

Simple Site Plans

Using The Project Manager

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Simple Site Plans comes complete with a full project manager. This manager lets you keep all the project drawings for each site in an orderly manor and also allow you to keep a schedule of project time line events. For example: when the electrical first fix will start and end. This is much like a diary but more powerful as each project can have its own diary.

If you are an extremely busy project manger with several projects on the go printed reports and Outlook plug-ins are available on request that allow you to see all ongoing timeline events.

Drawings can be created & saved to a project; drawings can be changed and saved as a different drawing within the project. Drawings can be emailed with MS Outlook 2000 or greater in various formats.

The Project manager is accessed from the 'File' menu on the menu bar at the top of the page.

The options regarding the project manager from the file menu are:

- Project Database and Client Details
- Save Plan To Project File
- Save Plan To Project File As...
- Email EMF Plans To Client

Project Database and Client Details

Click this menu option to open the Client & Project database. From the Client & Site Details page you can add & amend clients, clients sites and drawings.

Add and edit the project manager time line (diary) database for each site.

Add and edit the Costs estimator for each site

Each site will have its own folder to store drawings in, this folder is usually

C:\SSPS\<Site Name>

Save Plan To Project File

This option will allow you to save the current drawing to the currently open project.

The system will auto backup the current drawing every 10 mins or so, and when you close a drawing or attempt to open a drawing from the Client database system the drawing is automatically saved.

This will not save a normal blank drawing to any client record.

Save Plan To Project File As

This option will allow you to save the current drawing to the currently open project but this will save it as a new drawing within the project. This is especially useful when you have created a ground floor plan in a project and then want to save the plan as the first floor so you don't have to start from scratch, just alter the ground floor drawing and the Save it as the First Floor drawing, within the open project.

