



Machinery Requests

This section describes how to create a Machinery Request within the Machineries module of ProjectVIEW

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1 Introduction

In ProjectVIEW, a Machinery Request is used from the Site Engineer when they want to make a request for a machinery from the HQ or garage.

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 Machinery Request

2.1 Web Version

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

“MACHINERIES MENU” > “Machinery Request Form”

This will display a grid with all the machinery requests:

T Date	Company	Branch	Project	SubProject	Unit	Document	Garage	Supplier	Requester	Date From	Date To	Comments
10/04/2019	SaudiCo	Bus Stops - JV	Bus Stops Project Phase-I						Abu Bakar	10/06/2019	10/31/2019	
10/04/2019	SaudiCo	Bus Stops - JV	Bus Stops Project Phase-I						Ammar Al Ali	10/06/2019	10/29/2019	
12/15/2019	SaudiCo	Bus Stops - JV	Bus Stops Project Phase-I	ETERM	42045 (ETERM)				Inhad Ahmad Bhatt	12/18/2019	12/04/2019	
12/17/2019	SaudiCo	Bus Stops - JV	Bus Stops Project Phase-I	ETERM	42045 (ETERM)				Inhad Ahmad Bhatt	12/18/2019	12/25/2019	
12/08/2019	SaudiCo	Bus Stops - JV	Bus Stops Project Phase-I	BRT-5TH-B1	42041 (12_21)	DOC #001				12/29/2019	12/31/2019	TEST ME
1/5/2020	SaudiCo	Bus Stops - JV	Bus Stops Project Phase-I	ETERM	42045 (ETERM)				Site Engineer	1/5/2020	1/12/2020	test
1/14/2020	SaudiCo	Bus Stops - JV	Bus Stops Project Phase-I	ETERM	42045 (ETERM)				Site Engineer	1/14/2020	1/14/2020	test1
5/14/2020	SaudiCo	Bus Stops - JV	Bus Stops Project Phase-I			MREQUEST-1			George	6/1/2020	6/20/2020	
5/1/2020	SaudiCo	Bus Stops - JV	Bus Stops Project Phase-I			500			George	5/17/2020	5/26/2020	
5/2/2020	SaudiCo	Bus Stops - JV	Bus Stops Project Phase-I			720			George	5/17/2020	5/25/2020	
5/17/2020	SaudiCo	Bus Stops - JV	Bus Stops Project Phase-I			Mach-req-1			George	5/18/2020	5/31/2020	
5/9/2020	SaudiCo	Bus Stops - JV	Bus Stops Project Phase-I			7777			George	5/20/2020	5/30/2020	
5/17/2020	SaudiCo	Bus Stops - JV	Bus Stops Project Phase-I			DEMO-001			George	5/18/2020	5/30/2020	
5/17/2020	SaudiCo	Bus Stops - JV	Bus Stops Project Phase-I			DEM-00002			George	5/18/2020	5/31/2020	
5/19/2020	SaudiCo	Saudico	KAFD - P1	PARCEL 1.08					George	5/20/2020	5/31/2020	
5/11/2020	SaudiCo	Saudico	KAFD - P1	PARCEL 1.08					George	5/21/2020	5/31/2020	
5/20/2020	SaudiCo	Saudico	KAFD - P1			89			George	5/21/2020	5/25/2020	
5/21/2020	SaudiCo	Saudico	KAFD - P1			1234			George	5/22/2020	5/31/2020	

Clicking on the “+” button on lower left part of the screen creates a new machinery request.

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

The screenshot shows the 'New Mach RF Header' form in the ProjectVIEW ERP system. The form is titled 'NEW MACH RF HEADER' and includes a navigation bar at the top with various menu options like HOME, PROJECTS MENU, BUDGETS MENU, etc. The form fields are as follows:

- T Date*: A date field with a calendar pop-up showing November 2020.
- Company: A dropdown menu.
- Branch: A dropdown menu.
- Project: A dropdown menu.
- SubProject: A dropdown menu.
- Unit: A dropdown menu.
- DocumentNo: A text input field.
- Garage: A dropdown menu.
- Supplier: A dropdown menu.
- Requester: A text input field containing the name 'George'.
- Date From: A date input field.
- Date To: A date input field.
- Comments: A large text area at the bottom of the form.

Buttons for 'OK' and 'CANCEL' are located at the top right and bottom right of the form.

The following fields are mandatory:

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

Having added the above, the user must click on the “OK” button.

The next screen allows the user to add the machinery types they want or to edit the existing ones:

REVIEW MACH RF HEADER
5/2/2020

Please review mach rf header information below. Click Edit to change this record, click Delete to delete the record, or click Cancel/Close to return back.

