# PROJECT WORKFLOW

### Manage Categories

- Create Categories: Users can create new categories or subcategories.
- Edit Categories: Modify category names and descriptions.
- Delete Categories: Remove categories when they are no longer needed.

### Staff Management with Job Role Selection

- Add Staff Members: Admins can add new staff members and enter their details.
- Edit Staff Information: Modify staff member details such as name, contact information, and job role.
- Assign Job Roles: Assign specific job roles or responsibilities to staff members.

## Project Flaw

### Step 1: Admin Creates and Assigns a Project to a Department Manager

This step involves the initiation of a new project within the ERP system and the assignment of project ownership to a department manager.

- **Access Project Management**: The admin logs into the ERP system and navigates to the project management module.

- **Create New Project**: Within the project management module, the admin initiates a new project by providing project details such as name, description, start date, etc.

- **Assign Department Manage**r: The admin selects the department manager from a list of authorised staff members who have the "Department Manager" role.

## Step 2: Department Manager Assigns Work to Project Engineers

In this step, the department manager accesses the ERP system, reviews the newly assigned project, and delegates specific tasks to project engineers.

- **Department Manager Login**: The department manager logs into their ERP account using their credentials.

- **Access Assigned Project**: Upon logging in, the department manager navigates to the project management module, where they can view a list of projects assigned to them.

- **Select the Project**: The manager selects the specific project for which they want to assign project engineers.

- **Review Project Details**: The department manager reviews the project details, including its objectives, timeline, and any specific requirements.

- **Select Project Engineers**: The manager selects project engineers from a list of available staff members who are suitable for the project.

- **Notify Engineers**: The ERP system will generate notifications to inform the selected project engineers about their assigned tasks.

## Step 3: Project Engineer Creates a Requisition and Prints It

In this step, a project engineer creates a requisition for necessary materials or resources required for the project. They also have the option to print the requisition for documentation or approval purposes.

- **Project Engineer Login**: The project engineer logs into their ERP account using their credentials.

- **Access Project**: The engineer navigates to the project management module and selects the specific project they are working on.

- **Create Requisition**: Within the project details, the engineer accesses the requisition creation module.

- **Enter Requisition Details**: The engineer fills out the requisition form, specifying details such as the item or resource needed, quantity, preferred supplier (if applicable), and any additional notes or justification.

- **Submit Requisition**: After completing the requisition form, the engineer submits it to initiate the procurement process.

- **Option to Print Requisition**: The ERP system provides an option to print the requisition. The engineer can choose to print a physical copy for documentation or approval purposes.

## Step 4: Department Manager Accepts the Requisition

In this step, the department manager reviews the requisition submitted by the project engineer and decides whether to approve or reject it.

- **Access Requisitions**: Within the ERP system, the manager navigates to the requisitions or procurement module.

- **Review Requisitions**: The manager can see a list of pending requisitions, including details such as the requested items, quantities, and the project engineer's name.

- **Select Requisition**: The manager selects the requisition submitted by the project engineer that requires review.

- **Review Details**: The department manager reviews the requisition in detail, taking into account factors like budget constraints, project needs, and availability of requested items.

- **Make a Decision**: Based on the review, the manager has the option to:

    - **Approve**: If the requisition meets the project's needs and budget constraints, the manager approves it.

    - **Reject**: If the requisition is not in line with project requirements, budget constraints, or if more information is needed, the manager rejects it.

- **Notification**: The ERP system generates a notification or alert to inform the project engineer of the manager's decision.

## Step 5: Purchase Manager Updates Quotations from Multiple Agents

In this step, the purchase manager is responsible for obtaining and updating quotations from various suppliers or agents to fulfil the approved requisition.

- **Purchase Manager Login**: The purchase manager logs into their ERP account using their credentials.

- **Access Approved Requisitions**: Within the ERP system, the manager navigates to the requisitions or procurement module and filters for approved requisitions.

- **View Approved Requisition**: The manager selects the approved requisition for which quotations need to be updated. This requisition includes details about the required items and quantities.

- **Request Quotations**: The purchase manager contacts multiple suppliers or agents to request quotations for the items listed in the requisition. This can be done through the ERP system or external communication methods.

