



# Sample Features in a Project/Time Management System



Softek Services, Inc.  
Washington, DC  
(202) 682-4500

# Main Menu



All systems will open with an attractive Main Menu that incorporates your Organization's color scheme and logo.

This helps users navigate to the various system components and exit from the program.

# Custom Project Screen

All screens are customized with the fields and attributes that are important to you. For example, this client needed to track project information as well as various phases and fees for the project.

The Customer information is linked to the Contacts module. Double-clicking on the Company name displays the full Contacts screen and other Projects related to the Contact.

**Project Screen**

Proj Numb: 3138 00    Proj Manager: Anne    Contract Signed:     Active:

Proj Name: ABC Expansion    Sq Footage: 90000    Beg Date: 3/1/01

Proj Addr: 123 Main Street    Construction \$: \$100,000.00    End Date: 5/1/01

City St Zip: Fairfax VA 22030

Customer and Billing Information | Broker/Contractor/Engineer | Special Billing Notes | Project Scope

Company: ABC Inc.    Contact ID: 2002

Name: Mr. James R. Doe    To: Accounts Payable

Addr1: 123 Main Street    Bill To: 123 Main Street

Addr2: Suite 200    Suite 200

City St Zip: Fairfax VA 22030    Fairfax VA 22030

Phone: (703) 691-1000    Fx: (703) 691-1111

DTJ Fee Information | Project Rates / Job Info

Phs#	Phase Description	Phase Fee
1	Space Planning	\$9,000.00
2	Design Development	\$3,000.00
3	Construction Adminis	\$2,500.00
*		\$0.00

CycleID	FeeProjection
6 -- 2001	\$4,500.00
7 -- 2001	\$4,500.00
*	

Fee Type: Multi-phase Lump Fee

Fee Total: \$14,500.00

Reimb Exp: Charge for

Reimb Mark Up: 10.00%

Not to Exceed: \$0.00

Deposit: \$0.00

Terms: 30

Prior to closing this screen or adding a new Project (Proj4 or Proj2), please enter values for PM and Proj Name.

Record: 818 of 818

Form View

Custom buttons can be added to help add new projects and automatically assign numbers, delete projects, and print reports.

# Time Entry Screen

The Time screen allows users to view and enter time for a specific Work Week.

**Time Screen** Close Form

Week Ending: 3/24/01    Cycle: 3    Employee: Jonathan James    Print Preview Time Sheet    Copy Prev Day's Time

Project Nbr	Phase#	Date	Hours		Comments	Bill Rate
			Billable	Non-Bill		
2608.00	4	3/19/01	2	0	finishes and Knoll furn.	\$65.00
2909.00	1	3/19/01	1	0	red line plans/ order frames	\$75.00
2993.00	1	3/19/01	4.5	0	Field measure floors 2-5 with Tom	\$75.00
3088.00	1	3/19/01	2	0	Lobby finishes	\$75.00
2909.00	1	3/20/01	2	0	submittal approval thru Dave at Opus	\$75.00
2993.00	2	3/20/01	2.5	0	site visit to accept furn. delivery	\$75.00
3087.00	1	3/20/01	1	0	send out package to bid	\$75.00
3088.00	2	3/20/01	1	0	send drawing package out for 2 bids	\$75.00
2748.00	1	3/21/01	1.5	0	clarify finishes on revised workstation	\$75.00
2868.00	4	3/21/01	2	0	revise space plan to reprice. Sent to	\$75.00
2909.00	1	3/21/01	2.5	0	programming meeting	\$75.00
2909.00	1	3/21/01	3.5	0	space plan/ (site visit to punch TMSI	\$75.00
2608.00	4	3/22/01	1	0	Review workstation w/ Knoll ( Pam V	\$65.00
2730.00	1	3/22/01	0	0.5	fabric select for Brad's chairs	\$75.00
2909.00	1	3/22/01	4	0	programming w/ Tessa/ Visit SMED	\$75.00
3088.00	2	3/22/01	2	0	Lobby finishes	\$75.00
2868.00	4	3/23/01	2	0	CD's	\$75.00
2909.00	1	3/23/01	3	0	field survey input in CAD	\$75.00
3138.00	1	3/23/01	2	0	input space plan	\$75.00

\* When copying the previous day's time, you may need to scroll up to see the new records.

