MSS Project Report...

Date: 7/7/2003
From: Anna L. Slepecky, PMP
Last Appointment Date: 6/21/00
Next Appointment Date: TBA
Company: ABC Company

ACCOMPLISHMENTS:
✓ Interviewed Joe, Bill and Dave regarding current scheduling procedures in preparation for Vantage/Scheduling assessment and recommended course of action.
✓ Reviewed COS/WIP reports and discussed how to address closed/complete jobs and transfer of “leftover” WIP to COS on closed jobs.
✓ Discussed method for entering advanced billing invoices.

PLANNED:
✓ Review the anomalies on the stock status report (this item left over from June 16 meeting).
✓ Document requested changes to COS/WIP reports and gain ABC Company consensus and approval to begin programming changes.
✓ Determine if recurring payroll items are accrued even if a payroll check is not cut for an employee.
✓ Develop training agenda and course of action regarding scheduling in ERP system.

ISSUES:
✓ ABC Company must determine feasibility of “catching” wrong lot numbers on shipments before the corresponding invoice is posted. This is important to develop a method for correctly capturing COS and WIP.
✓ ABC Company must determine if subcontract work can be handled similarly to a raw material issue.