

eTurns

Project Spend

Help documentation



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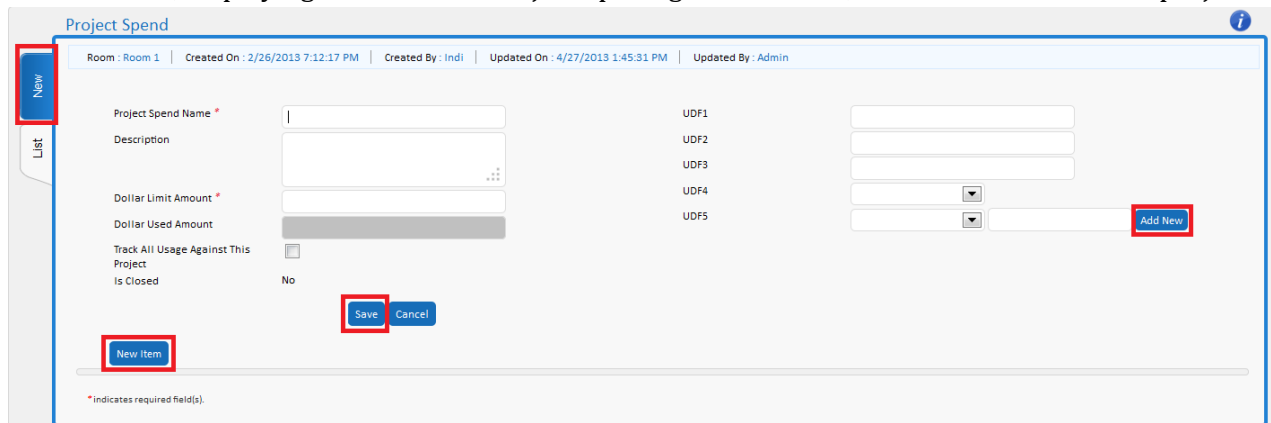
Project spend keeps a log of the items utilized in the project along with inventory update of the items and their respective costs. It also keeps a check on the total amount spent in the project and implement restriction if the quantity/amount exceeds the limit set.

Guidelines

a. Add new Project spend:

To add new Project spend, click on the New tab on left hand side of the panel or right click and select 'New' from the list.

- Enter the particulars and hit "Save" button, then click on "New Item" button and a pop up appears on screen, displaying Add Items to Project Spend grid on screen, to add new items to the project.



Project Spend

Room : Room 1 | Created On : 2/26/2013 7:12:17 PM | Created By : Indi | Updated On : 4/27/2013 1:45:31 PM | Updated By : Admin