Form View NUM

When entering time, Employees must select a valid Project Number and Phase, then enter the Date, Billable Hours, Non-billable Hours, and any Comments. The Bill Rate is calculated automatically based on the Employee's bill rate for the project.

# Time Entry Features

**Time Screen**

Week Ending 6/9/01 [Calendar Icon] Cycle 6 Employee Jonathan James [Dropdown] Print Preview Time Sheet Copy Prev Day's Time Close Form

Users can click the calendar button to view and select a different Work Week.

**Calendar Form**

<< 2001 >>  
< March >

Sun	Mon	Tue	Wed	Thu	Fri	Sat
25	26	27	28	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

Cancel

Managers can select a different Employee to view and/or edit his or her time information.

Users can print Time Sheets directly from this screen.

Users can copy the Previous Day's Time to speed up data-entry when working on the same project(s).

# Time Sheet Report

Clicking the Print/Preview Time Sheet button displays a 2-page time report. The first page displays each time record, with hours summarized by day and for the week.

Name: Jonathan James		Timesheet for Week Ending: 3/24/01						
Proj #	Phs#	Project Name	Phase Description	Date	B	NB	Bill Rate	Comments
2608.00	04	Construction Site XYZ	Contract Documents	3/19/01	2.00	0.00	\$65.00	finishes and Knoll furn.
2909.00	01	Mobile Inc.	Design Development	3/19/01	1.00	0.00	\$75.00	red line plans/ order frames
2993.00	01	National Institute	additional services	3/19/01	4.50	0.00	\$75.00	Field measure floors 2-5 with Tom
3088.00	01	AAA Communications	Schematic Design	3/19/01	2.00	0.00	\$75.00	Lobby finishes
					<b>9.50</b>	<b>0.00</b>		
2909.00	01	Mobile Inc.	Design Development	3/20/01	2.00	0.00	\$75.00	submital approval thru Dave at Opus 3
2993.00	02	National Institute	furniture procurement	3/20/01	2.50	0.00	\$75.00	site visit to accept furn. delivery
3087.00	01	Retail Space for AAA Realty	full service	3/20/01	1.00	0.00	\$75.00	send out package to bid
3088.00	02	AAA Communications	Full Service	3/20/01	1.00	0.00	\$75.00	send drawing package out for 2 bids from b
					<b>6.50</b>	<b>0.00</b>		
2748.00	01	XYZ Corporation	Full Service	3/21/01	1.50	0.00	\$75.00	clarify finishes on revised workstations.
2868.00	04	The Computer Agency	Contract Documents	3/21/01	2.00	0.00	\$75.00	revise space plan to reprice. Sent to Gary
2909.00	01	Mobile Inc.	Design Development	3/21/01	2.50	0.00	\$75.00	programming meeting
2909.00	01	Mobile Inc.	Design Development	3/21/01	3.50	0.00	\$75.00	space plan/ (site visit to punch TMSI)
					<b>9.50</b>	<b>0.00</b>		
2608.00	04	Construction Site XYZ	Contract Documents	3/22/01	1.00	0.00	\$65.00	Review workstation w/ Knoll ( Pam Veripa
2730.00	01	Ball Park Arena	Area Calc	3/22/01	0.00	0.50	\$75.00	fabric select for Brad's chairs
2909.00	01	Mobile Inc.	Design Development	3/22/01	4.00	0.00	\$75.00	programming w/ Tessa/ Visit SMED Showr
3088.00	02	AAA Communications	Full Service	3/22/01	2.00	0.00	\$75.00	Lobby finishes
					<b>7.00</b>	<b>0.50</b>		
2868.00	04	The Computer Agency	Contract Documents	3/23/01	2.00	0.00	\$75.00	CD's
2909.00	01	Mobile Inc.	Design Development	3/23/01	3.00	0.00	\$75.00	field survey input in CAD
3138.00	01	ABC Expansion	Space Planning	3/23/01	2.00	0.00	\$75.00	input space plan
					<b>7.00</b>	<b>0.00</b>		
<b>Total for Week Ending</b>					<b>39.50</b>	<b>0.50</b>	<b>40.00</b>	

# Time Sheet Report

The second page of the Time report summarizes the time records by Project and within Project by Phase.

