Pre Planning

2.0 Pre Planning

The **Pre Planning** menu in the home page of the ***cuteQM*** app is mainly used to perform pre-fabrication in the structural projects. You can search the feasibility of the material and to assign the priority. This menu also helps to add the material request.

Here, you can manage the offcut inventory and material issuance. You can also view the reports related with the BOM.

Once you click the **Pre Planning** menu, the following tabs open,

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2.1 Bill of Material (BOM)

The **BOM** tab in the **Pre Planning** menu helps to add the size of BOM needed for the pre-fabrication in the structural project. To add a BOM,

1. Click **BOM** in the **Pre Planning**

The **Bill of Material** page opens.

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Figure 2.1: Bill of Material page

2.1.1 Add a BOM

If you want to add a BOM,

1. Click image-16517536709 86.png
Image not found or type unknown (**ADD** button) in the **Bill of Material** See Fig 2.1.

The page opens a new window to add the details of BOM.

image-16517536899 88.png
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image-16517536984 79.png
Image not found or type unknown **Note**: The field notified with a symbol (*) is mandatory. You must enter the relevant details in that fields before saving.

2. In the **Nesting No** box, enter the nesting number.

3. In the **CNC sheet No** box, enter the CNC sheet number.

4. In the **Drawing No** box, enter the drawing number.

5. In the **Cut No** box, enter the cut number.

6. In the **Piece Mark No** box, select a piece mark number from a drop-down list.

7. In the **Material Grade** box, enter the material grade.

8. In the **Plate thick (mm)**box, enter the plate thickness value.

9. In the **Size (length x Width)**box, enter the length and width of the plate.

10. In the **JDE Item code** box, enter the JDE item code.

11. In the **Size M2**box, enter the size value.

12. In the **Type** box, select the type of material.

13. In the **Nesting** box, select Yes or No according to your requirement.

14. In the **Weight (kg)** box, enter the weight value.

15. In the **Remarks** box, enter your remarks if any.

16. Click **Save**.

The BOM is successfully added and listed in the **Bill of Material** page.

2.1.2 Edit a BOM

If you want to edit any existing BOM in the **Bill of Material** page, do the following,

image-1651753845194.png

1. Click Image not found or type unknown (Edit icon) in the **Edit** column for the respective BOM. See Fig 2.1.

The page shows the details of the selected BOM.

image-1651753860842.png

Image not found or type unknown

2. Click any box where you want to edit the details, and then edit the details in the respective box.

3. Click **Save**.

2.1.3 Delete a BOM

image-165175393

If you want to delete any existing BOM in the **Bill of Material** page, you can use Image not found or type unknown (Delete icon) provided in the **Bill of Material** page.

2.1.4 Export BOM List

You can export a list of BOMs added in the **Bill of Material** page in both the pdf and excel formats.

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1. If you want to export the BOM list in the pdf format, click Image not found or type unknown (**PDF** button).

The BOM list will be downloaded as a pdf file.

image-1651753980125.png

2. If you want to export the BOM list in the excel format, click Image not found or type unknown (**Excel** button).

The BOM list will be downloaded as an excel file.

2.1.5 Filter a BOM

If you want to filter any BOM from the list of BOMs in the **Bill of Material** page, do the following,

image-1651754024841.png

1. Click Image not found or type unknown (**FILTER** button) located on the **Bill of Material** See Fig 2.1.

Once you clicked the **Filter** button, the filter box opens in each column of the **Bill of Material** page.

image-1651754041475.png

Image not found or type unknown

2. Enter relevant detail in the respective column’s filter box to filter a BOM you want.

2.1.6 Import Multiple BOMs

If you want to import multiple BOM together, do the following,

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1. Click Image not found or type unknown (**IMPORT** button). See Fig 2.1.

The **Excel Import** page opens.

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Image not found or type unknown

image-1651754116728.png

2. Click Image not found or type unknown (**TEMPLATE** button).

An excel worksheet will be downloaded with a predefined template to enter the details of BOM.

3. Enter the required BOM details in the respective columns of the excel worksheet.

4. Once you have added the BOM details in the excel worksheet, save the excel worksheet on your computer.

image-1651754177018.png

5. Click Image not found or type unknown (**Browse** button) to select the excel worksheet to be uploaded.

6. Select the excel worksheet you want to upload from your computer.

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7. Click Image not found or type unknown (**Upload** button) to export the BOM details that are included in the excel worksheet.

