Facility Wizards

Projecto™

CAPITAL PROJECT MANAGEMENT SOFTWARE

User Manual

V3.5 R2.0

Approach and Conventions Used in this Manual

Understanding the approach and conventions used in this manual will allow you to learn and successfully use Projecto as quickly as possible:

We'll present the information in this manual in a top-down fashion, first covering the fundamentals, and then building-upon information already covered to describe how to perform capital project management tasks. Also, configuration of your Projecto software is covered in a chapter at the end of this manual.

The manual is divided into chapters, sections, and subsections. You can distinguish these by their numbering and font size. These examples are actual chapter, section, and subsection headers from this manual:

Chapter 3 Introduction to the Projecto User Interface

3.1 Data Presentation in Projecto

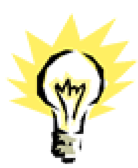
3.1.1 Data Fields

We use *italics font* when we are defining a new term, and also when we are referring directly to a *term*.

We use **bold font** to indicate a command executed through a menu or button, and when specifying a label of a data field or button, or the text or selection entered into a data field. For commands entered using the menu at the top of the application's window, this will specify the sequence of menu commands required to execute a specific function. Here are some examples of how **bold font** is used:

- **File>Print** prints the records displayed on the screen
- The **Project SF** field is used to specify the facility square footage affected by the project
- Selections for the **Status** field include "**OPEN**", "**HOLD**", etc.

Worthwhile information that supplements a topic, but that doesn't necessarily relate directly to the topic discussion, is shown in *clarifying information* insets like this:



This is an example of how a clarifying information inset looks. These provide supplemental information for a topic.

Instructions on how to use the Projecto as effectively and efficiently as possible, using shortcut keys and other productivity enhancing techniques, are shown in *power user insets*, like this:

This is an example of how a power user inset looks. These provide instructions on how to more efficiently and effectively use the software.

Information to help you better find your way around this manual, such as giving you information about where a certain topic will be covered, are shown in *manual navigation insets* like this:

> This is an example of how a manual navigation inset looks. These provide information to help you get around this manual.

There are certain Projecto functions (mainly for deleting data) that are potentially harmful to your data. When these functions are described, we also provide a caution, reminding of potential bad consequences if the user is not careful. These are contained in *caution insets*, like this:

> This is an example of how a caution inset looks. These warn you about functions that are potentially harmful to your data if not used correctly.

Getting Support

We at Facility Wizards believe that our software is so easy to use, that your need for support will be minimal. We stand by this belief with our support policy: For as long as you license and use our software, we'll never charge you for end–user support by phone, fax, or e–mail. This includes helping to get you and your organization's other new users productive, including answering any questions you may have about how to work with our software, entering and editing data, running reports, and so forth.

To contact Facility Wizards Support:

- Our technical support is available Monday through Friday 9AM to 5PM CST.
- We can be reached at (773) 832–0200.
- We often will be able to assist our clients through our online remote administration service at support@facilitywiz.com. You must first be speaking with one of our technical support staff before you click on the link: Join an online tech support session.

Chapter 1 Getting Started with Projecto

Projecto is the ideal software for any organization that is involved with facilities-related capital projects. Projecto has been designed and developed with you, the software user, in mind. The result is easy to learn and use, powerful software. Projecto's standard user interface gives you the features and functions, screens, menus, data fields, and reports that you need to be successful in your project management responsibilities.

This chapter gives you preliminary information on getting Projecto operational within your organization. We'll cover the various installation and configuration options for Projecto, followed by our recommendations for implementing the software.

1.1 Product Configurations

Projecto can be installed and configured in several different ways. Understanding these options is important to make the correct decisions about:

- How many seats of software to license
- Any Facility Wizards *add-on kits* that also need to be licensed. (add-on kits provide additional, optional capabilities for Facility Wizards software)
- The design and plan for your overall Projecto software solution
- The process for installing the configuring the software
- The hardware that will be required to host the software
- Any staff who will be required to install and configure the software
- Any staff who will be required to support the software once it is operational

The different Projecto configurations are:

Standalone

The *standalone* configuration is an implementation in which the Projecto software is installed on a single computer for a single user.

Multi-User Client-Server

The *multi-user client-server* configuration is an implementation in which Projecto's databases are installed on a central server computer, with multiple Projecto users each working on their own, separate computers, and accessing the data from these common databases. Projecto is installed on each user's computer, and the computers are networked to the server computer that contains Projecto's databases.

Web-Based

The *web-based* configuration uses the Facility Wizards *Web Interface Add-On Kit* to implement a web browser based user interface to Projecto. This allows users who do not need use of the full-function Projecto software, to access Projecto data using any computer with a Web browser.

Terminal Server using Windows Terminal Services or Citrix

The *terminal server using Windows Terminal Services* and the *terminal server using Citrix* configurations are similar to the multi-user client-server configuration described above. In this implementation, the server computer containing Projecto's databases is remotely located, and is communicated with using Windows Terminal Services or Citrix.

It is also possible to implement a hybrid configuration of Projecto, which combines elements of two or more of the above configurations. For example, it is possible to have a multi-user client-server configuration that also implements a web-based user interface.

1.2 Software Implementation Steps

You and your organization will become productive with Projecto as quickly as possible if you have a plan for making your software operational. There are four basic elements to getting started with Projecto, that should be included in such a plan:

Installation and Configuration

The first step in getting started with Projecto is to install and configure the software. You may or may not be the person who performs this task, depending on your role within your organization. Contact Facility Wizards or your Facility Wizards distributor if you will be involved in this installation task. Once the software is installed, the specific configuration features and instructions for Projecto are located in Chapter 6 – Configuring Projecto.

Learning Projecto

Getting familiar with Projecto's features and functions is also obviously necessary in order for you to become successful with the software. This manual is the great place to gain this familiarity. Working with the *sample data*, which is installed as part of software installation, is also an important learning activity. In addition, Facility Wizards and Facility Wizards distributors offer in-depth training, which is another effective way of getting up-to-speed. Contact Facility Wizards or your Facility Wizards distributor for more information.

Data Preparation

The sample data that is installed with the software is useful for learning the software. However, before your organization actually starts using the software for real capital project management tasks, it is important to remove this sample data. In addition, there are several other data preparation tasks that should be done, including setting-up default data, and changing the headers and footers that are printed on reports. Again, you may or may not be the person who performs these tasks. If you will be involved in these tasks, refer to Chapter 6 – Configuring Projecto.

Standards and Procedures

Organizations often develop *standards and procedures* for properly using software like Projecto. These standards and procedures can provide common guidelines for how Projecto will be utilized, including conventions for inputting data, and defined roles and responsibilities for performing software functions and for performing accompanying capital project management tasks. The larger your Projecto installation in terms of number of users, the greater the need will be for these standards and procedures.

The sequence of these software implementation steps should be as follows:

- Installation and configuration should be done as soon as your organization receives the software. This will enable you and your organization to get productive with Projecto as soon as possible.
- Since you are reading this manual, you have obviously begun your learning of Projecto. You can continue to study this manual as your software is being installed and configured. Then, in combination with this manual, and in combination with any training being provided by Facility Wizards or by your Facility Wizards distributor, you can get hands-on experience with the Projecto software using the sample data. This practice will prepare you for using Projecto to perform your organization's actual capital project management tasks.

- The data preparation steps depend on installation of the Projecto software. Also, one of the data preparation steps, the removal of the sample data, depends on you and your organization's personnel being sufficiently up-to-speed on the software such that the sample data is no longer needed for learning. Because of these dependencies, the data preparation steps should take place when the software has been installed, and when you and your organization's personnel no longer need the sample data for learning.
- The development of standards and procedures can occur in parallel with all of the above. Ideally, this should be completed when your organization begins its actual production use of Projecto.

