Project Controls

Granting privileges by Personnel

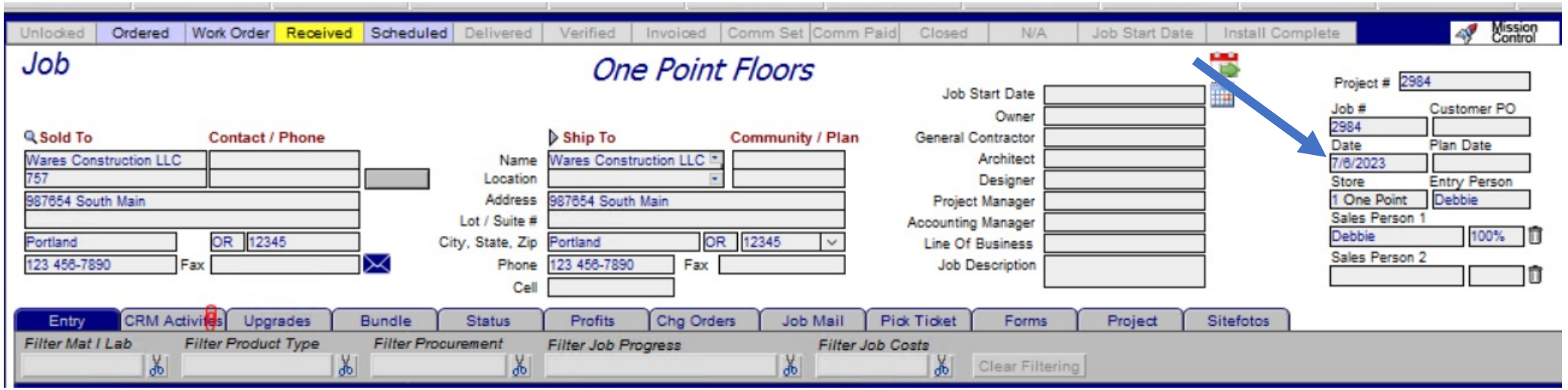
Robin Biffath

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.



Future Job Tracking (what happened when)

Why did the profit change on the Project?

What changed?

Who approved that?

PACIFIC SOLUTIONS
A Cyncly Company

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.

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

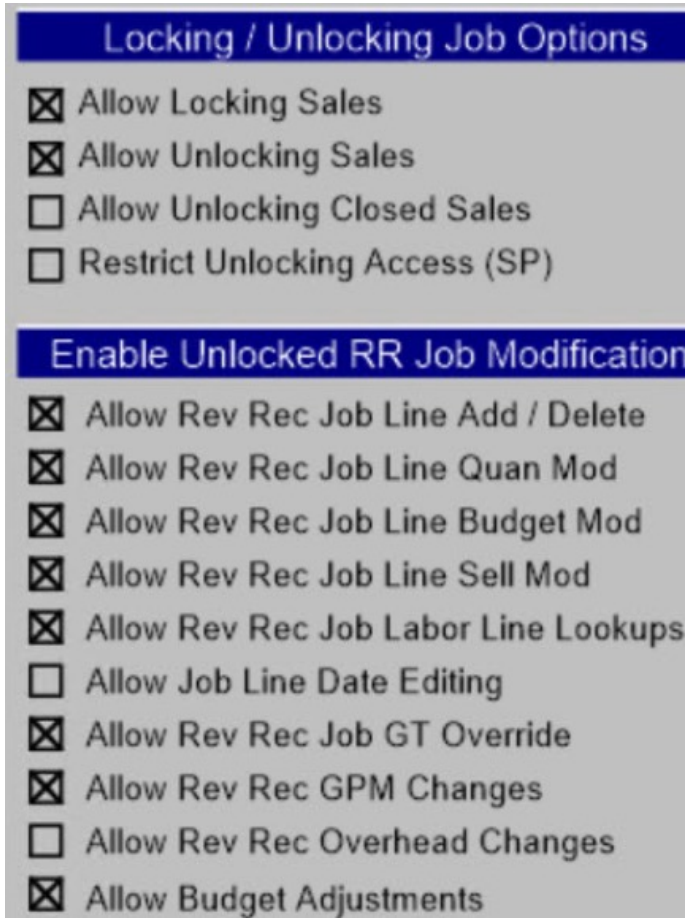
1. Keep changes to the current open fiscal period.
2. Close change orders each month to align with the WIP reporting period.
3. Do not unlock Closed Jobs to make changes.(*these already came off the WIP)*
4. Do not make changes to Projects that have a header date in a processed fiscal period(*the numbers 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!!