The columns added in the excel worksheet will be listed in the **Excel Column** field.

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image-1651754229002.png

Image not found or type unknown **Note**: Make sure that the **Excel Column** field must have all the columns as in the **System Column** field.

8. To map the columns in the **System Column** and **Excel Column** fields, do one of the following,

a. If you want to map the columns automatically, click (**AutoMap** button).

The columns will be mapped automatically and displayed in the **Mapped Columns** field.

b. If you want to map each column manually, select the respective columns in both the **System Column** and **Excel Column** fields and then click (**Map** button).

The selected columns will be mapped and displayed in the **Mapped Columns** field.

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9. To un-map the columns in the **Mapped Columns** field, select the respective column and then click (**UnMap** button).

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Image not found or type unknown **Note**: In the **Total Rows** field, the range for uploading the data from the excel worksheet will be updated automatically.

10. Click (**Populate Values** button).

The data are populated.

11. Click (**Process** button).

The system processes all the uploaded data and shows if any error with the uploaded data. You can

image-1651754380115.png

download the error details in the excel worksheet by clicking Image not found or type unknown (**Export to Excel** button).

image-1651754402726.png

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image-1651754413646.png

Image not found or type unknown **Note**: Different color code explains the different type of errors.

12. Once you have rectified the identified error in the excel worksheet, follow the above procedures to upload the worksheet.

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13. Click Image not found or type unknown (**Import** button) to import the uploaded data.

The data will be successfully imported.

2.2 Assign Priority

The **Assign Priority** tab in the **Pre Planning** menu helps to assign the priority for JDE, Offcut, and FIM warehouses. Likewise, you can assign priority for Material Type and Material Size. For example, if you assign the high priority for any warehouse, the materials from the high priority warehouse will be taken initially for performing feasibility.

To assign priority,

1. Click **Assign Priority** in the **Pre Planning**

The **Assign Priority** page opens.

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Figure 2.2: Assign Priority page

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Note: You can assign the priority by giving the numbers from 1 to 99.

2. If you want to assign priority for warehouses,

- Select the **Warehouse**

The added warehouses will be listed.

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- In the **Priority** column, enter the priority numbers for the respective warehouse.
- Click **Save Changes**.

3. If you want to assign priority for material type,

- Select the **Type** option

The material types will be listed.

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Image not found or type unknown

- In the **Priority** column, enter the priority numbers for the respective type.
- Click **Save Changes**.

4. If you want to assign priority for material size,

- Select the **Size**

  The added sizes will be listed.

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  Image not found or type unknown

- In the **Priority** column, enter the priority numbers for the respective size.
- Click **Save Changes**.

2.2.1 Export Assigned Priority List

You can export the assigned priority list in the **Assign Priority** page in the pdf and excel formats

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by using Image not found or type unknown

image-1651755154956.png

(**PDF** button) and Image not found or type unknown (**Excel** button). To know how to export, see the topic, "**Export BOM List**".

2.3 Feasibility

The **Feasibility** tab in the **Pre Planning** menu helps to search the feasibility percentage of material type and size available in the warehouses. Based on the feasibility search percentage, the inspectors will move furtherly for material requisition and material issuance.

To navigate into the Feasibility page,

1. Click **Feasibility** in the **Pre Planning**

   image-1651755309386.png

   Image not found or type unknown

Figure 2.3: Feasibility page

image-1651755556952.png

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Note: The feasibility result displayed in different color explains that status of material feasibility.

- The feasibility result displayed in Green color shows that the material has 100 percentage feasibility.
- The feasibility result displayed in Blue color shows that the material has less than 100 percentage feasibility.

2.3.1 To do Feasibility Search

To search the feasibility percentage, do the following steps in the **Feasibility** page,

1. In the **Type** box, select the material type.

- If you select **PG**(I Beam), the feasibility percentage will be calculated based on three types such as BF, WP, and TF. See below figure.

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- If you select PT (T Beam), the feasibility percentage will be calculated based on two types such as BF and WP. See below figure.

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- If you select Node means it is only one. See below figure.

  image-1651755476960.png

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2. In the **Size** box, select the material size.