1.3 Customization

One of Projecto's key strengths is that it can be readily customized to implement any unique and special requirements that your organization might have. This could involve adding or re-arranging fields, or reports, or adding new functions. Usually this work is performed by Facility Wizards, a Facility Wizards distributor, or your own organization's staff depending on their technical capabilities. Contact Facility Wizards or your Facility Wizards distributor for more information about customization options for Projecto.

Chapter 2 Projecto Key Concepts and Features

This chapter introduces and describes Projecto's major features, and the key concepts behind these features. This will give you the necessary background to go deeper into the specific functions for using the software. From a high level view, Projecto lets you perform capital project management tasks by utilizing and tracking information about:

- Project tasks and schedules
- Project budgets, and project funding sources and amounts
- Project costs
- Project teams and project contact persons
- Project notes and action items
- Project meetings, and meeting minutes
- Project related documents stored on your computer or computer network
- Vendors that contribute labor and materials to capital projects
- Reports that provide visibility into your organization's capital project management activities

2.1 Projecto Databases and Records

Projecto stores your capital project management data in *databases*. Each database stores data that serves a specific purpose, and all the databases together comprise the repository for all of the data supporting Projecto's features and functions.

The databases in Projecto contain *records*. Regardless of how your data is displayed, internally within Projecto your data is stored as records. A record is a set of closely related data. For example, the data that defines a project contact person is stored in a record which consists of that person's last name, first name, contact information, and so forth. Continuing with this example, the database containing the data for project contact persons consists of multiple records of this type, one for each person.

Depending on the specific database, a Projecto database can contain just one type of record, or several or many different types of records.

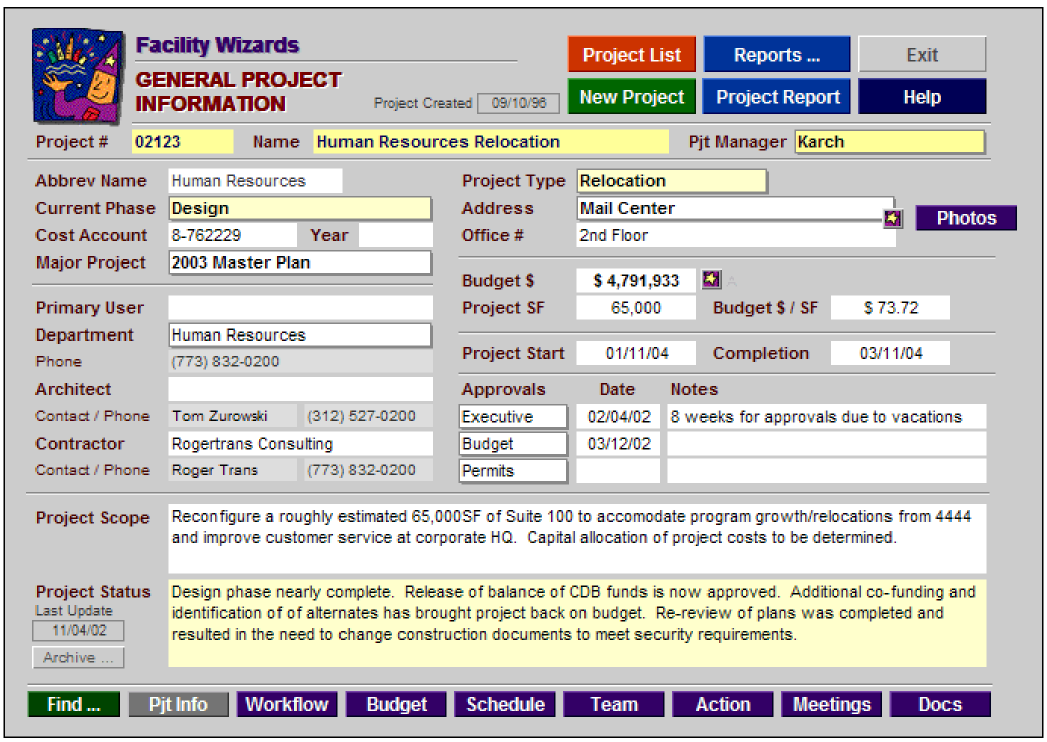
In order to be successful with Projecto, you should be familiar with the different Projecto databases and the records that are stored within each database. In the remainder of this chapter, we'll describe Projecto's software features, including related databases and records:

2.2 Projects

You use Projecto for managing capital projects involving facility construction or substantial facility maintenance activities. Capital projects are efforts that are complex enough to warrant their own budget and schedule, and for which the expenditures can be depreciated over multiple years. Capital projects are stored in Projecto's *Projects database*.

In this Manual we use the terms *projects* and *capital projects* interchangeably.

The following image shows the *General Project Information screen*, which is one of the screens that provides you with access to the Projects database. This screen lets you enter, view, and edit basic project information, including the project scope, project start and completion dates, and overall project budget amount. At this point it's a good idea to get a little familiar with this screen, to begin developing an understanding of the data that's contained in a capital project within Projecto (all of Projecto's screens will be covered in complete detail later in Chapter 4 – Section 4.2 – Projecto Screens in Detail):



General Project Information Screen

As shown in this screen image, each project contains a variety of data. The following table shows the major data elements contained in the Projects database, and the records that this data is contained in:

Projects Database	
Data	**Records**
– Project ID and name – Project manager – Project type – Facility location where the project work is being performed – Architect responsible for the project design – Contractor performing the project work – Square footage area affected by the project – Project start and completion dates – Project approvals – Project budget – Steps required to accomplish the project – Project schedule and schedule phases – Actual project schedule performance – Project funding sources and amounts – Project team – Project notes and action items – Schedule of project meetings – Project meeting minutes – Attached project documents	– *Project records* – *Project Image records* – *Workflow/Checklist records* – *Funding records* – *Budget records* – *Anticipated Cost records* – *Change Order Detail records* – *Schedule Phase records* – *Team Member/Contact records* – *Note/Action Item records* – *Meeting records* – *Meeting Minutes records* – *Document records*

Each project in Projecto has an assigned status:

- *Planned* projects are projects for which planning has been performed, but also for which work on the project has not begun
- *Active* projects are projects for which work is underway
- *Complete* projects are projects for which work has been completed
- *Closed* projects are projects for which work has been completed, and for which all project expenditures have been accounted for. Closed projects are generally only valuable as a historical record for planning future projects.

- *On-Hold* projects are either empty projects that are placeholders for future projects, or projects that planning is partially done but that is suspended for some reason. An On-Hold project could also be a project for which construction has been partially performed, but that has been suspended for some reason, for example, due to a lack of funding.

2.2.1 Workflow/Checklists

To support your management of facilities capital projects, Projecto provides the ability to define and use *Workflows/Checklists*. A Workflow/Checklist is a set of detailed steps for accomplishing a capital project, which can encompass any or all of the following activities:

- Initiating the project
- Funding and budgeting
- Scoping
- Design
- Planning
- Assigning the project team, including vendors and contractors
- Construction
- Quality assurance
- Project completion and occupancy
- Any post-construction activities

A project's Workflow/Checklist consists of a set of *Workflow/Checklist Activities*. Each Workflow/Checklist Activity is stored in a Workflow/Checklist record.