Project Spend Name *

Description

Dollar Limit Amount *

Dollar Used Amount

Track All Usage Against This Project

Is Closed No

UDF1

UDF2

UDF3

UDF4

UDF5

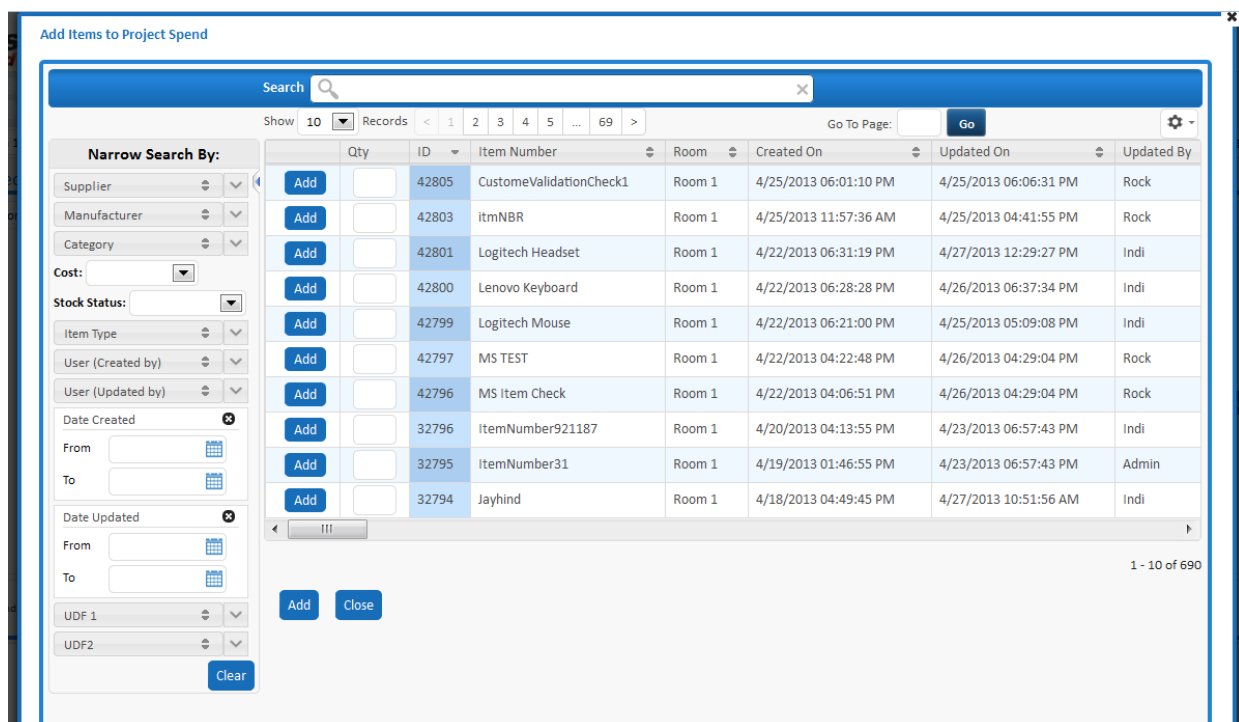
Save Cancel

New Item

Add New

*Indicates required field(s).

Figure 1



Add Items to Project Spend

Search

Show 10 Records < 1 2 3 4 5 ... 69 > Go To Page: Go

Narrow Search By:

Supplier

Manufacturer

Category

Cost:

Stock Status:

Item Type

User (Created by)

User (Updated by)

Date Created

From

To

Date Updated

From

To

UDF 1

UDF2

Clear

Qty	ID	Item Number	Room	Created On	Updated On	Updated By
Add	42805	CustomValidationCheck1	Room 1	4/25/2013 06:01:10 PM	4/25/2013 06:06:31 PM	Rock
Add	42803	itmNBR	Room 1	4/25/2013 11:57:36 AM	4/25/2013 04:41:55 PM	Rock
Add	42801	Logitech Headset	Room 1	4/22/2013 06:31:19 PM	4/27/2013 12:29:27 PM	Indi
Add	42800	Lenovo Keyboard	Room 1	4/22/2013 06:28:28 PM	4/26/2013 06:37:34 PM	Indi
Add	42799	Logitech Mouse	Room 1	4/22/2013 06:21:00 PM	4/25/2013 05:09:08 PM	Indi
Add	42797	MS TEST	Room 1	4/22/2013 04:22:48 PM	4/26/2013 04:29:04 PM	Rock
Add	42796	MS Item Check	Room 1	4/22/2013 04:06:51 PM	4/26/2013 04:29:04 PM	Rock
Add	32796	ItemNumber921187	Room 1	4/20/2013 04:13:55 PM	4/23/2013 06:57:43 PM	Indi
Add	32795	ItemNumber31	Room 1	4/19/2013 01:46:55 PM	4/23/2013 06:57:43 PM	Admin
Add	32794	Jayhind	Room 1	4/18/2013 04:49:45 PM	4/27/2013 10:51:56 AM	Indi

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Add Close


Figure 2

- The “New Item” button opens a pop up, for user to enter required quantity of item in Quantity box in front of it and then click “Add”. The user may also enter various quantities together and then hit the “Add All” button at the bottom of the page. To close the selection, hit “Close”.
- If the user wishes to track all the expenditure against one project only, check the “Track All Usage Against This Project” check box.
- If the user wishes to add any new value in the UDF5 dropdown, enter the value in the text box next to it and hit “Add New” button. The value is reflected in the dropdown.
- The items to be added in the project can be filtered by:
 - a. Supplier: This filter contains list of all suppliers. Check/uncheck the name of supplier to be displayed on screen.
 - b. Manufacturer: This filter contains list of all manufacturers. Check/uncheck the name of manufacturer to be displayed on screen.
 - c. Category: This filter lists all the categories items are termed under. To select a particular category to be displayed on page, check the checkbox in front of it. Uncheck the check box to view all the categories on screen. User may check number of categories.
 - d. Cost: This dropdown allows user to filter the items on basis of their cost, i.e., items of particular cost range are only displayed for user convenience. User may check/uncheck the filter to be implemented.
 - e. Stock Status: This dropdown allows user to filter items to be included in list based on their present status of stock. User may check/uncheck the filter to be implemented.
 - f. Item Type: This filter allows filtering the type of item to be entered in the cart. User may check/uncheck Item, Quick list, Kit or Labor to be displayed on screen.