EDIT DELETE CLOSE SHOW MACHINERY AVAILABILITY SHOW MACHINERY ALLOCATIONS ENTRY COMPLETE

MACH RF HEADER

These are the fields of the mach rf header record that can be edited.

T Date 5/2/2020

Company SawdCo

Branch Bus Stops - JV

Project Bus Stops Project Phase-II

SubProject

Unit

DocumentNo 720

Storage

Supplier

Requester George

Date From 5/17/2020

Date To 5/25/2020

Comments

Entry Complete

Approved

Approved Level

EDIT DELETE CLOSE SHOW MACHINERY AVAILABILITY SHOW MACHINERY ALLOCATIONS ENTRY COMPLETE

Mach RF Detail Mach RF Assignments

MACH RF DETAIL (2)

This is a list of mach rf details.

Quantity	Machinery Type	Date From	Date To	Comments
2 ***	Compressor	5/17/2020	5/25/2020	
3 ***	Concrete Vibrator	5/17/2020	5/31/2020	

To add a new item, the user has to click on the "NEW MACH RF Detail" button, which will display the following form:

Machinery Availability
Record

This page allows Machinery Request Form management.

New Mach RF Detail

Please fill this form and click OK button to create a new mach rf detail record. Click Cancel to return to the previous screen.

OK MACHINERY AVAILABILITY CANCEL

NEW MACH RF DETAIL

Complete the form. Make sure to enter all required fields.

Quantity

Machinery Type *

Date From 5/17/2020

Date To 5/25/2020

Supplier

Comments

OK MACHINERY AVAILABILITY CANCEL

The following fields are mandatory:

- ✓ Quantity
- ✓ Machinery Type

Having added the above, the user must click on the “OK” button.

2.2 Desktop Client Version

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

“Machineries” > “Transactions” > “Machinery Request”

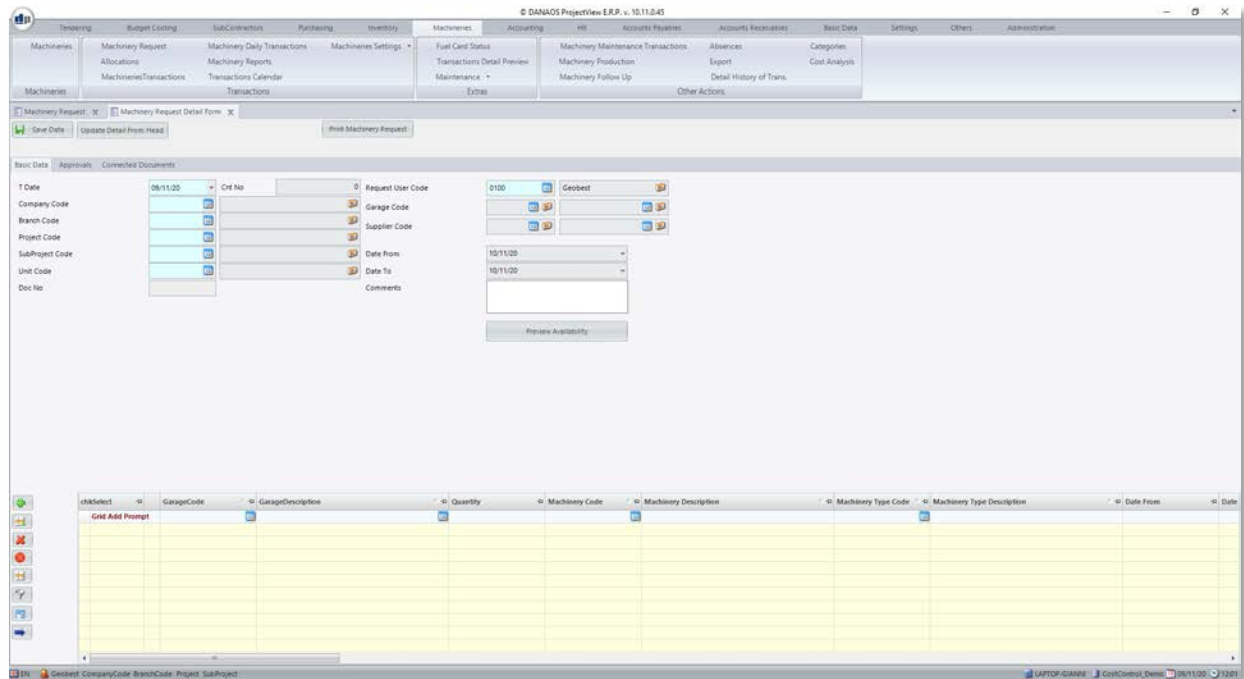
This will display an empty grid. By clicking on the *“Retrieve”* button, the grid is populated with all the machinery requests:

The screenshot shows the 'Machinery Request' window in the ProjectVIEW ERP desktop client. The window title is '© DANAOS ProjectView ERP, v. 10.11.045'. The menu bar includes: Tendering, Budget Costing, SubContracts, Purchasing, Inventory, Machineries, Accounting, HR, Accounts Payables, Accounts Receivable, Basic Data, Settings, Others, Administration. The 'Machineries' menu is open, showing options like Machinery Request, Machinery Daily Transactions, Machinery Settings, Fuel Card Status, Machinery Maintenance Transactions, Transactions Detail Preview, Machinery Production, Maintenance, Machinery Follow Up, and Extras. The 'Machinery Request' window has a toolbar with 'Retrieve' and 'Close File' buttons. Below the toolbar are filter fields for Company Code, Branch Code, Project Code, Request User, Comments, Date Fr, and Date To. The data grid below has columns: Company Code, Company Description, Date From, Document No, Garage Code, Garage Description, Branch Code, Branch Description, Date To, Supplier Code, Supplier Description. The grid contains the following data:

Company Code	Company Description	Date From	Document No	Garage Code	Garage Description	Branch Code	Branch Description	Date To	Supplier Code	Supplier Description
01	ALPHA COMPANY	02/08/18	MRQ/18/9			01	ALPHA COMPANY	22/08/18		378
01	ALPHA COMPANY	15/03/19	MRQ/19/2			01	ALPHA COMPANY	31/03/19		378
01	ALPHA COMPANY	22/01/20	MRQ/20/2			01	ALPHA COMPANY	28/01/20		500
01	ALPHA COMPANY	20/02/20	MRQ/20/4			01	ALPHA COMPANY	29/02/20		500
01	ALPHA COMPANY	21/02/20	MRQ/20/6			01	ALPHA COMPANY	28/02/20		500
01	ALPHA COMPANY	01/07/20	DOC-2			01	ALPHA COMPANY	22/07/20		884
01	ALPHA COMPANY	01/07/20	MRQ/20/8			01	ALPHA COMPANY	22/07/20		884

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

When a user creates a new machinery request, the new machinery request form is displayed:



The following fields are mandatory:

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

Having added the above, the user must save the machinery request.

2.2.1 Adding Items

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

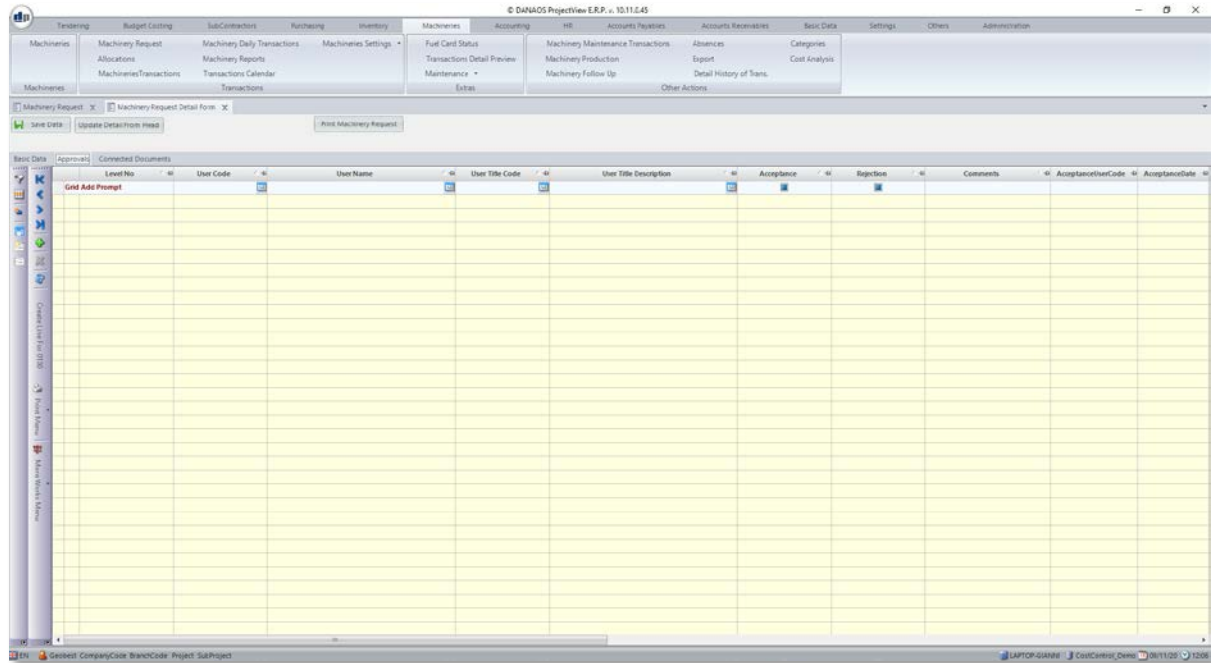
To add new lines, the user must fill in the following fields in a new line of the grid:

- ✓ Quantity
- ✓ Machinery Type Code

Having added the above, the user must save the machinery request.

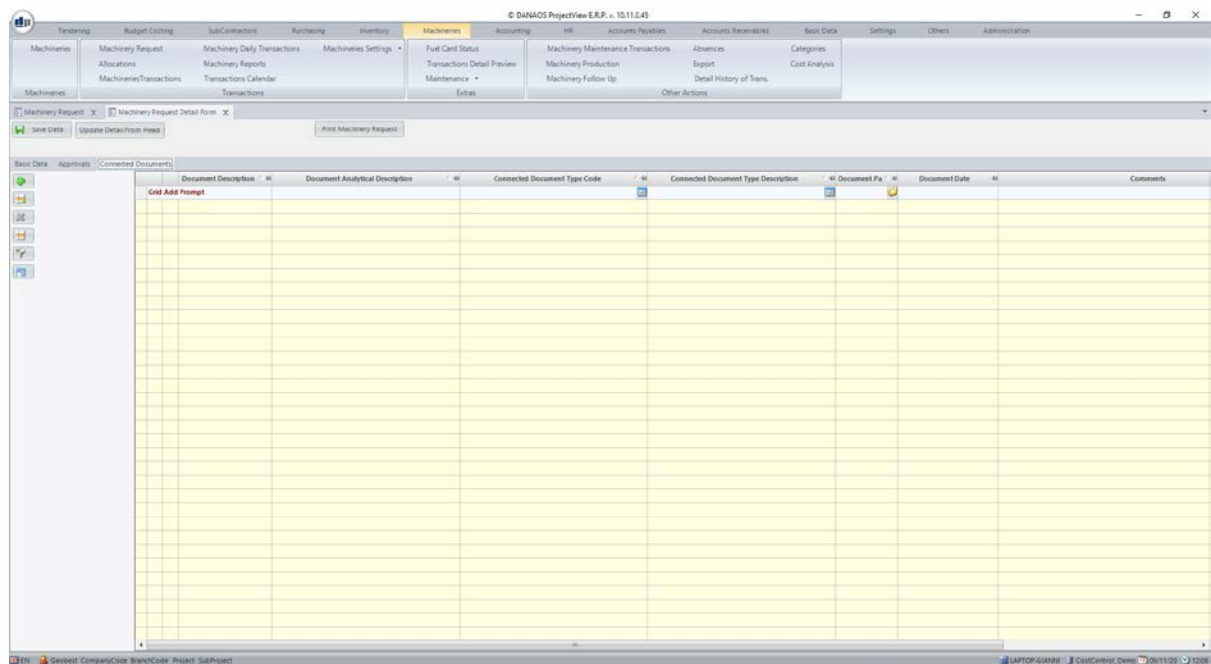
2.2.2 Connected Documents

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



2.2.3 Approvals

This tab allows user to approve or reject a machinery request.



