

Project Resource Estimating and Planning (PREP)TM

Microsoft
GOLD CERTIFIED

Partner

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 detailed 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 spread-sheets and start using *Project Resource Estimating & Planning (PREP)TM* 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 and 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.

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.


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.

Designed for
Microsoft Dynamics SLTM
Project Management & Accounting

Related modules:

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

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<p>Date: Sunday, December 05, 2004 Time: 12:05:09PM User: SYGADMIN</p> <p style="text-align: center;">Contoso, Ltd Detailed Estimate - Detail Period: 12-95 As of: 12/5/2004</p> <p style="text-align: right;">Page: 1 of 1 Report: RP730.rpt Company: 0000</p>																																																																																																																																																																																																																																						
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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 Selection and 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.

Resource Calendar

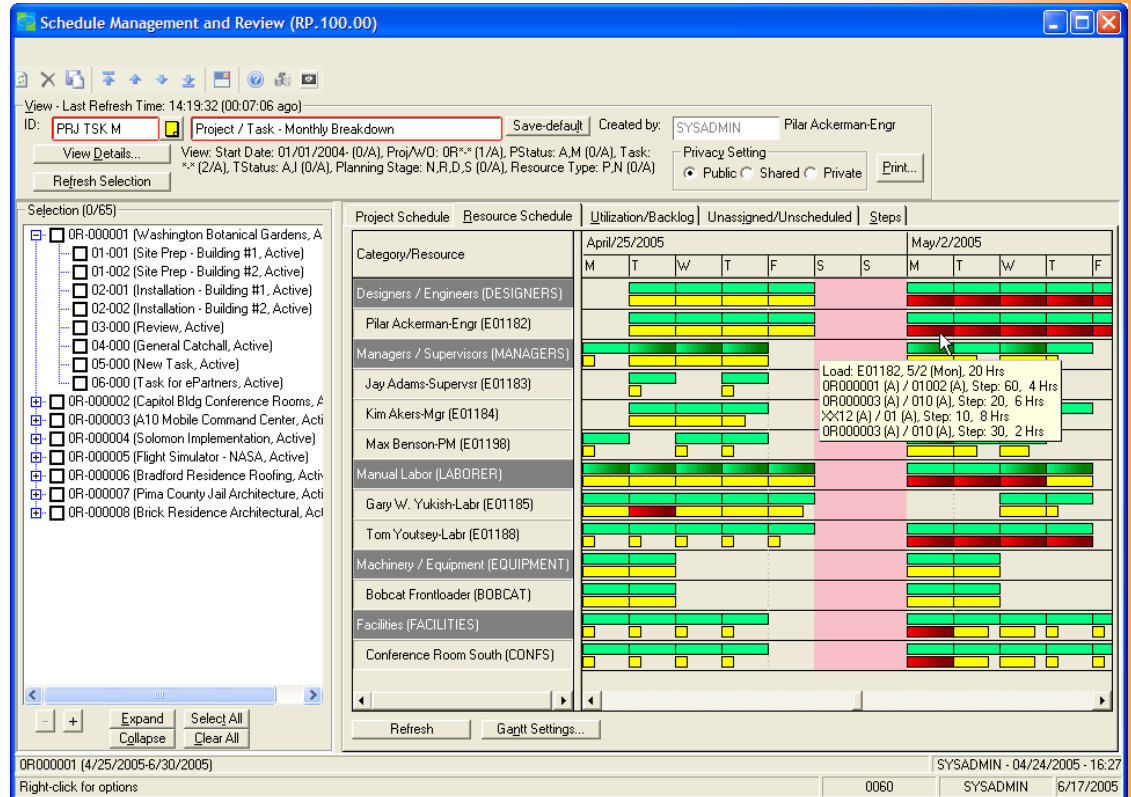
The *Resource Calendar & Capacity* wizard assists you in easily defining the available hours of each of your resources. You define your hours of operation, holidays, etc. Record resource-specific exceptions, such as vacations or sick time, and the wizard will generate the records for your *capacity calendar*.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

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.

Backlog and 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!



PREP's *Scheduling Management & Review* application will allow you to view your *Resource Schedule* and those *Resources' capacity and load conditions*. Organize, filter and display your data using virtually unlimited user-defined views. Use point-and-click functionality to reschedule, change capacity, etc. Hover over the load and capacity blocks to view information specific to that day.

Seamless Integration with Project Controller

Developed to be an extension to the Microsoft Dynamics SL Project Series, PREP is more than simply a standalone 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 <i>Estimate Entry</i> 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 <i>Estimate Entry</i> 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-driven <i>Billing Rates</i> 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 <i>Attribute filters</i> 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 <i>Schedule Management & Review</i> <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 <i>Schedule Management & Review</i> 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.
What Resources (both person and non-person) are currently assigned to Project RP101?	Use <i>Schedule Management & Review</i> 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 <i>Schedule Management & Review, Backlog/Utilization tab</i> 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.

Features included in Project Resource Estimating & Planning (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
- Point-and-click ease of use
- Rough-cut or detailed estimates, optionally using position/rate and multi-level rate tables
- Optionally auto-update budgets from estimates
- Quotes in MS Word
- Collect actual costs
- Workstep / Workflow

Prerequisites:

- Microsoft Dynamics SL Project Controller

Available on these Microsoft Dynamics SL versions:

- v6.5, 6.0, 5.5



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