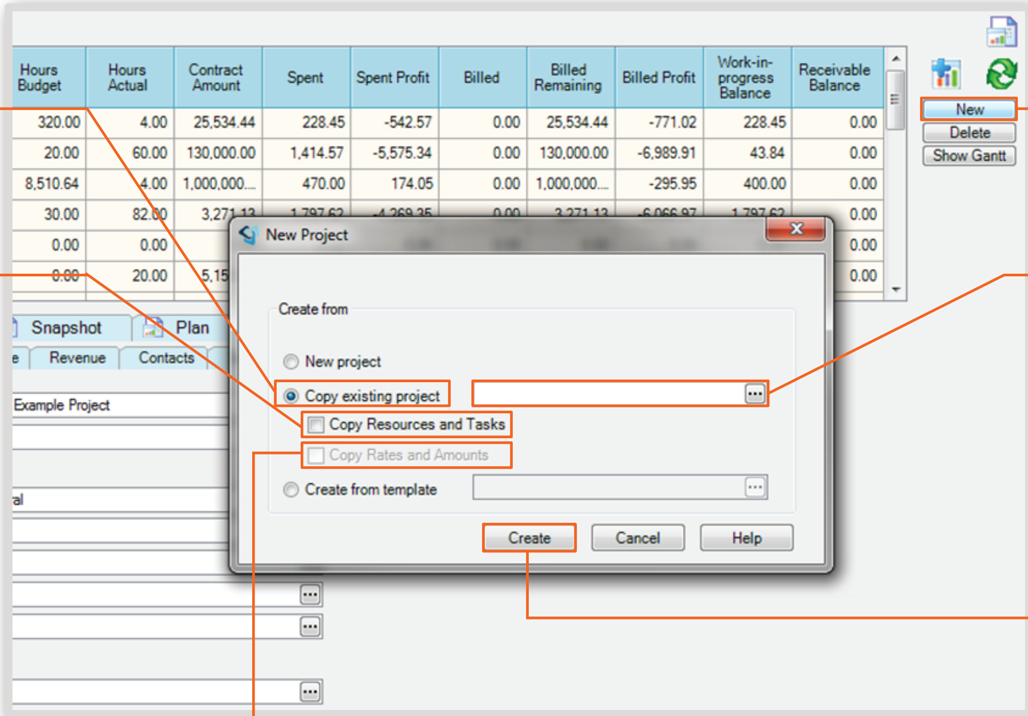
Ajera Standard Workflow Overview Series: Projects from Copy

Copy Existing Project



1 Click on the "New" button to create a Project

2 Select Copy existing project.

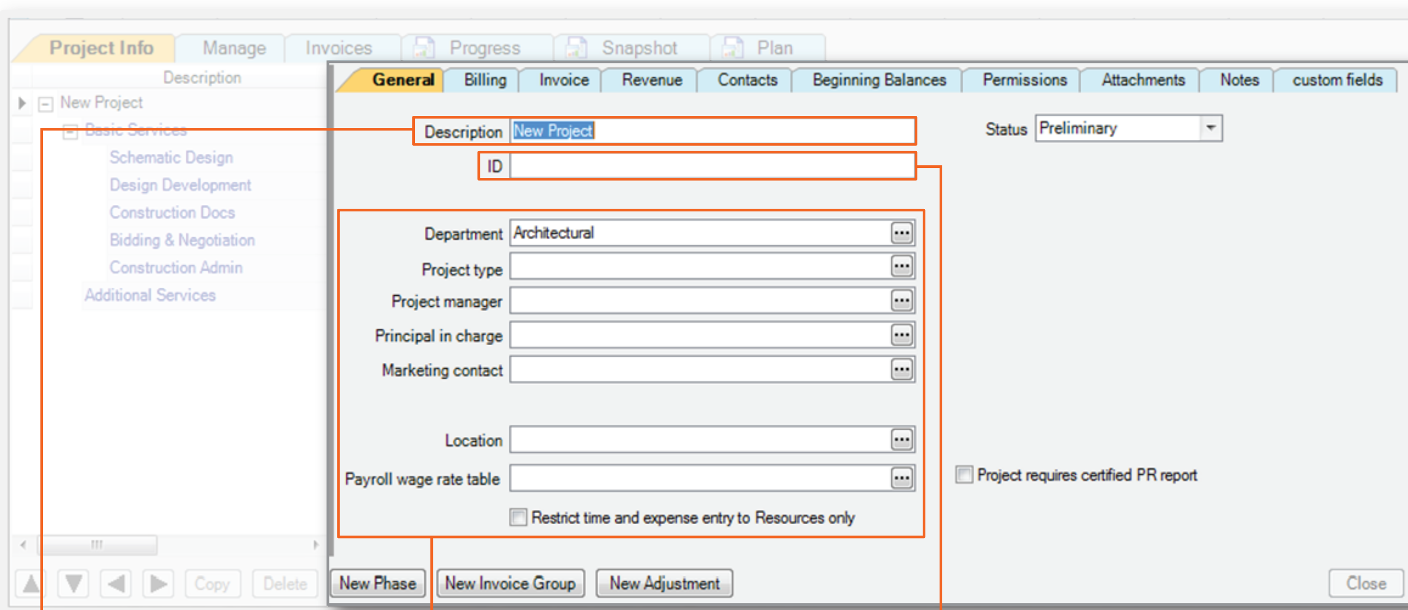
3 Click to select the project you want to copy from the list.

