Site Item Request

This section describes how to create a Site Item Request within the Inventory module of ProjectVIEW

Table of Contents

1 Introduction

In ProjectVIEW, a Site Item Request (SIR) is used from the Site Engineer when they want to make a request for an item from the HQ.

To do this, both the web version and the desktop client version are needed; the web version is used on-site while the desktop client version is used to approve the SIR and continue the process at the HQ.

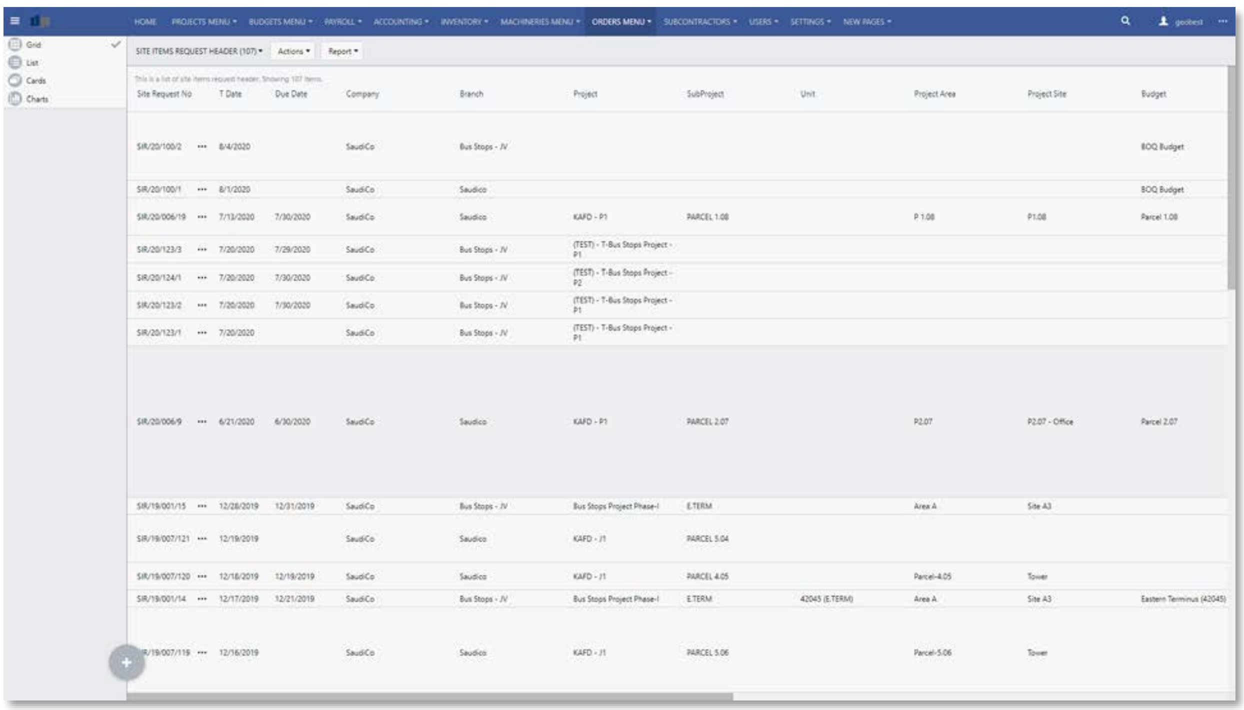
2 Creation of a Site Item Request

2.1 Web Version

To create a SIR in the web version, the user has to navigate to:

"ORDERS MENU" > "Site Item Request"

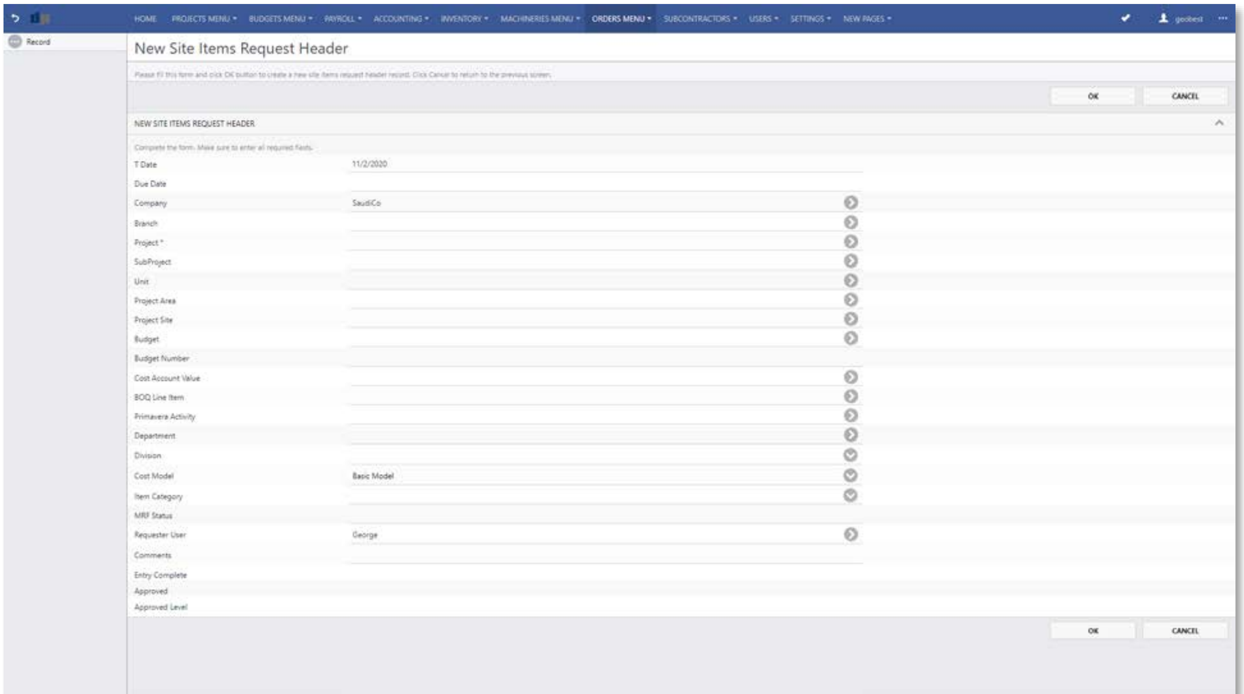
This will display a grid with all the SIRs:



