Packaging using MSE Applications
Functional Overview
Ellipse EAM® 8
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Functional Overview

Packaging Using MSE Applications

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Definitions, Acronyms and Abbreviations

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FAQs

Does this functionality replace the MSQ695 functionality?

Yes.
Introduction
Purpose
The purpose of this functional overview is to detail how Job Packaging will be achieved in Ellipse 8.1. Instead of converting the existing MSQ695 Job Packaging application to an MSE, it has been included in the following applications:

- Job Estimating – MSE655
- Projects – MSE660.

Scope
The scope of this functionality is contained within the following modules:

- Work Orders (3620)
- Projects (3660)
- Job Estimating (3655)

Audience
The intended audience of this document includes business users, and the relevant Mincom managers, and functional and technical consultants.

Definitions and acronyms

Security
Standard Ellipse security applies.

Business Rules

Bulk Packaging Only
Bulk Packaging will be the only option allowed.

Packaging from both Job Estimates (MSE655) and Projects (MSE660)
Packaging will be available from two applications: Job Estimates and Projects, as business processes can vary across industries.

For industries where no specific Estimator business role exists, and the same business role performs the estimating, project creation, and project management role, the MSE660 Projects application may be more commonly used for packaging. Here, the user will be able to view the project hierarchy, select a level on the Project hierarchy to package to, and search for and select a Job Estimate. The user can then view the Job Estimate hierarchy, and finally select a level on the Job Estimate hierarchy to package from. The resultant project structure is immediately available for further processing.

For industries where a specific Estimator business role exists and different business roles perform the project creation and project management roles, the MSE655 Job Estimates application may be more applicable for packaging. Here, viewing or processing the resultant project structure is not immediately necessary. Hence, in MSE655, the user simply selects the entire estimate structure or a specific node and selects the packaging action. Either a new Project is created by Ellipse or the user enters the project number to package to. No project hierarchy is displayed.
Note that standard security functionality will allow clients to restrict packaging to one or both applications.

**Requirements only at Work Order Task level**

In the existing work order MSE applications, requirements are not allowed to be entered against a Work Order header and can only be entered against a task. Requirements are currently able to be entered against projects in MSE660.

The functionality to add requirements to a project in MSE660 will remain, as this does allow a simple project budget to be created. However, when packaging an estimate, requirements will only be copied at the WO Task level. An error message will display advising the user that unless requirements only exist at the task level, packaging cannot proceed.

This will require clients to construct job estimates at appropriate levels to cater for this.
Functional Overview

Process description

Separate Job Packaging application not required

Instead of converting the MSQ695 Job Packaging application to an MSE, this functionality has been included in the following applications:

- Projects – MSE660
- Job Estimating – MSE655

A separate Job Packaging application will not be written.

Job Estimate application – MSE655

A new Action has been added: ‘Package Estimate’.

This action will only be available when the status of the Job Estimate is ‘Selected for Work’.

To package an entire estimate, ensure item zero is selected prior to choosing the Action - ‘Package Estimate’.

To partially package an estimate, ensure the correct item has been selected, prior to choosing the Action - ‘Package Estimate’.

Packaging Options

A separate window is available to allow data entry. This will display which item is being packaged, and allow packaging options and defaults to be entered. If values are not entered on the Job Estimate, then these default values will be used.

The three options available are:

- Package Quantity – Select this option to Package the quantity indicated in the ‘Quantity To Package’ field, as a consolidated item or items.
- Package Quantity with Multiple Items - Select this option to create new child items from the top-level item in the estimate, rather than consolidating subordinates into a single target job package node.
- Consolidate – Select this option if you want to consolidate the selected node and all child items into a single target job package node.

Package estimate to new project

The user will be able to enter a Project Prefix or a Project Number and a new Project will be created.

Package estimate to existing project

The user will be able to package to an existing Project Number by entering the Project Number to package to. The functionality to view the Project hierarchy and select a node to package to, will not be provided.

Package estimate to a new Parent Work Order

The user will be able to enter a Parent Work Order Prefix or leave blank and a new Parent Work Order will be created.