4 **Copy Resources and Tasks**
Check the Copy Resources and Tasks check box to copy resources and tasks from the original project.

5 **Copy Rates and Amounts**
The "Copy Resources and Tasks" check box needs to be checked before the Copy Rates and Amounts check box can be selected – check this box if you want to copy over rates and amount s from the original project.

6 Click on the "Create" button to create the new project.

General Sub Tab



1 **Description** (Required)
Enter the description of the new project.

3 Enter new information into these fields, or leave as is from the copied project.

2 **ID**
Enter the ID number for the project, based on your standard procedure.

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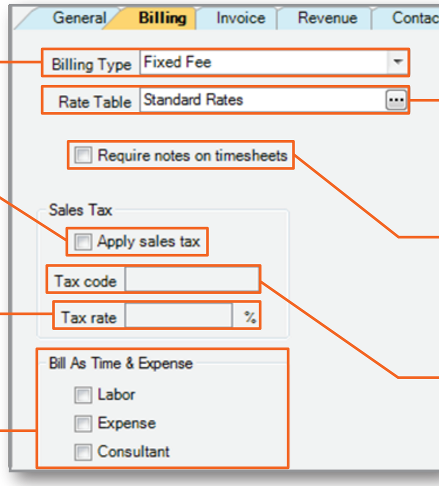
Billing Sub Tab



1 **Billing Type**
Change the billing type if needed.

2 **Rate Table (Required)**
Select the Billing Rate Table to use for this project if different from the original project.

3 **Require Notes on Timesheets**
Check this box if you want to require a note being added to the timesheet entry for each time entry to this project.

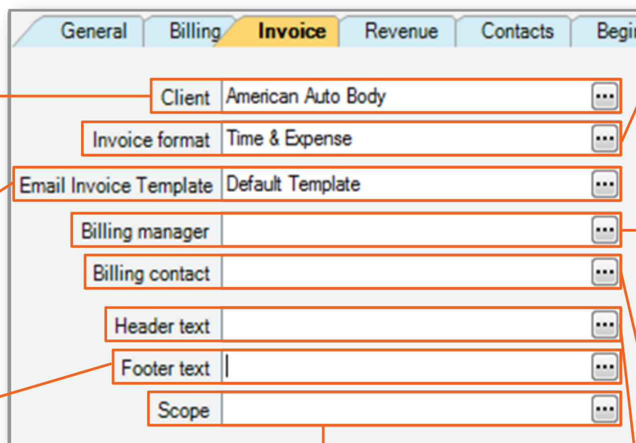
4 **Apply Sales Tax**
check this box to have a Sales Tax calculated for this project on time and expense entries.

5 **Tax Code**
If sales tax applies to the project, type the tax code that applies to the project.

6 **Tax Rate**
If sales tax applies to the project, enter the sales tax rate as a percent.

7 These fields only appear for fee-based billing types. If the fee on a contract does not include labor, expense, or consultant fees, but you want to bill them as time and expense, select these check boxes.

Invoice Sub Tab



1 **Client (Required)**
Identify the client who is invoiced for services.

2 **Invoice Format (Required)**
Establish the look and content of the client invoice. The options that appear depend on the invoice formats you set up.

3 **Invoice Email Template**
Determine the look and content of the email that is used for the final client invoice. The options that appear depend on the email templates you set up.

4 **Billing Manager**
Identify the person responsible at your company for billing on this project.