Site Request No		T Date	Due Date	Company	Branch	Project	SubProject	Unit	Project Area	Project Site	Budget
SIR/20/100/2	•••	8/4/2020		SaudiCo	Bus Stops - JV						BOQ Budget
SIR/20/100/1	•••	8/1/2020		SaudiCo	Saudico						BOQ Budget
SIR/20/006/19	•••	7/13/2020	7/30/2020	SaudiCo	Saudico	KAFD - P1	PARCEL 1.08		P 1.08	P1.08	Parcel 1.08
SIR/20/123/3	•••	7/20/2020	7/29/2020	SaudiCo	Bus Stops - JV	(TEST) - T-Bus Stops Project - P1					
SIR/20/124/1	•••	7/20/2020	7/30/2020	SaudiCo	Bus Stops - JV	(TEST) - T-Bus Stops Project - P2					
SIR/20/123/2	•••	7/20/2020	7/30/2020	SaudiCo	Bus Stops - JV	(TEST) - T-Bus Stops Project - P1					
SIR/20/123/1	•••	7/20/2020		SaudiCo	Bus Stops - JV	(TEST) - T-Bus Stops Project - P1					
SIR/20/006/9	•••	6/21/2020	6/30/2020	SaudiCo	Saudico	KAFD - P1	PARCEL 2.07		P2.07	P2.07 - Office	Parcel 2.07
SIR/19/001/15	•••	12/28/2019	12/31/2019	SaudiCo	Bus Stops - JV	Bus Stops Project Phase-I	E.TERM		Area A	Site A3	
SIR/19/007/121	•••	12/19/2019		SaudiCo	Saudico	KAFD - J1	PARCEL 5.04				
SIR/19/007/120	•••	12/18/2019	12/19/2019	SaudiCo	Saudico	KAFD - J1	PARCEL 4.05		Parcel-4.05	Tower	
SIR/19/001/14	•••	12/17/2019	12/21/2019	SaudiCo	Bus Stops - JV	Bus Stops Project Phase-I	E.TERM	42045 (E.TERM)	Area A	Site A3	Eastern Terminus (42045)
R/19/007/119	•••	12/16/2019		SaudiCo	Saudico	KAFD - J1	PARCEL 5.06		Parcel-5.06	Tower	

Clicking on the "+" button on lower let part of the screen creates a new SIR.

When a user creates a new SIR, the new SIR form is displayed:



The following fields are mandatory:

