

# Resource Manager

## Automate the Procure to Pay Process & Project Management for Sage 300

April 24, 2023

*norming*



# Agenda



Company Background



Solution Overview



Live Demo



Q & A

# About Norming







## A Key ISV of Sage

20+ years with sage  
900+ business partners  
10000+ clients



## Our Products

-  Norming Asset Management
-  Norming Resource Manager
-  Norming Security Suite
-  Norming eHRMS



## Our Awards

Won a number of awards from sage

# Resource Manager - Functions



Travel n  
Expense

Travel Req.

Cash Adv.

Exp. Report

Exp. Payment



Time  
Mgmt.

Timesheet

Time Clock

Leave

Overtime



Project  
Mgmt.

Scheduling

Planning

LEM Report



Other  
Functions

Sales Quote

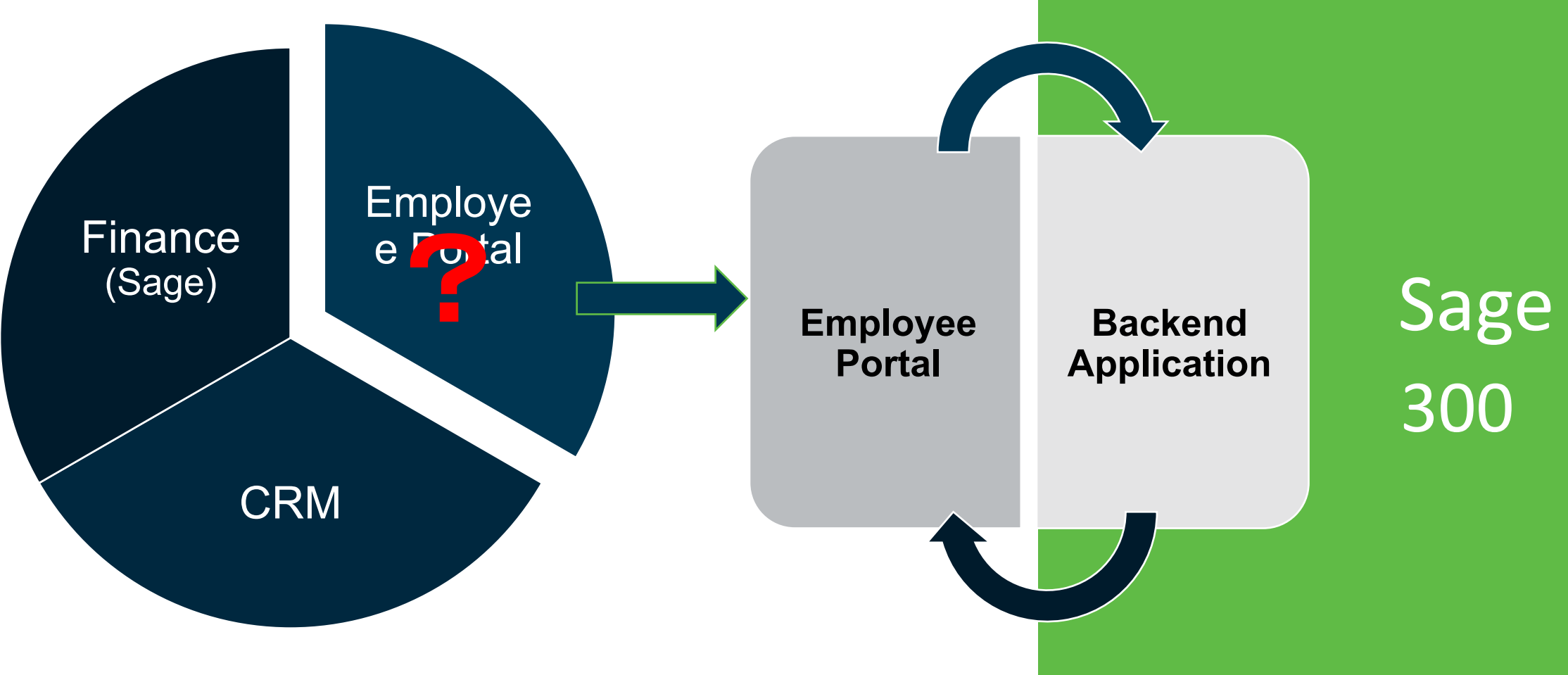
Item Usage  
Req.

Custom Req.

