retrieve One**.

   The Enhanced Search window closes, and your item is entered in the Assign Material grid.

   Next you need to add the quantity of the material you want to use for this stage of your project.

5. Click the **Plus** Sign (+) beside your item, and then in the **Quantity** field, type the quantity of the item required for this stage of your project.

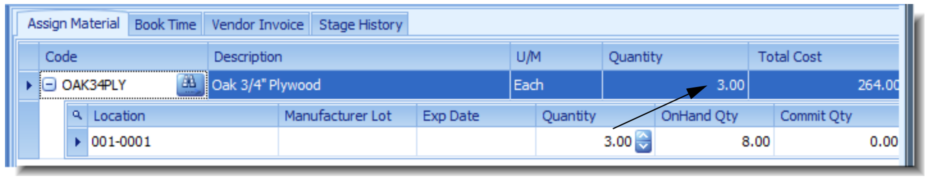

Figure 3: Assign Materials to a stage.

Labor for a Stage

For each stage of your project, you book the time and assign the employees required to complete that stage. SIMMS displays a record of your total labor costs associated with the stage.

Book Time for a Stage

1. Open the **Project Manager**. Select a project, and then click **Detail**.
2. Select a stage, and then click the **Book Time** tab.
3. By default, SIMMS enters the current date in the **Book Date** field. To enter a different date, click in the **Book Date** field, click the arrow that appears, and then select a date from the field's calendar.
4. Click in the **Employee** field, click the arrow that appears, and then select an employee from the list.

   Only an employee that is assigned as a production employee appears in this list.
5. In the **Hours** field, type the number of hours you want to allocate for this job.
6. In the **Comments** field enter a comment.

SIMMS enters the pay rate for this employee in the Hourly Rate field.

Note*: You can book time for a project's stage directly in the Project Detail window on the Book Time tab.*

Vendor Invoices

From the Project window you can create a manual vendor invoice that is linked to a project's stage. This enables you to track your purchases to a specific stage of your project.

Create a Manual Vendor's Invoice

1. On the **Modules** menu, point to **Kits**, point to **Project Management**, and then click **Project Management**.

   The BOM Project window opens.

2. Select your project from the grid, and then click the **Detail** button.

   The Project Detail window opens.

3. Select the stage to which you want to assign the vendor's invoice.

4. Click the **Vendor Invoice** tab, and then click **Create Invoice**.

   The Manual Vendor Invoices window opens.

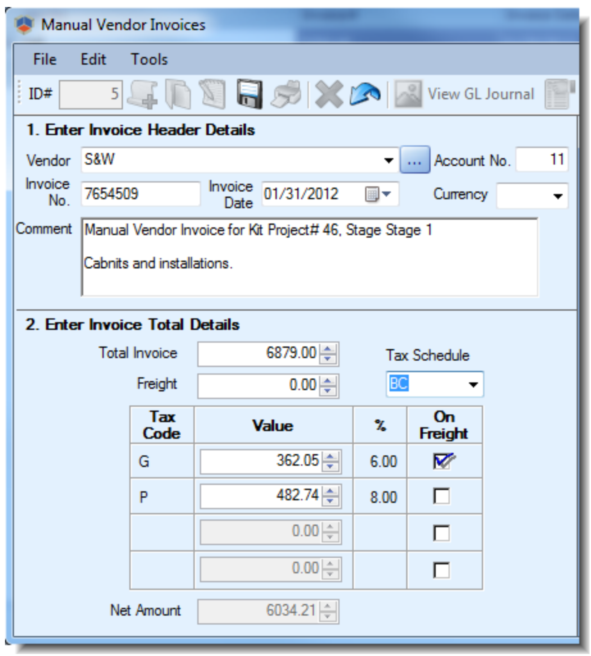

Figure 4: Manual Vendor Invoices.

5. In the **Invoice No**. text box, type the invoice number from your vendor's invoice.

6. In the **Invoice Date** box, select the invoice date.

7. In the **Total Invoice** box, type the total cost on the invoice.

8. In the **Freight** box, type the freight cost.

9. For each tax code, type the amount of taxes charged.

10. If you are using the SIMMS' General Ledger module, the Enter Account Allocation Details pane is available. In this pane you allocate the cost of an invoice to an expense account. Click the

Account field, and then select the appropriate expense account from the list of accounts.

11. Click the **Save** icon .

Transferring an Item

When you transfer an item to your project, you can link that transfer to a specific project and a project's stage. The item transferred and its related details are automatically added to your project's stage.

Note*: When you transfer an item to a project close all project related windows, including the Project Manager and Project Detail windows. SIMMS needs to lock these windows in order to update the information in them.*

You enter item transfers in the Transfers window. This window is divided into three panes:

- **Header**
  In this pane you enter your basic document information and the initial and final location for your transfer. In addition, you can link your transfer to a kit project and its stage.
- **Bill/Ship To Address**
  In this pane you enter the bill-to and ship-to address for your transfer.
- **Details**
  In this pane you enter the details for the item you want to transfer.