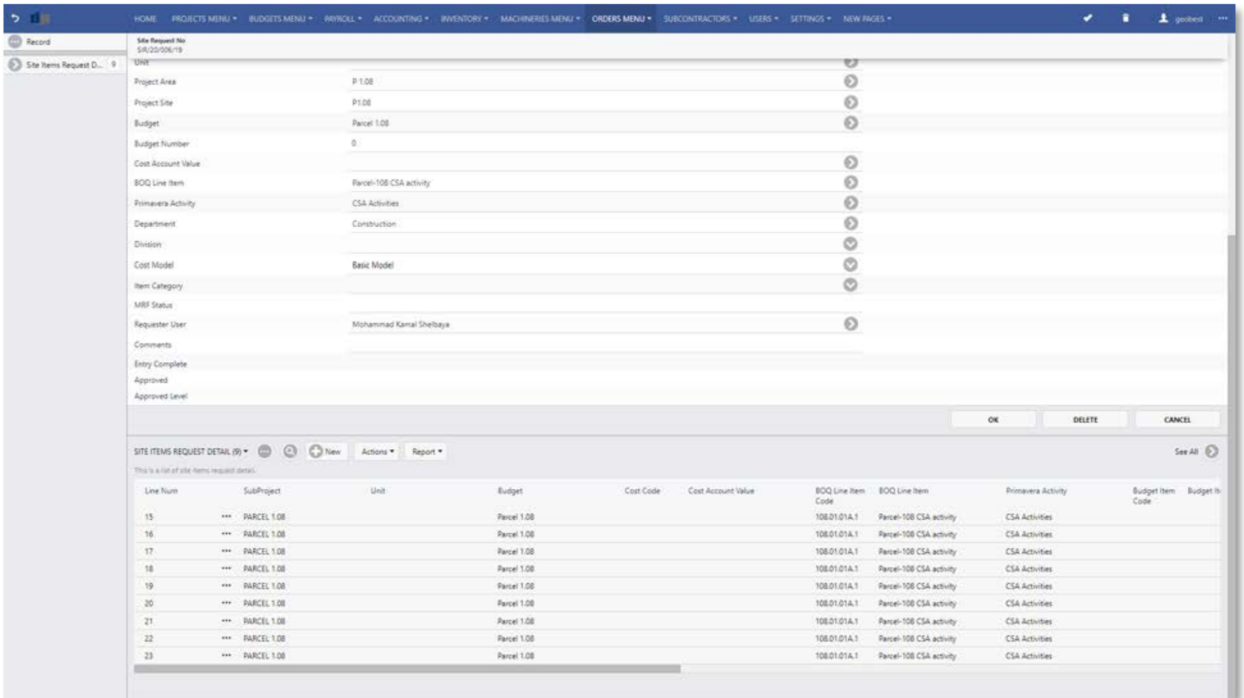
- ✓ T Date
- ✓ Due Date
- ✓ Company
- ✓ Branch
- ✓ Project
- ✓ Department Code
- ✓ Budget Code
- ✓ Due Delivery Date

If this SIR refers to a single, specific BOQ item, the "*BOQ Line Item*" field must be filled in (**Recommended**).

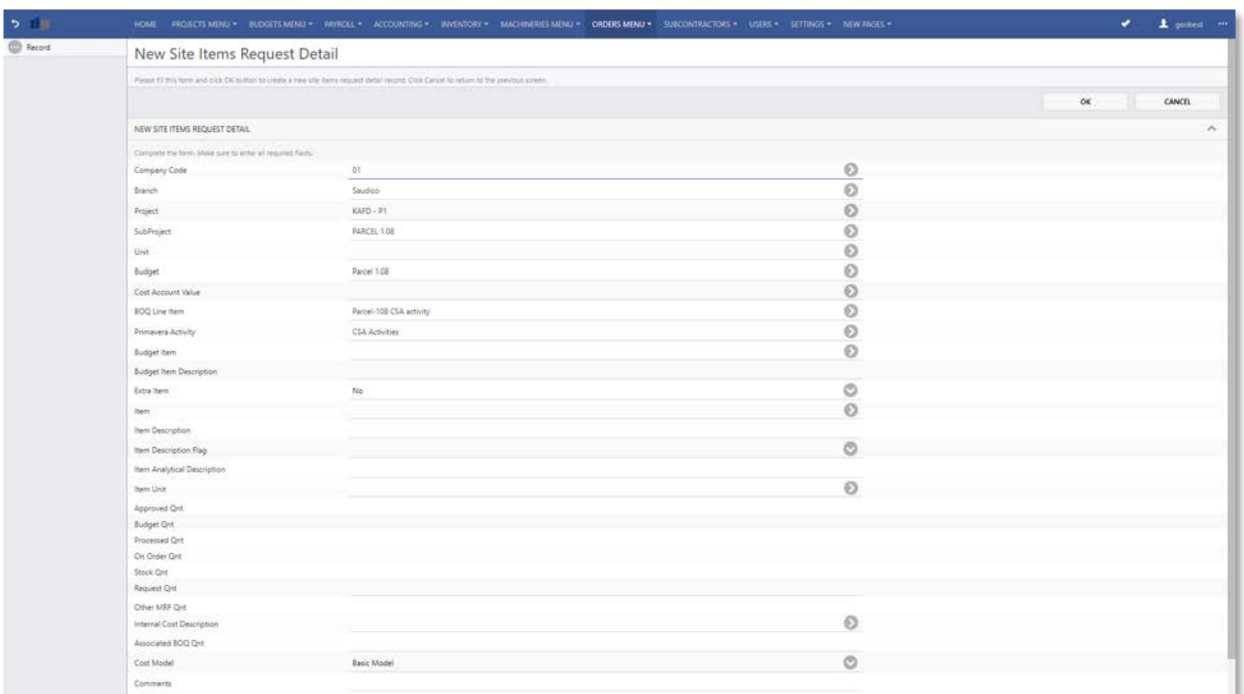
If this SIR is connected to a Primavera Activity, the "*Primavera Activity*" field must be filled in.

Having added the above, the user must save the SIR and click on the "*OK*" button.