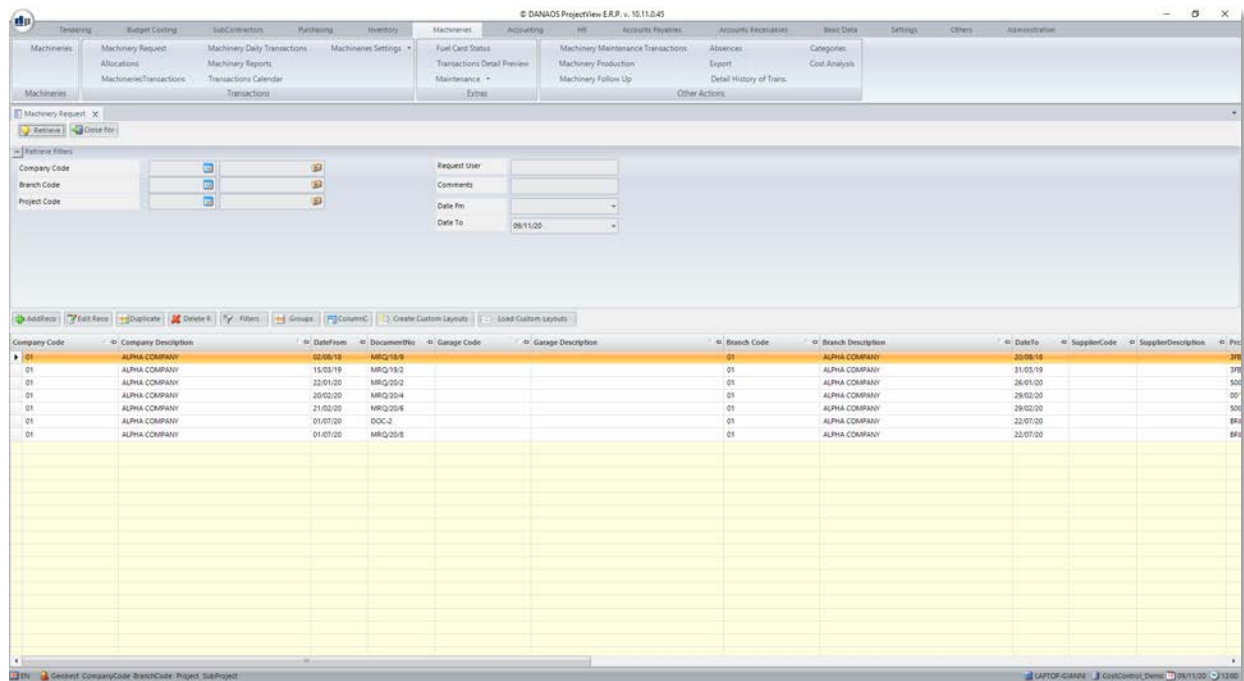
3 Processing Machinery Requests

After the creation of a machinery, 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 machinery requests, the user has to navigate to:

“Machineries” > “Transactions” > “Machinery Request”

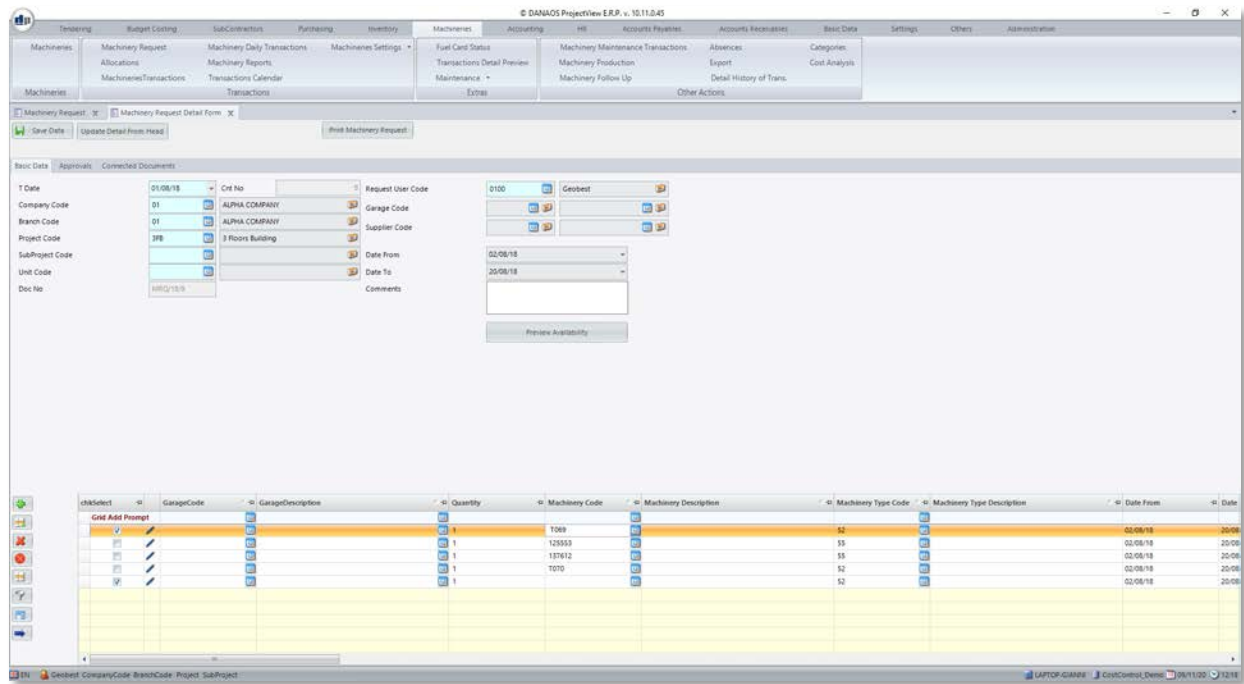
This will display an empty grid. By clicking on the *“Retrieve”* button, the grid is populated with all the machinery requests:



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

Double clicking on a machinery request will display the machinery request form.