**Total Hours by Project**

Name: Jonathan James      Week Ending: 3/24/01

Proj #	Phs#	Project Name	Phase Description	B	NB
2608.00	04	Construction Site XYZ	Contract Documents	3.00	0.00
2730.00	01	Ball Park Arena	Area Calcs	0.00	0.50
2748.00	01	XYZ Corporation	Full Service	1.50	0.00
2868.00	04	The Computer Agency	Contract Documents	4.00	0.00
2909.00	01	Mobile Inc.	Design Development	16.00	0.00
2993.00	01	National Institute	additional services	4.50	0.00
2993.00	02	National Institute	furniture procurement	2.50	0.00
3087.00	01	Retail Space for AAA Realty	full service	1.00	0.00
3088.00	01	AAA Communications	Schematic Design	2.00	0.00
3088.00	02	AAA Communications	Full Service	3.00	0.00
3138.00	01	ABC Expansion	Space Planning	2.00	0.00
<b>Total for Week Ending</b>				<b>39.50</b>	<b>0.50 = 40.00</b>

Page: 2      Ready      NUM

# Billing for Time

By tracking Projects and their fees, along with the amount of hours an Employee works on the Projects, performing Billing can be easy. This screen was developed to replicate a client's billing process.

O'Brien Travis Jaccard - [Billing Screen]

File Edit View Insert Format Records Tools Window Help

Cycle & Year: 3 - 2001

**Billing Screen** Do Billing Billing Report Close Form

Project	Project Name	Ph#	Phase Fee	Prev Billings	Fee Remain BEFORE	Amount to Bill	Fee Remain AFTER	Prev Bill Effort	Total Cycle Effort	Total Effort	Remaining Effort	Bill Date
2608.00	Construction Site XYZ	1	3,360.00	3,360.00	0.00			3,350.00	0.00	3,350.00	10.00	4/1/01
2608.00	Construction Site XYZ	2	3,600.00	3,600.00	0.00			3,608.75	0.00	3,608.75	-8.75	4/1/01
2608.00	Construction Site XYZ	3	8,400.00	8,400.00	0.00			8,382.50	0.00	8,382.50	17.50	4/1/01
2608.00	Construction Site XYZ	4	32,100.00	29,328.00	2,772.00	2,772.00	0.00	14,540.00	3,262.50	17,802.50	14,297.50	4/1/01
2608.00	Construction Site XYZ	5	8,400.00	0.00	8,400.00	1,000.00	7,400.00	537.50	0.00	537.50	7,862.50	4/1/01
2730.00	Ball Park Arena	1	4,000.00	2,757.50	1,242.50	1,242.50	0.00	2,740.00	1,297.50	4,037.50	-37.50	4/1/01
2748.00	XYZ Corporation	1	44,020.00	39,618.00	4,402.00			31,647.50	1,628.75	33,276.25	10,743.75	4/1/01
2868.00	The Computer Agency	1	500.00	500.00	0.00			413.75	75.00	488.75	11.25	4/1/01
2868.00	The Computer Agency	2	1,000.00	0.00	1,000.00	1,000.00	0.00	595.00	160.00	755.00	245.00	4/1/01
2868.00	The Computer Agency	3	600.00	0.00	600.00	600.00	0.00	0.00	630.00	630.00	-30.00	4/1/01
2868.00	The Computer Agency	4	4,374.15	0.00	4,374.15	500.00	3,874.15	0.00	555.00	555.00	3,819.15	4/1/01
2909.00	Mobile Inc.	1	3,500.00	2,672.50	827.50	827.50	0.00	2,672.50	1,425.00	4,097.50	-597.50	4/1/01
3138.00	ABC Expansion	1	9,000.00	0.00	9,000.00	2,000.00	7,000.00	0.00	1,660.00	1,660.00	7,340.00	4/1/01
3138.00	ABC Expansion	2	3,000.00	0.00	3,000.00			0.00	0.00	0.00	3,000.00	4/1/01
3138.00	ABC Expansion	3	2,500.00	0.00	2,500.00			0.00	0.00	0.00	2,500.00	4/1/01
				0.00				0.00	0.00	0.00	0.00	