The next screen allows the user to add the items he wants or to edit the existing ones:



To add a new item, the user has to click on the “*NEW*” button, which will display the following form:



The following fields are mandatory:

- ✓ Extra Item (to show if this item is included in the original BOQ or not)
- ✓ Item
- ✓ Item Description
- ✓ Item Unit
- ✓ Request Qnt
- ✓ Budget Code

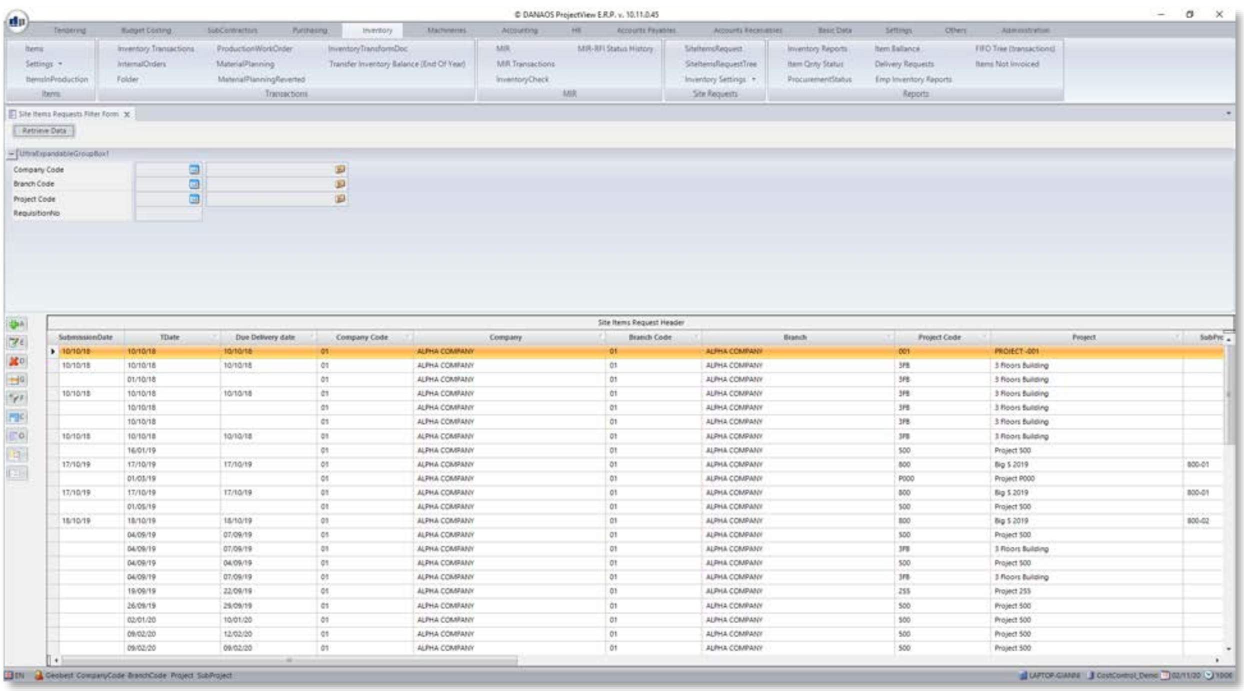
Having added the above, the user must save the new item and click on the "*OK*" button.

2.2 Desktop Client Version

To create a SIR in the desktop client version, the user has to navigate to:

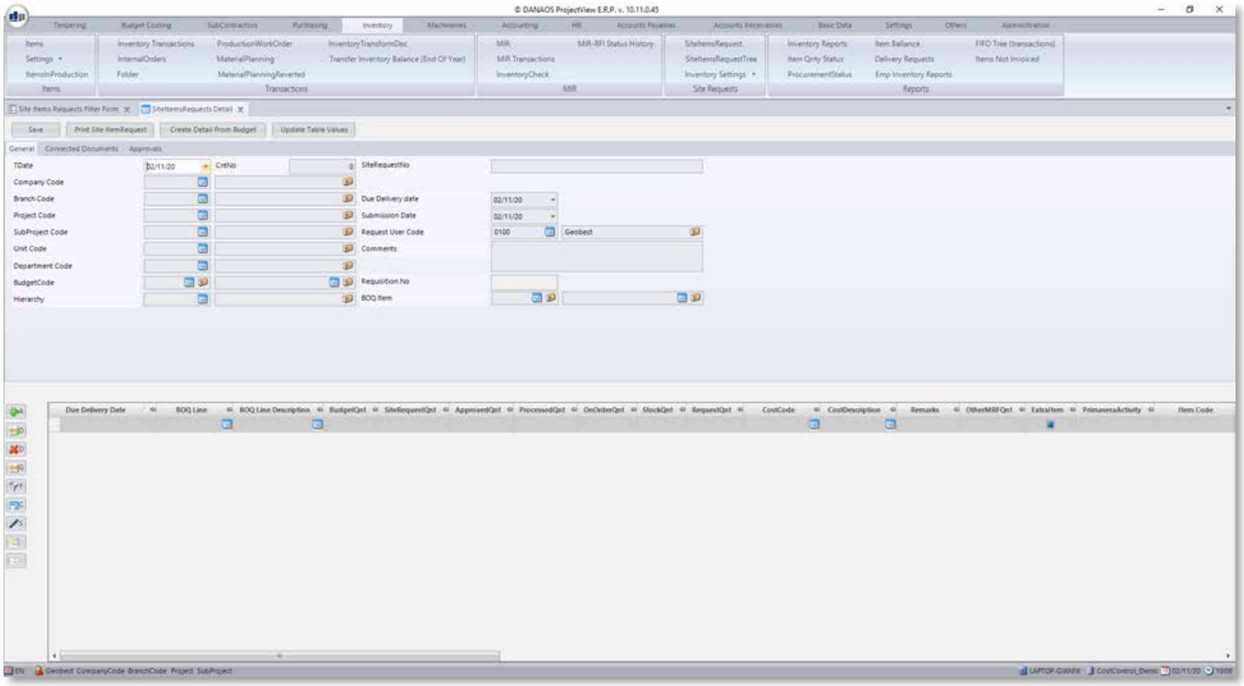
“*Inventory*” > “*Site Requests*” > “*Site Item Request*”