3.1 Machinery Request form



The next steps will be to:

- ✓ Select the machineries that will be approved (in the grid) and tick the check box in the “*chk Select*” column
- ✓ Change the quantity as needed

Finally, the user must click on the “*Transfer To Machinery Allocations*” button which is located on the left of the grid:



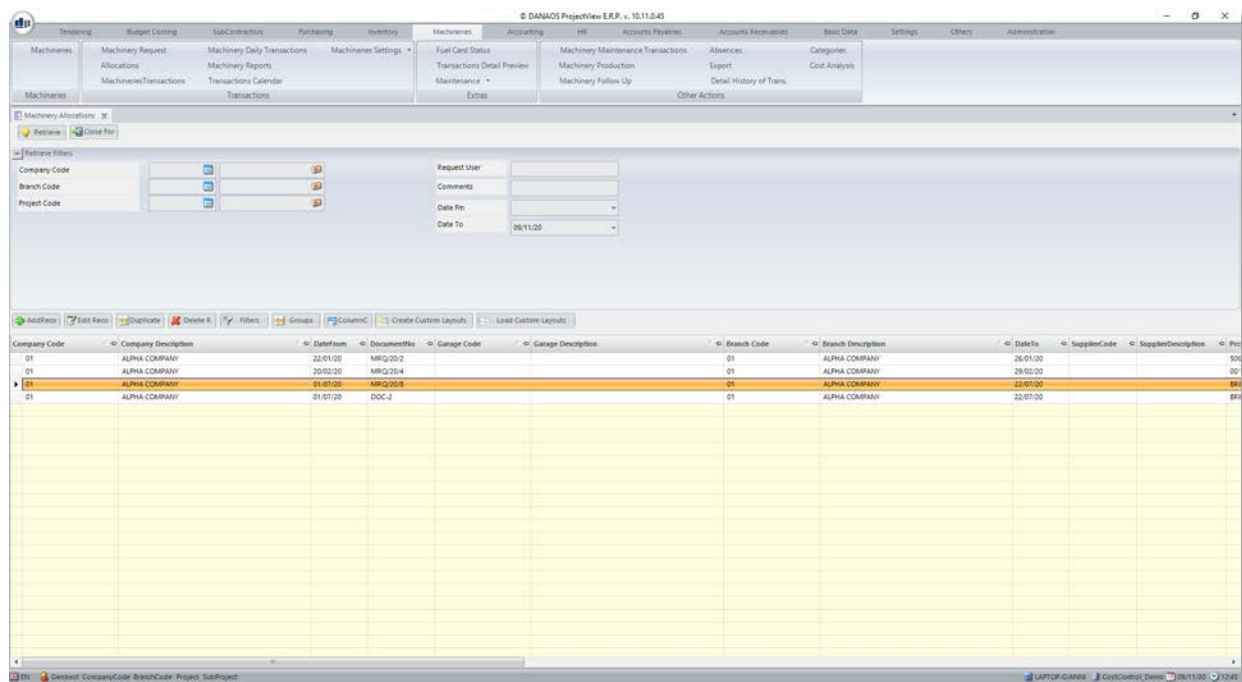
4 Machinery Allocations

A Machinery Allocation is the next step following an approved machinery request.

To review machinery allocations, the user has to navigate to:

“Machineries” > “Transactions” > “Allocations”

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



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

Double clicking on a machinery request will display the machinery allocation form.

4.1 Machinery Allocation form

4.1.1 Approving allocations and assigning machinery

Approver	Grid Add Prompt	Confirmed On/Off	Non-Available On/Off	Quantity	Machinery Code	Machinery Description	Machinery Type Code	Machinery Type Description	Date From	Date To
				1	7069		52		01/07/20	22/07/20
				1	26322		08		01/07/20	22/07/20
				1	28156		08		01/07/20	22/07/20

This form is very similar to the machinery request form described previously. The main difference is that the system has now split each line into multiple ones, each with a quantity of one machinery (e.g. if the machinery request was for four machineries, the allocation will have four lines).

The user must now assign a specific machinery by filling in the “*Machinery Code*” column. To do that, they can check for the availability of the machineries by clicking on the “*Preview Availability*” button. This will display the following window:

By setting the parameters as appropriate and clicking on the “*Preview Availability*” button, the system will display a grid with all machineries along with their availability.