3. In the **Feasibility** box, enter the feasibility percentage.

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Tip: If you enter 100, the items which have the feasibility percentage of 100 will be listed. If you enter 10, the items which have the feasibility percentage above 10 will be listed.

4. If you want to see the feasibility percentage for any particular warehouse, select the warehouse listed in the **Warehouse** field

- If you want to view the feasibility percentage for the items in the JDE warehouse, select the checkbox of **JDE**.
- If you want to view the feasibility percentage for the items in the Offcut warehouse, select the checkbox of **Offcut**.
- If you want to view the feasibility percentage for the items in the FIM warehouse, select the checkbox of **FIM**.

5. Click **FEASIBILTY SEARCH**.

The feasibility result opens based on the given input and feasibility percentage.

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According to the material type i.e., PG, PT, or Node, the feasibility percentage is calculated in the back end by using the pre-defined formula, respectively.

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image-1651755747844.png

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Note: If you want clear the given input data, click (**CLEAR** button).

image-1651755772070.png

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6. Click (Expand icon) of the respective type or click (**Expand All** button) to expand all the type together.

A new window opens and shows a list of items included in the type.

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- **CNC sheet no** – shows the respective CNC sheet number of the item.
- **Warehouse** – shows the warehouse type.
- **BOM Qty** – shows the material size added in the BOM.
- **Required Qty** – shows the required quantity of item.
- **Stock Qty** – shows the overall quantity of stock available in all the inventories.
- **Available Qty** – shows the available quantity of item.
- **Reserve / Release Qty**– shows the reserved / released quantity of item.
- **MR Qty**– shows the quantity of item for which the material requests has added.
- **MI Qty**– shows the quantity of item for which the material issuance has done.

7. If you want to give purchase order details, enter in the **PO Details** column.

8. Click **Save changes**.

2.4 Clear Feasibility Search Data

If you want to clear the data of feasibility search done by any of the user, you can use this clear feasibility search data functionality.

Users assign with Admin role only have access to view the **Clear Feasibility Search Data** tab in the **Pre Planning** menu.

To clear the feasibility search data,

1. Click **Clear Feasibility Search Data** in the **Pre Planning**

The **Feasibility Search Clear** page opens.

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Figure 2.4: Feasibility Search Clear page

The page shows the feasibility search data of all the users.

image-1651755919514.png

2. Click Image not found or type unknown (Clear icon) of the respective user to clear the feasibility search data.

The feasibility search data of the selected user will be cleared.

2.5 Offcut Inventory

When a material issuance has been created with the Offcut material, we need to add the offcut material details in the Offcut inventory. To add the offcut material details,

1. Click **Offcut Inventory** in the **Pre Planning**

The **Offcut Inventory** page opens.

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Figure 2.5: Offcut Inventory page

2.5.1 Add Offcut Material Detail

To add the offcut material detail,

image-1651756016664.png

1. Click Image not found or type unknown (**ADD** button) in the **Offcut Inventory** See Fig 2.5.

A new window opens to add the details of offcut material.

image-1651756036551.png

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1. In the **Material Request** box, select a material request from a drop-down list.

The cut length for the selected material request opens.

image-1651756062565.png

Image not found or type unknown

2. In the **Cut Length** column, change the cut length of the offcut item if you want.

image-1651756078645.png

Image not found or type unknown **Note**: The cut length should not be exceeded the material issuance quantity.

3. In the **Received Date** box, choose the date when the offcut material received in the Offcut inventory.

4. Click **Save changes**.

The offcut material is added.

2.5.2 Change the Received Cut Length Quantity

If you want to change the quantity of the received cut length,

image-1651756122770.png

1. Click Image not found or type unknown (Edit icon) in the **Edit** column for the respective material request. See Fig 5.5.

The page shows the added details.

image-1651756137944.png

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2. In the **Cut Length** box, enter the received cut length quantity.

3. In the **Unique Number** box, enter the unique number.

4. Click **Save**.

The added cut length quantity will be updated in the **Received Cut Length** column.

2.5.3 Adjust Cut Length Quantity

To adjust the cut length quantity,

image-1651756185406.png

1. Click Image not found or type unknown (Add icon) in the **Adjustment**

The **Adjustment** window opens.

