BellHawk Project Option User Manual

Introduction

The project option in BellHawk is designed to support organizations that perform contracts or jobs which involve multiple purchase orders, work orders and ship orders. This includes make-to-order manufacturers, DoD contractors, engineering and construction organizations.

Here we use the term "Project" to avoid the confusion with the word "Job" which, in some organizations, is synonymous with a single work-order and in others with a contract which has many deliverables and requires the issuance of many work orders. We also avoid the use of the word contract, with its financial connotations, and instead focus on the status of materials and the orders for project activities.

The project option (BH-PROJ) enables the following to be associated with a project code:

- Purchase Orders

- Ship Orders

- Work Orders

- Untagged and tagged containers of material

This enables the reporting of the status of purchase, work, and ship orders, as well as inventory and work-in-progress on a project by project basis.

Inventory and work-in-process materials can be associated with a blank project code, when they are considered to be common stock.

BH-PROJ also enables warnings to be generated when:

- Untagged materials for one project are attempted to be mixed with those from another project or with common stock in a location or in a type 2 container.

- Materials designated for a project are attempted to be used for a work order or ship order with a different project code but common stock can be used for any project.

BH-Project also allows for a location to be designated for a specific project such that only materials designated for that project can be placed in the designated location.

This document assumes that the user has familiarized themselves with the Materials Tracking and Production Tracking User manuals and their prerequisite manuals. The examples used in this document include the use of the BH-PO, BH-SO, BH-PICK and BH-UDP modules which are typically used in conjunction with BH-PROJ. This document assumes that the user has familiarized themselves with the user manuals for these options.

Setting Up Projects in BellHawk

Projects can be entered into BellHawk using the [Projects] button from either the Ship Orders or Production switchboards, which themselves are reachable from the main switchboard. The Projects button leads to the following screen, where existing projects are listed and new projects can be added:

On this screen, we see a list of open Projects with the following information:

1. The unique code assigned to the project (1)

2. The Name assigned to the project (2)

3. The Customer Name for this project (3). This may be your own company name if this is an internal project.

4. The date wanted for the overall project completion (4).

5. Whether the project is released (5) and the date is was released (6). Materials and orders cannot be associated with a project until it is released.

6. A description of the project (7).

7. A button (8) which can be used to edit the project, including releasing and closing the project.

8. A row of Filter boxes (9) which can be used to select a subset of projects using the [Filter] button (10).

9. An [Add New] Button to add new projects (11)

10. A [Return] button to return to the prior screen.

Selecting the [Add New] button will bring up the Project detail screen:

On this screen:

1. Enter the project code, which must be unique (1)

2. Enter a Project Name to appear on Reports (2)

3. Enter a brief (250 characters or less) description of the project (3)

4. Enter the Customer Code (4) or select the Customer from a subsidiary screen using the Ellipses. The customer code can be MyCompany for internal projects.

5. Enter the date wanted or select this using the Calendar control (5)

6. Then Add the project using the [Add Project] screen (6)

7. Use the [Return] button (7) to return to the previous screen without saving the data.

Once created, the Project data can be edited (except for the project code) and the project updated using the [Update Project] button (8).

When initially created the project is in unreleased status, meaning no materials or orders can be assigned to the project. The project can be released using the [Release] button (9) and can be closed using the [Close Project] button (10).

Please note that by default projects remain in the list of active projects for two days after they are closed. This number can be changed using the Project tab on the System Administrator's System Parameters screen.

Adding Reserved Location for Project

	A	B	C	M	N	O	P
1	LOCATION	LocationCode	LocationDescription	WorkCenterCode	SortCode	ERPCode	ProjectCode
2		#01504	Stock Room Bin #01504		#01504		
3		#01506	Stock Room Bin #01506		#01506		P1059
4		#01513	Stock Room Bin #01513		#01513		
5		#01516	Stock Room Bin #01516		#01516		
6		Brazing	Brazing	Brazing	Brazing		
7		Cutting	Cutting	Cutting	Cutting		
8		Inspection	Inspection	Inspection	Inspection		
9		MRB	Material Review Area		MRB		
10		QC	QC Dept	QC	QC		
11		Receiving	Receiving Dock		Receiving		
12		Shipping	Shipping Dock		Shipping		
13							

Locations can be designated as reserved for a project by entering the project code for the location, as shown here, and then importing this as setup data through the Excel Setup data screen.

Entering Materials into Inventory

On the Enter and simple Receive Transactions, the project option adds a Project Code (1) field, which enables the project code to be typed or scanned in or selected from a subsidiary screen using the ellipses button.