Package estimate to existing Parent Work Order

The user will be able to package to an existing Parent Work Order by entering the Parent Work Order Number to package to.
Package estimate to a new Work Order
The user will be able to enter a Work Order Prefix or leave blank and a new Work Order will be created.

Package estimate to existing Work Order
The user will be able to package to an existing Work Order by entering the Work Order Number to package to.

Package estimate to a new Work Order Task
The user will be able to create a new Work Order Task.

Package estimate to existing Work Order Task
The user will be able to package to an existing Work Order Task by entering the Work Order Number and Task number to package to.

Requirements
Requirements will only be created at a Work Order Task level.
If the structure of the JE has requirements defined at Work Order header level, an error will display, telling the user “Packaging not allowed as requirements defined at Work Order header level”. The user will need to adjust the structure of the JE prior to packaging.

Project Number Display
If packaging to a new project number, a message will display to inform the user of the project number that was created.

Parent Work Order Number Display
If packaging to a new Parent Work Order, a message will display to inform the user of the Parent Work Order number that was created.

Work Order Number Display
If packaging to a new Work Order, a message will display to inform the user of the Work Order number that was created.

Projects application – MSE660
New Function – Package Estimate
Additional functionality will be added to the Projects application to enable the user to package an Estimate.
The user will be able to view the Project hierarchy, select a level on the Project hierarchy to package to, search for and select a Job Estimate. The user will be able to view the Job Estimate hierarchy, and select a level on the Job Estimate hierarchy to package from.
A new ‘Package Estimate’ option will be added on the tree view.
The user will be able to package/partial package a Job Estimate to a new Project or to an existing Project, using the ‘Package Estimate’ option on the tree view. When packaging to an existing Project, the user will select the required level of the Project hierarchy, before choosing the ‘Package Estimate’ option.
This will allow the user to search for and open a Job Estimate, view the Job Estimate hierarchy, and select which Job Estimate Item to package – either Item 0, or another Item (for partial packaging):

The user will be able to ‘Select and Return’ a node from the Job Estimate hierarchy.

Once a Job Estimate Item has been selected, the user will return to MSE660 and will be able to enter defaults and options on a new detail screen within MSE660. If values are not entered on the Job Estimate, then these default values will be used.

The user will be able to save defaults.

After saving, the resultant project structure will be available for further processing.

**Work Order and Work Order Task Update**

The functionality of MSE660 has been enhanced so that Work Orders and Work Order Tasks are able to be updated within MSE660 itself. The user is able to click on the relevant part of the hierarchy, and the details are displayed which are available for update.

**How It Works**

**Using MSE655 to create a hierarchy**

Open an Estimate that is at status ‘Selected for Work’.

Select ‘Actions’ drop down and select ‘Package Estimate’.
A new Packaging screen displays. Select ‘Project’ as the new Job package Entity Type. (The Update mode can be selected to Modify an existing Project hierarchy by entering the Project number).

Fill in required fields & select OK.
New entity is created and the new number is detailed at the top left hand side of the page.

The same process can be followed for creating a new Parent Work Order hierarchy or packaging to an existing one.

Open an Estimate that is at status ‘Selected for Work’.
Select ‘Actions’ drop down and select ‘Package Estimate’.

A new Packaging screen displays. Select ‘Parent Work Order’ as the new Job package Entity Type. (The Update mode can be selected to modify an existing Parent Work Order hierarchy).
Fill in required fields & select OK.

New entity is created and the new number is detailed at the top left hand side of the page.

The same process is followed to package to an existing Work Order or Work Order Task, or to create.
Using MSE660 to create a hierarchy

Open MSE660 & select ‘New’.

The MSE660 ‘Create Project’ screen displays.
Using the green plus sign, add a new Project.

A new entity is created, enter required information and save.

A new project has been created.
Using the ‘Actions’ drop down select ‘Package Estimate To Existing’.

Packaging screen opens.
Enter required information and select OK.

The new project hierarchy has been created.
Update Work Orders/Work Order Tasks from MSE660

Select the Work Order/ Work Order Task.
Change the description and select save.

Description is updated. Select the Task description. Make changes and save.

Changes are saved.