b. Edit/Update Project spend:

To edit an existing project record, click on the project spend name and new screen appears on screen. The quantity limit of item may be updated; also new items can be added to project as well as deleted. To edit any item in list the user must have the required authorization.

c. Delete a project:

To delete a project, select the record and then click on Delete icon  or press Delete key on your keyboard. The user may also delete the selected or multiple records. A pop up verifies your selection and then deletes the selected records.

Project Spend

ID	Project Spend Name	Description	Dollar Limit Amount	Dollar Used Amount	Track All Usage Against This Project	Is Closed	Room
14	New PS May		200	11624293	No	No	Room
22	di chr	thủ	2323		No	Yes	Room
23	NR Project Test	sdfsdf	4500	0	No	Yes	Room
24	hjhjhjh	hisdhfhshdfhshf	2500		No	Yes	Room
27	PS 1	ds fsdf	1212		No	Yes	Room
28	Test1212		1111		No	Yes	Room
29	Test12121		123		No	Yes	Room
30	test sdfsdf	szdfsdf	3434		No	Yes	Room
31	Test 12314		112		No	Yes	Room
32	test786		786		No	Yes	Room

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Figure 3

d. Export the page:

Export functionality enables user to export the page. Click on the Export icon on top right of the screen and then user may choose to export the page through any of the following mediums:

- Print: It prints the selected page.
- Excel: It converts the page to excel sheet.
- CSV: It converts the page to CSV sheet.
- PDF: It converts the page to PDF document.
- Copy: It copies the page to Clipboard.

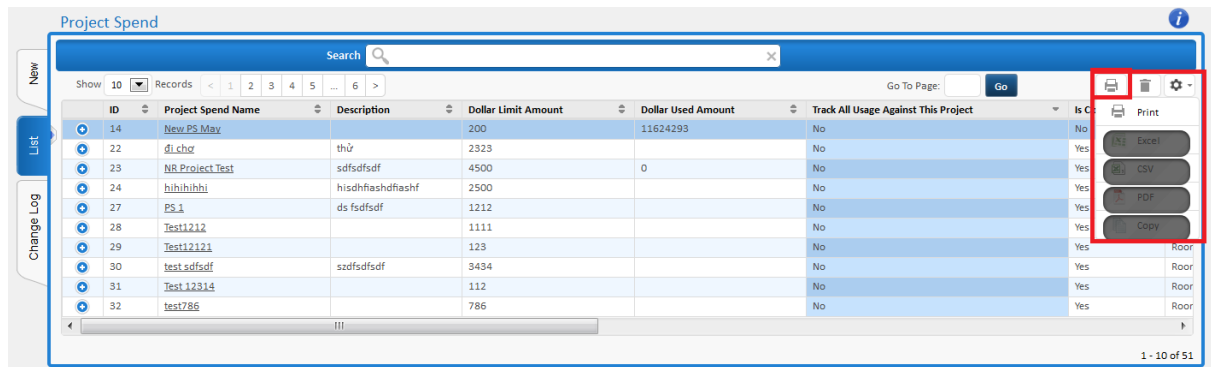


Figure 4

e. View change log:

To view the updated history of a project, select the project and click on Change log tab. It displays when the project was created and the number of times it was updated.