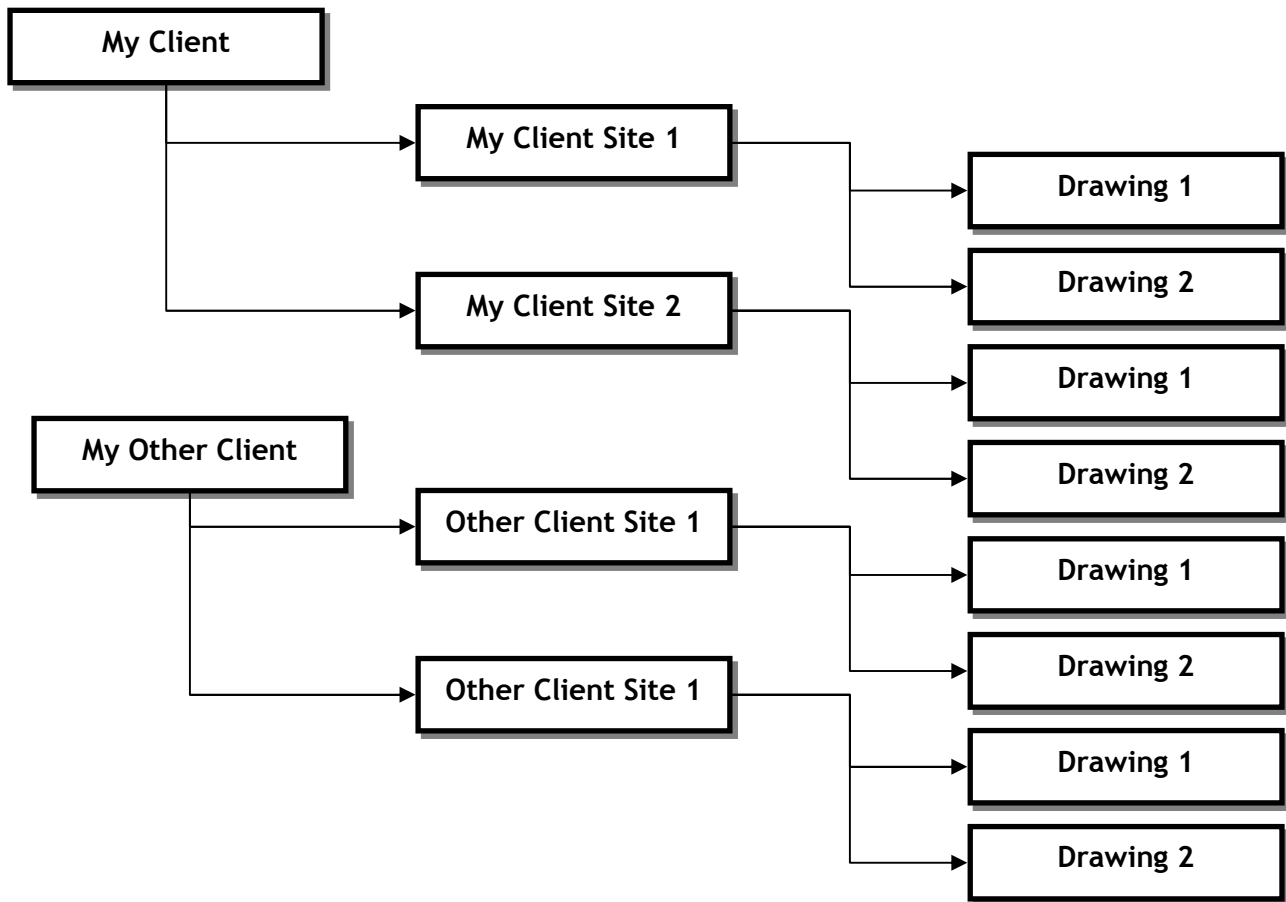
Email Drawings To A Client

This page will allow you to select a client and the associated drawing export files EMF, PDF, WMF for the site you select from the list. And mail them to the client using MS Outlook . The files will be zipped up prior to sending. And attached to the mail file.

You must have an email account for this to operate (not a web mail account)

Clients And Sites.

The Client Site database is a One to Many configuration this means you can have as many sites listed to one client. And as many drawing listed as required to each site.



Clients

To add a new client:

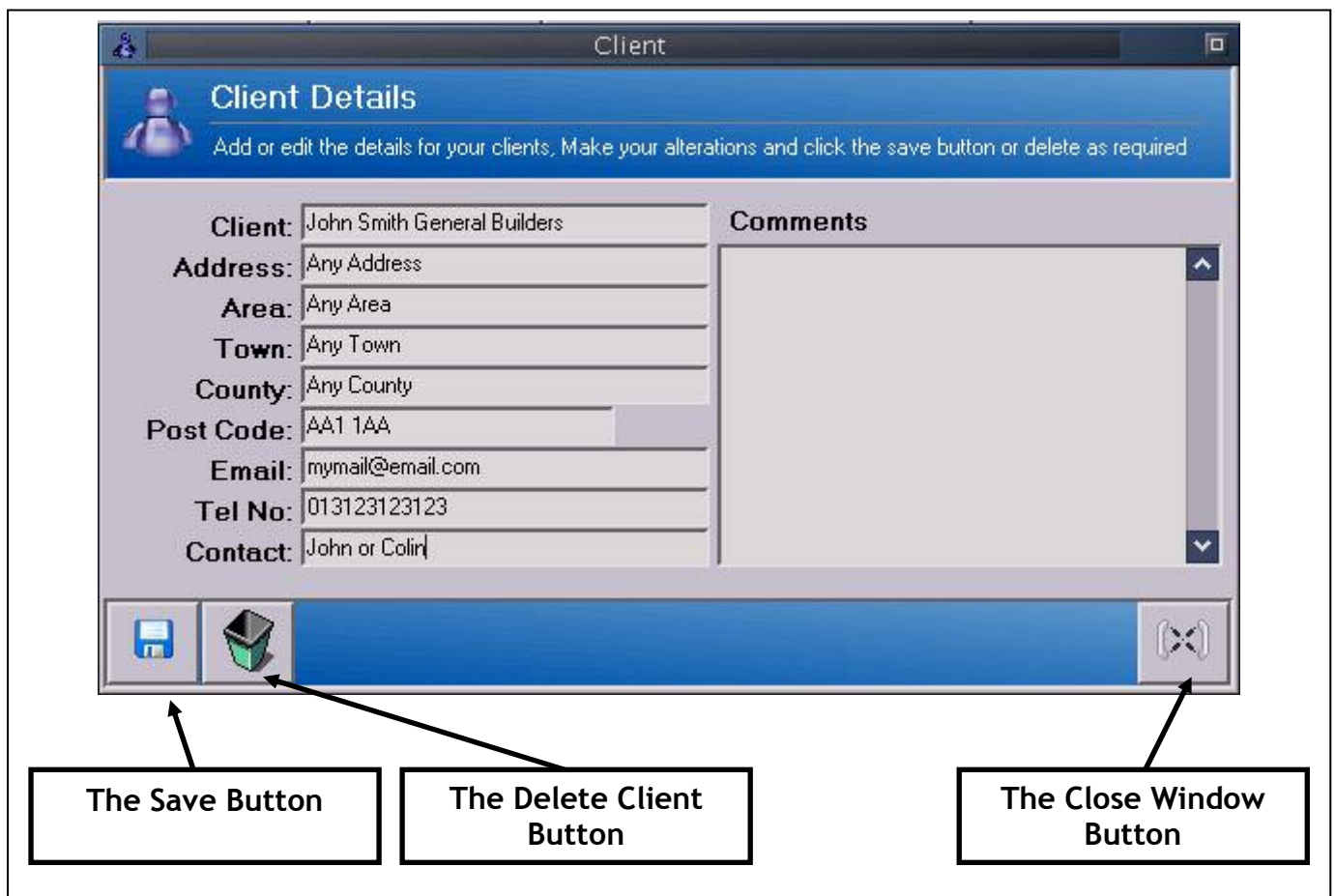
- Click 'File' from the menu bar
- Click 'Project Database and Client Details'
- In the new window 'Client And Site Details Page' click 'New Client'
- In the next new window. "Client Details" Fill in the required details.
- Click the 'Save' button (looks like a little floppy disk)
- Click 'Close' (the button with the X on it)