The screenshot shows a window titled "Available Machineries" with date filters for "Date From" (12/08/2018) and "Date To" (18/08/2018). Below the filters is a grid with columns for Machinery Code, Machinery Description, Machinery Type, and Machinery Type, followed by a series of columns representing dates from 2018 to 2022. The grid contains several rows of machinery, including Forklifts (FRL) and Water Tanks (WTT), with some cells containing codes like "001 -Bus St..." indicating availability or status.

Note

The “*Preview Availability*” window uses the following colors to distinguish between different allocations:

- Requests
- Allocations not Approved
- Allocations Approved
- Transactions

Using this information, the user can assign the specific machinery in the previous grid by filling in the “*Machinery Code*” column in each line.

The screenshot shows a detailed grid with columns: Approve, Grid Add Prompt, isSelect, isConfirmedDeliv, isNonAvailableDeliv, Quantity, Machinery Code, Machinery Description, Machinery Type Code, Machinery Type Description, Date From, and Date To. It contains two rows of data with machinery codes 7009, 26232, and 28136, and dates from 01/07/20 to 22/07/20.

If a machinery is not available, the user can still assign the machinery code, but they must also change the “*Date From*” column to coincide with the availability rate of that machinery.

Having decided which allocations are to be approved, the user must tick the “*Approve*” check box in each line and save.

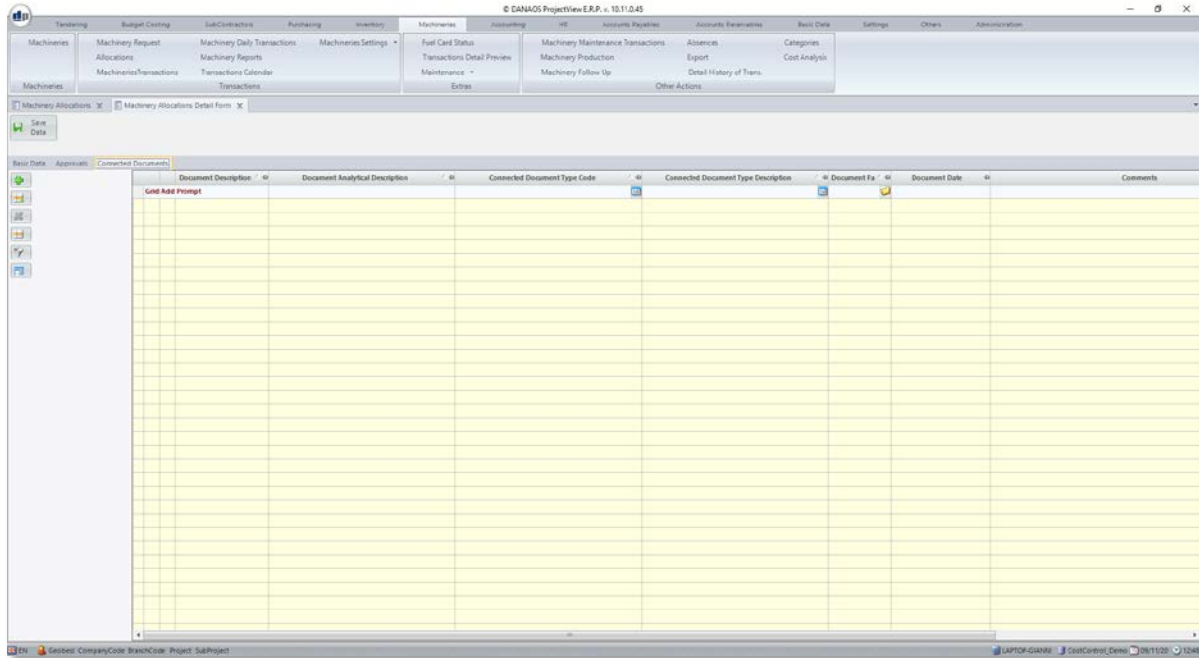
Having selected the appropriate allocation lines (ticking the “*chk Select*” column of each line within the allocation grid), the user can do the following:

- ✓ Transfer the machineries to the site
- ✓ Order the machinery directly through a subcontractor
- ✓ Order the machinery through the purchasing department

All three options are described in the next chapter.