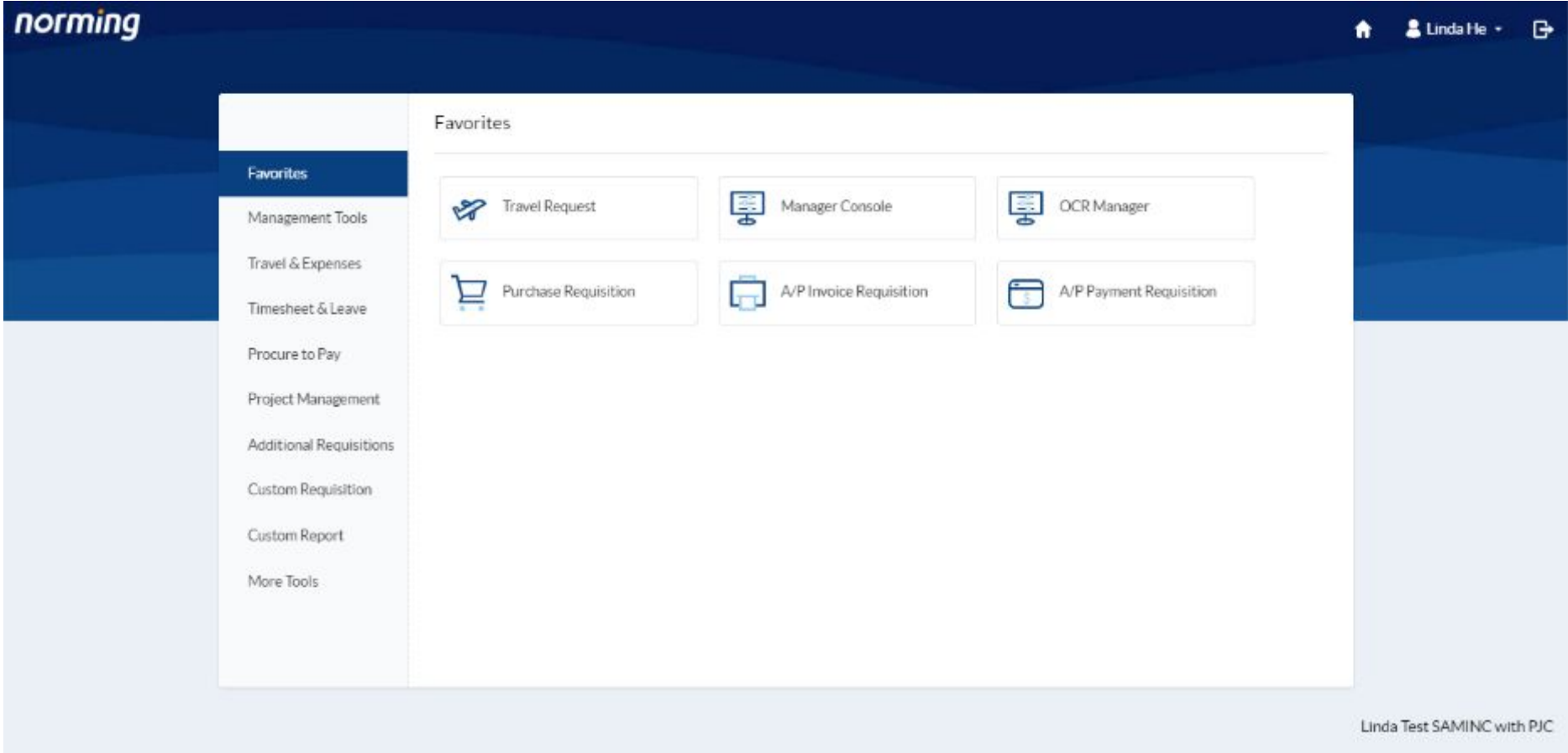
Custom Report

Manager Console

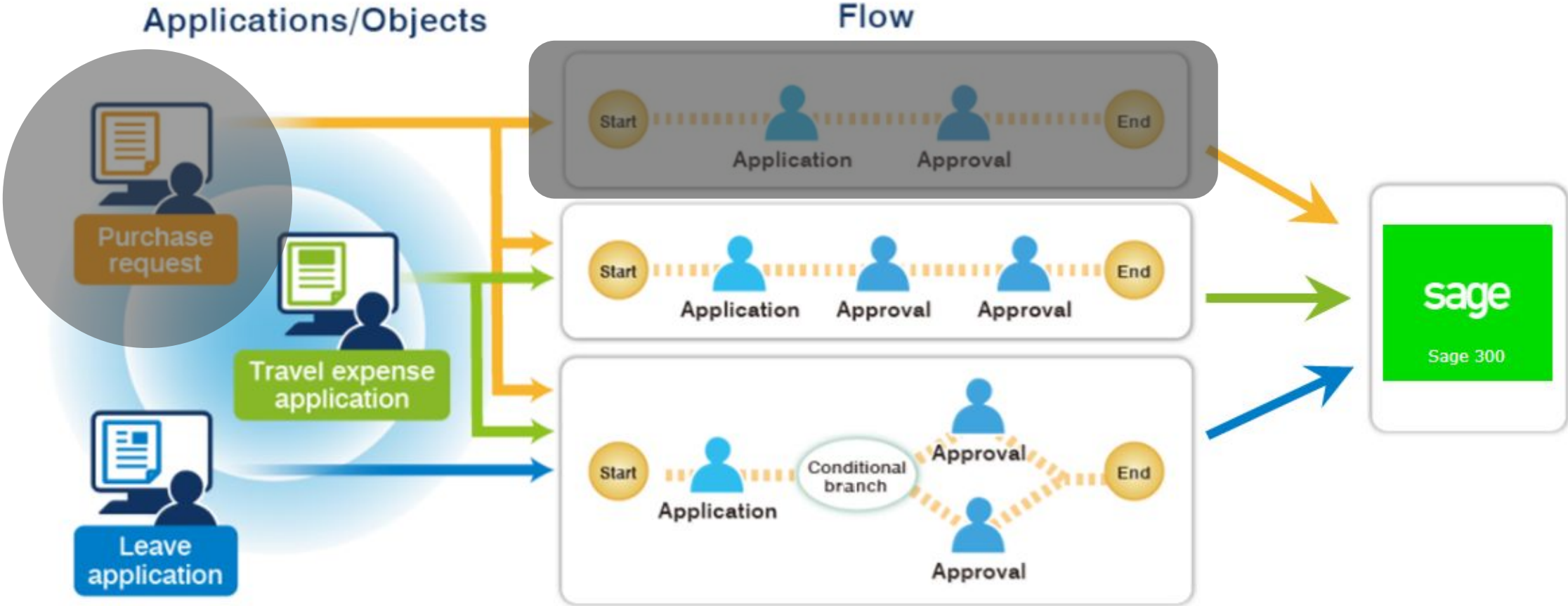
# Employee Portal for Sage



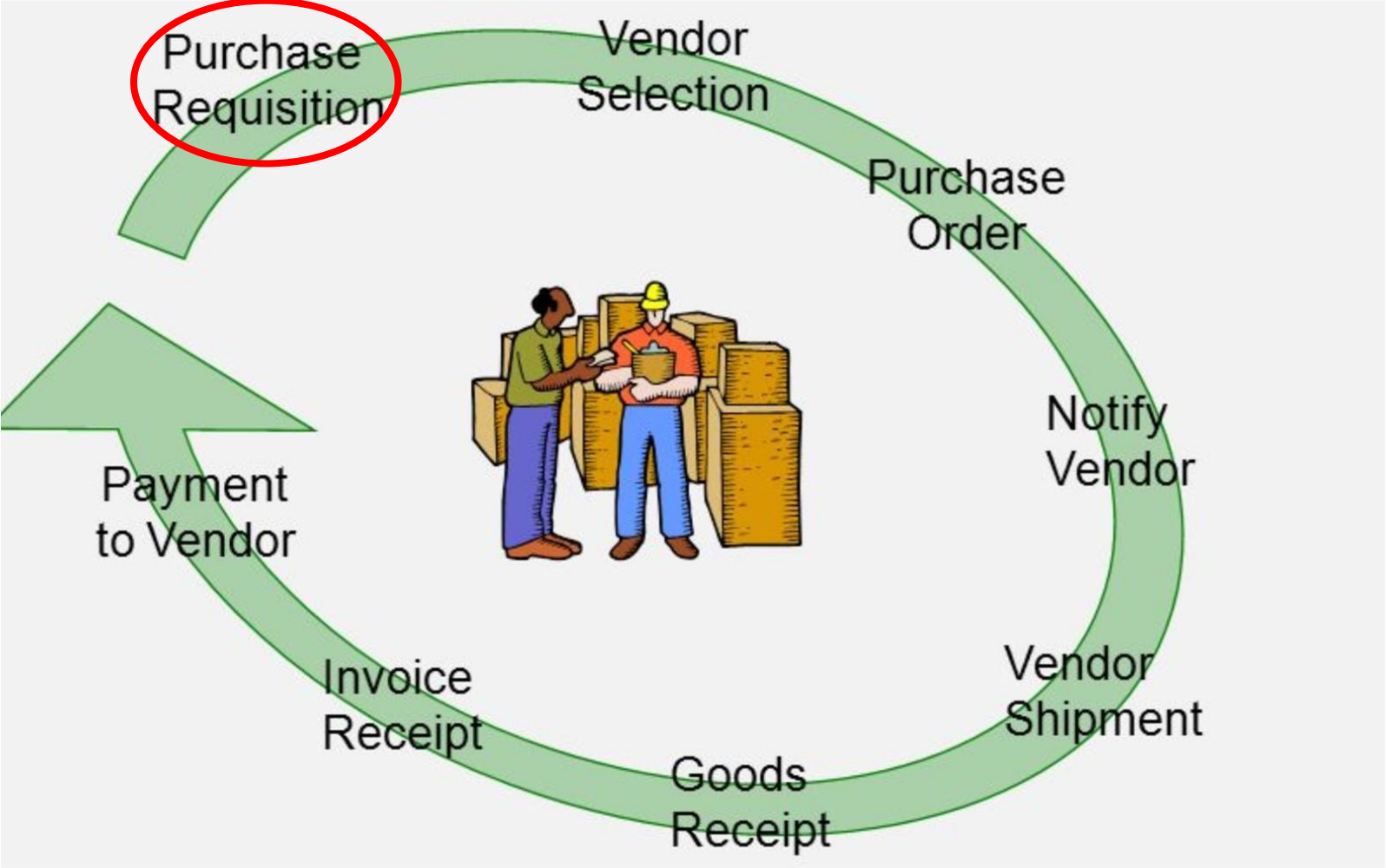