Your new client will now be available in the dropdown 'Client' selector on the 'Client And Site Details Page'

To edit a clients details:

- Click 'File' from the menu bar
- Click 'Project Database and Client Details'
- In the new window 'Client And Site Details Page' click 'Client Details'
- In the next new window. "Client Details" alter details as required.
- Click the 'Save' button (looks like a little floppy disk)
- Click 'Close' (the button with the X on it)

The Client Details Page.



Sites

Once you have added at least one client you can create sites for your client.

From the dropdown 'Client' selector on the 'Client And Site Details Page' chose the client you want to work with.

To add a new site:

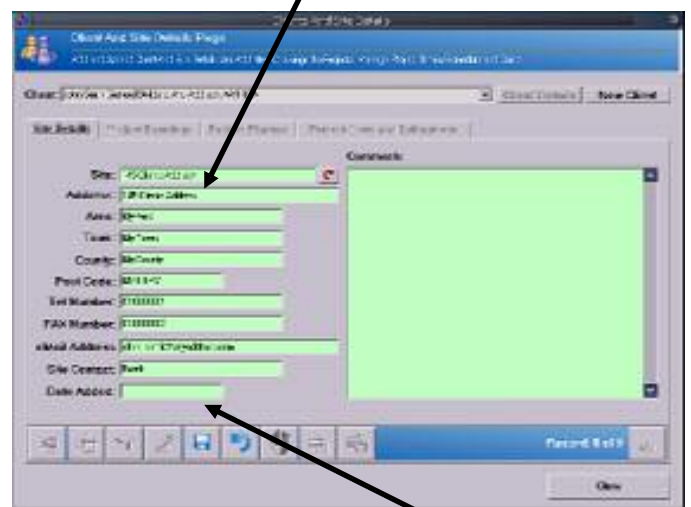
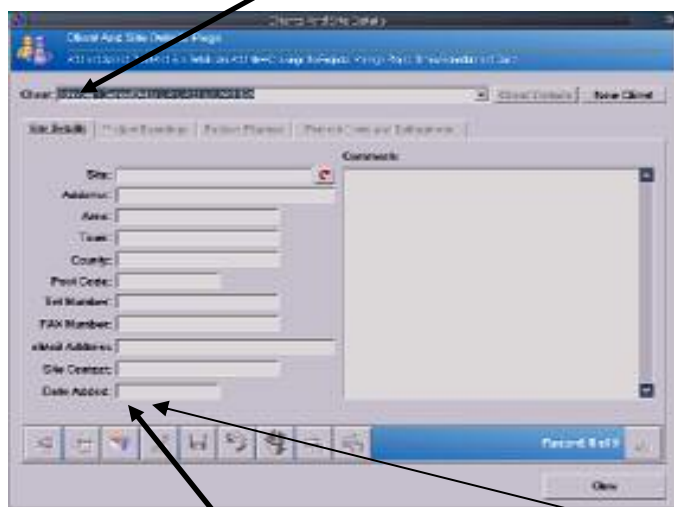
- On the Site Details Tab
- Click The Add New Site Button (Picture of a house)
- The Boxes will turn Green.
- Enter the required details
- Click the save Button (Picture of a Floppy Disk)