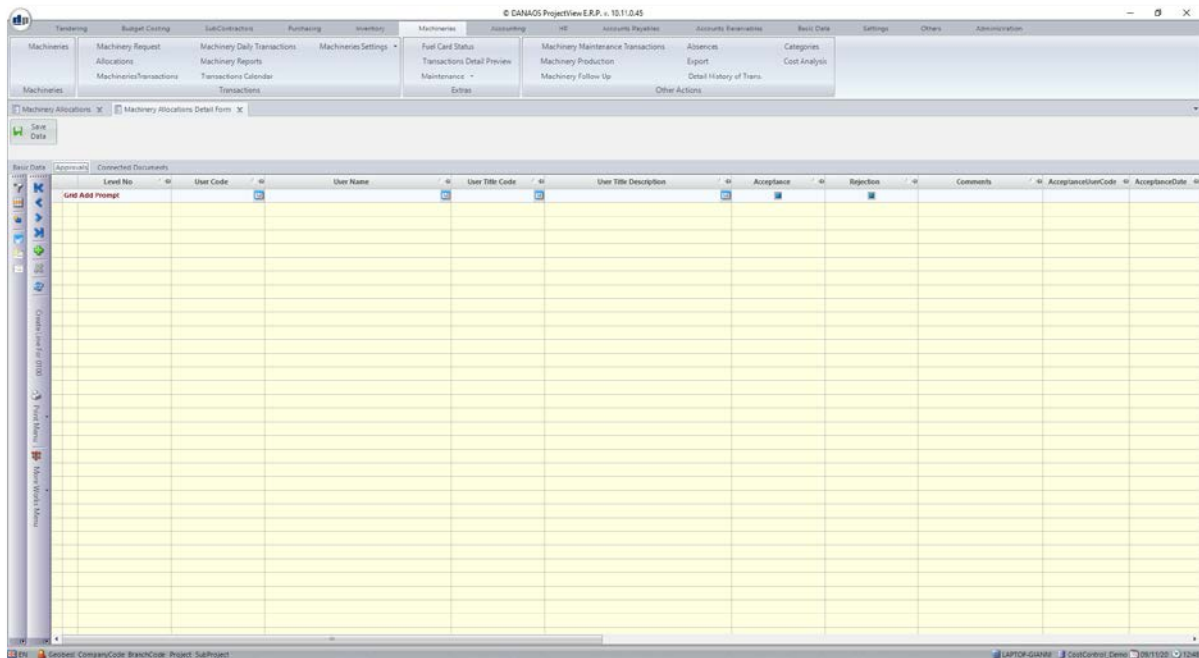
4.1.1.1 Connected Documents

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



4.1.1.2 Approvals

This tab allows user to approve or reject a machinery allocation.



4.1.2 Transferring the machinery to the site

If the machineries are either available or will be available in the future, they can be sent to the site at the appropriate time.

To do so, the user must click on the “*Transfer To Machinery Transactions*” button which is located on the left of the grid:



4.1.3 Ordering the machinery directly through a supplier

If the machineries are not available, an order can be directly sent to the pre-assigned supplier.

To do so, the user must click on the “*Transfer To Order*” button which is located on the left of the grid:



This will automatically create the aforementioned order.

Note

To do so, the machinery allocations in question should have a “*Supplier Code*”, “*Unit Price*” set in in the allocation grid.

4.1.4 Ordering the machinery through the purchasing department

If the machineries are not available and no supplier has been assigned, they must be procured through the normal purchasing process.

A new requisition must be created in order for the machinery to be ordered by the purchasing department.

To do so, the user must click on the “*Transfer To Requisitions*” button which is located on the left of the grid:



This will automatically create the aforementioned requisition.

5 Appendix – Machinery Settings

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

- ✓ Garages
- ✓ Machinery Expenses Types
- ✓ Car Traffic Licenses
- ✓ Car Technical Check
- ✓ Machinery Types
- ✓ Machinery Status
- ✓ Machinery Locations
- ✓ Gearbox Types
- ✓ Capacity Types
- ✓ Fuel Types
- ✓ Lubricant Types
- ✓ Fuel Card
- ✓ Fuel Card Usage Types
- ✓ Car Insurance Types
- ✓ Machinery Analytical Characteristics

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

“Machineries” > “Transactions” > “Machinery Settings” > ...

and then choose the appropriate item from the list.

6 Appendix – Manually download machinery requests

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”

The screenshot shows the 'Primavera Connectivity' form in the ProjectVIEW ERP system. The form is titled 'Primavera Connectivity' and contains various input fields for filtering data. The 'Match With Primavera Partners Data Records' section is expanded, showing a list of radio button options. The 'Download Site Material Requests' option is selected. A 'Continue' button is visible at the bottom of the options list.

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 Machineries Requests”* and click on the *“Continue”* button.



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

DANAOS Projects Software Solutions

Tamani Head Office - Office 1923

Business Bay

Dubai - UAE, P.O. Box 24051

Email: support@danaos-projects.com

Tel: +971 4 8714149