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image-1651756220845.png

2. Click Image not found or type unknown (**ADD** button) in the **Adjustment**

image-1651756236257.png

Image not found or type unknown

3. In the **Adjustment Qty** box, enter the adjustment cut length quantity.

4. In the **Remarks** box, enter your remarks if any.

5. Click **Save**.

The adjusted cut length quantity will be updated.

image-1651756275859.png

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2.5.4 Export Offcut Inventory List

You can export a list of offcut materials added in the **Offcut Inventory** page in the pdf and excel formats by using Image not found or type unknown (**PDF** button) and Image not found or type unknown (**Excel** button). To know how to export, see the topic, “**Export BOM List**”.

image-1651756305394.png

image-1651756315431.png

2.5.5 Filter an Offcut Material

If you want to filter any offcut material from the list of offcut materials in the **Offcut Inventory** page, you can use Image not found or type unknown (**FILTER** button). To know how to filter, see the topic, “**Filter a BOM**”.

image-1651756343354.png

2.6 Material Request

The **Material Request** tab in the **Pre Planning** menu helps to manage the material requests added in the **Feasibility** page.

2.6.1 Add a Material Request

If you want to add a material request, do the following steps,

1. Navigate to the generated feasibility results in the **Feasibility**

   image-1651756402760.png

   Image not found or type unknown

2. Select the checkbox of the type for which you want to add the material requests.

   image-1651756427415.png

3. Click Image not found or type unknown (**ADD MATERIAL REQUEST** button).

The **Subcon Details** window opens.

image-1651756443185.png

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4. In the **Sub Contractor Name** box, select a sub-contractor.

5. In the **Request Date & Time**box, choose the request date and time.

6. In the **Location** box, select a location.

7. Click **SAVE**.

The material request will be added in the **Material Request** page.

image-1651756480170.png

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Note: For each item code included in the project, one material request will be created individually.

For example, The BOM quantity is 18 and you set the high priority for JDE and the least priority for Offcut. A material request will be created with the JDE inventory if the JDE has the same quantity of 18. If the JDE is available with quantity of 10, then two material requests will be created separately for quantity of 10 in JDE and quantity of 8 in Offcut.

8. Click **Material Request** in the **Pre Planning**

The **Material Request** page opens and shows the list of created material requests.

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Image not found or type unknown

Figure 2.6: Material Request page

image-1651756578335.png

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Note: The material request displayed in different color explains the status of the request.

- The material request displayed in Blue color indicates a new material request.
- The material request displayed in Green color indicates the completed material request.

9. If you want to view the material details, click (Expand icon) of the respective request.

The **Material Details** window opens and shows the material details.

image-1651756605648.png

Image not found or type unknown

2.6.2 Approve a Material Request

Once you have added the material request, the **Request Status** column in the **Material Request** page is appeared with Image not found or type unknown (Submit and Reject icons).

image-1651756623723.png

image-1651756642040.png

1. If you want to approve the material request, click Image not found or type unknown (Approve icon) in the **Request Status** Otherwise click Image not found or type unknown (Reject icon) to reject the request.

image-1651756651681.png

The approved material request will be moved for Material Acceptance.

2.6.3 View a Material Request Report

If you want to view a material request report, click Image not found or type unknown (Report icon) provided in the **Report** column of the **Material Request** page.

image-1651756686517.png

2.6.4 Export Material Request List

You can export a list of material requests added in the **Material Request** page in the pdf and excel formats by using Image not found or type unknown (**PDF** button) and Image not found or type unknown (**Excel** button). To know how to export, see the topic, "**Export BOM List**".

image-1651756717941.png

image-1651756727906.png

2.6.5 Filter a Material Request

If you want to filter any material request from the list of material requests in the **Material Request** page, you can use Image not found or type unknown (**FILTER** button). To know how to filter, see the topic, "**Filter a BOM**".

image-1651756754663.png

2.7 Material Issuance

When a material request has been created with the Offcut inventory, we need to issue materials from the Offcut inventory for the created request.

image-1651756783582.png

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Note: You can do the material issuance process for materials only in the Offcut inventory.

The **Material Issuance** tab in the **Pre Planning** menu helps to issue the materials from the Offcut inventory based on the added material request.