To edit a site:

- On the Site Details Tab
- Click The Edit Site Button (Picture of a pen over paper)
- The Boxes will turn Green.
- Alter the details as required.
- Click the save Button (Picture of a Floppy Disk)

Site Details Tab

Site Details In Add/Edit Mode













Add New Site Button

Edit Site Button

Save Changes Button

The Other Buttons Are

	Move to the First Site		Undo Changes
	Move To The Previous Site		Delete Site
	Add New Site		Move To The Next Site
	Edit Site Details		Move To The Last Site
	Save Changes		Show All Sites In A List For Selection

Project Drawings

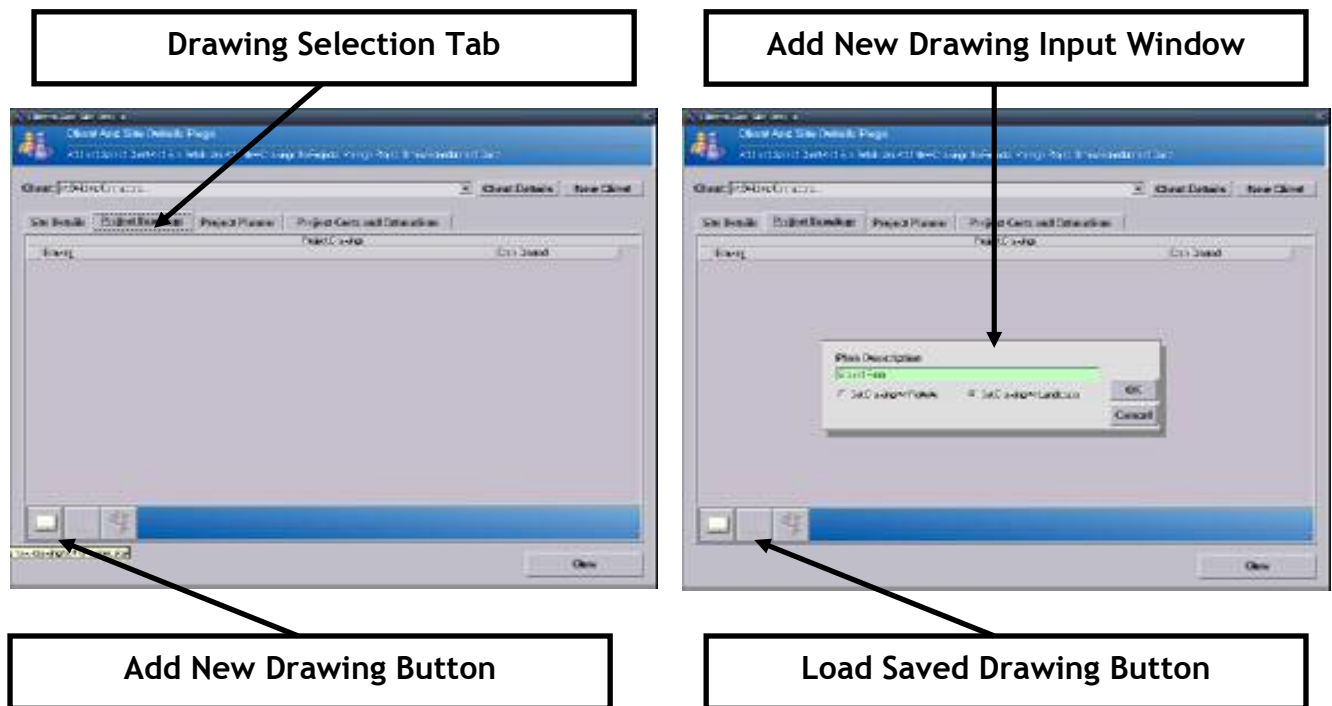
On the Project Drawings Tab you will find a list of all the drawings associated with the site.