In the BellHawk containers table, the following both can be associated with a Project Code:

- Type 1 single use containers with a license-plate tracking barcode.

- Virtual single use containers which contain loose materials or physical containers which do not have a tracking barcode.

If the New Container checkbox is checked then the project code is associated with the Type 1 container. If it is unchecked then the project code is associated with the virtual container in the destination (2) in the location or Type 2 barcode specified in (3).

If the Project Code field (1) is left blank then the material is assumed to be Common stock that can be used on any project.

If the destination entered in (3) has previously been specified as a reserved location for the project then the user will be warned that they are not allowed to place or material designated for another project in that location.

ENTER MATERIALS

User Badge

E301

Reason for Entering

Setup Inventory

Item Number

CCoup48

Half Inch Copper Coupling

Size: Half Inch

Material: Copper

☐ Is Customer Owned

☑ New Container (2)

Container Type

Box

Unit Of Measure

Each

Quantity

12

Project Code

P1059 (1)

Destination Barcode

#01513 (3)

Stock Room Bin #01513

New Tracking Barcode

#01498

☐ Mark as Work in Process

Enter   Clear   Return

Moving Project Related Materials

When materials are moved to new locations or containers they retain their Project Code. The exception to this is when common stock is moved to a location that is reserved for a specific project. In this case the materials are automatically assigned to the project code of the destination.

Lookup Project Inventory by Source

If BH-PROJ is licensed then the Project Codes are shown on the Lookup Inventory by Source screen as shown below. Note that project codes are associated with untagged virtual containers as well as with Type 1 containers tagged with license-plate tracking barcodes.

MOVE MATERIALS
User Badge
E301
Source Barcode
#01500 [...]
Stock Room Bin #01506
☐ Move Whole Container

Item Number: CCoup78
    Seven Eights Copper Coupling
    6 ea available

Unit Of Measure
Each ▾ [...]
Quantity
1
☐ New Container
Destination Barcode
#01506 [...]
Stock Room Bin #01506

[Move]   [Clear]   [Return]

Source
#01506 [...]
Stock Room Bin #01506

[#01500] CCoup78 5 Each Seven Eights Copper Coupling   Size: Seven Eights, Material: Copper, Project:P1059
untagged CCoup78 1 Each Seven Eights Copper Coupling   Size: Seven Eights, Material: Copper, Project:P1059

[Return]

Changing Project Code Associated with Materials

The project codes associated with materials can only be changed by the Materials Manager from the List of Containers screen be editing an individual entry and then changing the assigned Project Code.

These changes cannot be done through regular Inventory transactions as this typically has financial implications for an attached ERP or accounting system.

EDIT CONTAINER ATTRIBUTES
This is loose material - not in a tagged container.

Tracking Barcode: #01506>1
Item Number: CCoup78
Item Description: Seven Eights Copper Coupling
Size: Seven Eights ▾
Material: Copper ▾
Project Code: P1059 [...]
Quantity: 1 ea
Location: Stock Room Bin #01506 [...]
Unit Cost: 2.5
Owned By: MYCOMPANY [...]
    ABC Company
For Customer: MYCOMPANY [...]
    ABC Company
is Work In Process ☐
[Save Changes] [Delete] [Return]

Purchase Orders

If BH-PROJ is licensed then a Project Code can be specified for all line items on a PO. If this is left blank then Project Codes can be specified for individual line items on the PO.

Please not that if a project code is specified at this level:

1. This PO is included in the summary report for the Project otherwise it is not.

2. The PO Lines are all assigned to this project code and cannot be changed to a different project code.

ADD PURCHASE ORDER

Check if ASO: ☐
Order Number: BH000101
Supplier: V101   [...]
Metal Wholesale Distributors
Address: 12 South Street
Main ▾   Bangor
ME
03671
USA
For Customer: MIP   [...]
Mix Pharma
Project Code: P1058   [...]
Date Wanted: 06/01/2016
Order Notes:

[Order Lines] [Release Order] [Purchase Order]
[Add Order] [Copy] [Return]

If the Project Code is left blank on the PO header screen (above right) then the Project Code can be specified at the PO Line Item detail screen.

If it is specified on the PO header level then it defaults to the Project code specified on the PO header screen and cannot be changed.

