



Project Controls

Granting privileges by Personnel

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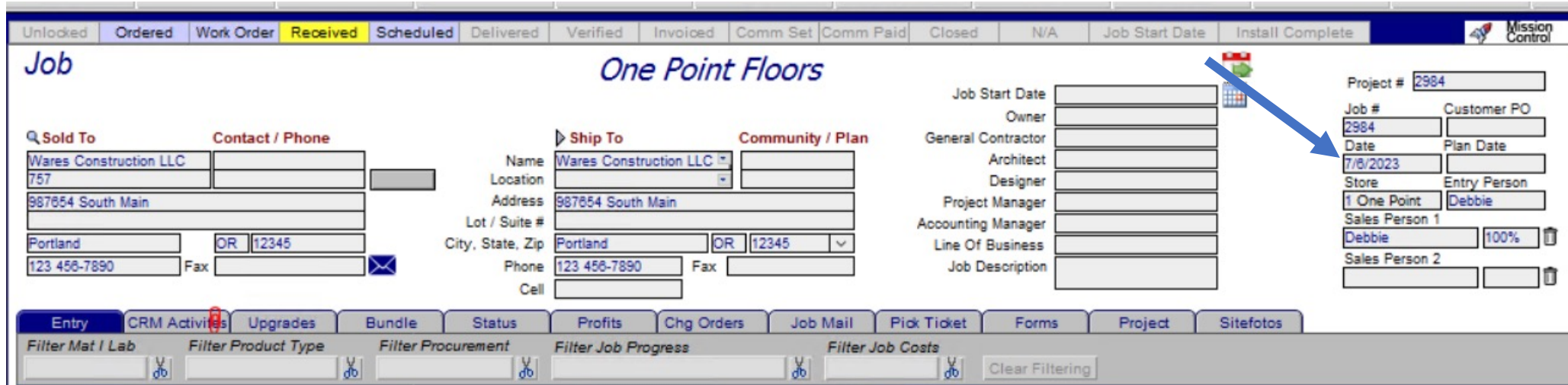
Ultimate Goal



- Keep WIP accurate(and other Reports)
- Aid in project clarity - what happened when
- Limit changes to the personnel that are aware of the ramifications
- Granting the privileges to only the items needed

Did you know

When a line is added to a job the Reports are affected starting on the date of the header.



Unlocked | Ordered | Work Order | **Received** | Scheduled | Delivered | Verified | Invoiced | Comm Set | Comm Paid | Closed | N/A | Job Start Date | Install Complete | Mission Control

Job

One Point Floors

Job Start Date:

Owner:

General Contractor:

Architect:

Designer:

Project Manager:

Accounting Manager:

Line Of Business:

Job Description:

Project #

Job # Customer PO

Date Plan Date

Store Entry Person

Sales Person 1

Sales Person 2

Entry | CRM Activities | Upgrades | Bundle | Status | Profits | Chg Orders | Job Mail | Pick Ticket | Forms | Project | Sitefotos

Filter Mat / Lab | Filter Product Type | Filter Procurement | Filter Job Progress | Filter Job Costs | Clear Filtering

Future Job Tracking (what happened when)

Why did the profit change on the Project?

What changed?

Who approved that?





Project Changes Guidelines

Creating Structure V23b8x

Personnel Access



All Jobs in JobRunner will automatically lock when they are transferred from a proposal to a job.

A screenshot of the JobRunner software interface. At the top, there is a horizontal menu with buttons for "Delete", "Find", "Find All", "Print", "Transfer", "List View", and "Change C". Below this is a row of status tabs: "Locked", "Ordered", "Work Order", "Received", "Scheduled", "Delivered", "Verified", "Invoiced", "Comm Set", "Comm Paid", "Closed", and "% Comp". The "Locked" tab is highlighted in blue, and a blue arrow points to it from the left. Below the tabs, the word "Job" is displayed in a large, blue, serif font. To the right of "Job", the text "One Point Floors" is written in a blue, italicized serif font. Further right, there are three input fields for "Job Start Date", "Owner", and "General Contractor". At the bottom, there are several red text labels: "Sold To" with a magnifying glass icon, "Contact / Phone", "Ship To" with a right-pointing triangle icon, and "Community / Plan".