To add a new drawing:




- On the Project Drawings Tab
- Click The Add New Drawing Button (Picture of a blank canvas)
- A little window will appear asking for the name of the drawing and if you want the page orientation to be Landscape (default) or Portrait.
- Enter the required details Click OK
- A New Drawing will be created and displayed
- The Site Details page will automatically close.

To open a drawing from the project manager:

- Select The Site
- On the Project Drawings Tab
- Click on the drawing you wish to load from the list of drawings
- Click the load drawing button
- Drawing will be displayed
- The Site Details page will automatically close.



The Other Buttons Are

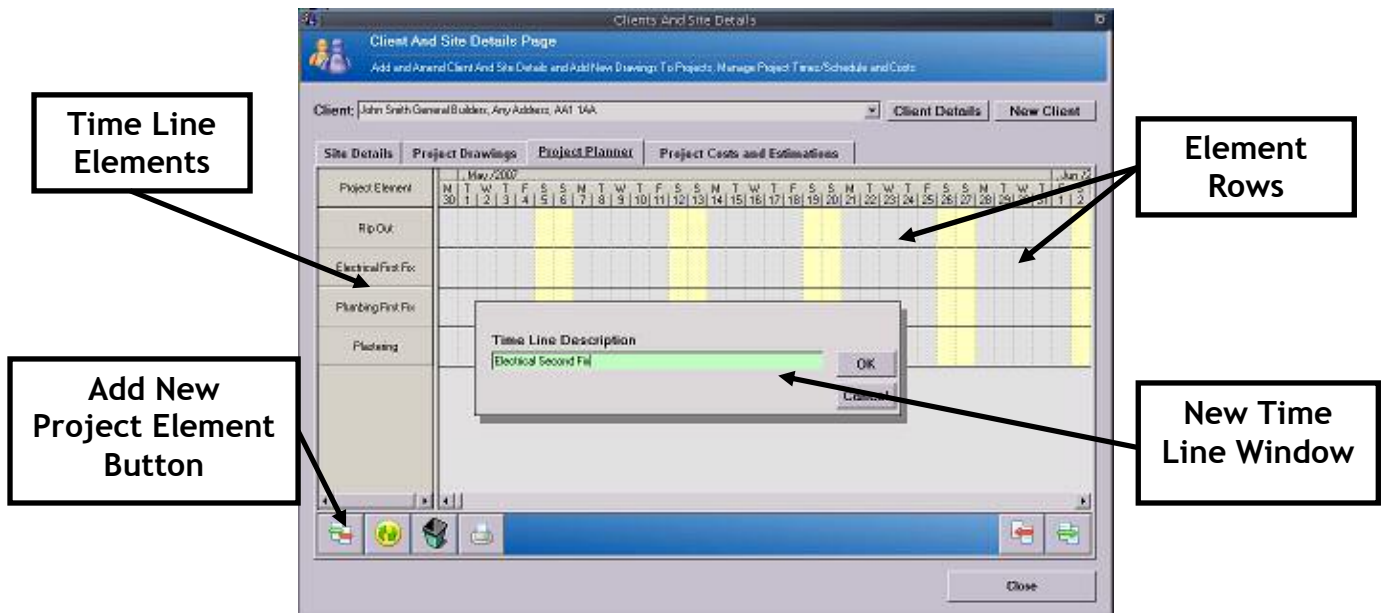
	Add New Drawing Button	
	Load Saved Drawing Button	
	Delete Site	

Project Planner

The project planner displays the time line data across the days; each item or 'Project Element' has its own segment.