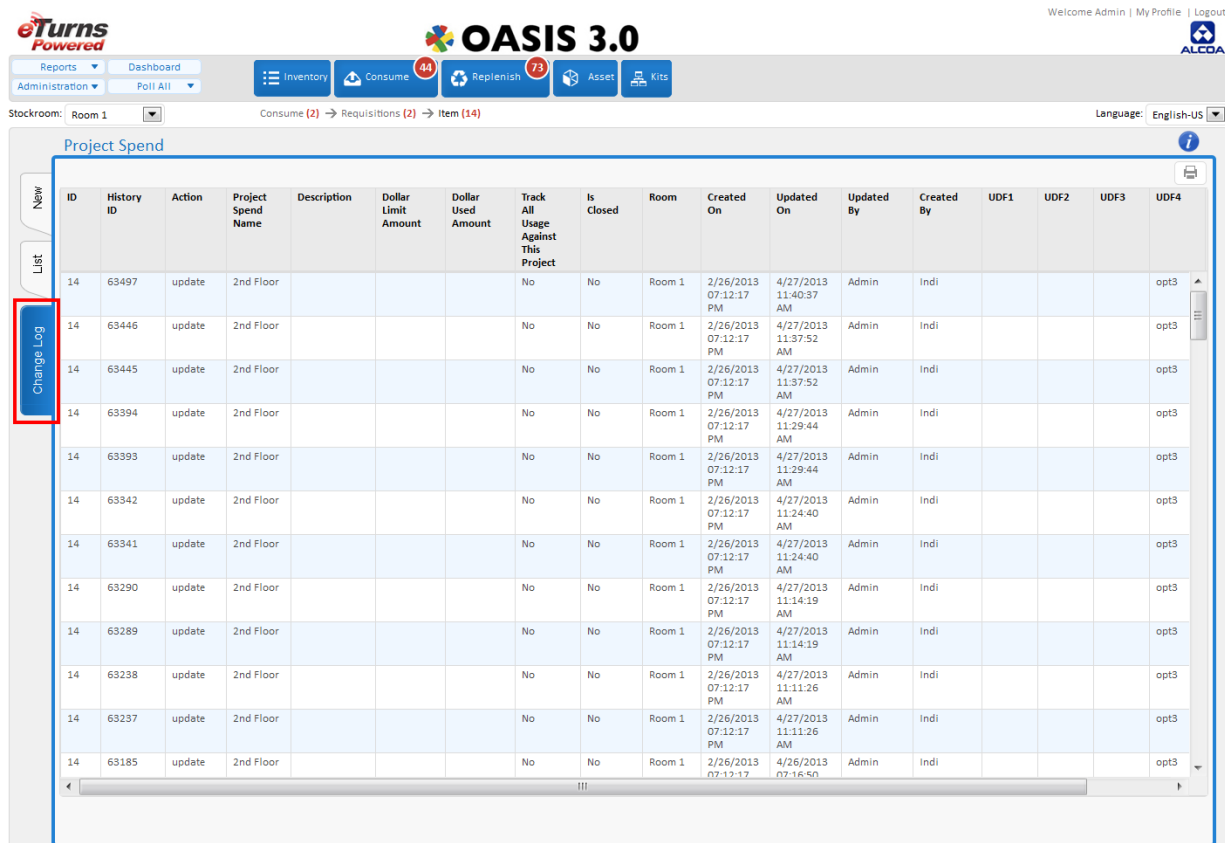
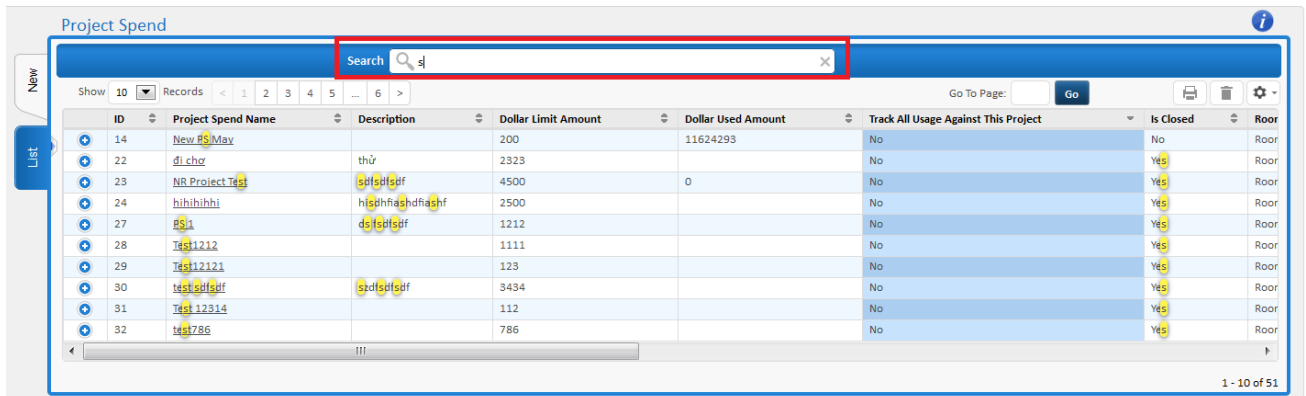


Figure 5

f. Search Project Spend for keyword:

There are two types of search available to look for any keyword or filter the content of the module:

- i. Main Search: To search the document for any particular keyword, the Main search is used. Enter the keyword in the search box on top of screen and the keyword gets highlighted on the screen.