Each Workflow/Checklist Activity has an assigned status:

- *Open* Workflow/Checklist Activities are yet to be accomplished
- *Done* Workflow/Checklist Activities have been accomplished
- *Hold* Workflow/Checklist Activities are placed on-hold for some internal reason, for example, awaiting approvals
- *Delay* Workflow/Checklist Activities are being delayed for some external reason, for example, awaiting a vendor proposal

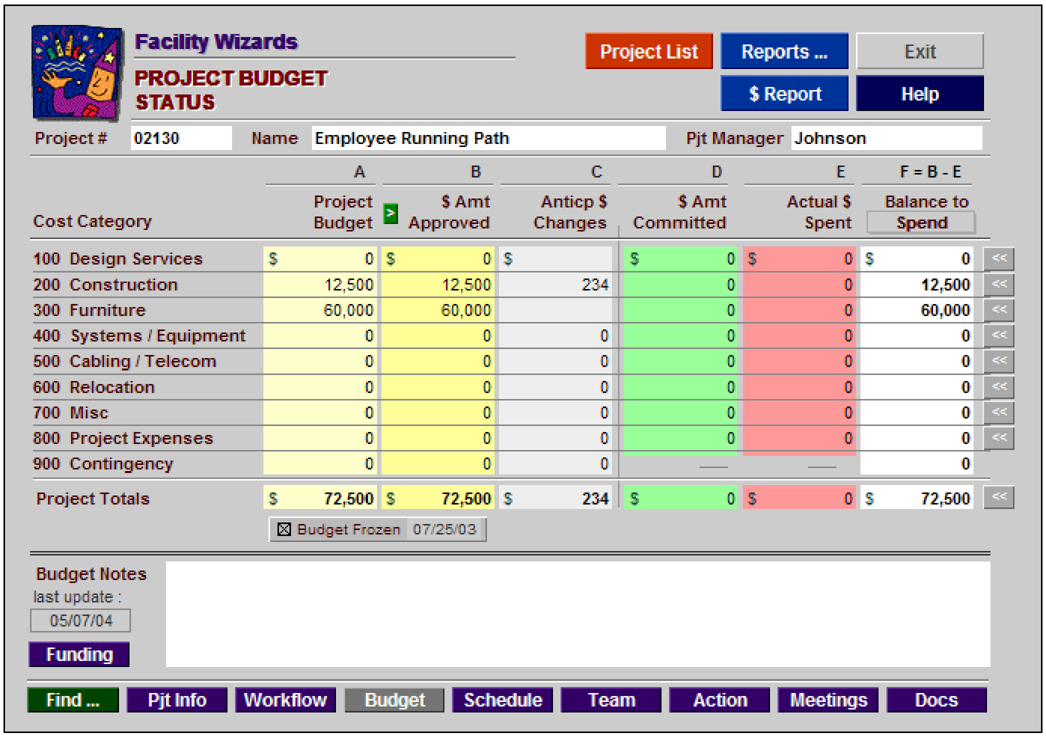
In addition, some of the Workflow/Checklist Activities in a project's Workflow/Checklist can be marked as *critical*. A critical Workflow/Checklist Activity must be completed before work on the project can progress further, and move on to the following Workflow/Checklist Activities.

Projecto also lets you to define a *default Workflow/Checklist*, which is loaded when a new project is created. This is discussed in more detail below in Section 2.6 - Projecto Setup and Default Data.

2.2.2 Budgeting and Funding

One of Projecto's key features is tracking the budget and funding for capital projects. The budget data in Projecto includes budget amounts, committed amounts, and budget changes. Project costs are also tracked (which is discussed below in Section 2.4 – Project Cost Tracking).

The following image shows the *Project Budget Status screen*, which is the screen that provides you with access to a project's budget and funding information. Again, at this point it's worthwhile to get somewhat familiar with this screen, to begin developing an understanding of the data that's contained in a project budget in Projecto:



Project Budget Status Screen

As shown in this screen, budget amounts, changes, and expenditures are assigned to a set of *cost account categories* that include "**100-Design Services**", "**200-Construction**", "**300-Furniture**", and so forth. Budgeting of capital projects should go-through a standard process that controls budget decisions, including budget changes and approvals. Projecto's supported budgeting steps are:

1. The budget is created, and budget amounts are assigned across the cost account categories and their cost accounts.

2. The budget goes through an approval process, and the individual budget amounts and the overall budget are approved.

3. Budget changes occur as the project progresses. Changes are first entered as *anticipated costs*. Anticipated costs are processed as *change requests*, which are reviewed and either approved or rejected. Approved change requests become *change orders*, which are logged into the project's budget.

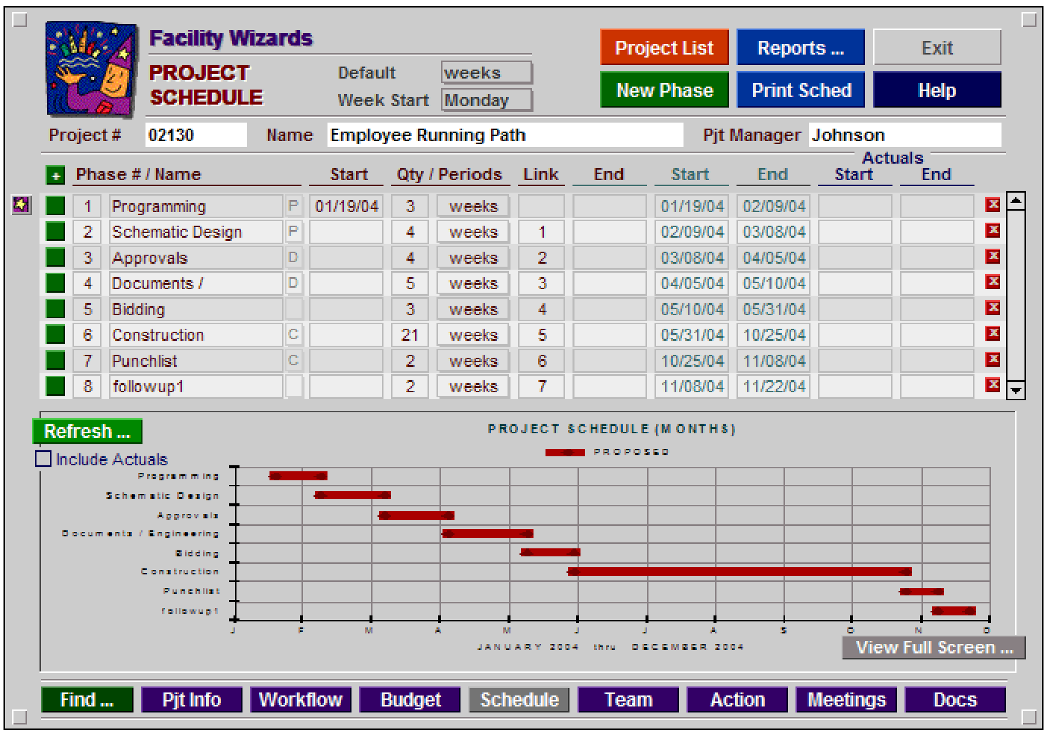
Using Projecto's project budgeting feature, project expenditures are managed by entering and tracking commitments, purchase requisitions, purchase orders (POs), contracts, invoices, minor expenses, and budget balances. These concepts are described in more detail below, in Section 2.4 – Project Cost Tracking.

Projecto also lets you track funding for your capital projects, consisting of funding sources and amounts. This feature lets you calculate the total amount of project funding, and contrast the total funding with the total project budget.

2.2.3 Schedule

Tracking a project's schedule is another key Projecto feature. In Projecto, a project schedule consists of a set of *phases*. Each phase has a start and completion date, and phases can be linked together to identify dependencies between the phases. This means that the phases can occur in sequence, or can occur in parallel or overlap.

This image shows the *Project Schedule screen*. Once again, it's a good idea to get a little familiar with this screen, which you use to enter the schedule phases using a tabular format, and then also displays them in a graphical schedule:



Project Schedule Screen

A project's schedule and schedule phases are stored in the Projects database in Schedule Phase records. There is one Schedule Phase record for every phase, and each record contains it's phase's dates, duration, dependencies on other phases, descriptive text, and so forth.

In Projecto, you can mark a project's schedule phases as *PDC Phases*. In these cases, PDC Phases marked as:

- "**P**" indicates phases used for planning purposes
- "**D**" indicates phases used for design purposes
- "**C**" indicates phases used for construction purposes

To utilize the PDC Phases, you can select an option that causes these phases to be shown in one of Projecto's reports for visualizing project schedule phases, making it easy to distinguish the portions of the overall project schedule that are used for planning, design, and construction.