EDIT ORDER LINE ITEM DETAIL
Purchase Order BH000102
Vendor: Metal Wholesale Distributors
Line Number: 1
Item Number: CCoup78   [.] [...]
Item Description: Seven Eights Copper Coupling
Size: Seven Eights ▾
Material: Copper ▾
Notes:
Project Code: [...]
Date Wanted: 6/2/2016
Units: Each ▾
Order Quantity: 6
Unit Cost: $2.5000

Receiving against PO Line

When receiving against a PO Line the Project Code is inherited from the PO Line but can be changed to another Project Code using the ellipses or direct text entry at time of receipt.

The received materials are then assigned to the specified Project Code. Alternately the project code can be left blank when the materials are assigned to common stock.

RECEIVE AGAINST PO

User Badge

E301

Purchase Order Number

BH000101   ...

PO Line

BH000101>1   ...

☐ New Container

Our Item:	SP78
Seven Eights Stainless Steel Pipe	
Quantity Left To Receive:	1
Units:	Each

Length :   8 ft
Size :   Seven Eights
Material :   Stainless

Parameters

Unit Of Measure

Each   ⌄   ...

Quantity

1

Project Code

P1058   ...

Destination Barcode

#01516   ...

Stock Room Bin #01516

Receive   Clear   Return

Ship Orders

Ship Orders can be assigned to projects, as shown here:

ADD SHIP ORDER HEADER

Ship Order Number: SO000101

Customer: CDE   ...
CDE Industries

Customer Order Number: CDE05102

Order Date: 06/15/2016

Shipping Address: 23 Park Ave
[Main ▾] Worcester
MA
01608
USA

Billing Address: 23 Park Ave
[Main ▾] Worcester
MA
01608
USA

Project Code: 1058   ...

Date Wanted: 06/22/2016

Order Notes: [   ]

Importance: [Standard ▾]
Salesperson: [   ]

[Order Lines] [Shipping Instruct.] [Release Order]
[Acknowledgement] [Packing List]

[Add Order] [Copy] [Return]

[Close Order] [Cancel Order]

The ellipses can be used to look up the project code on a subsidiary screen. If the project code is left blank then this Ship Order (SO) is for shipping common stock. Common stock can be shipped against a project code but materials purchased or made for other projects cannot.

Work Orders

If work orders are created from ship order lines then they are automatically assigned to the same project code. If they are created manually then they can be assigned to make materials for a specific project or the project code can be left blank to make common stock materials.

WORK ORDER DETAIL

Work Order Number:	WO00001001
Work Order Type:	Processing
Status:	Released
Item Number:	ASSY101
Item Description:	Copper Adaptor Assembly
Quantity:	2 (Each)
Instructions: (255 char max)	
Project Code:	1058
Date Wanted:	6/22/2016
Scheduled Start Date:	6/22/2016
Customer:	CDE
	CDE Industries
Ship Order Number:	SO000101
Ship Order Line:	1
Importance:	Standard
Item is Customer Owned:	☐

Materials produced by this work order, including work-in-progress, will then be assigned to the project code for the work order.

EDIT CONTAINER ATTRIBUTES
This is an individually barcoded item.

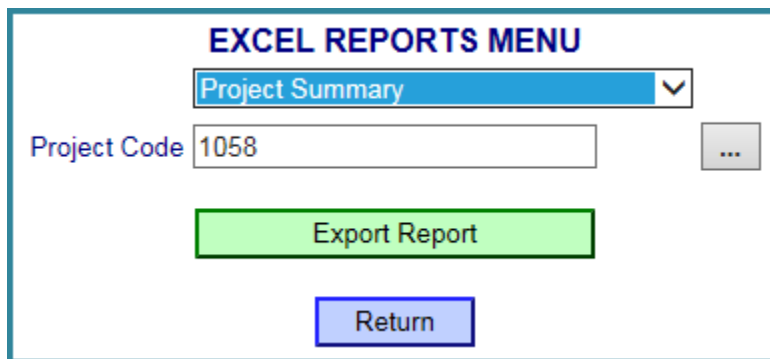|	
Tracking Barcode:	#01517
Item Number:	ASSY101
Item Description:	Copper Adaptor Assembly
Project Code:	1058
Location:	Shipping Dock
Unit Cost:	125
Owned By:	MYCOMPANY
	ABC Company
For Customer:	CDE
	CDE Industries
Order Number:	
is Work In Process	☐

Save Changes   Delete   Return

Pick Orders

When a pick order is generated from a Work Order Step or a Ship Order then the project code is carried to the Pick Order. If there is an attempt to pick material that does not match the project code and is designated for another project then a warning is generated when an attempt is made to pick the wrong materials.