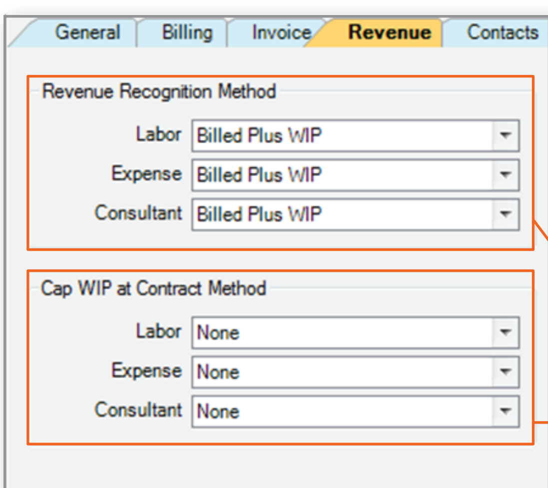
5 **Billing Contact**
Contact for the client that handles billing issues on this project. If the billing contact has an address on record, that address prints on the invoice. Otherwise, the client's address prints on the invoice.

6 **Header Text**
Enter text that you want to print on the invoice below the client mailing address

7 **Footer Text**
Enter text that prints on only the last page of the invoice.

8 **Scope**
The description of work to be performed for the project.

Revenue Sub Tab

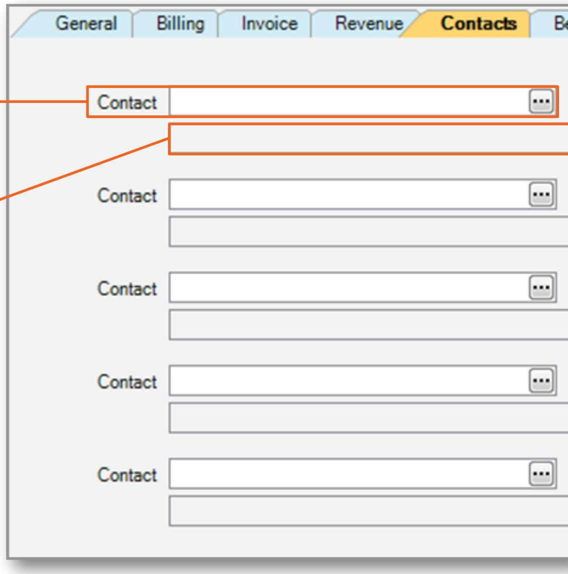


1 **Revenue Recognition Method**
Choose the revenue method by Activity Type for the project. The options will be dependent on selections made in Company Preferences.

2 **Cap WIP at Contract Method**
Choose the method for capping WIP. The options, if available, are determined by selections in Company Preferences.

Deltek.

Contacts Sub Tab



1 **Contact**
Enter a contact name for the project.

2 **Contact Comments**
In the field directly below each contact name, type a description or any notes about the contact.

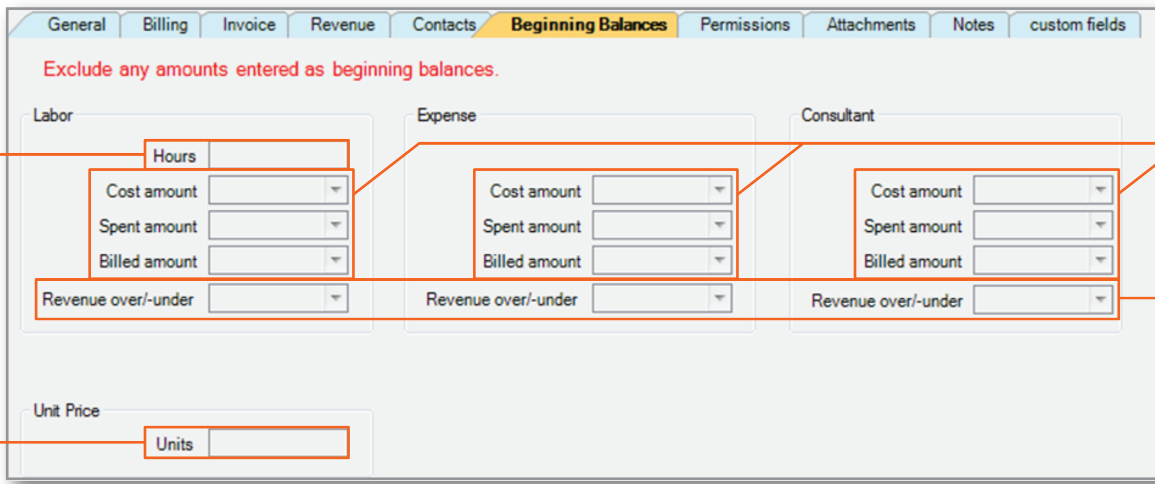
1 **Hours**
The total hours worked to-date on this phase prior to using Ajera. Used for project-to-date cost and spent hours on management reports. Included in the Hours Actual column of the Project List.