Personnel Access



There are specific options for unlocking jobs available in the Personnel Access area.

Locking/Unlocking Options:

- Allow Unlocking Sales: the user may unlock any job that is not closed.
- Allow Unlocking Closed Sales: the user may unlock any job including closed jobs.
- Restrict Unlocking Access (SP): users may only unlock their own jobs and only within the parameters from the above two options.

Keeping the Numbers Clean



1. Keep changes to the current open fiscal period.
2. Close change orders each month to align with the WIP reporting period.
3. Do not unlock Closed Jobs to make changes. (*these already came off the WIP*)
4. Do not make changes to Projects that have a header date in a processed fiscal period (*the numbers have been submitted etc*).
5. Limit users' access to perform unnecessary changes to projects.
6. The controller and/or high-level managers should be the only users with any direct allowances to change projects in process.



Recommended Settings

Personnel access. Let's lock this down!!

Accounting Controller Settings



- The controller manages what access other users have at jobs directly when unlocking
- It could be all access or only some of it depending on the nature of the Project being unlocked.

Locking / Unlocking Job Options	
<input checked="" type="checkbox"/>	Allow Locking Sales
<input checked="" type="checkbox"/>	Allow Unlocking Sales
<input type="checkbox"/>	Allow Unlocking Closed Sales
<input type="checkbox"/>	Restrict Unlocking Access (SP)

Enable Unlocked RR Job Modification	
<input checked="" type="checkbox"/>	Allow Rev Rec Job Line Add / Delete
<input checked="" type="checkbox"/>	Allow Rev Rec Job Line Quan Mod
<input checked="" type="checkbox"/>	Allow Rev Rec Job Line Budget Mod
<input checked="" type="checkbox"/>	Allow Rev Rec Job Line Sell Mod
<input checked="" type="checkbox"/>	Allow Rev Rec Job Labor Line Lookups
<input type="checkbox"/>	Allow Job Line Date Editing
<input checked="" type="checkbox"/>	Allow Rev Rec Job GT Override
<input checked="" type="checkbox"/>	Allow Rev Rec GPM Changes
<input type="checkbox"/>	Allow Rev Rec Overhead Changes
<input checked="" type="checkbox"/>	Allow Budget Adjustments

Unlocking the Job



- Unlocking the Job will display the Controller's abilities on the unlock screen.
- Once the job in the project is unlocked, the controller defines what options can be done to that job by other users.

Please select the access privileges that should be allowed for this unlocked Job and provide a lock date for this unlock to expire.


<input checked="" type="checkbox"/>	Allow Rev Rec Job Line Add/Delete	Lock Job On: <input type="text"/>
<input checked="" type="checkbox"/>	Allow Rev Rec Job Line Quantity Mod	
<input checked="" type="checkbox"/>	Allow Rev Rec Job Line Budget Mod	
<input checked="" type="checkbox"/>	Allow Rev Rec Job Line Sell Mod	
<input checked="" type="checkbox"/>	Allow Rev Rec Job Labor Line Lookup	
<input type="checkbox"/>	Allow Job Line Date Editing	
<input checked="" type="checkbox"/>	Allow Rev Rec Job GT Override	
<input checked="" type="checkbox"/>	Allow Rev Rec Job GPM Change	
<input type="checkbox"/>	Allow Rev Rec Job Overhead Change	
<input checked="" type="checkbox"/>	Allow Budget Adjustments	
<input checked="" type="checkbox"/>	Allow Contract Adjustments	

User Access



- The controller can at this time un-mark any features not needed so that when other users access the job they are only able to perform limited changes.
- The controller will also select the date that the job in question will stop allowing the changes.