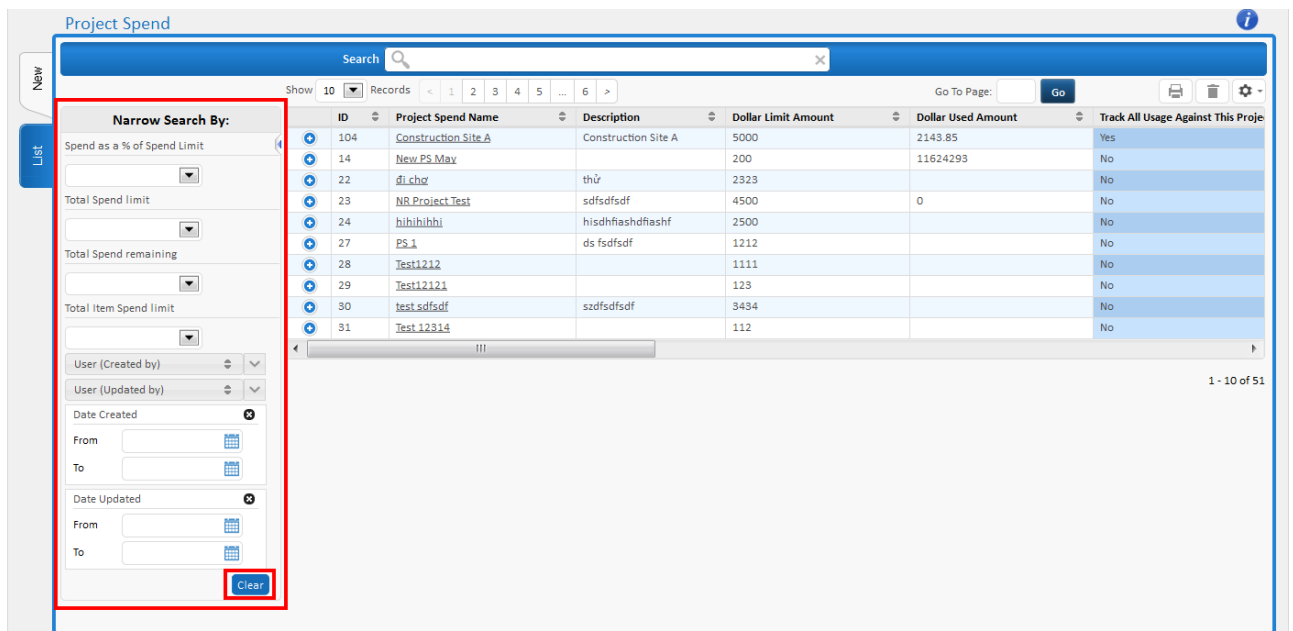


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Figure 6

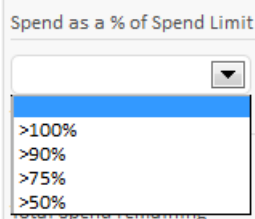
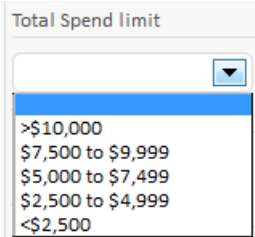
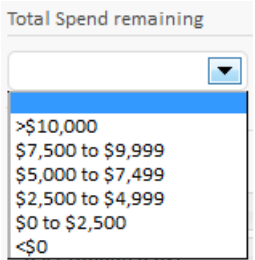
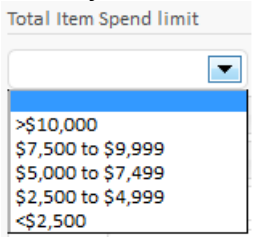
- ii. Narrow Search by: As the name suggests this function is used to filter or narrow down the scope of search for user convenience. It is an alternate search to the Search functionality and much detailed one.