Projecto lets you to define three *Schedule Templates* for *Small*, *Medium*, and *Large* projects. A Schedule Template defines the schedule phases that are created for a new project. The appropriate Schedule Template is loaded when a new project is created, based on the project's size. This is discussed in more detail below in Section 2.6 – Projecto Setup and Default Data.

2.2.4 Project Team and Project Contacts

Each capital facilities project involves a team of personnel, which we call the *project team*. We refer to the persons in the project team as both *project team members* and *project contacts*. These can include the architect, contractors, construction workers, consultants, users of the facility construction, and any other personnel involved with the project. Projecto lets you store and access a list of these persons for each project, including their contact information.

2.2.5 Project Notes and Action Items

Capital projects often produce a large quantity of information, some of which can easily get overlooked or lost without using software to help manage it. In Projecto, this information can be recorded as *project notes* and *action items*.

The action items stored and tracked in Projecto include the names of the persons that the action items are assigned to, as well as a dates by which the action items must be accomplished. A project note can be associated with an action item, or can be just entered as a standalone notation that is not related to any particular course of action.

Project action items in Projecto have a status that can be *Open* or *Complete*: Open action items have not been accomplished; Complete action items have been accomplished. Action items can also be specified as *HOT*, indicating that the action items are more important than action items that are not HOT.

2.2.6 Project Meetings and Meeting Minutes

Meetings and projects go hand-in-hand. You can use project meetings to perform planning, track status, decide on project changes, or any other project-related topic. Projecto lets you enter scheduled project meetings, as well as enter and track detailed *meeting minutes*.

The meeting minutes stored in Projecto include the ability to store decided-upon *Next Steps* resulting from the meeting, including assigning each Next Step to a project team member.

Projecto's meeting minutes function also lets you create a project action item (discussed in the previous subsection) from a project meeting Next Step. This is valuable because a project action item has a deadline date, whereas a meeting Next Step does not.

2.2.7 Documents

Projects always involve computer files of various types. *Project documents* in Projecto can be CAD files containing architectural drawings, word processing documents, spreadsheets containing budgetary analysis, and any other project related computer file. In Projecto, you can *attach* these document files, which lets you track and open these files from within Projecto.

When an external file is attached within Projecto, the actual files still exist outside of Projecto, on your computer or computer network. We call these *references* to external files.

Projecto’s document management feature lets you consolidate and manage all project documents from within Projecto. In addition to the references to the files, Projecto also stores certain information about each file, for example, a file’s type and purpose.

2.3 Vendors

Projecto includes a *Vendors database*. The vendors tracked in Projecto can be any company that is involved in your capital projects, for example architectural firms, general contracting firms, and companies providing trade workers. Once a vendor is defined within Projecto, the vendor can be easily selected in Projecto's cost tracking feature (discussed in the next section) as part of logging a project cost to that vendor.

This table shows the major data elements contained in Projecto's Vendors database, and the corresponding record that this data is contained in:

Vendors Database	
Data	**Records**
– Vendor company name – Vendor ID – Vendor specialty – Vendor contact information – Vendor Federal Tax ID	*Vendor records*

2.4 Project Cost Tracking

Tracking project costs is a key Projecto feature. This capability allows you to enter and track project expenditures, providing visibility into the budget status of capital projects.

2.4.1 Cost Accounts

In Projecto, project expenditures are logged against cost accounts. Projecto's cost accounts are grouped into *cost account categories* that are labeled in increments of one-hundred, for example: "**100-Design Services**", "**200-Construction**", "**300-Furniture**", and so forth. Within each cost account category, more refined cost account numbers are defined such as "**201-Interiors**", "**202-Demolition**", "**203-Carpentry**", etc. To suit your organization's specific requirements, the cost account categories and cost accounts are completely definable by you.

In addition to the cost account categories and cost accounts, Projecto lets you to define three *Budget Templates* for Small, Medium, and Large size projects. A Budget Template defines the cost accounts that a project can utilize, and the three Budget Templates are groups of cost accounts flagged for the different size projects. Based on the project's size, the appropriate Budget Template is loaded when a new project is created.

This table shows the major data elements contained in Projecto's *Cost Accounts database*, and the corresponding record that this data is contained in:

Cost Accounts Database	
Data	**Records**
– Cost account category – Cost account number – Cost account name – General Ledger code – Budget Templates	*Cost Account records*

2.4.2 Cost Tracking

Projecto's cost tracking feature lets you manage budget amounts committed to, and expenditures made to vendors that provide supplies and services for your capital projects. An important concepts is that expenditures can be logged against *commitments*, which are pre-planned expenditures backed-up with a PO or a contract. Ad-hoc expenditures, that is expenditures without a commitment, can also be logged and tracked in Projecto.

Projecto's cost tracking is integrated with Projecto's budgeting feature. Projecto calculates budget balances to show the remaining, budgeted funds that are available after expenditures, and commitments, are subtracted. Expenditures, commitments, and budget balances are all tracked across the cost account categories and their detailed cost accounts.

This table shows the major data elements contained in Projecto's *Cost Tracking database*, and the corresponding record that this data is contained in:

Cost Tracking database	
Data	**Records**
– Expenditure type – Expenditure Amount	*Cost records*

– Cost account category – Cost account number – Expenditure date – Project ID – Commitment ID (PO or contract number) – Vendor ID	

As with budgeting, purchasing for facilities capital projects should also follow a process. Projecto's cost tracking feature implements the essential process elements, allowing the software to map to your organization's purchasing process. Projecto supports this straightforward purchasing workflow:

1. A purchase requisition is used for the requesting documentation
2. When a purchase requisition is approved, it becomes a purchase order (PO)
3. Your organization's receives invoices from vendors for payment

Also, as alternatives to POs, Projecto lets you handle expenditures:

- That are established through ongoing contracts with vendors
- As minor expenses, for ad-hoc, lesser expenditures taken care of without POs or contracts

2.5 Facility Locations

Projecto's facility locations are divided into two key elements: the *Primary Facility Location* and the *Secondary Facility Location*. These allow a specific facility location to be displayed and printed in two parts, which identifies the specific location where the project work is done. Examples are **Address** and **Floor**, **Building** and **Room #**, and so forth.

Projecto has a *Facility Locations database* that contains the Primary Facility Locations where capital project work is performed. You can easily enter the information from this database into projects, ensuring that it is accurately known where the project work is being done.

This table shows the major data elements contained in the Facility Locations database, and the corresponding record that this data is contained in:

Facility Locations Database	
Data	**Records**
– Location ID – Location Name – Location address	*Primary Facility Location records*

2.6 Projecto Setup and Default Data

Projecto has a variety of setup and default settings that affect how capital project data is entered, processed, stored, displayed, and printed. This table shows the major data elements contained in Projecto's *Setup and Defaults database*, and the corresponding records that this data is contained in:

Setup and Defaults Database	
Data	**Records**
– Default Workflow/Checklist Activities and the Default Workflow/Checklist – Default schedule phases and Schedule Templates – Department IDs and names – Projecto Users	– *Default Workflow/Checklist records* – *Default Schedule Phase records* – *Department records* – *User records*

Previously, we introduced how defaults are set for a new project's Workflow/Checklist and for a new project's schedule. These defaults are structured as follows:

- Default Workflow/Checklist records contain the Default Workflow/Checklist Activities, which constitute the Default Workflow/Checklist
- Default Schedule Phase records contain the *default schedule phases*, which constitute three Schedule Templates for Small, Medium, and Large sized projects. When a new project is created, the appropriate Schedule Template is loaded, depending on project size.

The Setup and Defaults database also stores records containing basic data about your organization, as well as system administration settings for Projecto:

- Department records contain information about the departments in your organization. This data is utilized when selecting a department that is affected by a capital project.
- User records store user data for Projecto multi-user client-server software. This data includes permissions to perform various roles and tasks within Projecto, as well as authentication data for each user.