Enter the Header Information

1. Open the **Warehouse menu**, open the **Inventory** submenu, and then click **Item Transfer Manager**.
2. Click the **New** icon .
3. In the **Document Number** text box, type a document number.
4. Under **Default Locations**, in the **Initial Location** list, select the location your item is originating from.
5. In the **Final Location** list, select the location your item is going to.
6. To link a transfer to a project, do the following steps:
   - Under **Link to Kit Project**, in the **Project** list, select your project. In the **Stage** list, select the project's stage you want to link this transfer to.
7. In the **Comments** text box, type a comment.

This comment appears on your transfer document.

Select the Bill/Ship-To Address

1. Expand the **Bill/Ship To Address** pane, in the **Bill To** list, select the bill-to address.
2. In the **Ship To** list, select the ship-to address.

Select the Item to Transfer

1. In the **Details** pane, click in the **Description** field, and then click the **Search** icon  that appears.

   The Enhanced Search window opens.
2. In the **Description** text box, type the description for your item, and then click **Find**.
3. Select your item, and then click **Retrieve One.**

   Your item's details are entered in the Transfer window's grid.

Edit an Items Details

You can edit some of your items details, such as its transfer quantity or initial location. See "Table 2: Edit an Item's Details".

Table 2: Edit an Item's Details

Field	
UM	In this field SIMMS enters your item's standard unit of measure. You can choose any of the available units of measure defined for your item.
Initial Location	In this field SIMMS enters your item's default initial location. You chose your item's default initial location in the Header pane of the Transfer window.
Final Location	In this field SIMMS enter your item's default final location. You chose your items default final location in the Header pane of the Transfer window.

Table 2: Edit an Item's Details

Field	
Transfer Qty	In this field you enter the quantity of the item you are ordering. By default SIMMS enters one (1) as your quantity.

4. If any of the items on your transfer are serialized, assign them their serial numbers. Otherwise, click the **Save** icon.

Assign a Serial Number to an Item

1. In the **Transfer** window, click the **Serial Number** icon.
2. In the **Select column**, click the check box for the serial number you want to assign to your item.
3. Click the **Save Serial Numbers** link, and then close the **Serial Number Manager**.
4. Return to the **Transfer** window, and click the **Save** icon.

Transfer Items to a Stage with a Data Collector

You can transfer material to a project's stage using your SIMMS software for Window's Mobile. This is done in much the same way you would transfer items using SIMMS.

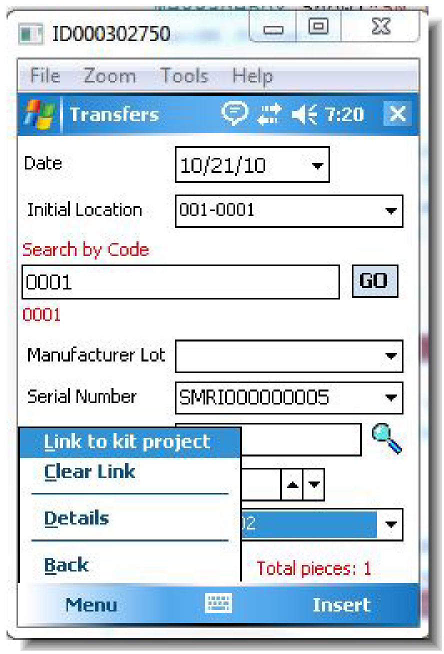

Figure 5: SIMMS for Window Mobile.

Viewing a Stage's History

SIMMS records the activity for each stage of your project. This includes stock holds, time booked, vendor invoices created, and more. In addition, The date, time and user who performed the activity is also recorded.

View a Stage's History

- Open a project in the **Project Detail** window, select a stage and then click the **Stage History** tab.

Closing a Project

After you complete your project you need to close it. When you close a project any stock assigned to that project is removed from inventory, and the item you manufactured is added into inventory.

Close a Project

1. In the **Project Manager** window, select your project, and then click **Close Project**.

2. A message displays asking you to confirm you want to close the project. Click **Yes**.

   The Close Project dialog box opens.

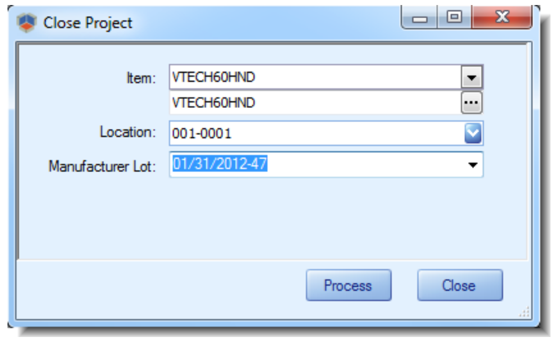

Figure 6: Close a project.

3. In the **Item** list, select the item code for the item you have manufactured.
4. In the **Location** list, select the item's location.
5. In the **Manufacturer Lot** list, do one of the following:
   - Type the manufacturer's lot for your item.
   - Select an existing manufacturer's lot from the list.
6. In the **Serial Number** text box, type the item's serial number.

   Both the Serial Number and User SN text box display only if your item uses serial numbers.
7. In the **User SN** text box, type the item's user serial number.
8. Click **Proceed**.