- **Receive Quotations**: Once quotations are received from the suppliers or agents, the purchase manager uploads or enters the quotation details into the ERP system. These details typically include supplier names, quoted prices, delivery times, and terms.

- **Compare Quotations**: The ERP system provides tools to compare the quotations received from different suppliers. The purchase manager evaluates the quotations based on factors such as cost, delivery time, etc.

- **Update Requisition**: Using the ERP system, the purchase manager updates the requisition with the chosen supplier and their respective quotation details.

- **Notify Relevant Parties**: The ERP system will generate notifications to inform relevant parties, such as the finance department or the project engineer, of the supplier selection and the updated requisition.

## Step 6: Convert Quotation to Purchase Order (LPO)

In this step, the purchase manager takes a selected quotation from a supplier and converts it into a Letter of Purchase Order (LPO). The system provides an option to print the LPO for record-keeping or further processing.

- **Access Approved quotation**: Within the ERP system, the manager navigates to the quotations module and filters for approved quotation.

- **Convert to LPO**: Using the ERP system, the purchase manager converts the selected quotation into a Letter of Purchase Order (LPO) by clicking on a "Convert to LPO" option.

- **Review LPO Details**: The manager reviews the LPO details, which include the supplier's information, quoted prices, delivery terms, quantities to be ordered, and any other relevant terms and conditions.

- **Option to Print LPO**: The ERP system provides an option to print the LPO. The purchase manager can choose to print a physical copy for record-keeping or to send to the supplier

- **Confirm and Send LPO**: After reviewing and printing the LPO, the manager confirms the LPO and sends it electronically to the chosen supplier

## Step 7: Site Engineer Confirms Arrival of Ordered Materials

In this step, the site engineer receives the materials that were ordered and confirms their arrival in the ERP system for inventory and project tracking.

- **Site Engineer Login**: The site engineer logs into their ERP account using their credentials.

- **Access Project Inventory**: Within the ERP system, the site engineer navigates to the project's inventory or materials management module.

- **View Open Orders**: The engineer checks for open orders or pending deliveries associated with the project.

- **Confirm Arrival**: Upon receiving the materials, the site engineer selects the corresponding order that has been delivered and confirms the arrival of the materials by marking the order as "Received" or "Delivered."

- **Update Inventory**: The ERP system automatically updates the project's inventory database to reflect the received materials. This includes increasing the available quantity of the ordered items.

- **Check Quantity and Quality**: The site engineer may inspect the delivered materials to ensure they match the order both in terms of quantity and quality. Any discrepancies or issues can be noted in the ERP system.

- **Generate Receipt or Acknowledgment**: Optionally, the ERP system can generate a digital receipt or acknowledgment of the material delivery, which can be saved for record-keeping purposes.

## Step 8: Project Closure and Authorization

In this step, the project undergoes a structured closure process involving various stakeholders, including the project manager, department manager, accountant, and admin, to ensure that all aspects of the project are accounted for and finalised.

- **Project Manager's Closure:**
    - **Access Project**: The project manager navigates to the project management module and selects the project that is ready for closure.

    - **Review Project**: The manager reviews the project's status, tasks, and deliverables to ensure everything is completed as per the project plan.

    - **Confirm Project Completion**: If everything is in order, the project manager confirms the project's completion within the ERP system.

- **Department Manager's Confirmation:**

    - **Access Project**: The department manager reviews the closed project within the project management module.

    - **Authorise Closure**: If the project manager confirms the project's completion, the department manager authorises the closure of the project from their end. This step may involve verifying that all department-specific tasks are finished.
- **Accountant's Confirmation of Payments:**
    - **Accountant Login**: The accountant logs into their ERP account.

    - **Access Financial Records**: The accountant reviews financial records related to the project, including invoices, expenses, and payments received.

    - **Confirm Payments**: The accountant ensures that all payments, including invoices from suppliers and client payments, are received and properly documented within the ERP system.

    - **Authorise Closure**: If all payments are in order, the accountant authorises the closure of the project from the financial perspective.

- **Admin's Final Closure:**
    - **Access Project Closure**: The admin navigates to the project closure module within the ERP system.

    - **Review Authorizations**: The admin reviews the authorizations from the project manager, department manager, and accountant.

    - **Final Closure**: If all previous authorizations are in place and the project is confirmed as completed and financially settled, the admin performs the final closure of the project within the ERP system.