2.7 Reports

Projecto's reports provide you and your organization with important visibility into the status of capital projects and the data the affects capital projects. These reports assemble and print information that you can use to spot bottlenecks and other issues, and to take proactive steps to keep your organization's capital project management efforts on-track:

Report	Purpose
Project Status report	Prints a list of project statuses
Project Cost Summaries report	Prints a list of approved project budgets and estimated overall project costs
Project Schedule Summaries report	Prints a graphical overall project schedule for one or more projects
Open Action Items report	Prints a list of project action items
Bar Chart report	Prints one of a set of Bar Chart reports that provide graphical comparisons of various project data: – Project budgets – Square footage area for different projects – Budget dollars per square footage area for different projects – Project completion date
Cost Activity report	Prints a list of project commitments and expenditures
Project Summary Sheet report	Prints a summary of the project's scope, budget, schedule, and status
Project Status History report	Prints a history of project statuses
Current Project Budget report	Prints a project's budget
Original Versus Current Project Budget report	Prints a project's original budget and current budget, allowing the original and current budget to be compared
Project Commitments and Balances report	Prints a list of project commitments, and the budget balances when expenditures are subtracted from the commitments
Project Commitments report	Prints a list of project commitments
Project Invoices and Expenditures report	Prints a list of project invoices and expenditures
Project Cost Change report	Prints a list of project anticipated costs, and approved and committed cost changes
Change Order Analysis report	Prints a list of project change orders
Project List report	Prints a list of the projects stored in Projecto, including key project

	information
Photo report	Prints project images
Project Workflow report	Prints a project's Workflow/Checklist Activities
Summary Budget Analysis report	Prints a summary of a project's budget
Detailed Budget Analysis report	Prints complete details of a project's budget
Project Funding Source report	Prints project funding sources and amounts
Project Cost report	Prints a list of project costs
Project Schedule report	Prints both graphical and tabular views of a project's schedule
Project Team report	Prints a list of project team members/project contacts and their contact information
Action Items report	Prints project notes and action items
Meeting List report	Prints a list of project meetings
Project Meeting Minutes report	Prints a project's meeting minutes
Project Documents report	Prints a list of a project's attached documents
Vendor report	Prints a list of the vendors stored in Projecto, including vendor specialties, locations, and contact information
Vendor Data Sheet report	Prints a vendor's name, specialty, location, and contact information
List of Project Cost Accounts report	Prints a list of cost accounts categories and cost accounts
Default Schedule Activities report	Prints a list of default schedule phases
Default Workflow Activities report	Prints a list of Default Workflow/Checklist Activities
Building List report	Prints a list of Primary Facility Locations
Department List report	Prints a list of departments

Chapter 3 Introduction to the Projecto User Interface

This chapter covers the underlying concepts, and the basic parts that comprise Projecto's user interface. We'll cover these in a top-down fashion by first defining the elements that makeup the user interface, followed by the discussion of the functions that are common throughout Projecto.

3.1 Data Presentation in Projecto

In Projecto, your data is presented, entered, and edited using a variety of data fields. In addition, buttons are displayed, which when clicked, perform various Projecto features and functions, and let you navigate throughout the software. The data fields and buttons are grouped together in screens. Each screen presents a meaningful set of related data, and provides access to the features and functions that operate on that data. In the following subsections, we'll go into more detail about Projecto's data fields, buttons, and screens:

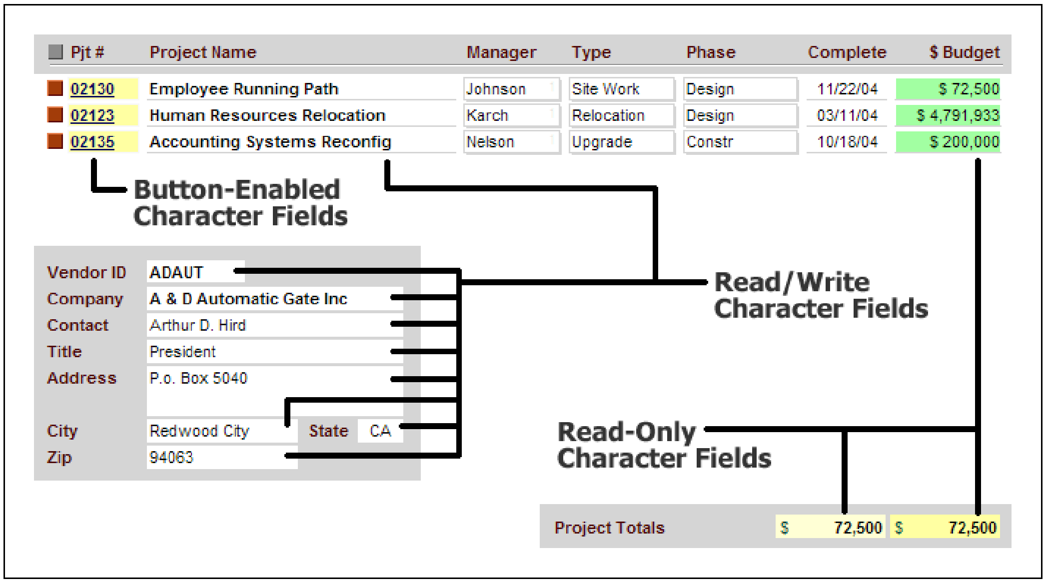
3.1.1 Data Fields

The data fields in Projecto are used to display your data, and allow you to enter and edit your data. Most data fields are positioned on the screen next to labels describing the data contained in the data fields. We refer to these as *labeled* data fields. However, some data fields are not labeled, because their placement on the screen makes it clear what their purpose is. We call these *unlabeled* data fields.

Data fields contain or represent character and numeric data. Most let you view, enter or select, and edit data. We call these *read/write* data fields. Some data fields, however, just allow you to view data, because their values have been set somewhere else in Projecto. We call these *calculated* data fields if their values have been calculated by Projecto**,** and we call these *read-only* data fields if their values have simply been set by another of Projecto's screens. Here is detailed information about the different types of Projecto's data fields:

Character Fields

Some *character fields* contain both alphabetic data and numeric data, and other character fields contain just numeric data. The character fields that contain numeric data are often used to view, enter, or edit currency data, in U.S. Dollars. *Read/write character fields* let you view, enter, and edit the character data; *calculated character fields* and r*ead-only character fields* just allow you to view the character data.

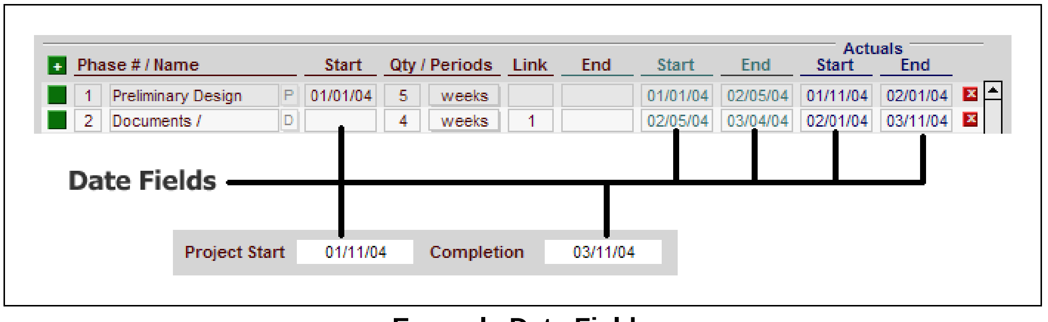


Example Character Fields

Another type of character field that is used in Projecto is the *button-enabled character field*. These display character text, are read-only, and behave just like a button when clicked, causing Projecto to go to another screen.

