

# UltiProject Features

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## Table Of Content

1. Master Data .....	2
2. Project.....	3
3. Pegase interface.....	5
4. Service Management .....	6





# 1. Master Data

Function	Functional requirement	Fulfilment of the requirement
Released Product Statuses	The management of the lifecycle of material requires to manage accurately the status of product in alignment with the conception/industrialization stages.	In Dynamics 365 for Operations the management of the 3 checkbox “Stopped” in the default order settings (purchase, inventory and sales) for one material has been extended with the concept of status: One status is a combination of this 3 checkboxes.
Product Versions	In the manufacturing industry, it’s often required to manage de versioning of products. A same product may have several versions existing at the same time with different statuses. Depending on the status, the different logistic operations will be possible or not.	The status management has been extended to the products variants to allow the management of product version.
History of status modification	The history of the status changes is a requirement of several Quality Management System such as ISO9001, ISO14001...	Each status change is logged in the system and shows the date and the person
Creation / Modification Workflow	The creation/modification of products may involve several departments of an organization with several steps for the validation.	A workflow of validation of products may be configured to fit to the organization and the validation process. The workflow are company dependent and thus can be customized by legal entity.



## 2. Project

Function	Functional requirement	Fulfilment of the requirement
Tracking Dimension Project	Stock dedicated to one project need to be identified, valued and managed independently of other stocks/projects.	In addition of the tracking dimensions Batch and Serial number, a project tracking dimension is created and allow the following functions : <ul style="list-style-type: none"> <li>• Independent valuation of products</li> <li>• Material planning specific to a project</li> <li>• Stock clearly identified by project</li> </ul>
Project Dimension Creation	When a project is created, a project dimension must be initialized at the same time.	The Project dimension can be created immediately during the project creation in Dynamics 365 for Operations.
Project dimension and project Hierarchy	A global project dimension may be required for a hierarchy of project (Project including subprojects).	When a project hierarchy is created, the project dimension of the root project can be assigned to all subprojects
Project dimension and BOMs	Ability to track all the component linked to a project and that will be consumed by production orders. This function is also linked to the project logistics requirement (See above)	During the MRP calculation, the project dimension is propagated in all above levels for all the product managed by a project dimension. A parameter is available to stop the propagation for a specific BOM line if requested
Project dimension during MRP calculation	Planned purchase and production orders related to a project have to be created with the project dimension	
Disabling MRP Calculation	For equipment manufactured in accordance with a project, it may be necessary to attach several components of the different level of a BOM to WBS nodes. By doing this, the MRP calculation may create redundant planned orders	In the lines of BOM, a checkbox is added to indicate that the MRP must stop its calculation
Link BOMs lines with Project WBS	The project information is required in BOMs to be able to link project activities to BOM levels. The final goal is to make independent the different level of BOM and disconnect the standard function of production planning. Note that this function is linked to the previous one.	

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Costing Version	A special version is required to be able to keep the price breakdown	
Costing Sheet	The projects managers needs to analyze the costs of projects following different views	Costing sheet are configurable and allow to report Project progress and costs including committed costs, semi committed costs, and ongoing production consumption costs Costing sheets allow as well to calculates the ETC and EAC
Project Logistics	In a Project Based Manufacturing environment, the supply chain planning is fundamental. There is product demand at all levels of projects and they all need to be covered in time to be able to have everything in place in time. This demand can be covered with a lot of different transactions (Purchases, Production orders, On-hand inventory...). The project planner need an accurate overview of all transactions involved in a project, to evaluate the impact of all the logistic events on the project timeline.	The project logistics form is created to show an overview of the complete project and activities and the demand lines that are attached to all different levels. It also shows how these demand lines are covered: this coverage can be a hard relation, but it can also be indicated from master planning (anonymous orders). The following orders are shown in the project logistics: <ul style="list-style-type: none"> <li>• Item requirements</li> <li>• Sales orders</li> <li>• Production orders</li> <li>• Purchase orders</li> <li>• Transfer orders</li> <li>• Planned orders</li> <li>• Purchase Requisitions</li> <li>• Request for quotations</li> <li>• On hand inventory reservations</li> </ul>
Stock Transfer	Stocks have to be easily transferred from one project to another in respect with the cost breakdown of the transferred product.	