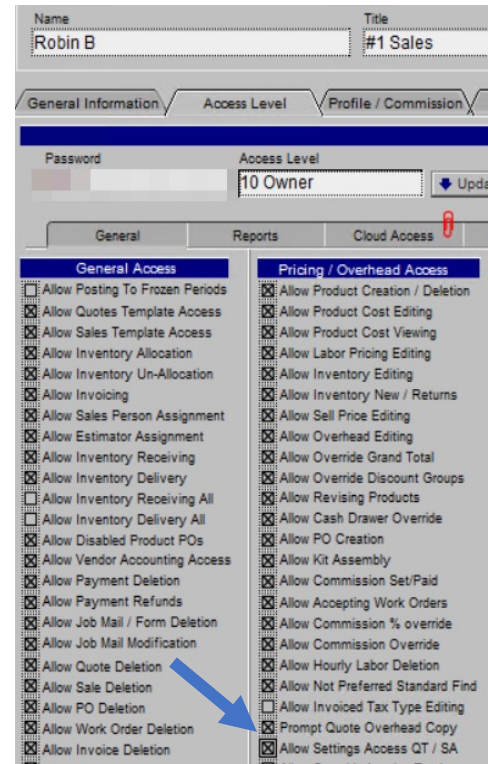
Please select the access privileges that should be allowed for this unlocked Job and provide a lock date for this unlock to expire.

Lock Job On: 7/31/2023 

- Allow Rev Rec Job Line Add/Delete
- Allow Rev Rec Job Line Quantity Mod
- Allow Rev Rec Job Line Budget Mod
- Allow Rev Rec Job Line Sell Mod
- Allow Rev Rec Job Labor Line Lookup
- Allow Job Line Date Editing
- Allow Rev Rec Job GT Override
- Allow Rev Rec Job GPM Change
- Allow Rev Rec Job Overhead Change
- Allow Budget Adjustments
- Allow Contract Adjustments

User Access

- When a User navigates to the job, they will only be able to perform the activities the controller has granted.
- The user can review what has been granted by opening the settings(if access is given) button at the job.