3 **Revenue Over/Under**
If recognized revenue prior to using Ajera by Activity Type is more than Actual Revenue, enter a positive amount. This appears in the Revenue Recognition report as Under Billed. If recognized revenue prior to using Ajera by Activity Type is less than Actual Revenue, enter a negative amount. This appears in the Revenue Recognition report as Over Billed. Entry is only available if the phase has a Revenue method of Formula, Formula plus WIP, or Percent of Contract.This is editable until you create the first committed revenue session.

2 **Cost, Spent & Billed Amounts**
The total cost, spent and billed amounts for labor, expenses and consultants to-date for this phase prior to using Ajera. Used for project-to-date cost on management reports.

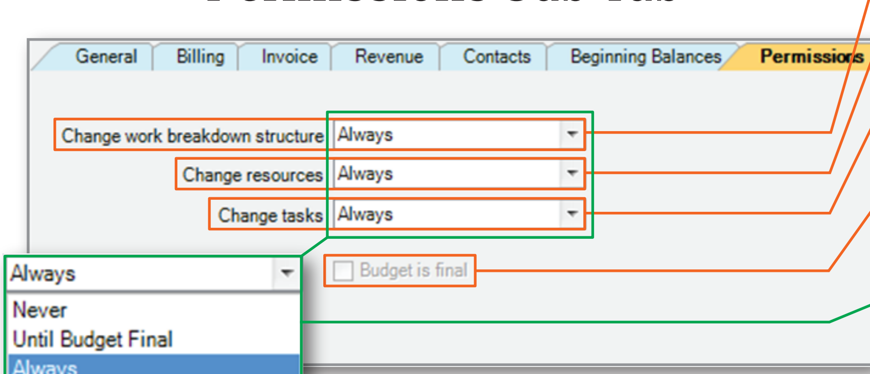
Beginning Balances Sub Tab

Only available to fill out at the phase level



4 **Unit Price Units**
Applies only if the phase has a billing type of Unit Price. The total units billed to-date prior to using Ajera for the phase.

Permissions Sub Tab



1 **Change Work Breakdown Structure**
Indicate if users of the project can change the work breakdown structure as represented in the project tree on the left of the window.

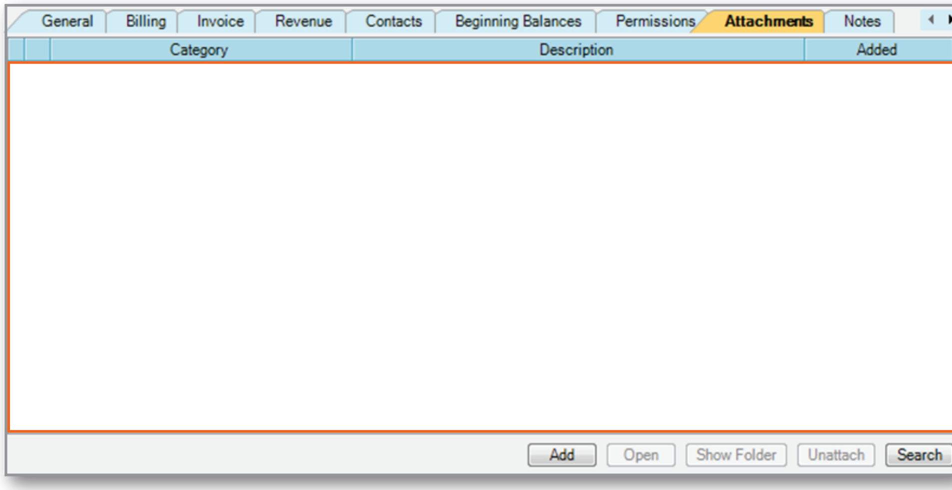
2 **Change Resources**
Indicate if users of the project can change the project's resources.

3 **Change Tasks**
indicate if users of the project can change the project's tasks.

4 **Budget is Final**
When the "Final budget" check box is selected on the Manage tab, you can no longer change amounts in the budget. You can only undo the finalizing of a budget by clearing this checkbox.