This will display an empty grid. By clicking on the “*Retrieve*” button, the grid is populated with all the SIRs:



This grid can be refined by using the parameters above it before retrieving data.

When a user creates a new SIR, the new SIR form is displayed:



The following fields are mandatory:

- ✓ TDate
- ✓ Company Code
- ✓ Branch Code
- ✓ Project Code
- ✓ Department Code
- ✓ Budget Code
- ✓ Due Delivery Date

If this SIR refers to a specific requisition, the “*Requisition No*” field must be filled in.

If this SIR refers to a single, specific BOQ item, the “*BOQ Item*” field must be filled in (**Recommended**).

Having added the above, the user must save the SIR.

2.2.1 Adding Items

Having completed the previous step, the user can now start adding items to the SIR. This is done using the Grid at the bottom part of the form.

If a BOQ Item has been added in the previous step, the SIR can be populated with the items which are included in that BOQ item. To do this, the user must click on "*Create Detail From Budget*". The user must then add the correct "*Request Qnt*" of each lines which corresponds to the quantity of that item they need to request from the HQ.

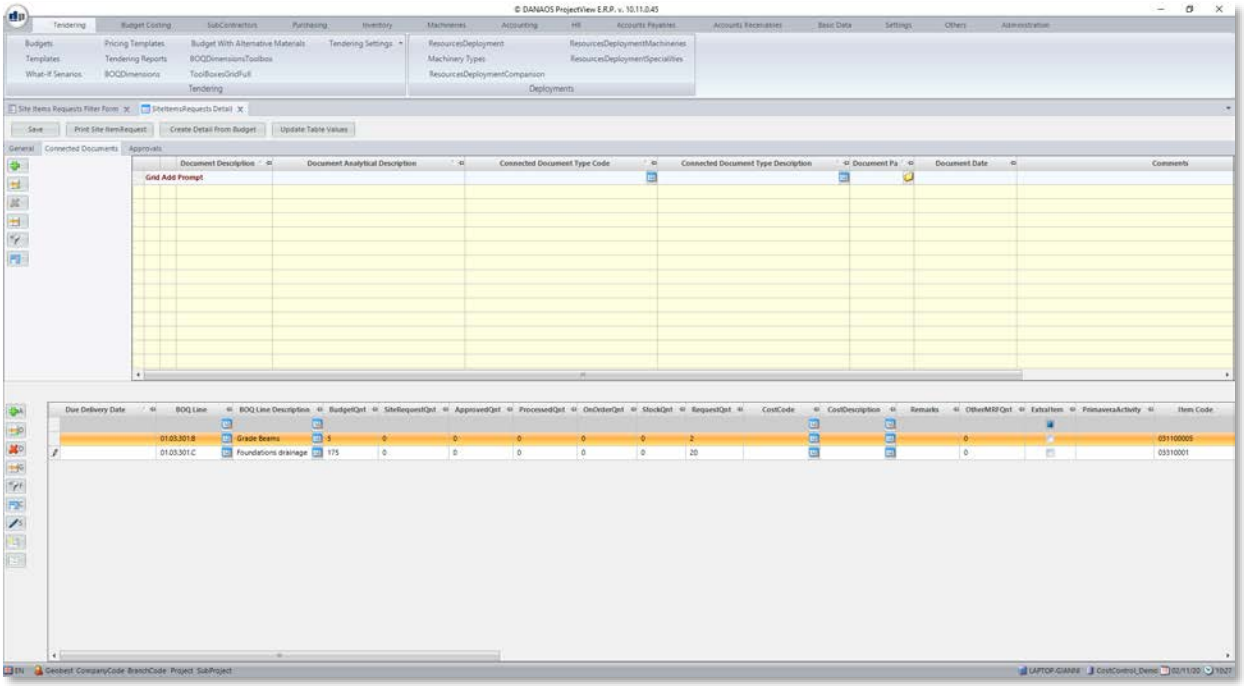
To add new lines, the user must fill in the following fields in a new line of the grid:

- ✓ Due Delivery Date
- ✓ BOQ Line
- ✓ Request Qnt
- ✓ Item Code
- ✓ Item Unit Code

Having added the above, the user must save the SIR.