To add a project Element

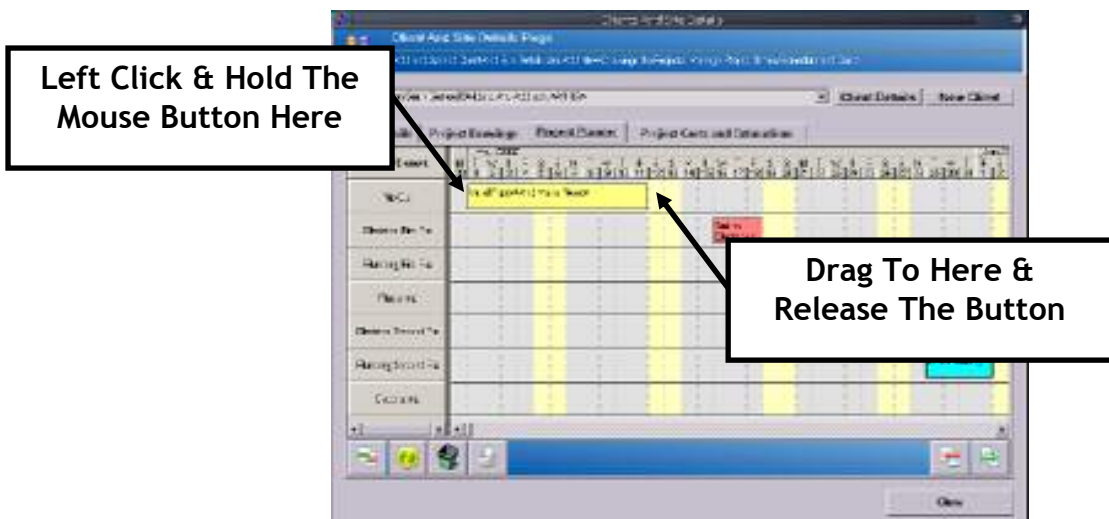
- On the Project Planner Tab
- Click The Add New Element Button
- A little window will appear asking for the name of the Element
- Enter the required details Click OK
- A New project Element will be created and displayed



Once you have created your Project Elements to can add time line events.

To Add Time Line Events:

- In the Date/Day window select the element row to add the time line to.
- Left Click and HOLD the mouse button down in the row at the start date/day
- Drag the mouse to the end day/date
- Release the mouse and a new window will pop up.



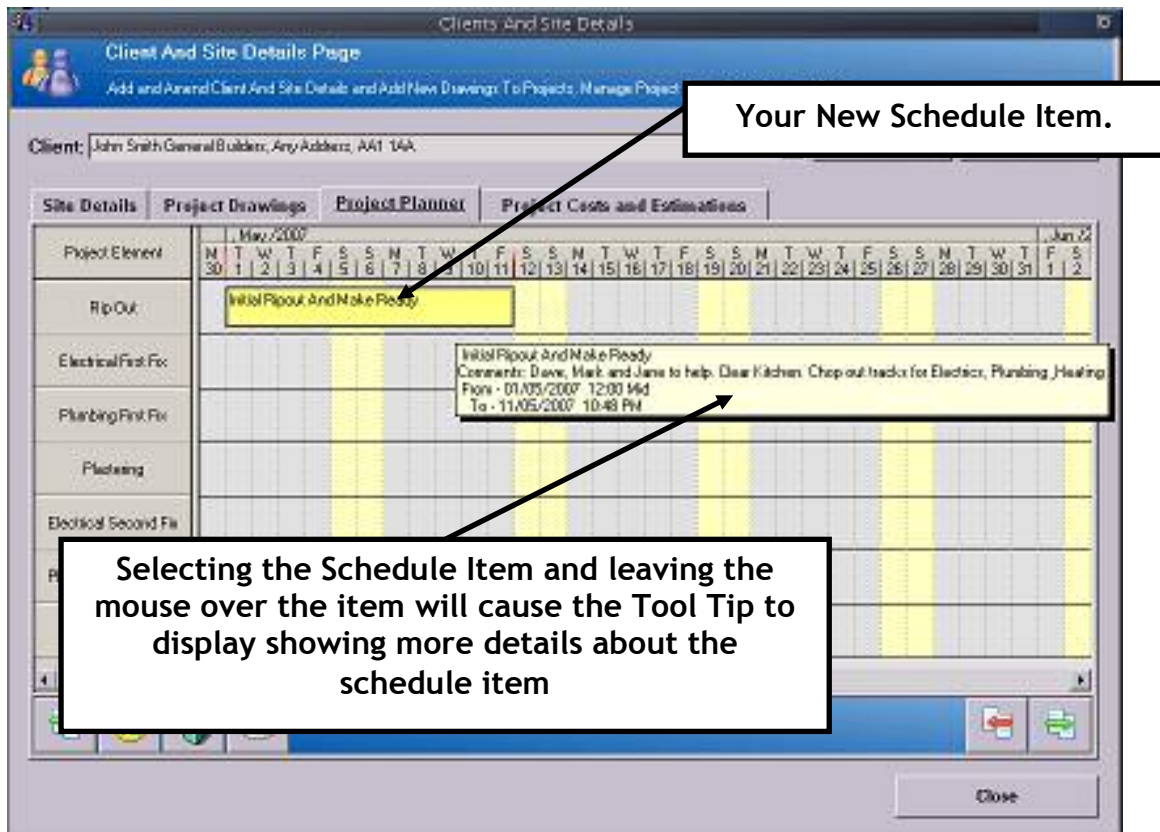
In the new window - The 'Project Planner - Schedule Item'