# Employee Portal



# Workflow

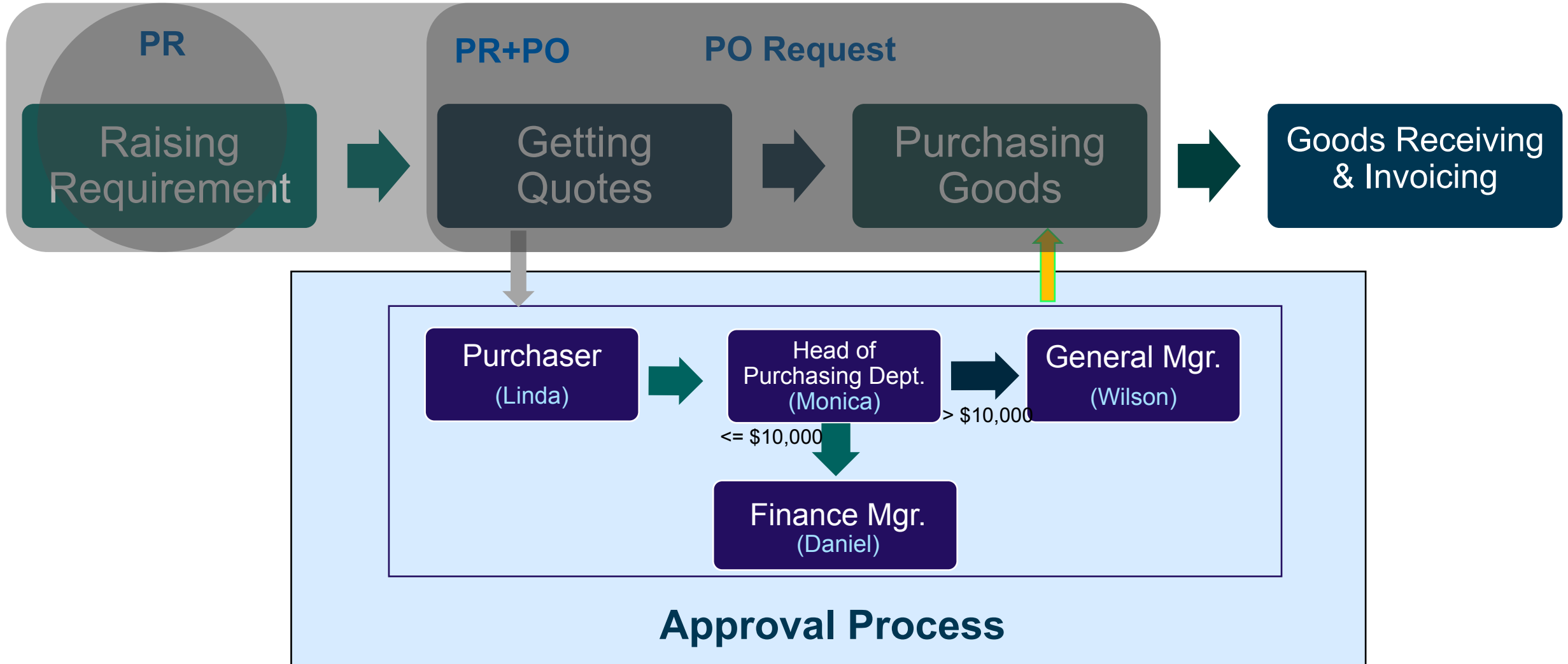


# Procure to Pay

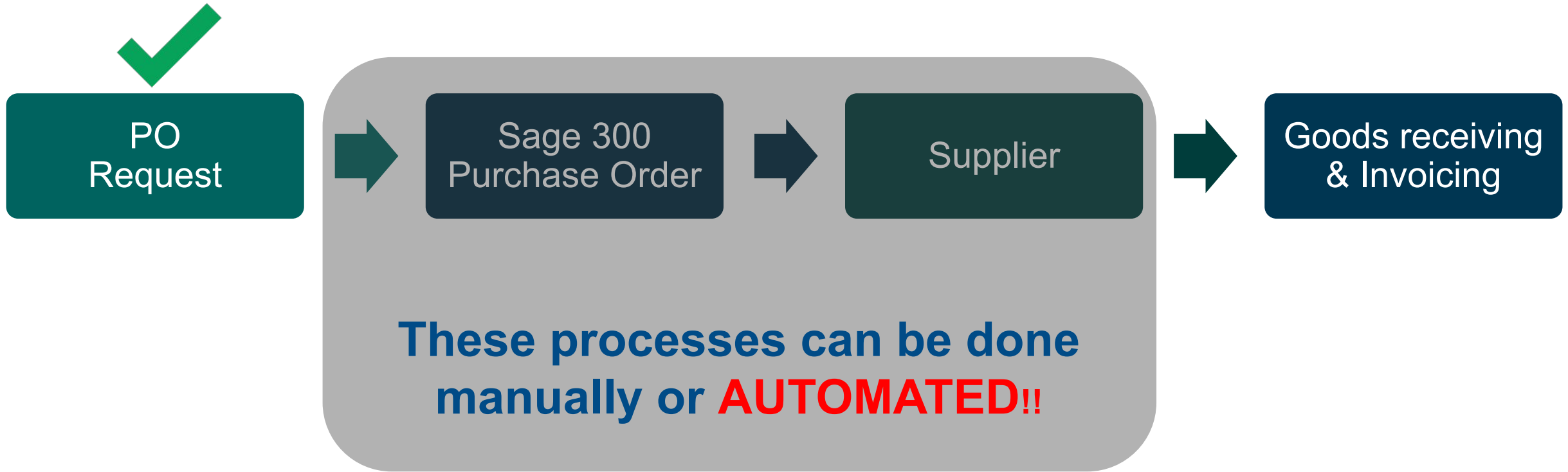