1. Click **Material Issuance** in the **Pre Planning**

The **Material Issuance** page opens.

image-1651756803616.png

Image not found or type unknown

Figure 2.7: Material Issuance

2.7.1 Add a Material Issuance Report

If you want to add a material issuance report,

image-1651756858355.png

1. Click Image not found or type unknown (**ADD** button) in the **Material Issuance** See Fig 2.7.

The page opens a new window to add the details of material issuance.

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image-1651756886331.png

Image not found or type unknown

Note: The field notified with a symbol (*) is mandatory. You must enter the relevant details in that fields before saving.

2. In the **Material Request Number** box, select a material request number from a drop-down list.

3. In the **Issued Date** box, choose the issued date.

4. Click **Save**.

The material issuance request will be added.

2.7.2 Add Issued Quantity

Once you have added the material issuance request, you must add the issued quantity details. To add,

image-1651756942566.png

1. Click Image not found or type unknown (Add icon) in the **Result**

The **Material Details** window opens.

image-1651756956099.png

Image not found or type unknown

2. Check the available quantity in the **Total Quantity**

3. In the **Issued Qty** column, enter the issued quantity.

image-1651756981773.png

Image not found or type unknown **Note**: The issued quantity can be higher than the available total quantity for all type of components.

4. Click **Save changes**.

2.7.3 Approve a Material Issuance

Once you have added the material issuance, the **Issue Status** column in the **Material Issuance** image-1651757025083.png

page is appeared with Image not found or type unknown

(Submit and Reject icons).

image-1651757039975.png

1. If you want to approve the material issuance, click Image not found or type unknown (Approve icon) in the **Issue Status** image-1651757053621.png

Otherwise click Image not found or type unknown (Reject icon) to reject the request.

The approved material issuance will be moved to Offcut Inventory.

2.7.4 View a Material Issuance Report

image-1651757090651.png

If you want to view a material issuance report, click Image not found or type unknown (Report icon) provided in the **Report** column of the **Material Issuance** page.

2.7.5 Export Material Issuance List

You can export a list of material issuances added in the **Material Issuance** page in the pdf and excel formats by using

image-1651757120606.png image-1651757129444.png

Image not found or type unknown (**PDF** button) and Image not found or type unknown (**Excel** button). To know how to export, see the topic, “**Export BOM List**”.

2.7.6 Filter a Material Issuance

If you want to filter any material issuance from the list of material issuances in the **Material Issuance** page, you can use

image-1651757159363.png

Image not found or type unknown (**FILTER** button). To know how to filter, see the topic, “**Filter a BOM**”.

2.8 CNC Process

The **CNC Process** tab in the **Pre Planning** menu helps to update the unique number of the added material request.

1. Click **CNC Process** in the **Pre Planning**

The **CNC Process Update** page opens and shows a list of added material requests.

image-1651757193208.png

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Figure 2.8: CNC Process page

2. In the **Unique Number** column, enter the unique number of the material request.

The unique number will be updated successfully.

2.9 BOM Status by Size

The **BOM Status by ISO** tab in the **Planning** menu helps to view the BOM status added against the ISO number. To view the BOM status,

1. Click **BOM Status by ISO** in the **Planning**

The **BOM Status by ISO** page opens and shows a list of modules with their ISO numbers.

image-1651757243508.png

Image not found or type unknown

Figure 2.9: BOM Status by ISO page

image-1651757271157.png

2. Click Image not found or type unknown (Expand icon) in the **Details**

The page shows the items included in the respective module including the BOM quantity, material request quantity, material issued quantity, and offcut material quantity.

image-1651757295035.png

Image not found or type unknown

2.9.1 Export BOM Status

You can export the BOM generated in the **BOM Status by ISO** page in an excel format by using image-1651757325031.png

Image not found or type unknown (**Excel** button). To know how to export, see the topic, “**Export BOM List**”.

2.10 BOM Details

The **BOM Details** tab in the **Planning** menu helps to view the added BOM details. To view the BOM details,

1. Click **BOM Details** in the **Planning**

The **BOM Details** page opens.

image-1651757363290.png

Image not found or type unknown

Figure 2.10: BOM Details page

2. If you want to view any particular BOM details, you can use the filter options (Explained below) given in the page,

- If you want to view the BOM details of any sub-contractor, select a sub-contractor in the **Sub Contractor Name** box.
- If you want to view the BOM details of any module, select a module in the **Module box.**
- If you want to view the BOM details against an ISO number, select an ISO number in the **ISO Number box.**
- If you want to view the BOM details for any item code, select an item code in the **Item Code box.**
- If you want to view the BOM details against a MR number, select a MR number in the **MR Number box.**
- The **Option 1**, **Option 2**, **Option 3**, and **Option 4**boxes are provided to filter the BOM details by giving the BOM description.