- Enter the Bar Text (this will be the information displayed on the event in the main Date/Day window)
- Check the start Dates & Time
- Check the stop dates & time
- Select a Bar Colour by clicking the little button to the right of the colour box and chose the required colour.
- Add any comments you wish
- Click OK

The screenshot shows the 'Project Planner - Schedule Item' dialog box within the 'Clients And Site Details' application. The dialog has a title bar 'Clients And Site Details' and a subtitle 'Client And Site Details Page'. Below the subtitle is a text field for 'Client' containing 'John Smith General Builders, Any Address, AA1 1AA'. The dialog has four tabs: 'Site Details', 'Project Drawings', 'Project Planner' (selected), and 'Project Costs and Estimations'. The 'Project Planner' tab contains the following fields:

- Bar Text:** 'Initial Ripout And Make Ready'
- Start:** '01/05/2007' and '00:00 hrs'
- Stop:** '11/05/2007' and '00:00 hrs'
- Bar Colour:** A yellow color box with a small button to its right.
- Comments:** A text area containing 'Dave, Mark and Jane to help. Clear kitchen. Drop out tracks for Electric, Plumbing & Heating'

At the bottom right of the dialog are 'OK' and 'Cancel' buttons. A 'Close' button is located at the bottom right of the application window. A white box with the text 'Enter The Required Information And Click OK' has four arrows pointing to the 'Bar Text', 'Start', 'Stop', and 'OK' fields.



Editing A Schedule Item.

First Left Click on the item to edit then right mouse click once on the item and the 'Project Planner - Schedule Item' window for that item will appear.

Deleting A Schedule Item.

First Left Click on the item to delete
Click The Delete Button On The Tool Bar

Printing The Schedule.

The print will show only the date range displayed.







Click the print button on the tool bar.

It is recommended that you print in landscape. (check your printer preferences in the print dialog window)

Moving Up and Down the Date Range.

The two most right buttons on the tool bar move the date range up and down. Typically the page will open at today's date and will scroll for 90 days the buttons move the date range 60 days forward or backward with each click.

The Tool Bar Buttons

	Add New Project Element		Move Down The Date Range
	Refresh Window		Move Up The Date Range
	Delete Schedule Item		Print Schedule