Date Fields

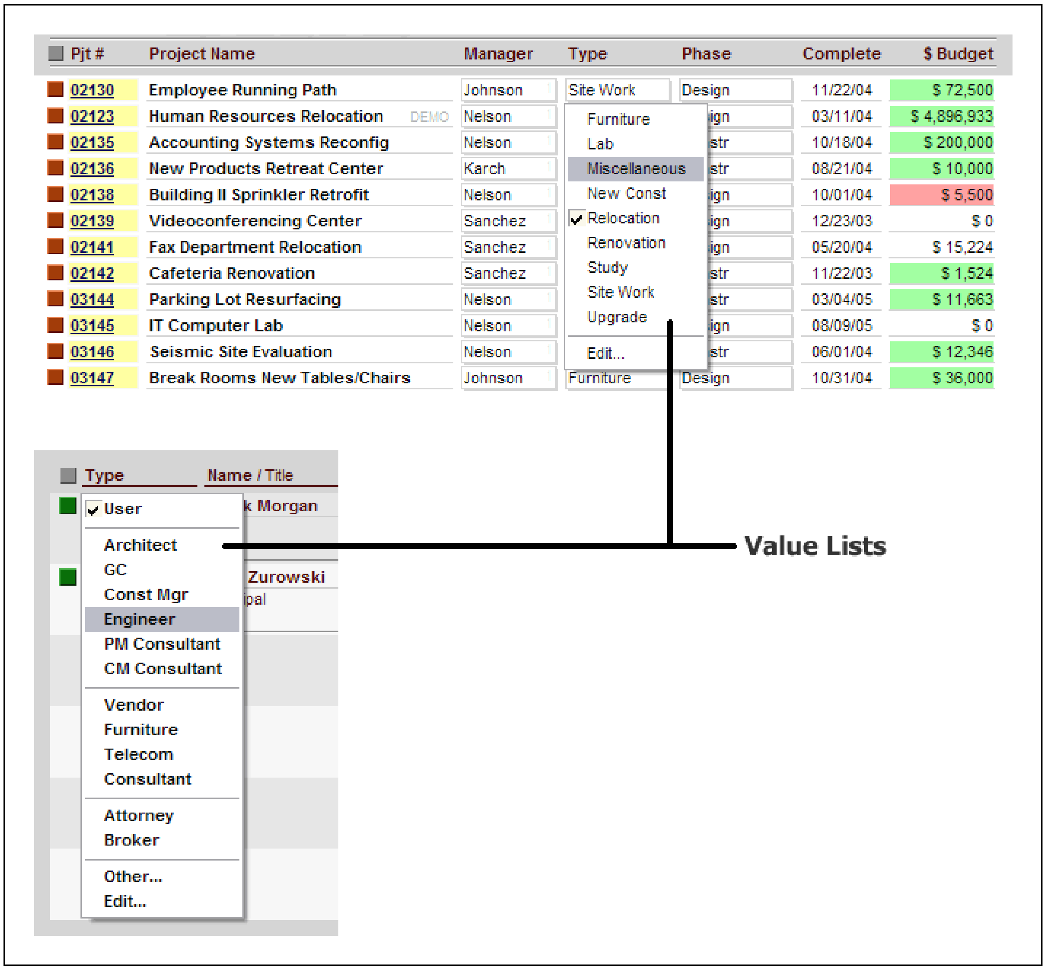
Date fields display dates in the format **mm/dd/yy**, for example, **10/31/04**. In Projecto, there are *read/write date fields*, *read-only date fields*, and *calculated date fields*.



Example Date Fields

Value Lists

Value lists are data fields that contain a predetermined set of values. Instead of typing your data into the field, you click on a value list, causing the set of values to be displayed, and then you click again to select one of the values.



Example Value Lists

Almost all of the value lists in Projecto have a predefined set of initial selections, and many of the value lists get their range of selections from some data source in Projecto, or from the user. These different types and variations of the value list fields in Projecto are as follows:

- Some of Projecto's value lists have a selection entitled "**Edit…**". When you click on this selection, an ***Edit** box* appears, displaying the currently defined list of selections for the value list. You can then add one or more selections into the value list, by typing them into the Edit box. You can also edit the already existing selections. From that point forward, the new or changed selections will appear in the value list.
- Projecto also uses value lists that get their range of selections from one of Projecto's databases. This means that when you enter or edit a specific set of data in the Projecto database, that data will show-up as a range of selections in the value list. Projecto's cost accounts is a good example of this: The cost accounts are defined in the Cost Accounts database, and then the cost accounts are displayed in value lists that you use to select a cost account.

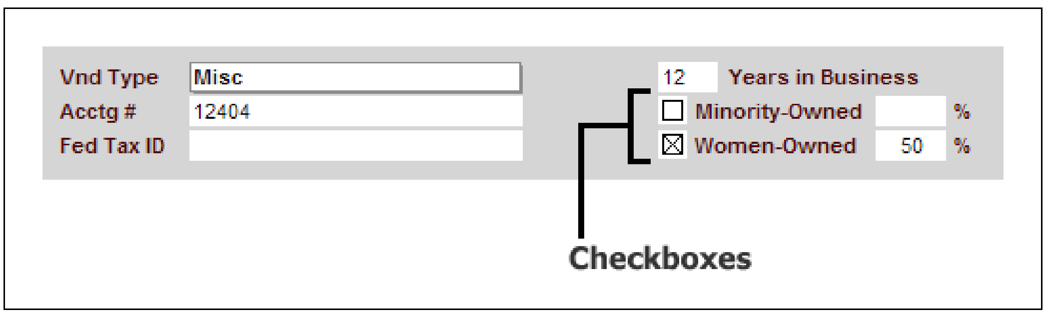
- Some of Projecto's value lists have a selection entitled "**Other…**". When you click on this selection, an ***Other** box* will be displayed. You can use this Other box to specify a value other than one of the selections displayed in the value list.
- For some of the value lists in Projecto, you can also override the values in a value list field by typing-in a value that is not one of the selections. You can also select a value from the value list and then edit it.

Any value list can easily be customized to change or add-to their initial range of selections. For instructions on how to accomplish this, contact Facility Wizards or your Facility Wizards distributor.

Almost all of the value lists in Projecto are read/write. That is, you can make a selection using the value list, and then view the selection in the value list after you made the selection. However, there are a few value lists in Projecto that are read-only. This means that although you can click on the value list and see its different selections, you cannot actually make the selection. In this manual, we call these *read-only value lists*, whereas we refer to the normal read/write type as just *value lists*. For each read-only value list, there is a corresponding value list on another screen that is read/write. So, the purpose of a read-only value list is just to remind you of what the valid selections are in the read/write value list on the other screen.

Checkboxes

A *checkbox* is a data field that indicates a single value that can be true or false. When the box is checked, the value is true; when the box is not checked, the value is false. These appear in several of Projecto's screens.

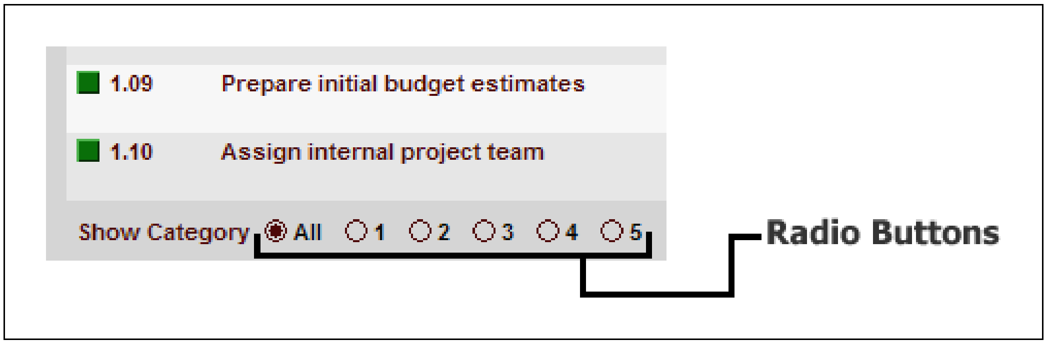


Example Checkboxes

Another type of checkbox in Projecto is the *read-only checkbox*. This checkbox displays its state as either checked of not checked. However, you cannot actually manipulate this checkbox, because this checkbox value is actually set internally by Projecto when another action is taken.