# Demo – eProcurement (Purchase Requisition)



# Demo – Issue PO to Supplier

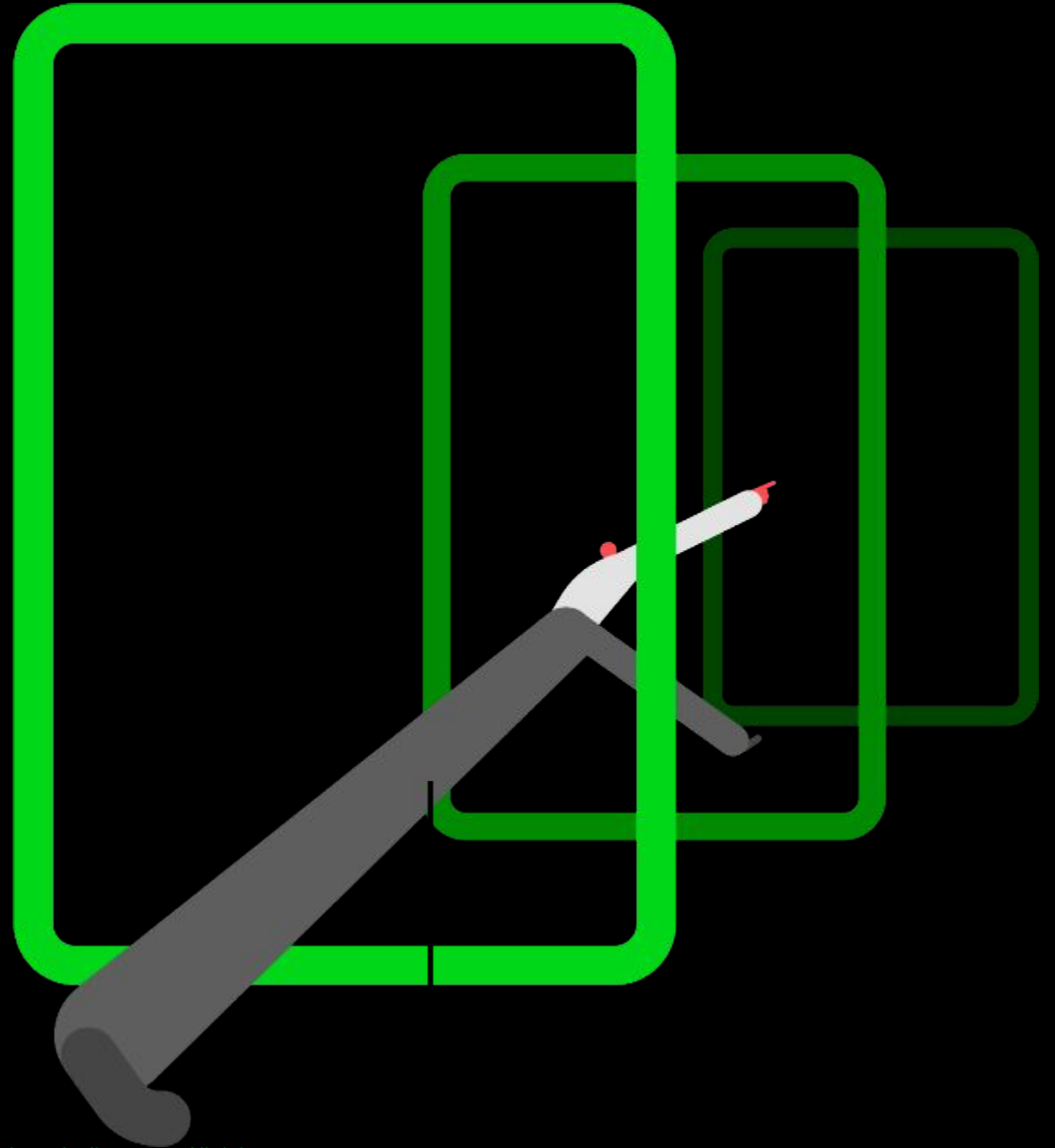


# Benefits of Norming P2P Solution