5 These are the options available for each dropdown next to the options on this sub tab. Never prevents any changes from being made once entered, regardless of ROLE. Until Budget Final allows changes to be made until the "Final budget" check box is checked on the Manage Tab. Always allows for changes at any time.

Attachments Sub Tab

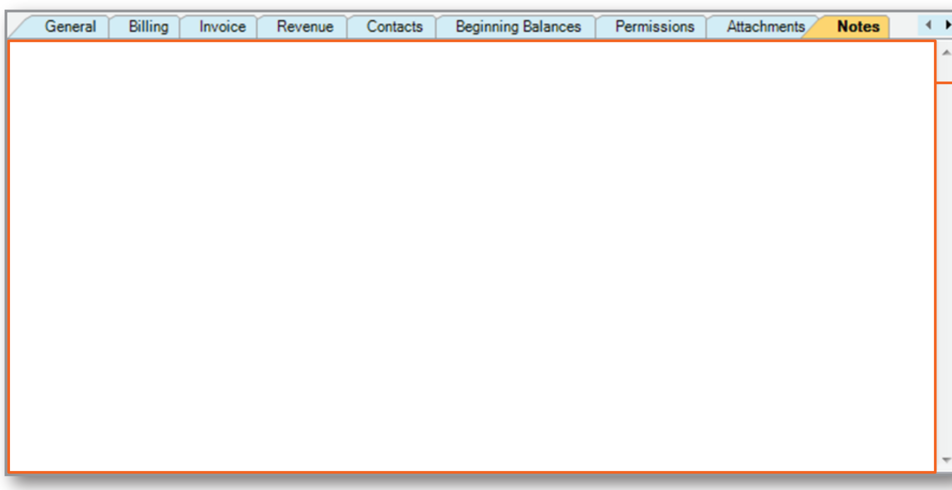


1

This tab contains any attachments about the project.

You can add attachments, by linking to related files. A linked file must be in a shared location for other people to open it (for example, on a shared network or a website).

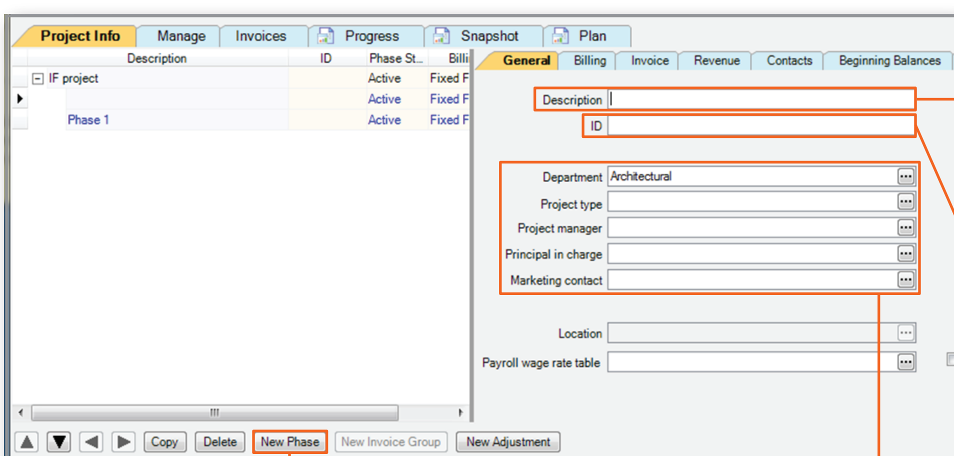
Notes Sub Tab



1

This tab contains any notes about the project.

Add Phases to the Project



2

Phase Description (Required)
The name of the phase.

3

ID
An ID number for the phase, based on your standard procedure.

1

Click on the "New Phase" button to add phases to the project.

4

This information may be changed for every phase level, however, by default will mirror the information entered at the Project level.