Radio Buttons

Radio buttons are data fields that exist in groups of two or more, and represent mutually exclusive values that can be true or false. That is, only one of the radio buttons can be set to true, and then all of the others will be automatically set to false. A radio button is true when the inner-circle of the radio button is filled-in to show a solid color.



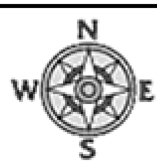
Example Radio Buttons

Almost all of the radio buttons in Projecto are read/write. However, in one of Projecto's screen's there is a set of radio buttons that are read-only, and which are set internally by Projecto when another action is taken. In this manual, we refer to these as *read-only radio buttons*, whereas we refer to the majority of radio buttons that are read/write as just *radio buttons*.

Container Fields

Container fields contain references to external image files, and each container field displays the image contained in its file. The container fields in Projecto are used to contain images that replace the Facility Wizards logo and name that appear at the top-left of each Projecto screen.

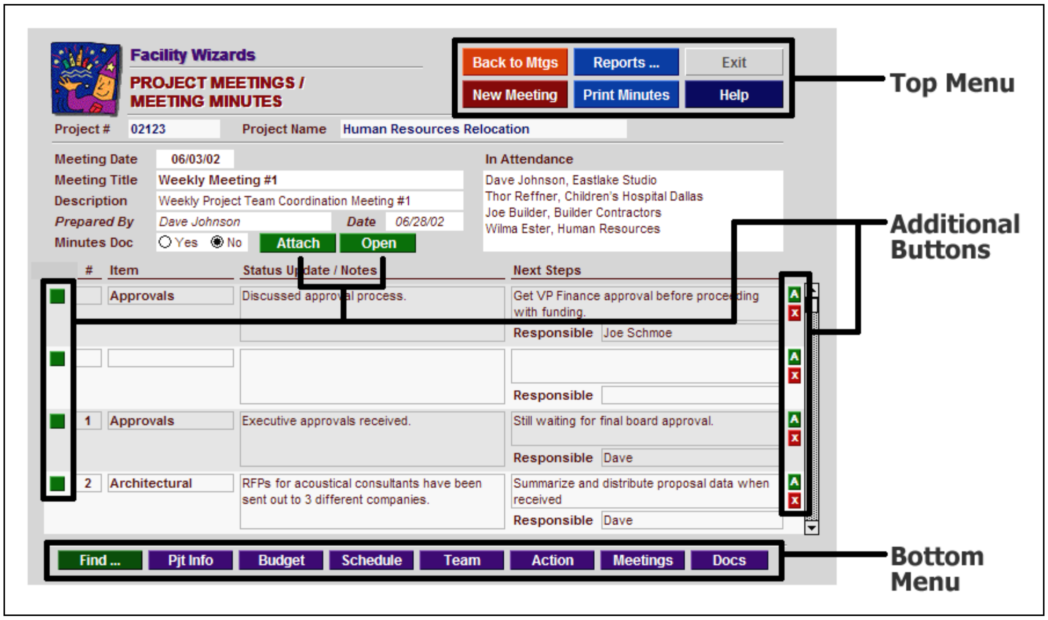
Images can be .BMP, .GIF, .JPG, .PICT, or .TIFF files. It's important to clarify that container fields do not actually contain the image files themselves. Instead, they contain references to the files. The image files still exist as separate disk files outside of Projecto.



For more information on changing the displayed screen images to images of your organization's logo and name, see Chapter 6 – Configuring Projecto.

3.1.2 Buttons and Menus

Buttons can be part of menus, and can be placed among the data fields that are contained in the screens. You click on the buttons to move among the various screens, and to perform various Projecto functions, for example, calculating a value or printing a report.



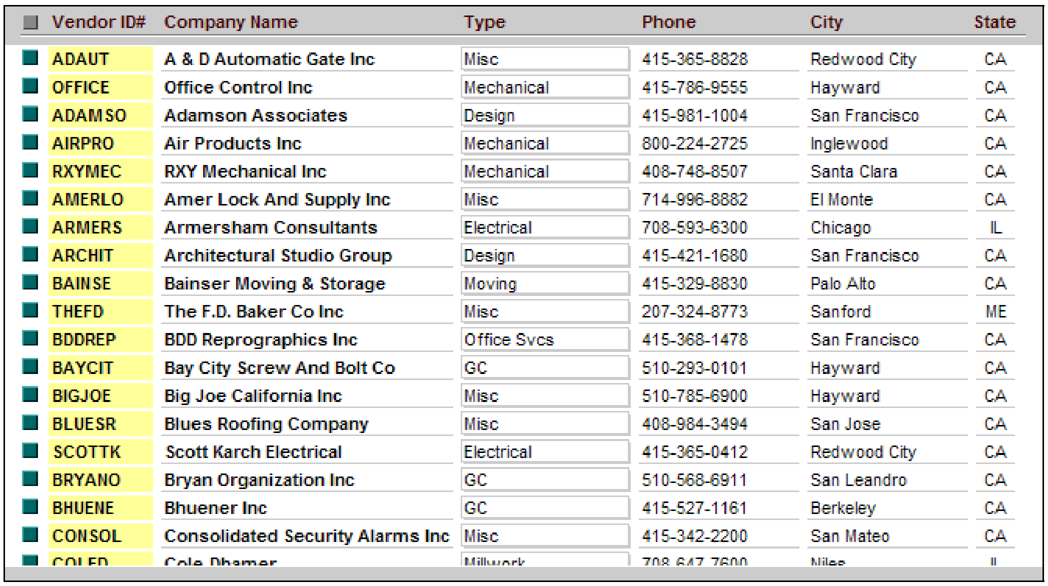
Projecto Top Menu, Bottom Menu, and Additional Buttons

Menus are simply groupings of buttons that appear in a consistent placement and format in Projecto's screens. As shown in the above screen image, most screens contain a *top menu* and a *bottom menu*. In addition, a few of Projecto's menus, such as in the Menu of Reports screen, take-up most of the screen area.

3.1.3 Data Presentation within Projecto Screens

To present your data, Projecto screens contain data fields, usually including a mix of the types and variations we described above (read/write character fields, checkboxes, etc.). The screens that contain data fields can also contain buttons among the data fields. All Projecto screens contain one or more menus.

Projecto presents your data in three different ways. The most basic of these is a *list display*. This lists the data fields in a tabular format, using rows and columns, with column headers. Each displayed row of data represents a record of data contained in one of Projecto's databases. There can also be one or more buttons within each row in the tabular display, which you use to execute various functions on the record.



Vendor ID#	Company Name	Type	Phone	City	State
ADAUT	A & D Automatic Gate Inc	Misc	415-365-8828	Redwood City	CA
OFFICE	Office Control Inc	Mechanical	415-786-9555	Hayward	CA
ADAMSO	Adamson Associates	Design	415-981-1004	San Francisco	CA
AIRPRO	Air Products Inc	Mechanical	800-224-2725	Inglewood	CA
RXYMEC	RXY Mechanical Inc	Mechanical	408-748-8507	Santa Clara	CA
AMERLO	Amer Lock And Supply Inc	Misc	714-996-8882	El Monte	CA
ARMERS	Armersham Consultants	Electrical	708-593-6300	Chicago	IL
ARCHIT	Architectural Studio Group	Design	415-421-1680	San Francisco	CA
BAINSE	Bainser Moving & Storage	Moving	415-329-8830	Palo Alto	CA
THEFD	The F.D. Baker Co Inc	Misc	207-324-8773	Sanford	ME
BDDREP	BDD Reprographics Inc	Office Svcs	415-368-1478	San Francisco	CA
BAYCIT	Bay City Screw And Bolt Co	GC	510-293-0101	Hayward	CA
BIGJOE	Big Joe California Inc	Misc	510-785-6900	Hayward	CA
BLUESR	Blues Roofing Company	Misc	408-984-3494	San Jose	CA
SCOTTK	Scott Karch Electrical	Electrical	415-365-0412	Redwood City	CA
BRYANO	Bryan Organization Inc	GC	510-568-6911	San Leandro	CA
BHUENE	Bhuener Inc	GC	415-527-1161	Berkeley	CA
CONSOL	Consolidated Security Alarms Inc	Misc	415-342-2200	San Mateo	CA
COLED	Cole Dhamer	Millwork	708 647 7600	Niles	IL