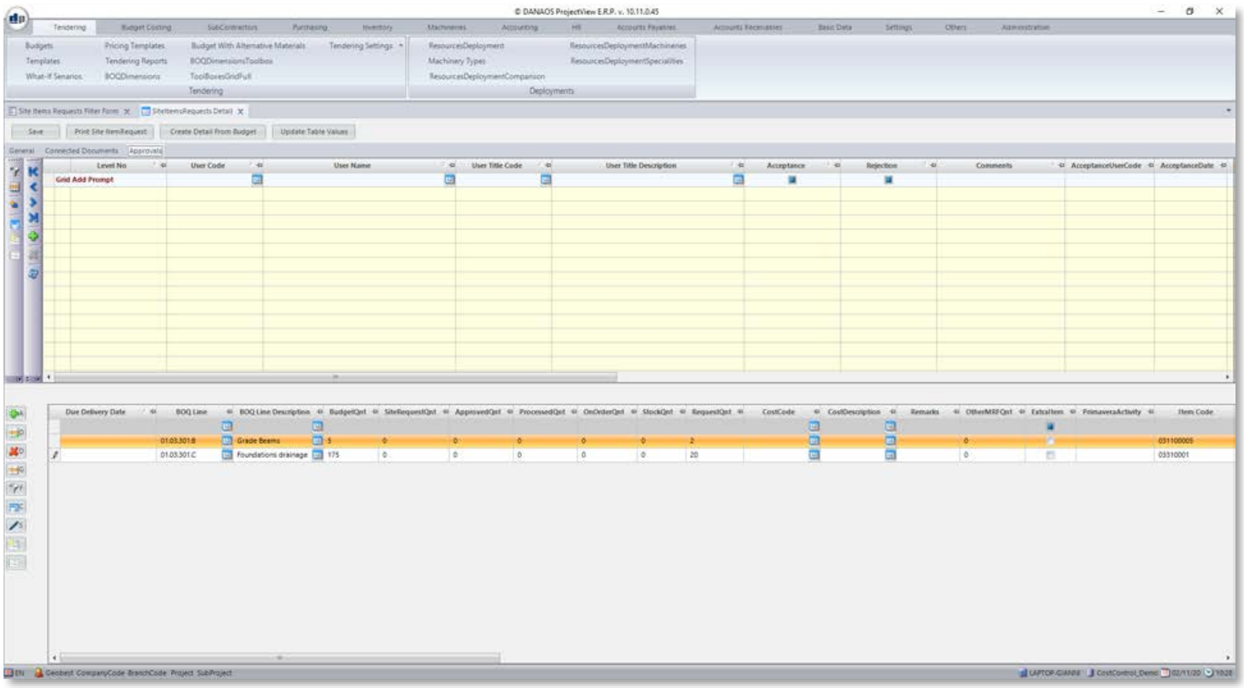
2.2.2 Connected Documents

It is possible to associate a SIR with one or more documents (e.g. Plans). This tab allows for these documents to be associated with the SIR.



2.2.3 Approvals

This tab allows user to approve or reject a SIR.

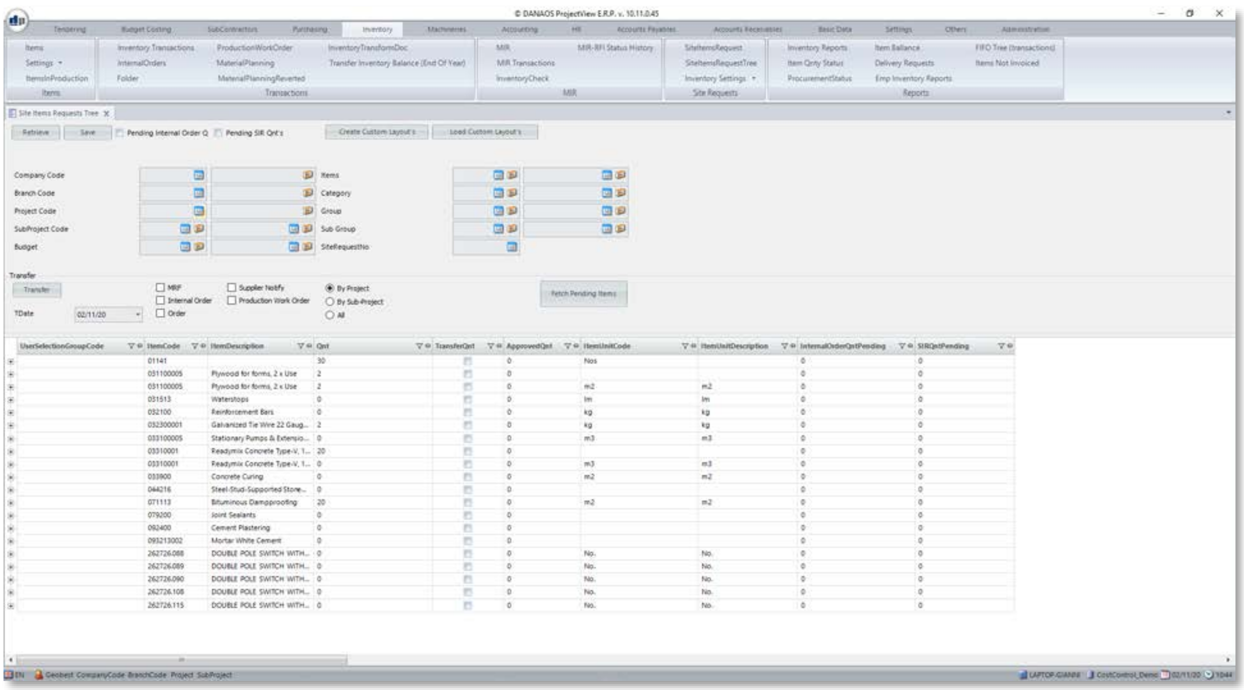


3 Processing Site Item Requests

After the creation of a SIR, no matter if it was created on the web version or on the desktop client version, the user must select what the next steps for this request will be.

