

PROJECT RESOURCE ESTIMATING & PLANNING (PREP)



PROJECTS



The *Project Series* applications available with Microsoft Dynamics SL is one of the most robust solutions available for small- to mid-sized Project Driven Organizations. For those PDO's that also require assignment and scheduling of resources at the task level, the only solution has been to step up to Microsoft Project Server (often too tall a task for many organizations)...until now!

While the Project Series is also an outstanding solution for cost collection, tracking and analysis, estimating has been an elusive function...also until now!

Benefits

Develop a simple rough-cut estimate to see if your project is feasible from a profit standpoint. If you need to "sharpen your pencil", develop a de-tailed estimate based on the actual resources you expect to use. Take the guesswork out of managing your resources and their schedules. What if you need to determine how your project's schedule is going to be affected by the unexpected illness of that key person? Do you want to select a resource based on unlimited user-defined attributes, then assign & schedule that resource to a project/task? Would you like a graphical scheduling tool to help you with that Monday morning scheduling session? Do away with those note tablets and Excel spreadsheets and start using *Project Resource Estimating & Planning (PREP)* to accomplish this in the native Microsoft Dynamics SL environment ... no external systems needed! Use as much or as little of the module as you need. Start out simple and build to more complex use.

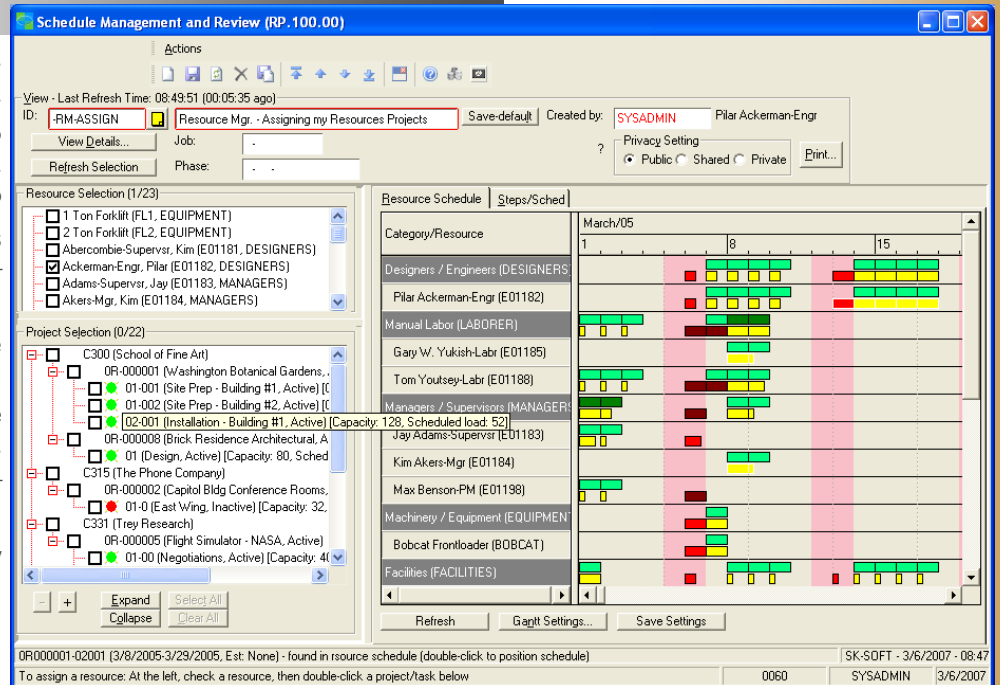
Cost & Billing Estimates

If you need to create a *rough-cut* estimate based on the categories of resources you'll need, PREP is there to help. Simply select the *resource categories* and hours you need and PREP will do the rest. When the time comes to create a *detailed estimate*, either build on what you've already done in the rough-cut estimate, or simply dive into the assignment of resources and let PREP generate the detailed estimate for you. The lists of materials you develop in *Project Work Order* (another Sandler-Kahne module) can be included with your estimate...in summary or detail.