3. Click **Search**.

The BOM will be displayed based on the given data in the filter boxes.

2.10.1 Export BOM Details

You can export the BOM details generated in the **BOM Details** page in an excel format by using image-1651757463946.png

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(**Excel** button). To know how to export, see the topic, “**Export BOM List**”.

2.11 View Release Note

The **View Release Note** tab in the **Pre Planning** menu helps you to add a new spool release note and the spool inspection result for the added release note.

1. Click **View Release Note** in the **Pre Planning**

The **View Release Note** page opens.

image-1651757504991.png

Image not found or type unknown

Figure 2.11: View Release Note

2.11.1 Add a Spool Release Note

If you want to add a new spool release note, do the following steps,

image-1651757545514.png

1. Click Image not found or type unknown (**ADD** button) in the **View Release Note**

The **Release Note** page opens.

image-1651757557502.png

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image-1651757567958.png

Image not found or type unknown **Note**: The field notified with a symbol (*) is mandatory. You must enter the relevant details in that fields before saving.

2. In the **Release Note Date** box, choose the release note date.

3. In the **Location** box, select a location.

Before saving the request, you must add spools.

image-1651757594829.png

Image not found or type unknown **Note**: You can add multiple spools for one request.

The page shows a list of added spools.

image-1651757614665.png

3. Click Image not found or type unknown (Add icon) of the respective spool which you want to add.

The added spools will be moved to the right side of the page.

4. In the **Remarks** box, enter your remarks if any.

5. In the **Inspection Item** box, enter the inspection item detail.

6. In the **Subject Coverage** box, enter the subject coverage detail.

7. Click **Save**.

The release note for spool will be added and listed in the **View Release Note** page.

2.11.2 Add Results of Spool Inspection

After completing the spool inspection for the added request, you can add the inspection result details. To add the results, do the following steps,

image-1651757698904.png

1. Click Image not found or type unknown (Result icon) in the **Result** column of the respective request.

The window opens and shows with a list of spools including their inspection result.

image-1651757715848.png

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2.11.3 Submit a Spool Release Note

Once you have completed the spool inspection, you should submit the inspection for the further process. the **Request Status** column in the **Release Note for Spool Inspection** page is

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appeared with Image not found or type unknown (Submit and Reject icons). See Fig 2.11.

image-1651757776736.png

1. If you want to submit the spool inspection, click Image not found or type unknown (Submit icon) in the **Completed**

image-1651757787608.png

Status Otherwise click Image not found or type unknown (Reject icon) to reject the request.

2.11.4 View a Spool Inspection Report

image-1651757817550.png

If you want to view a spool inspection report, click Image not found or type unknown (print icon) provided in the **Report** column of the **View Release Note** page. See Fig 2.11.

2.11.5 Attach a File into a Spool Inspection Report

If you want to attach a file with any existing spool inspection report in the **View Release Note** page,

image-1651757855955.png

1. Click Image not found or type unknown (Attach icon) provided against the respective request in the **View Release Note**

The **File Upload (P&ID - Drawings)** page opens.

image-1651757871755.png

Image not found or type unknown

image-1651757880991.png

Image not found or type unknown **Note**: Before uploading any file, read the instructions given in the **File Upload (PN)** page.

image-1651757913545.png

2. Click Image not found or type unknown (**Browse** button).

3. Select a file which you want to upload from your computer.

image-1651757923962.png

4. Click Image not found or type unknown (**Upload** button) to attach the file.

The uploaded file will be displayed in the **File Upload** table.

image-1651757943155.png

Image not found or type unknown

2.11.6 Export Spool Inspection Report List

You can export a list of spool inspection reports in the **View Release Note** page in the pdf and excel formats by using

image-1651757984588.pngimage-1651757995273.png

Image not found or type unknown (**PDF** button) and Image not found or type unknown (**Excel** button). To know how to export, see the topic, “

Export BOM List”.

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