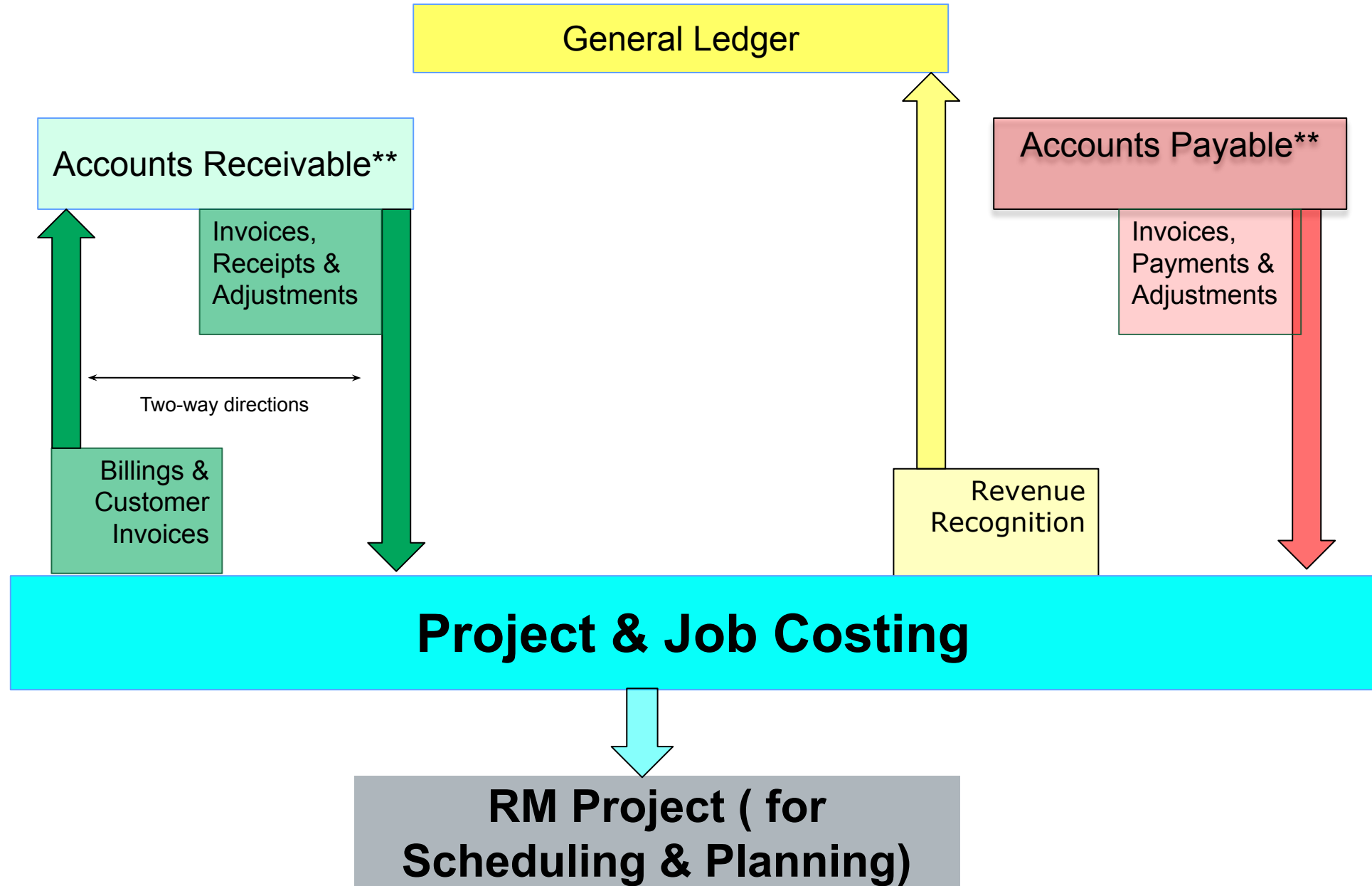
- Automated and streamlined P2P processes
- Web and mobile based Employee Portal
- User-friendly interface
- Comprehensive and flexible approval workflow
- Documents / images attachment
- Online quote request
- Costs control check, over-receipt check and over-invoiced check
- ...