Designed For Microsoft Dynamics SL™ Project Management & Accounting

Related modules:

- Microsoft Dynamics SL Project Series
- Sandler•Kahne's Project Work Order



Cost and Billing estimates are generated using simple default cost rates, the position/rate table, or by using the more sophisticated *standard* and *multi-level rate tables* found in the Project Series.

Need to automatically generate Indirect or Other costs? Use the auto-generate costs from Allocator feature to apply the Project's allocation method to your estimate's direct costs – all with the click of a button!

Generate Quotes

PREP will utilize the *billing estimate* to generate a quote in Microsoft Word format. Use *Quote Format Maintenance* to define different formats to customize quotes to meet your company's different formatting requirements.

Resource Selection & Assignment

Start by designating an employee as a resource, then adding non-person resources, like tools, conference rooms, equipment, etc. Optionally assign any number of attributes you'd like to each resource and you're ready to roll. *Attribute Filters* will help you use those attributes and resource categories to select your required resources ... all this using point and click technology!

Operations & Workflow

Not only can you assign resources to any task on any project, but you can also identify what that resource will be doing (*Operation*), when, and in what order. The *Statement of Work* report will reference those *worksteps* to provide the workflow documentation for field personnel.

The screenshot shows a 'Quote' document generated by the software. The quote is for the 'Brick Residence Architectural' project, managed by Max Benson-PM. It includes a table of resources and expenses, and a 'Quote Total' of 51,411.14. The quote is dated 12/5/2004.

Description	Hours	Amount
Resources		
Design	42.00	5,410.00
Working Drawings	60.00	8,500.00
Specifications	45.00	3,135.00
Construction	175.00	25,650.00
Inspection	20.00	3,000.00
Resources - All Tasks	342.00	43,995.00
Expenses		
Design		2,187.50
Expenses - All Tasks		2,187.50
Other Costs		
Construction		5,528.64
Other Costs - All Tasks		5,528.64
Quote Total		51,411.14

Prepare for higher profits by using PREP's Estimating and Quoting functions. Once you've been awarded the contract, drive your cost and billing estimates into the project's budgets.

Resource Calendar

The *Resource Calendar & Capacity* wizard assists you in easily defining the available hours of each of your resources. You define your hours of operation, holidays, etc. Record resource-specific exceptions, such as vacations or sick time, and the wizard will generate the records for your *capacity calendar*. During scheduling, changing a resource's availability is a simple point-and-click operation.

The screenshot shows the 'Schedule Management and Review' software interface. It displays a resource schedule for March 05, with columns for days 1, 8, and 15. Resources listed include Designers, Manual Labor, Managers, Supervisors, and Equipment. The interface includes a 'Resource Selection' list on the left and a 'Resource Schedule' grid on the right.

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Features included in PREP

- Graphical views of the Schedule
- Graphical views of capacity vs. load (planned utilization)
- Aggregate load includes schedules from the Service Series
- Record unscheduled and unassigned demand for later scheduling
- Virtually unlimited user-defined views
- Define and assign unlimited attributes to resources
- Resource calendar
- Scheduling & Planned Utilization
- Graphical scheduling with a project focus
- Graphical scheduling with a resource/resource manager focus
- Point-and-click ease of use
- Rough-cut or detailed estimates, optionally using position/rate and multi-level rate tables
- Auto-generate indirect or other costs using the project's allocation method
- Optionally auto-update budgets from estimates
- Quotes in MS Word
- Collect actual costs
- Workstep / Workflow

Scheduling & Capacity

When resources are scheduled on a task, that *load* is applied to the resource's *capacity* as defined with the *Resource Calendar & Capacity* wizard. *Scheduling Management & Review* makes this process simple. The graphical views and the ability to *slide* and otherwise manipulate the schedule in a point-and-click fashion will help immeasurably in the scheduling and re-scheduling of resources that are required to fulfill task requirements.