### 3. Pegase interface

Function	Functional requirement	Fulfilment of the requirement
Connection Parameters	Several instance of Pegase may work in relation with several AX systems by mean of webservices. When AX call a webservice of Pegase, the connection to the correct instance of Pegase is done via the user login included in the webservice authentication.	Connection parameters are stored in the general setting of the interface. This parameter is stored at the legal entity level; this allow to use several instance of Pegase for different legal entities of Dynamics 365 for Operations.
Master data Messages	The synchronization of data between is necessary to keep AX and Pegase synchronized. Dynamics 365 for Operations is the reference system for master data and need to provide to Pegase	The master data are managed by AX and are transferred to Pegase each. The transmission of master data is triggered manually by the user of Dynamics 365 for Operations.
Customer Master Data	Customer Master Data is one of the mandatory master data required by Pegase to manage intervention.	The customer master data are transmitted to Pegase. The interface is triggered manually and is possible for one or several customer at the same time. The address transmitted for the customer is the main address.
Site Master Data	Sites are addresses where equipment are located. Several sites can be linked to one customer	Sites are represented in Dynamics 365 for Operations by secondary addresses. The interface is triggered manually.
Equipment Master Data	Equipment, objects maintained	
Management of multiple companies	Pegase is not able to manage several legal entities in a same instance.	Prefix can be added in the master data ID transferred to Pegase by the interface. For example, if we set the prefix parameter of customer interface to "U-", the customer "1000" of the legal entity "USMF" of AX will be transmitted to Pegase as "U-1000". A prefix can be set for all the
Monitoring of the interfaces	The monitoring is necessary to allow users to analyze themselves the possible errors of data transfer between AX and Pegase.	A history of the messages exchanged between AX and Pegase is available on each object of AX.
Message archiving	The history of messages between AX and Pegase may increase quickly if the volume of intervention is important. An archiving function is needed	A transaction is available to purge the history depending on the date



## 4. Service Management

Function	Functional requirement	Fulfilment of the requirement
Equipment Geolocation	The optimization of the scheduling of interventions may depend on the location of intervention, and the geolocation of equipment is the basis to achieve this goal.	Geolocation of equipment are stored in Dynamics 365 for Operations and send to Pegase when an intervention is created. When an intervention is validated, if the geolocation of the equipment has been asked in the intervention, the coordinate of the equipment will be updated in Dynamics 365 for Operations.
Equipment Location and Contact	The equipment are attached to a site and a contact person is required if we have to plan an intervention on this equipment.	An address and the contact information are stored in the equipment master data.
Equipment Status	As for material, an equipment may have a status changing along all its life.	A status is available and allow to indicate its physical condition, commercial condition... The history of changes is available in a log file
Warranty data on equipment	When an equipment is sold to a customer, a warranty period is nearly always in the sale contract.	Warranty data are stored in the equipment master data, and will be taken into account for billing determination in case of repairing or periodic maintenance.
Equipment image	Visualization of the equipment itself or of its environment.	
Intervention Types	In Pegase, the intervention type define the type of service that the technician will have to realize on the equipment. After the intervention, the technician will have to fill a form on his mobile application, this form may be different depending on the intervention type.	In Dynamics 365 for Operations, during the qualification of the intervention, the type of intervention is selected by the service planner. This intervention type will be transferred to Pegase to select the corresponding form. In contracts, for each equipment covered by the contract, it is possible to assign spare parts intervention templates with list of spare parts
Automatic Intervention Status	The status of an intervention depends on the event occurring on Pegase. Thus service planner do not need to manage that manually	A Setup table is provided in the module to set the mapping between the status of the intervention on AX and Pegase.
Documents on intervention	The documents required by the technicians to execute the interventions on the customer site, have to be pushed to the mobile application	A document type is created in AX and is dedicated to the documents that need to be transmitted to a technician for an intervention. If several document with that type are attached to an equipment or a contract, they will be all attached during the qualification process an pushed to the technician mobile
Time recording on intervention	For contract with SLA, it's mandatory to record the duration of the related intervention.	The standard function is automated to be consistent with the mobile application: The "stop recording" function is linked to the intervention status and is set automatically by the interface.
Activities	When a outlook system is used by the company, it may be useful to replicate the planned intervention of technicians on their office calendar	As soon as an intervention is planned on Pegase, the status of the intervention is changed to "planned". At this moment, a activity of type

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		"Meeting" is created in AX. If AX is synchronized with an outlook, then the activity will be replicated in Outlook.
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