To review pending SIRs, the user has to navigate to:

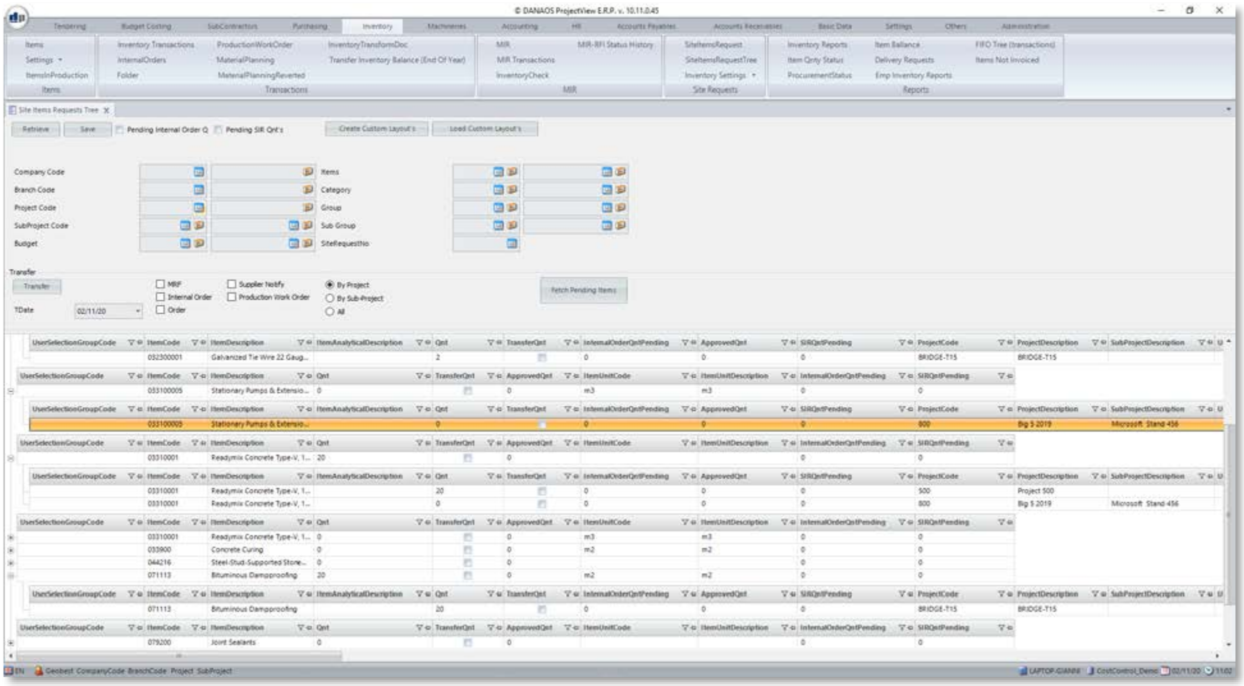
“*Inventory*” > “*Site Requests*” > “*Site Item Request Tree*”



By using the parameters and clicking on the “*Retrieve*” button, the grid will display the appropriate SIRs summarized by:

- ✓ Group Code (described in the next section)
- ✓ Item Description

By expanding the lines, the user can review what items have been requested and for which project.



The next steps will be to assign a group code, transfer and approve quantities for one or more lines and finally clicking on the "*Transfer*" button. These steps are explained below.

3.1 Assigning Group Code

The first step is to select the appropriate Group Code. A group code may be:

3.1.1 MRF

Selecting this group code means that a new MRF will be created for the selected item. A requisition will be later created from this MRF in order for the item to be ordered by the purchasing department.

3.1.2 Internal Order

Selecting this group code means that the items are currently available. There is no need for an external order and they can be sent to the site.

3.1.3 Order

Selecting this group code means that a new order will be created for the selected item. This happens when the item has a pre-selected supplier and price and therefore can be ordered directly, without the usual purchasing procedure.

Note

To do so, the item in question should have a "*Supplier Code*", "*Unit Price*" and the "*Order from this Supplier*" should be selected. All these are available in the item form (See. Inventory manual).

3.1.4 Supplier Notify

Selecting this group code means that there is an existing order with a supplier who only waits for a notification before delivering the item. An email will be sent to that supplier without going through the usual purchasing procedure.

3.1.5 Production Work Order

Selecting this group code means that an order will be given for the item to be produced out of its ingredients by the production team.

Note

To do so, the item in question should have a "*Cost Analysis*" breakdown. This is available in the item form (See. Inventory manual).