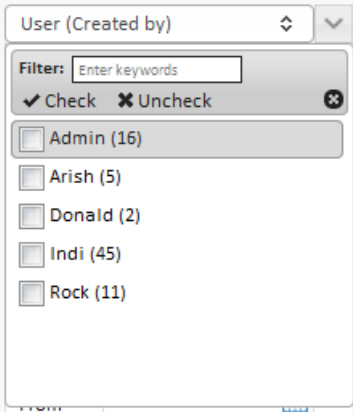
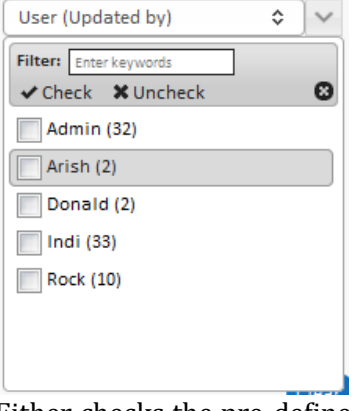

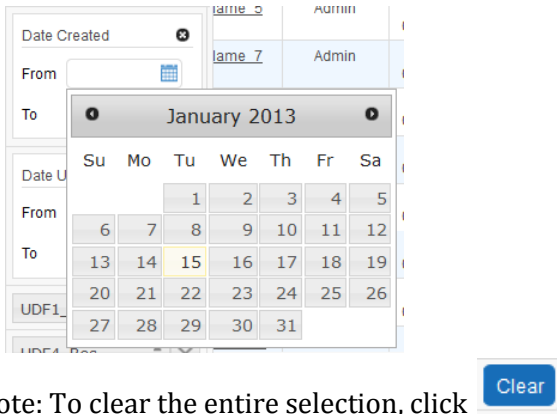

- To open Narrow search, click on the small Triangular icon on the top left corner of the screen.
- The following screen appears:



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Figure 7

Field	Description
Spend as a % of Spend Limit	<p>It is used to filter the module in accordance to the monetary value spent (in percentage) of any project. Select from the drop down the percent for which user wishes to view particular project.</p>  <p>The module reflects the filter selections made.</p>
Total Spend limit	<p>It is used to filter the module records with regards to the total amount spent in the project till date. User may select from the dropdown the bracket in which the spent limit of project lies.</p>  <p>The module reflects the filter selections made.</p>
Total Spend remaining	<p>It is used to filter the module in accordance to the amount left from the total spent limit of a particular limit. User may select from the dropdown the bracket in which the spent limit of project lies.</p>  <p>The module reflects the filter selections made.</p>
Total Item Spend limit	<p>It is used to filter the module records with regards to the items monetary value of a particular project. Every item has a price attached to it. And this filter sums up the prices of all items in a project and filters the records by the selection made by the user from the price bracket available.</p>  <p>The module reflects the filter selections made.</p>

User Created by	<p>It is used to filter the module for the 'Created by' field. Click on up-down arrow key. Dropdown appears:</p>  <p>User can select or unselect all of the items of the list using Check or Uncheck button. The module reflects the filter selections made.</p>
User Updated by	<p>It is used to filter the module for the 'Updated by' field. Click on up-down arrow key. Dropdown appears:</p>  <p>Either checks the pre-defined search filter or enter a new keyword in the Filter box and then click on Check. The module reflects the filter selections made. Note: To cancel the selections made at any point of time, click .</p>
Date Created and Date Updated	<p>They are used to filter the 'Created On' and 'Updated On' fields respectively. User may enter the date manually or select from the calendar pop-up. Enter 'From-To' time period to be filtered. The module reflects the search results for the selected time period.</p>  <p>Note: To clear the entire selection, click </p>

Note: At point of time only one of the either searches will work.

g. View records and Go to specific page:

The user is enabled to view particular records on the page and go to any page number directly. These functionalities can be accessed simply selecting number of records from the drop down and entering the page number to be displayed and click “Go”.

