

cApStAn SA

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General Plunet PM Guide 11. Special Project Setups

Is your project special/complicated/huge? There may be special settings that can be enabled for your project on a case-by-case basis!

Here are some of the additional features that can be enabled for your projects, depending on what kind of complexities exist in your projects.

If any of the questions below seem to apply to you, please read on:

If you are unsure how to implement any of the below, please contact OPS and Stefanos.

Projects

1. Does your project have a large scope or a complex setup, with several batches arriving at different times and possibly with different workflows for different materials (like in IEA projects, PISA, Ipsos EQLS FW or CAE DoE)?
2. Do you have very similar or recurring projects that you need to create similar or identical orders for, with similar or identical items?

Workflows

3. Do you need to add the same workflow (i.e. sequence of jobs) to a large number of projects/items? Does the sequence of jobs also need to have specific properties (wordcounts, prices, instructions)?
4. Does your project contain a workflow where client steps are mixed with cApStAn steps, for example a client review that is followed by a cApStAn final check?
5. Does your client require to send or retrieve files using a secure link?
6. Does your client need to submit standardized requests for quotations (e.g. they submit many, but approve few)?

Budgets/Pricelines

7. Does your budget require you to add lots of similar price lines or prices to lots of items?
8. Does your budget require price lines or prices that you can't find/don't exist in the system?
9. Do you often create projects for your client, but have to keep correcting prices that appear by default and are wrong?

Locales/Languages

10. Does your project include locales we have not yet worked on and that either do not yet exist in Plunet at all or exist, but there are no price lists?

11. Do you want to have the locales of your project ordered by country and not by locale name (like in TIMSS)?

Job setup

12. Does your project need jobs that don't yet exist in the system?

13. Do you want to add job instructions to a large number of jobs at the same time?

14. Do you want to save time when assigning by creating project/customer specific pricelists that differ from the default/standard pricelists?

Job Dispatching/Assignment

15. Does your project have dispatch message requirements that differ from the standard template (like in PISA)?

Data queries

16. Do you want to find out your Gross Profit Margin (GPM) from across multiple projects (e.g. multiple sub-projects)?

Q1. Projects w/ large scope (PISA, TIMSS, etc.)

Sub-projects

[Link sub-project](#)

Project	Customer	Project name	Status	Project category	Billable items (Number/Total)	Net in project currency
O-25-00542	Stichting IEA Secretariaat Nederland (IEA)	TIMSS27 - Field Test - Fixed Rates & Webinar Costs	Active	Orders	0 from 129	117,599.23 EUR
O-25-00545	Stichting IEA Secretariaat Nederland (IEA)	TIMSS27 - Field Test - Grade 4 COG Items & Admin Scripts	Completed	Orders	0 from 119	144,493.80 EUR
O-25-00546	Stichting IEA Secretariaat Nederland (IEA)	TIMSS27 - Field Test - Grade 4 & 8 QQ	Completed	Orders	0 from 121	164,192.82 EUR
O-25-00548	Stichting IEA Secretariaat Nederland (IEA)	TIMSS27 - Field Test - Grade 8 COG Items & Admin Scripts	Completed	Orders	0 from 120	144,097.70 EUR
Results: 4						250 results per page

Net total in project currency

570,383.55 EUR

Q2. Lots of similar/identical projects

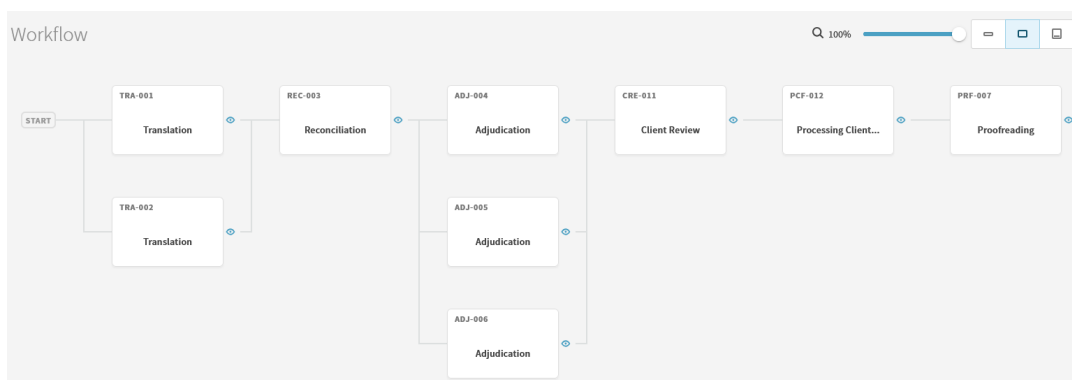
Select

New



☐ Quote template ☒ Item template

Q3. Lots of similar/identical workflows



Q4. Client workflow steps



This setup requires changing settings that are not accessible to PMs.

Q5. Client retrieves deliverables from Plunet

Delivery

Delivery

Not specified

Delivery dialog

Open delivery dialog

Delivery note as PDF attachment



zipped