3.2 Transferring and Approving quantities

There are three very important columns in the grid:

- ✓ Qnt
- ✓ TransferQnt
- ✓ ApprovedQnt

Qnt	TransferQnt	InternalOrderQntPending	ApprovedQnt
20	☑	0	20
0	☐	0	0

"*Qnt*" is the requested quantity.

By ticking the "*TransferQnt*", the user approves that this item should be ordered/produced. They can then change the "*ApprovedQnt*" amount to order/produce the desired quantity

3.3 Transferring Items

Having completed the above steps, the user must click select which operation they want to perform by ticking the appropriate check box ("*MRF*", "*Internal Order*" etc) on the "*Transfer*" button. A new dialog box will appear asking whether the store keeper should be notified.

3.4 Reviewing pending items

There are two very important columns in the Site Item Request Tree grid:

- ✓ InternalOrderQntPending
- ✓ SIRQntPending

The first one displays the quantity of this item which has not yet been sent to the site. Every time an internal order is sent, this number decreases.

The second one displays the quantity of this item in the SIR which has not been processed yet. Every time the user transfers a quantity (as described above), this quantity decreases.

Therefore, when the first number is 0, the site will have received all the items. When the second number is 0, all the items in the SIR will have been processed.

Another useful column is the "*SI*" which has a button inside it. When the user clicks that button, the SIR history (i.e. the list of transfers for that particular SIR) will be displayed in a separate window.

4 Appendix – Inventory Settings

There are various fields in the SIRs which use predefined codes. These are:

- ✓ Inventory Transaction Types
- ✓ Inventory Document Types
- ✓ Documents and Inventory Documents
- ✓ Inentories

To view/add/edit the above, the user has to navigate to:

“*Inventory*” > “*Site Requests*” > “Inventory *Settings*” > …

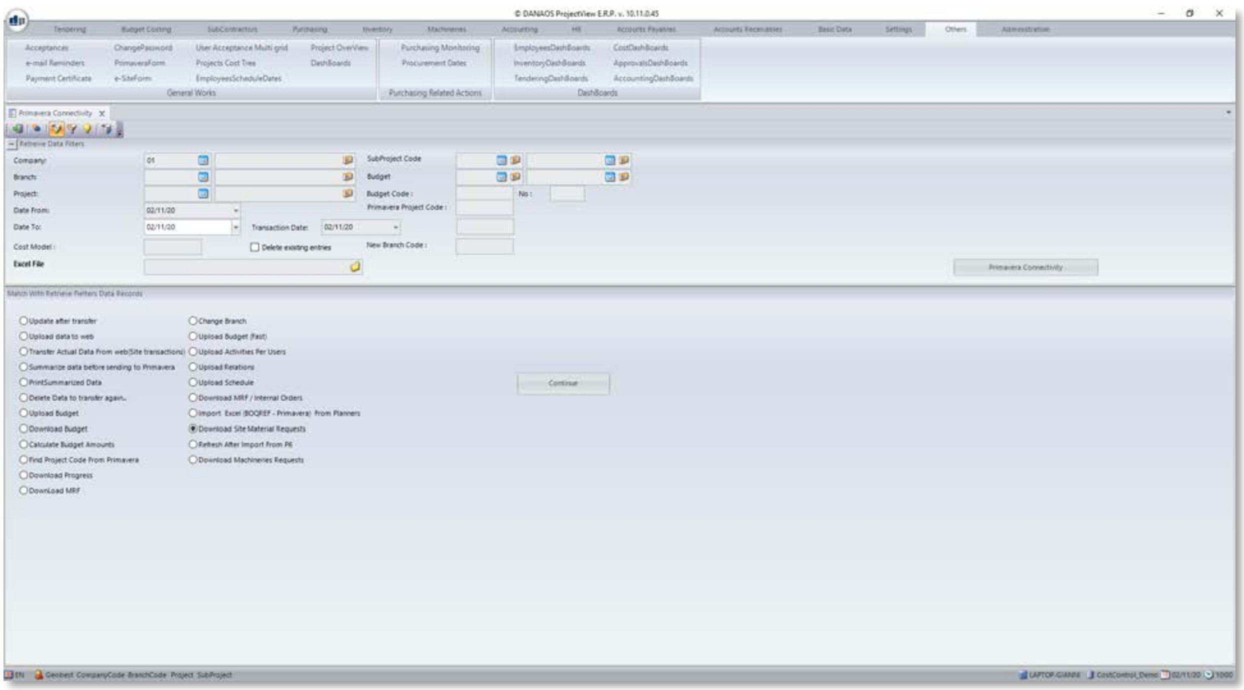
and then choose the appropriate item from the list.

5 Appendix – Manually download SIRs

SIRs are automatically downloaded every 30 minutes. If the user wants skip this time and download all available SIRs, he has to follow the procedure described below:

Navigate to:

“*Others*” > “*General Works*” > “*Primavera Form*”



When the form above is displayed, the user must first fill in the following parameters:

- ✓ Company
- ✓ Branch
- ✓ Project
- ✓ Date From
- ✓ Date To

Then, they must select the “*Download Site Material Requests*” and click on the “*Continue*” button.

In case of any queries or support issues, please contact us:

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