Scheduling & Assignments

Resources frequently get scheduled in different ways. This may vary based on company and/or personnel. PREP flexibly accommodates many of these requirements. Right within the graphical views of *Scheduling Management & Review*, resources can be assigned with a Project or Project Manager's focus (assign various resources to a Project/Task), OR from a Resource or Resource Manager's point of view (assign a resource to one/many project/tasks). The whole relationship between the resource manager and resource is managed and facilitates very quick and easy assignment. You'll love the point-and-click features of resource assignment, along with graphical feedback!

Backlog & Utilization

PREP provides the ability to view your *planned utilization* and *backlog* of work in daily, weekly, monthly, quarterly, and annual time slices. Optionally viewing this backlog expressed as dollars (cost, billing, profit) puts a powerful planning tool in your hands!

Sometimes backlog exists that is not fully defined – use PREP's *Unassigned Demand* to load requirements by Resource Category and yet still see how this affects your overall backlog. This feature can be considered "Rough Cut" scheduling.

Seamless Integration with Project Controller

Developed to be an extension to the Microsoft Dynamics SL Project Series, PREP is *more* than simply a stand-alone module that is interfaced to the core system. Users will appreciate the same look and feel as the rest of their Microsoft Dynamics SL applications. In fact, integration is so thorough that you'll assume that PREP is part of the core Project Series itself!

BUSINESS ISSUES	HOW THIS FLEXIBLE PRODUCT CAN HELP
Can I create an Estimate for a proposed project?	Absolutely! Use Estimate Entry If you only need a “rough-cut” estimate, simply estimate at the resource category level. If you need a more detailed estimate, go ahead and assign, but don’t schedule, the resources you’ll need. The estimate will be based on their respective rates – for costs and billings as well.
I’m currently using <i>Project Work Order</i> . Can I incorporate our estimated materials?	Absolutely! Use Estimate Entry If you have indicated that you wish to incorporate material requirements defined in <i>Project Work Order</i> , the estimate will reflect those details. So will the quote.
Can I generate a quote that is based on my cost estimate?	Yes! Use the manual or table-drive Billing Rates PREP will create a cost and billing estimate (optionally based on position rates and multi-level rates) and turn your billing estimate into a formal quote or proposal in Microsoft Word format.
I need to find an Engineer who is certified for under water work, and is available between June 1 st and July 15 th .	Use the Attribute Filters If you have defined the <i>attribute</i> “under-water certified”, and have assigned it to one or more <i>resources</i> , PREP can easily help you identify who is available and who has capacity to work on your project.
We need a scheduling tool that will help us in our Monday morning planning meetings.	Use Schedule Management & Review <i>Schedule Management & Review</i> allows you define virtually unlimited views of the projects and tasks on which you are working. Try a view that is grouped by <i>Project Manager</i> first...
I need a conference room next Wednesday, but they’re all busy.	Use Schedule Management & Review Find the projects that are consuming the conference room’s capacity. If you can “steal” the time from another project, simply reassign the time to your higher-priority project.
Our needs are relatively simple. PREP seems very powerful, will it be too much for us?	Use PREP’s many setup options Whether it’s simplifying the screens (schedule entry can have as few as five fields!) or removing un-needed features, use PREP’s setup screen to turn off whatever you don’t need. Likewise, many fields and options can be turned off by user without using Customization Manager.
What Resources (both person and non-person) are currently assigned to Project RP101?	Use Schedule Management & Review Simply select a pre-defined view (or define a new one) that arranges your projects in project/resource order. Once selected, you can easily view their schedule as well.
Do we have enough business coming up in the next 90 days to keep our staff busy?	Use Schedule Management & Review, Backlog/Utilization tab Select a pre-defined view (or define a new one) that identifies the time period you’re interested in, along with time intervals you want to use, and PREP will present this information in an easily understood graphical format. Under/over-utilization of your resources will jump out at you! If you want to express this information as dollar value, rather than hours and percentages, that option is available to those users who have been granted proper security access.

Prerequisites:

Microsoft Dynamics SL
Project Controller

Available on these Microsoft Dynamics SL versions:

7.0FP, 7.0, v6.x, 5.x



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