# Project Management

Norming Resource Manager  
for Sage 300



# Flowchart



# Homepage

The screenshot displays the Norming software homepage. At the top left is the 'norming' logo. The top right corner features navigation icons: a home icon, a notification bell with a red '2' badge, and a user profile for 'Linda He' with a dropdown arrow and a share icon.

A central white panel is titled 'Project Management'. On the left side of this panel is a vertical sidebar menu with the following items: 'Favorites', 'Management Tools', 'Travel & Expenses', 'Timesheet & Leave', 'Procure to Pay', 'Project Management' (highlighted in dark blue), 'Additional Requisitions', 'Custom Requisition', 'Custom Report', and 'More Tools'.

The main content area of the 'Project Management' panel contains three cards: 'Project Scheduling' (with a calendar icon), 'Resource Planning' (with a pie chart icon), and 'LEM Report' (with a document icon). A red rectangular box highlights the 'Project Scheduling' and 'Resource Planning' cards.

At the bottom right of the page, the text 'Linda's Sample Company' is visible.

Norming ESS Portal

localhost:8080/ess/web/ess/homepage

### Resource Planning

Proceed Employee / Work Phone / Mobile Phone / Work E-mail

<input type="checkbox"/>	Status	Employee	Work Phone	Mobile Phone	Work E-mail
<input type="checkbox"/>	0.00%	Li, Bruce	01058794068	18600740681	bruce.li@norming.com.123
<input type="checkbox"/>	0.00%	Lavery, Robert	4162341304	416) 453-7876	robert.lavery@sympatico.ca.cn.123
<input type="checkbox"/>	0.00%	Abrahams, Reginald	+44(0)1932 237110	(+44)07920 060	RAbrahams@acuitysolutions.co.uk...
<input type="checkbox"/>	0.00%	Dorsey, Paul	506854-2046	506 854-2080	pauld@dbgroupinc.ca.cn.123
<input type="checkbox"/>	0.00%	Zinck, Chris	902 468 2738	506 854-2080	czinck@zcg.com.cn.123
<input type="checkbox"/>	0.00%	Fraser, Beverly	780-940-3554	780-717-5452	bfraser@stonefield.com.cn.123
<input type="checkbox"/>	0.00%	Masters, Steve	44 1732 868765	(44 )1732 86876	smasters@accord-consulting.com....
<input type="checkbox"/>	0.00%	Moni., R.S.	9714-3545650	(971)50-4504839	moni@triadme.com.cn.123

Resource Planning

Search for employee... 04/25/2022 Save


Resource Usage	04/25/2022							05/02/2022							05/09/2022							05/16/2022						
Employee/Project/Phase/WBS/Task	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S
[10001] LI, Bruce	[Resource Usage Data]																											


Assign Task

localhost:8080/ess/#

■ Not Assigned
 ■ Partially Assigned
 ■ Fully Assigned
 ■ Over Assigned
 ■ Closed





Project



Project / Name 🔍

Project for Resource Manager

Milestone



Task

Task Code	Task Description	Status	Duration	Start Date	Finish Date
PJ-0000001	Project for Resource Manager	Inactive	62	08/02/2021	10/26/2021
11	Requirement Analyze & Syste...		44	08/02/2021	09/30/2021
W111	Requirement Analyze		44	08/02/2021	09/30/2021
REQUIREME	Requirement Analyzing	Started	44	08/02/2021	09/30/2021
W112	System Design		23	08/02/2021	09/01/2021
DESIGN	System Design	Started	23	08/02/2021	09/01/2021
22	System Implementation		36	09/02/2021	10/21/2021
IMPLEMENT	System Implementation	Inactive	6	09/02/2021	09/09/2021
CODE	System Coding	Inactive	17	09/10/2021	10/04/2021
TEST	System Test	Inactive	13	10/05/2021	10/21/2021
33	Go Live		62	08/02/2021	10/26/2021
UAT	User Test	Started	18	08/02/2021	08/25/2021
LIVE	System Goes Live	Inactive	35	08/26/2021	10/13/2021
SUPPORT	System Support	Started	62	08/02/2021	10/26/2021

Project Team

Project Manager:

Name:

<input type="checkbox"/>	Employee	Role	Status
<input type="checkbox"/>	[10001] Li, Bruce	Manager	Assigned
<input type="checkbox"/>	[10002] Lavery, Robert	Manager	Assigned
<input type="checkbox"/>	[10003] Abrahams, Reginald	Manager	Assigned
<input type="checkbox"/>	[10004] Dorsey, Paul	Manager	Assigned
<input type="checkbox"/>	[10005] Zinck, Chris	Manager	Assigned
<input type="checkbox"/>	[10006] Fraser, Beverly	Manager	Assigned