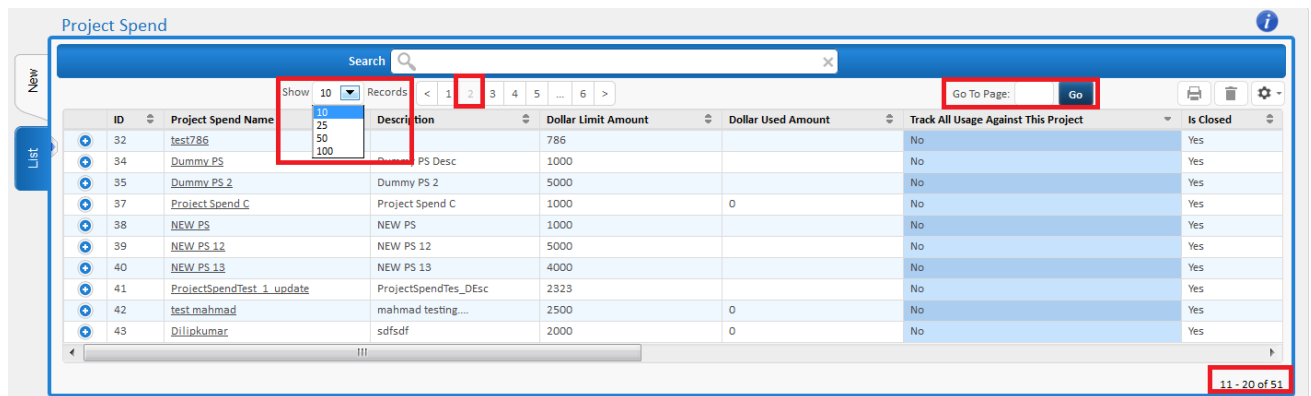


Figure 8

h. Implement various settings:

The user may choose from the below functionalities to be implemented on the module:

- Refresh: This option refreshes the module and displays the latest changes implemented.
- Auto Refresh: This option automatically refreshes the screen in specified time.
- Only Deleted: This option reflects only the deleted fields of the module on screen. To select it, check the checkbox in front of the option.
- Only Archived: This option reflects only the archived fields of the module on screen. To select it, check the checkbox in front of the option.
- Reorder: This option enables user to reorder the columns of the module.
 - User can also select which field to appear on screen and which remains to be hidden.
 - Check or uncheck the checkbox in front of the field to display or hide the fields respectively.
 - User may also drag and drop fields to be arranged in order of choice.
 - After the selection is completed, click “Reorder”.

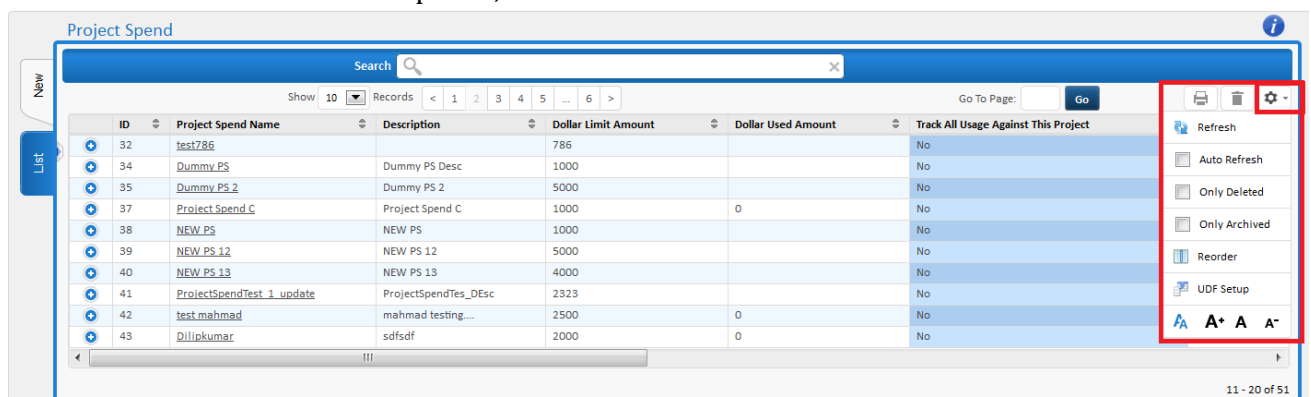


Figure 9



i. Miscellaneous settings:

Grid in History tab may have few of following functionality depends on requirements:

- 1) Resizing of columns
- 2) Re-ordering of columns using drag & drop of column header
- 3) Single column and multi column sorting (using shift key)
- 4) In-line editing

Multi selection of rows by clicking each row

The restriction applied on when the user pulls any quantity exceeding the limit assigned to it are:

- a. Project Level Amount Restriction: If the user pulls items exceeding the Dollar amount limit defined, then this restriction appears on screen: "Project spend Dollar Amount limit exceed do you want to create new requisition for the same ?"
- b. Project Spend Item limit: If the user pulls items more than present in inventory, then this message appears on screen: "Project spend Item's Quantity limit exceed do you want to create new requisition for the same".
- c. Project Spend Item's QTY: If the user pulls items exceeding the amount assigned to item spend, then this message appears on screen: "Project spend Item's Dollar limit exceed do you want to create new requisition for the same".