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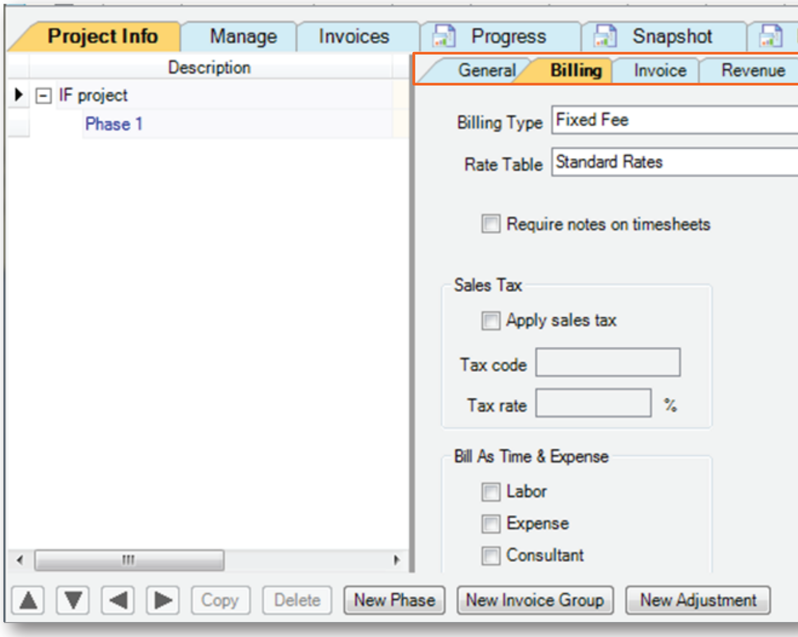
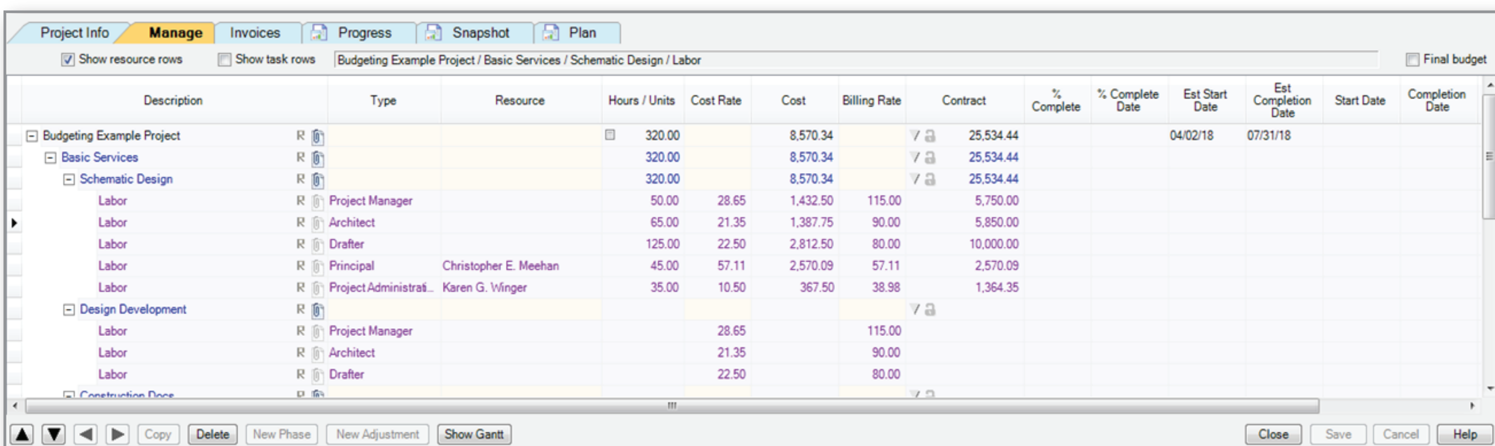
Add Phases to the Project



1

This information on these sub tabs may be changed for every phase level, however, by default will mirror the information entered at the Project level.

Manage Tab



Use the Manage Tab to budget for your project.

In Ajera, you can budget with as much or as little detail, depending on your needs and the complexity of your projects.

Budgeting Bottom - Up

You may use this method when you want to determine the total contract amount for a project based on the number of hours each phase or task should require. Ajera calculates the project totals for you.

Bottom-up budgeting is useful when you want to develop a budget to: Control the project hours and costs or Produce a project proposal.

You typically create bottom-up budgets for hourly based projects. Bottom-up budgeting lets you specify the number of hours for each labor or expense. When you enter hours, Ajera calculates the contract amount based on the project's rate table or from average billing rates entered for the employee type or in Company Preferences. Ajera calculates the cost from the employee's pay rate or from average cost rates entered for the employee type or in Company Preferences.

Budgeting Top - Down

You may use this method when you know the total contract amount or total number of hours needed to complete a project. For some projects, the fee is based on what the market can bear. In this case, you need to develop a budget for each phase and task required to complete the project. This top-down method also works well for developing feasibility budgets.

When building a top-down budget, you enter the total contract amount, total hours, or total cost for the project. You then specify the percentage of the total project for each phase or subphase.