**\$9,942.00**

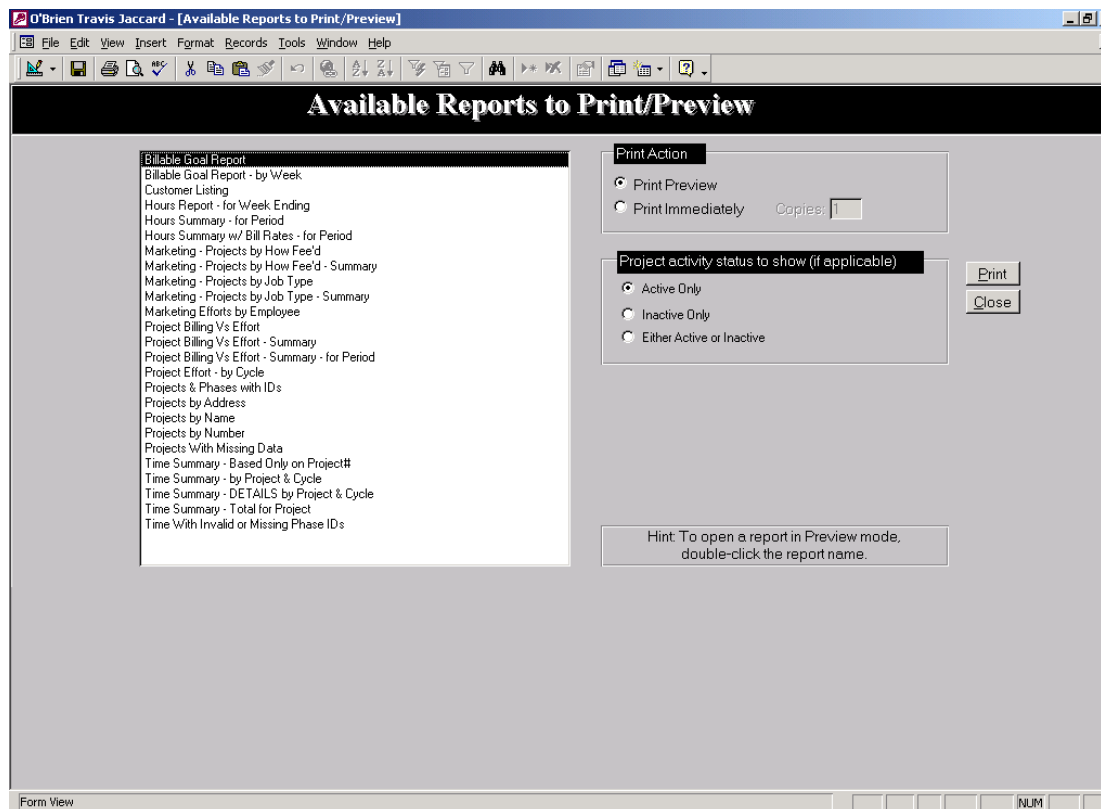
Record: 16 of 16

Form View

This screen, along with some custom reports, allow Managers to view up-to-the-minute snapshots of how their Project time is accumulating.

# Easy to Print Reports

Although Softek can create custom reports for any new system, we like to encourage our clients to participate in the report creation process, if desired. With a little training and guidance, users can create their own custom reports. Our Report Menus are designed to show all reports created by either Softek or you.





# More

---

This was just a sample of some Project and Time Management features that can be built into any custom system.

Softek would be glad to demonstrate additional systems or provide ideas for custom features that would help better organize, manage, and process your information technology needs.

Please contact Lynn Lear, Director of Consulting Services, if you would like to schedule a free initial consultation, receive an estimate or learn more about our services.



Softek Services, Inc.  
Washington, DC  
(202) 682-4500