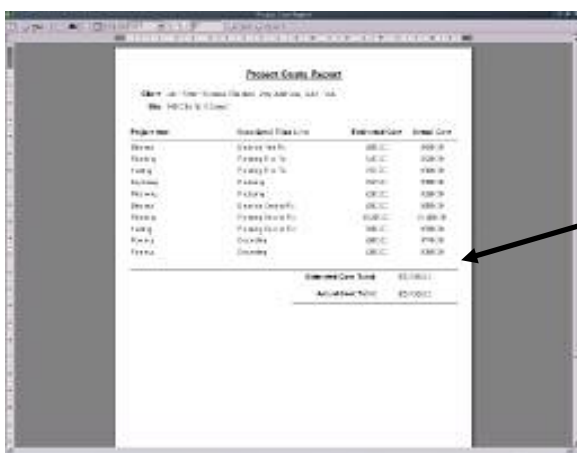
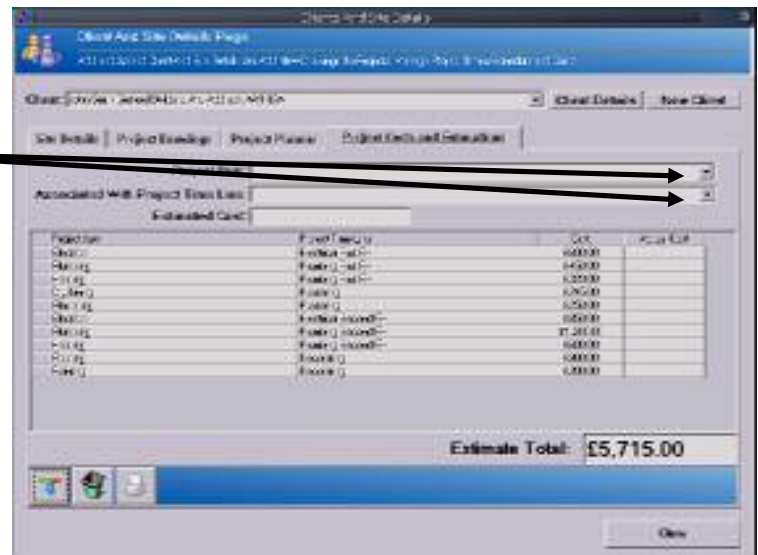
Project Costs and Estimations

Project Costs and Estimation allows you to keep a list of all the projects costs. Each cost can be inserted on its own or be attached to a project time line from the project planner.




Initially you would add the Item, the Time line and the estimated cost. As you generally won't know the actual cost until the project is complete the Actual costs can be entered directly on the grid at a later date.

To Add a new Project Cost.

- On the Project Costs and Estimations Tab
- Select From The Drop Down the 'Project Item'
- Select From The next Drop Down the 'Associated With Project Time Line' If Required else select N/A
- Enter the Estimated Cost
- Click The Add Project Cost Button
- A New project Cost will be created and displayed in the list
- The Estimate Total will alter to match the new item.



The Tool Bar Buttons

 Add New Project Element  Delete Schedule Item	 Print Estimates Report
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Emailing Drawings to Clients.

The email manager is accessed from the 'File' menu on the menu bar at the top of the main drawing window.

Using MS Outlook 2000 or higher you can send your drawings by using the email manager. When you use the manager the drawings will be compacted up into a zip folder to allow email transfer.

The drawings are zipped up as many security programs regard EMF (Enhanced Meta File) & WMF (Windows Meta File) files as dangerous due to the fact that this file type are actually code instruction on how to re-create the drawing. This is why they re-size so well.

In addition to the WMF & EMF files a PDF is also included in the zip folder. PDF (Portable Document Format) file open with Adobe Reader

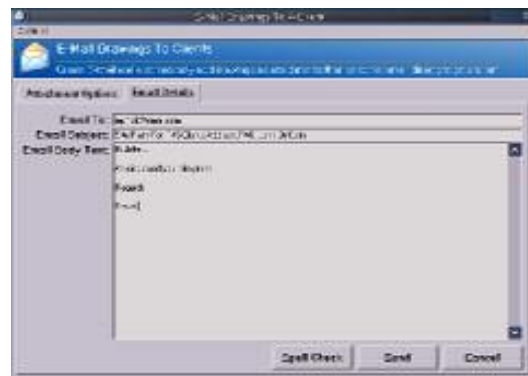
In the Options Menu on the email manager you can chose what files are included by default. To email the drawings to your clients:

First ensure the client you wish send the drawing to has an email address in the client database

- Click Menu
- Click Email EMF Plans To Client

In the New Window 'E-Mail Drawings To Clients'

- On The Attachments Tab Select from the list the Client & Site that you wish to send
- When you select a Client & Site the drawings associated with that site are shown in the list on the right
- Tick each box adjacent to the drawing description that you want to attach.
- Click Email Details tab
- The Email To will show the address to send to
- The Subject will show details of the Site the drawings relate to
- The Body Text will be blank ready for you to add whatever text you wish.
- Spell Check as required
- Click send



The email will be transferred to your outlook outbox ready to send next time you are on line.

Please note in newer editions of MS Outlook you will get security warnings informing you that outside programs are tiring to send emails click allow.