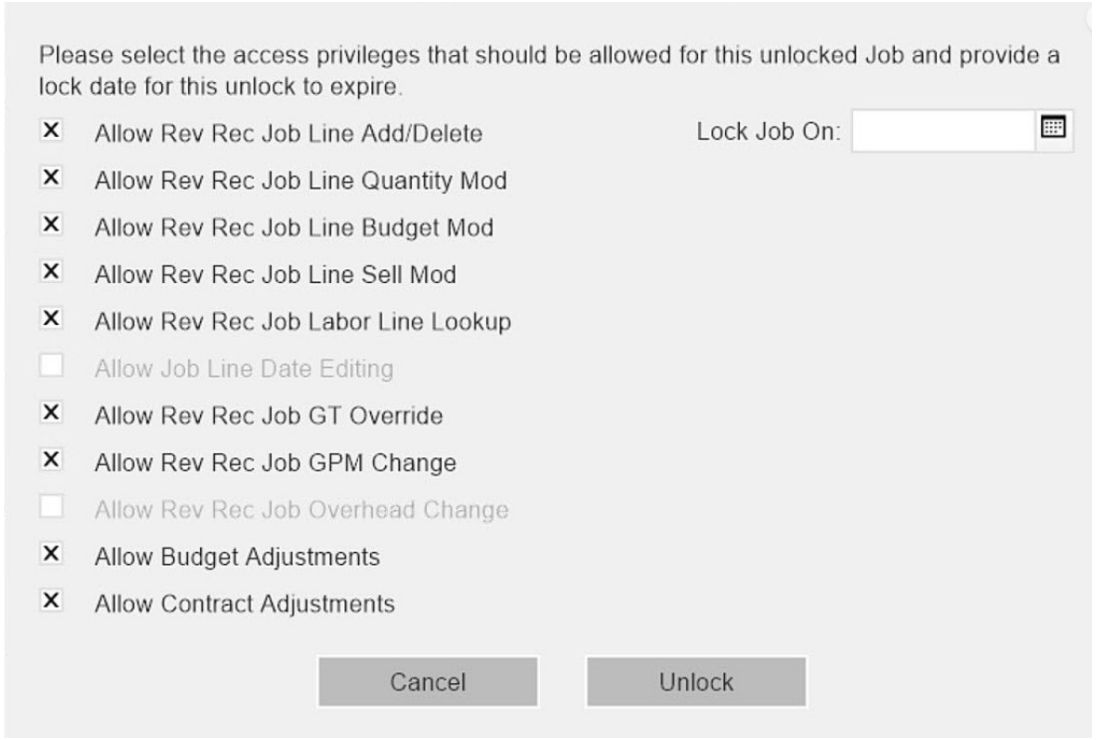
Accounting Controller Settings

- 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.