Excel Export Reports for Projects

Project Summary

This is reached from the Project Excel Reports on the Management Switchboard. This leads to the Excel Reports Menu – below – from which the Project code is selected via the ellipses or directly entered as a text field.
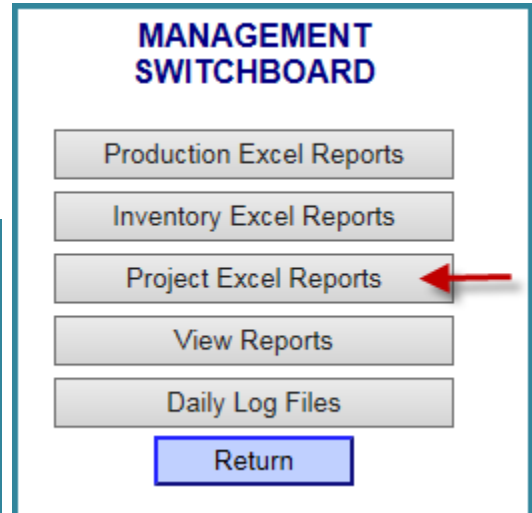
This report then shows the status of purchase orders (PO), ship orders (SO) and work orders (WO) for the selected project.

	A	B	C	D	E	F	G
1	Project	Type	Number	Status	Date Started	Date Last Action	Date Completed
2	1058	SO	SO000101	In Progress	06/22/2016	06/19/2016	
3	1058	WO	WO00001001	Closed	06/22/2016	06/19/2016	06/19/2016
4							

Please note that POs are only shown if the whole PO is for the selected project.

Items in Stock with Attributes

This is reached via the Inventory Excel Reports from the Management Switchboard, which leads to the screen below.

Then select the Items in Stock By Attributes export (1) and enter or select the Project Code (2) and then select the [Export Report] button (3).

If the Project Code is left blank then all the common stock items are shown:

	A	B	C	D	E	F	G	H	I
1	**Items In Stock By Attributes**								
2	**Item Number**	**Item Description**	**UDP Print String**	**Lot**	**Expiration Date**	**Quantity**		**Length**	**Length UOM**
3	Adapt48-78	Copper adaptor half inch to seven eights				1	ea		
4	CCoup48	Half Inch Copper Coupling				5	ea		
5	CP48	Half inch Copper Pipe				1	ea	4	ft
6	CP48	Half inch Copper Pipe				3	ea	8	ft

If a specific project code is selected then just the inventory for that project code is shown

	A	B	C	D	E	F	G	H	I
1	**Items In Stock By Attributes, Project Code = 1058**								
2	**Item Number**	**Item Description**	**UDP Print String**	**Lot**	**Expiration Date**	**Quantity**		**Length**	**Length UOM**
3	Adapt48-78	Copper adaptor half inch to seven eights				1	ea		
4									

Note that this shows items with different UDP descriptions, dimensions, lot numbers, and expiration dates as separate lines.

Value of Items in Stock by Attributes

This works the same as for the previous export except that Value of Items in Stock by Attributes is selected. It totals up the value of

	A	B	C	D	E	F	G	H	I	J
1	**Value of Items in Stock by Attributes**									
2	**Item Number**	**Item Description**	**UDP Print String**	**Lot**	**Expiration Date**	**Quantity**		**Value**	**Length**	**Length UOM**
3	Adapt48-78	Copper adaptor half inch to seven eights				1	ea	2.5		
4	CCoup48	Half Inch Copper Coupling				5	ea	12.5		
5	CP48	Half inch Copper Pipe				1	ea	24	4	ft
6	CP48	Half inch Copper Pipe				3	ea	72	8	ft

Items by Location and Attributes

This works the same as for the previous export except that Items by Location and Attributes is selected. This separates out items with the same UDP descriptions, dimensions, lot numbers, and expiration dates as separate lines for each location

Location Code	Location Description	Item Number	Item Description	UDP Print String	Lot	Expiration Date	Quantity		Length	Length UOM
#01504	Stock Room Bin #01504	CP48	Half inch Copper Pipe				1	ea	4	ft
#01504	Stock Room Bin #01504	CP48	Half inch Copper Pipe				3	ea	8	ft
#01506	Stock Room Bin #01506	Adapt48-78	Copper adaptor half inch to seven eights				1	ea		
#01513	Stock Room Bin #01513	CCoup48	Half Inch Copper Coupling				5	ea		

Commentary

The project option is a very useful way of looking at inventory as well as the status of purchase orders, work orders, and ship orders for each specific customer job. It is also useful for looking at common stock that is not yet assigned to projects.