Add
Remove
Save

Page 1 of 1

GANTT View
Assignment

Filter By: Phase/Task/Milestone Search 04/27/2022 View: Full Critical Tasks Save Assignment

Line No.	Task Code ↑	Description	Status	Duration	Start Date
18	PJ-00000001	Project for Resource Ma...	Inactive	62	08/02/20
22	11	Requirement Analyze & ...	Inactive	44	08/02/20
23	W111	Requirement Analyze	Inactive	44	08/02/20
24	REQUIREME	Requirement Analyzing	Started	44	08/02/20
25	W112	System Design	Inactive	23	08/02/20
26	DESIGN	System Design	Started	23	08/02/20
27	22	System Implementation	Inactive	36	09/02/20
29	CODE	System Coding	Inactive	17	09/10/20
28	IMPLEMENT	System Implementation	Inactive	6	09/02/20
30	TEST	System Test	Inactive	13	10/05/20
31	33	Go Live	Inactive	62	08/02/20
33	LIVE	System Goes Live	Inactive	35	08/26/20
34	SUPPORT	System Support	Started	62	08/02/20
32	UAT	User Test	Started	18	08/02/20
19	M1	System Design Plan	Open	0	09/01/20
20	M2	System Installed	Open	0	10/21/20
21	M3	System Sign Off	Open	0	10/26/20

**Schedule**

07/05/2021 08/01/2021 09/01/2021 10/01/2021 11/01/2021

05 Jul 12 Jul 19 Jul 26 Jul 02 Aug 09 Aug 16 Aug 23 Aug 30 Aug 06 Sep 13 Sep 20 Sep 27 Sep 04 Oct 11 Oct 18 Oct 25 Oct 01 Nov

Project for Resource Manager Id: #18  
 Requirement Analyze & System Design Id: #22  
 Requirement Analyze Id: #23  
 Requirement Analyzing Id: #24  
 System Design Id: #25  
 System Design Id: #26  
 System Design Id: #27  
 System Coding Id: #28  
 System Coding Id: #29  
 System Test Id: #30  
 Go Live Id: #31  
 System Support Id: #33  
 System Support Id: #34  
 User Test Id: #32  
 System Design Plan Id: #19  
 System Installed Id: #20  
 System Sign Off Id: #21

Context Menu:  
 Add... Id: #25  
 Edit Task Id: #26  
 Add Resource Id: #29  
 Start Task Id: #28  
 End Task Id: #29  
 Remove Task Id: #31  
 Remove Dependency Id: #33

localhost:8080/ess/#

Filter By: Phase/Task/Milestone Search 04/27/2022 View: Full Critical Tasks Save Assignment

Line No.	Task Code ↑	Description	Status	Duration	Start D
18	PJ-00000001	Project for Resource Ma...	Inactive	62	08/02/20
22	11	Requirement Analyze & ...			
23	W111	Requirement Analyze			
24	REQUIREME	Requirement Analyzing	Started		
25	W112	System Design			
26	DESIGN	System Design	Started		
27	22	System Implementation			
29	CODE	System Coding	Inactive		
28	IMPLEMENT	System Implementation	Inactive		
30	TEST	System Test	Inactive		
31	33	Go Live			
33	LIVE	System Goes Live	Inactive		
34	SUPPORT	System Support	Started		
32	UAT	User Test	Started		
19	M1	System Design Plan	Open		
20	M2	System Installed	Open		
21	M3	System Sign Off	Open		

**Add Resource**

Default Daily Work Hours: Available

Status	Employee	Work Phone	Mobile Phone
<input type="checkbox"/>	Zinck, Chris	902 468 2738	506 854-2080
<input type="checkbox"/>	Fraser, Beverly	780-940-3554	780-717-5452

Save & Close Cancel

Task Assignment(Requirement Analyzing)						04/25/2022		05/02/2022					05/09/2022					05/16/2022														
Employee	Start Date	End Date	Actual Duration	Total Work	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S
<input type="checkbox"/> [10001] Li, Bruce	08/02/2021	10/07/2022	308	2,457.00	8	8	8	8	8			8	8	8	8	8			8	8	8	8	8			8	8	8	8	8		
<input type="checkbox"/> [10002] Lavery, Robert	04/07/2017	05/15/2017	27	0.00																												
<input type="checkbox"/> [10003] Abrahams, Reginald	04/07/2017	05/15/2017	27	0.00																												
<input type="checkbox"/> [10004] Dorsey, Paul	04/07/2017	05/15/2017	27	0.00																												
<input type="checkbox"/> [10005] Zinck, Chris	08/02/2021	10/07/2022	308	2,464.00	8	8	8	8	8			8	8	8	8	8			8	8	8	8	8			8	8	8	8	8		

Not Assigned
  Partially Assigned
  Fully Assigned
  Over Assigned
  Closed

**Thank You !**