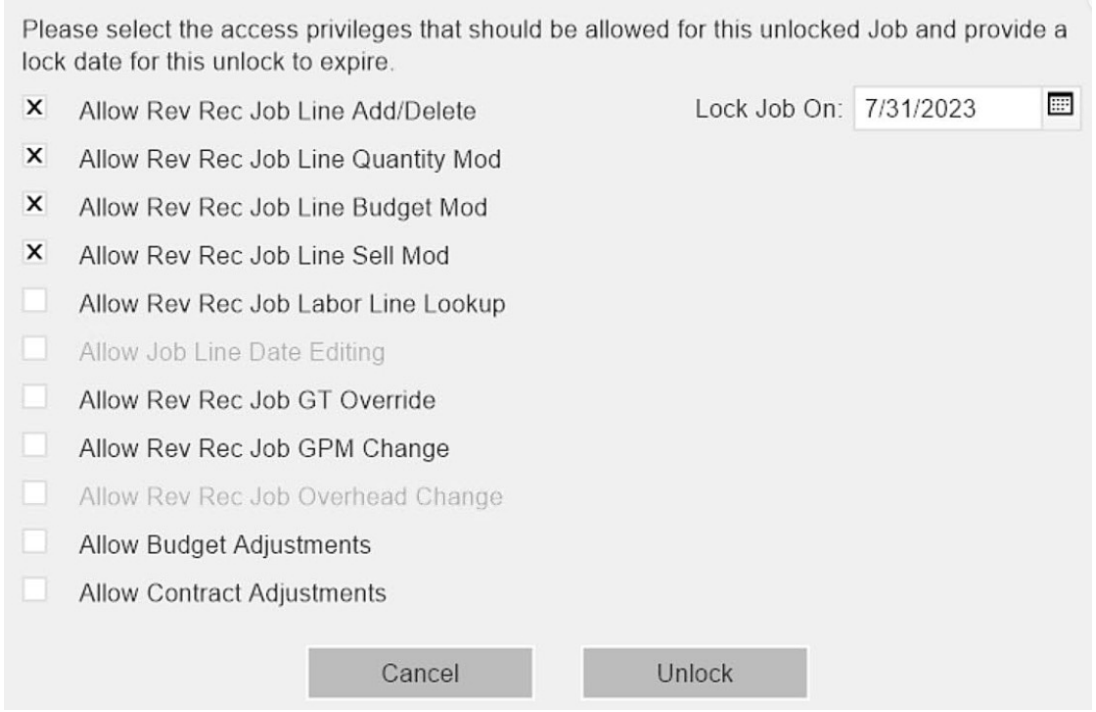
Unlocking the Job

- 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.



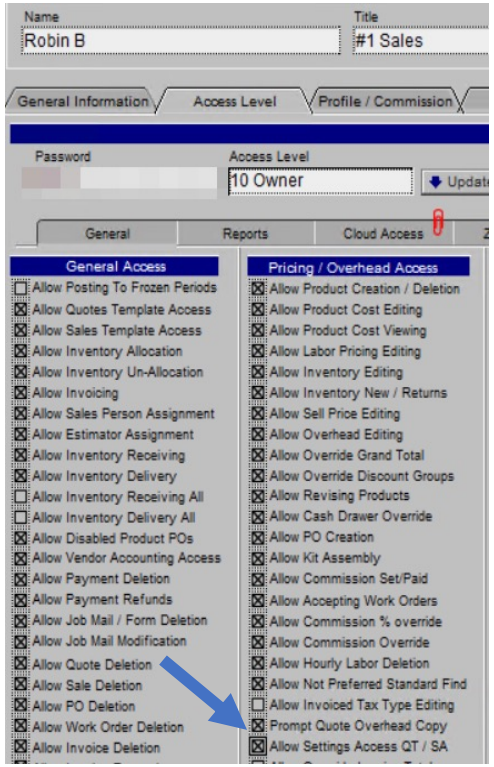
User Access

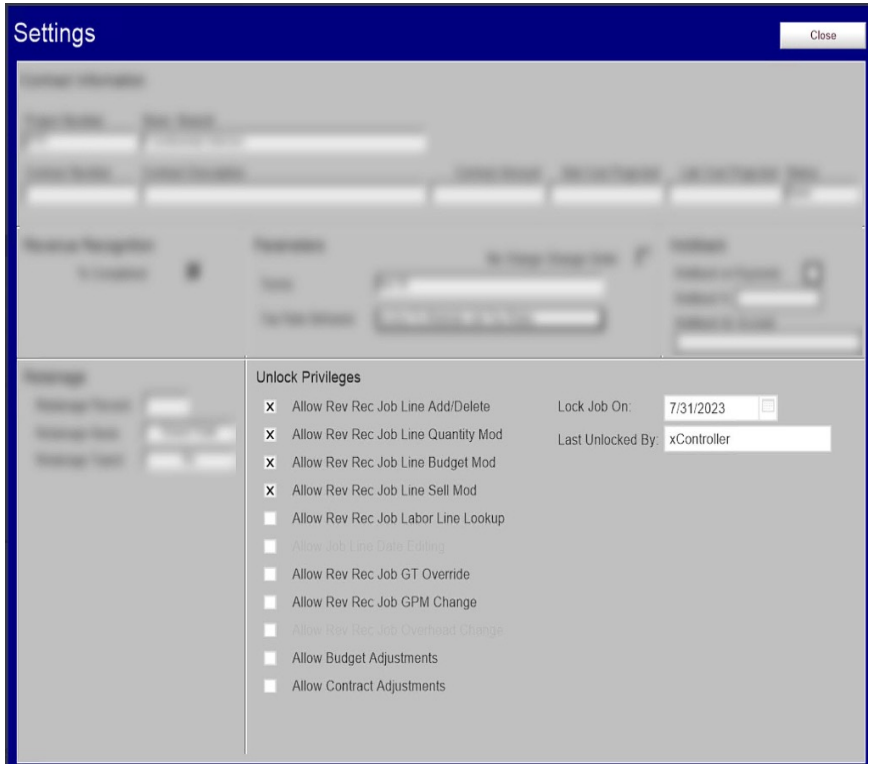
- The controller can at this time un-mark any features not needed so that when other users access the job they are only able to perform limited changes.
- The controller will also select the date that he job in question will stop allowing the changes.



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.





Project Change Guidelines

- Stay in the Fiscal Period
- If using Change orders Close at month end(keep the WIP True)
- Do not unclose 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