



## Project Management

The PCB X3 Project Management Module is designed to effectively manage and control all aspects concerning a project.

Similar to the client requests and quotes, projects follow a predefined workflow process.

The workflow for projects is defined as follows:

- **Project Planning Phase** – this phase begins immediately after the acceptance of the underlying quote
- **Project In Progress** – the phase automatically starts when purchases or material transactions are recorded or when the user sets the status to started
- **Project Completed**

In addition to the above, a project can also be put on-hold.

The Project Management Module consists of the following modules and menu items:

- Project Register
- Project Details
- Project Menu & Cockpit
- Contract Management
- Project Analyser
- Post Project Review
- Warehouse Project

### Project Register

The PCB X3 Project Register is designed to provide an immediate overview of all projects in the various workflow stages.

All items associated with a project can be accessed from the register via the project menu.

The PCB X3 Project Register has on-register search functions as well as an advanced project finder.

#### Key Features of the Project Register

- Search and display multiple projects

- Sort register by key fields
- Financial project overview for each selected project
- Access to external project folder
- Access to all project items including purchase, labour, sales invoices and client payment transactions
- Add user tasks to selected project or view task list

### Project Details

The Project Details forms part of the project associated items that are discussed in the section “Project Menu & Cockpit”.

The Project Details contains key information about the project and it consists of the following sections that are described further on:

- Overview
- Details
- Financial Summary
- Allocated Assets
- Project Charge-out Rates
- Occupational Health & Safety

The **Project Overview** section consists of Project Milestones and the Forecasted Project Completion Cost. The maintenance of both items occurs when a new project invoice is issued to the client. At that point is user is prompted to fill in the estimated per cent completed. Milestones can be added and maintained at any point in time.

The **Project Details** provide the basic project information such as description, user notes, status and starting date, project manager and client contact.

The **Financial Summary** of the project consists of the invoice summary, payment summary, amounts not charged yet and total outstanding.

The **Allocated Assets** section provides an overview of all assets that are allocated to the project and their current status. Assets can be “transferred in” or “transferred out” of a project with the system maintaining a full history.

The section provides the function to create a purchase invoice that can be directly charged to the client in case of cost-plus projects or for fixed-price projects the purchase invoice simply constitutes another cost item.

The **Project Charge-out Rates** are initially derived from the system-wide charge-out rates for trades/services and can be overwritten to suit the agreed rates with the client. Rates can be altered at any point in time and they are used or looked-up when creating labour transactions in case of cost-plus projects.

The **Occupational Health & Safety** section of the Project Details provides a list of key OHS document topics that are allocated to the project. The document topics stem from the PCB X3 Library and they can be linked to external files.

### **Project Menu & Cockpit**

The PCB X3 Project Menu & Cockpit provides a unique overview and access to all project associated items. The menu exists on the Project Register and when an item is selected it detaches itself and becomes self-contained thereby providing the user with a focused overview of the project.

The Project Cockpit consists of the key financial data concerning the project. The user has a choice of viewing a summarised or expanded cockpit.

#### **Key Features of the Project Menu & Cockpit**

- Access to the summarised or expanded cockpit
- Access to all client or site contacts
- Access to all labour transactions – including adding new transactions
- Access to all material purchase transactions – including adding new transactions
- Access to all sales invoice transactions – including adding new transactions
- Access to all client payment transactions – including adding new transactions
- Access to any project related documents including adding a new document

- Access to all project related tasks including adding new tasks
- Access to the external project folder
- Access to the client and site
- Access to the underlying quote
- Access to the project manager details (HR)
- Access to labour and material purchases not yet charged (cost-plus projects). Charge-out rates or profit margins can be altered
- Access to the General Ledger Transaction Menu
- Access to General Ledger Transaction Journals

### **Contract Management**

The PCB X3 Project Contract Management function allows setting up the initial contract and record subsequent changes.

Contract changes need the approval of the Project Manager and record is created for each contract change thereby providing a full audit-trail and history of changes.

### **Project Analyser**

The PCB X3 Project Analyser is designed to provide an overview of projects in terms of profit and forecasted completion costs versus original budgets.

### **Project Warehouse**

The PCB X3 Project Warehouse is created when setting up a new entity and it's purpose is to store all material / inventory purchases going into the warehouse. It also allows recording labour transactions and issuing cash sale invoices. Labour transactions can be temporarily stored and then moved to different projects.

Each entity that is set-up in PCB X3 automatically has a project warehouse.