Name: Robin B Title: #1 Sales

General Information Access Level Profile / Commission

Password: [Redacted] Access Level: 10 Owner Update

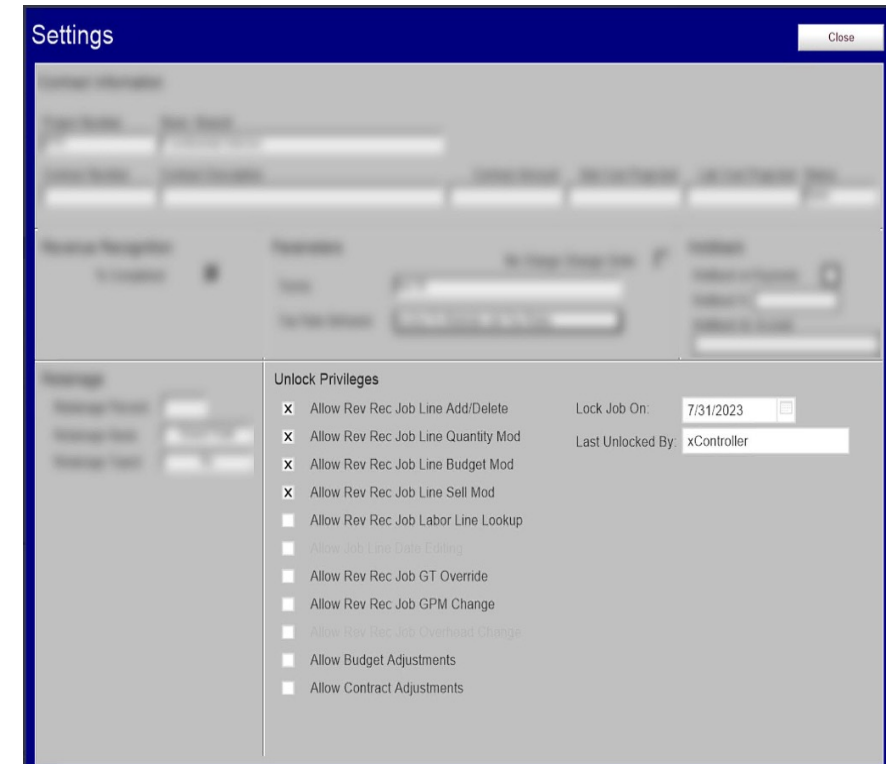
General Reports Cloud Access

General Access

- Allow Posting To Frozen Periods
- Allow Quotes Template Access
- Allow Sales Template Access
- Allow Inventory Allocation
- Allow Inventory Un-Allocation
- Allow Invoicing
- Allow Sales Person Assignment
- Allow Estimator Assignment
- Allow Inventory Receiving
- Allow Inventory Delivery
- Allow Inventory Receiving All
- Allow Inventory Delivery All
- Allow Disabled Product POs
- Allow Vendor Accounting Access
- Allow Payment Deletion
- Allow Payment Refunds
- Allow Job Mail / Form Deletion
- Allow Job Mail Modification
- Allow Quote Deletion
- Allow Sale Deletion
- Allow PO Deletion
- Allow Work Order Deletion
- Allow Invoice Deletion

Pricing / Overhead Access

- Allow Product Creation / Deletion
- Allow Product Cost Editing
- Allow Product Cost Viewing
- Allow Labor Pricing Editing
- Allow Inventory Editing
- Allow Inventory New / Returns
- Allow Sell Price Editing
- Allow Overhead Editing
- Allow Override Grand Total
- Allow Override Discount Groups
- Allow Revising Products
- Allow Cash Drawer Override
- Allow PO Creation
- Allow Kit Assembly
- Allow Commission Set/Paid
- Allow Accepting Work Orders
- Allow Commission % override
- Allow Commission Override
- Allow Hourly Labor Deletion
- Allow Not Preferred Standard Find
- Allow Invoiced Tax Type Editing
- Prompt Quote Overhead Copy
- Allow Settings Access QT / SA



Settings Close

Unlock Privileges

- Allow Rev Rec Job Line Add/Delete
- Allow Rev Rec Job Line Quantity Mod
- Allow Rev Rec Job Line Budget Mod
- Allow Rev Rec Job Line Sell Mod
- Allow Rev Rec Job Labor Line Lookup
- Allow Job Line Data Editing
- Allow Rev Rec Job GT Override
- Allow Rev Rec Job GPM Change
- Allow Rev Rec Job Overhead Change
- Allow Budget Adjustments
- Allow Contract Adjustments

Lock Job On: 7/31/2023

Last Unlocked By: xController

Project Change Guidelines



- Stay in the Fiscal Period
- If using Change orders Close at month end(keep the WIP True)
- Do not unclosed jobs
- Do Not make changes to jobs with header dates in previous fiscal period
- Limit Users Access to perform desired changes only
- A Controller/High level Managers should be the only users with direct access to Allowances



Controlled Changes

Restrictions are best But sometimes...

Full Audit

These best practices scenarios have full audit trails and are the ones that Pacific Solutions encourages

- Allow Budget change
 - When the original Budget was POOR (could be oversight or supply change)
- Allow Material Change
 - When TBD (This type of change on a material line is possible even in full project control restriction.)
- Allow Contract Adjustment
 - When there is a variance between Proposal and Job (generally small)

Open Season

Limited Audit trail

We make these suggestions to assist with real-world scenarios where you would need to un-restrict project controls. We call it "open season" as the project is unbound for changes that will be difficult to audit although might be necessary.

Use at your own risk. You're taking on the full responsibility for repercussions and loss of WIP report integrity.

- Time and Material Jobs
- Ongoing Prep work
- Cage Materials (blades, Trowels, etc.)
- Unit of Measure Changes

Help Center

www.Pacific-solutions.com

Client > Help Center Log in

Q & A



Next Up: Breakout #2

4:15 – 5:00 pm

- Tableau Business Analytics & DocuSign – Griffin Ballroom
- Enterprise Scheduler Updates & Best Practice – Belle Meade Room
- FloorRight – Magic Room Finder – Arlington Room