List Display Presenting Data In Tabular Format

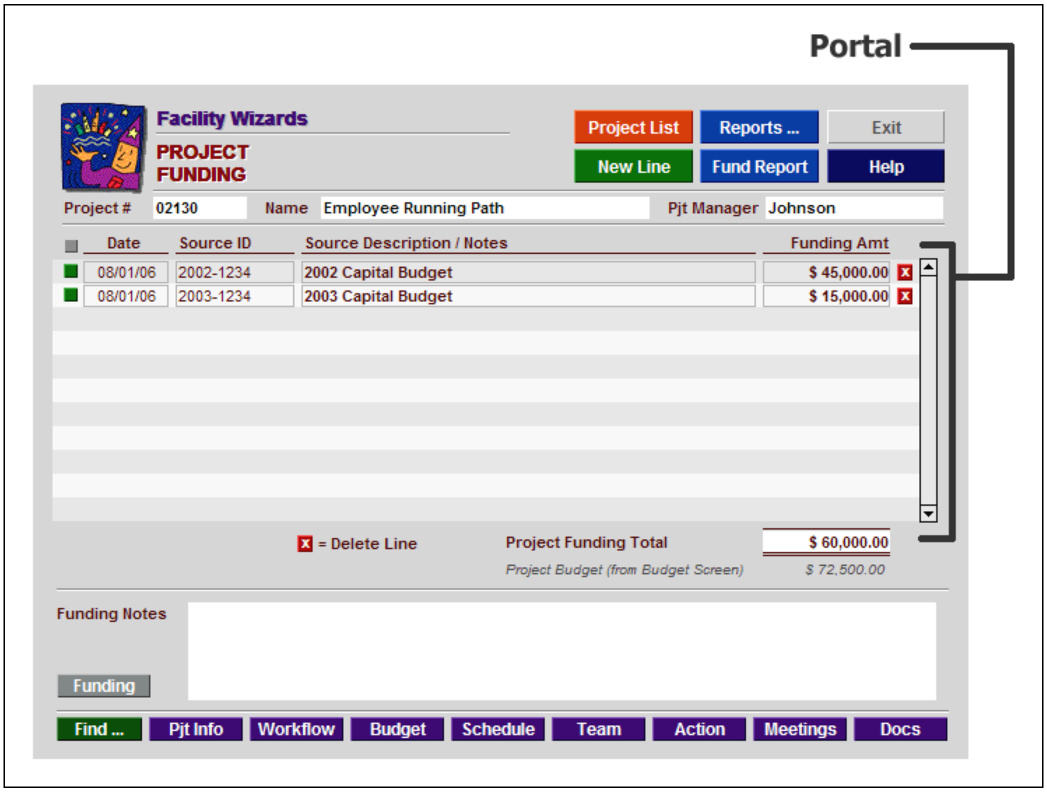
Another common type of presentation for your data is a *detail display*. As part of a screen, this organizes a record**,** or several different types of records, into data fields and groups of data fields that are meaningfully laid-out to create a form. The data fields and groups of data fields can be labeled data fields or unlabeled data fields. Like the list display, the detail display can also contain buttons.

Detail Display Presenting Form View of Data

The *portal* is another type of data presentation. This combines the detail display with the list display, providing a tabular list of data fields that is contained within a detail display. Also, like the list display

- There can also be one or more buttons within each row in the tabular display
- Each row of data fields corresponds to a record contained in one of Projecto databases

Each portal contains a scroll-bar that lets you scroll through the records shown in the portal.



Portal within Detail Display

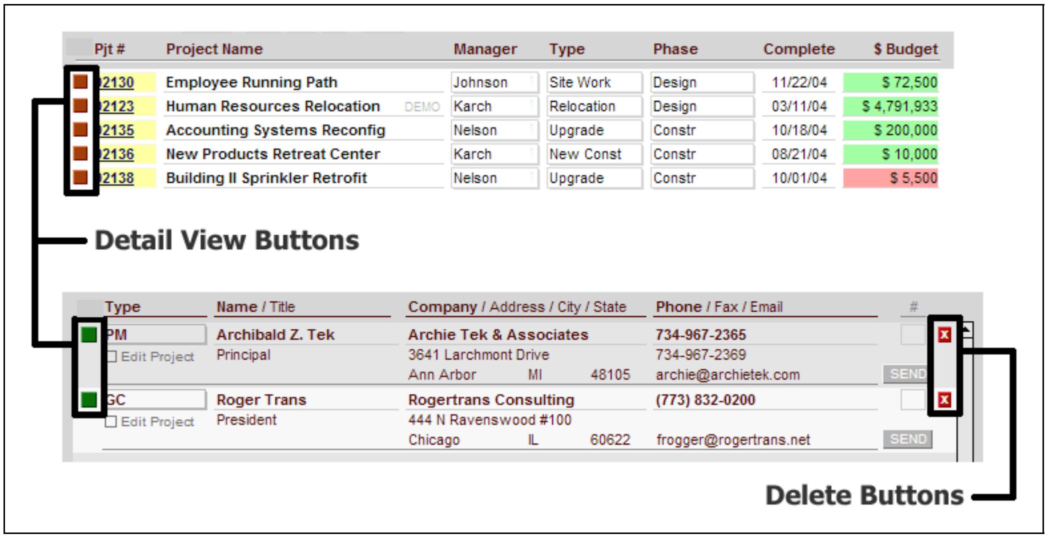
Simply stated, a portal shows a list of related records displayed within a detail display. For example, as shown in the above screen image, the portal shows the sources and amounts of funding for a capital project. Note that there are also buttons in this portal. We'll explain the purpose of these buttons next.

3.1.4 More on Projecto Buttons

In this subsection we'll describe some additional details about some of Projecto's buttons that are positioned among the data fields in Projecto's screens. You should be familiar with this to better understand the purpose of each of Projecto's screens (which we'll cover in Chapter 4 – Using Projecto). The specific buttons we need to discuss are:

Detail View Button

Some of the list displays and portals in Projecto's screens contain a *detail view button*. This will be displayed in the first column within these tabular types of displays. The detail view button, which appears on each row, lets you expand that record, taking you to another screen that presents a detail display of your data.



Detail View Buttons and Delete Buttons

Delete Button

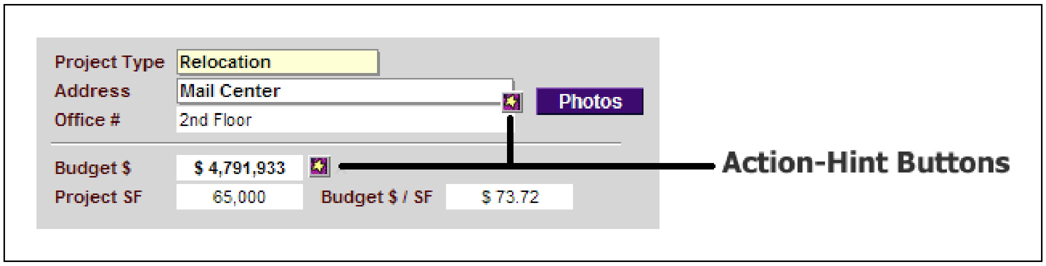
Some of the portals in Projecto's screens also contain a *delete button*. This will appear in the last column within these tabular types of displays. The delete button for each row lets you delete that record.

Once you delete a record you cannot get it back (except by reentering the data or loading the last backup of the Projecto data). Be careful to make sure that you actually do want to perform the deletion operation before you click a delete button.

Action-Hint Buttons

Action-hint buttons are also displayed on some of Projecto's screens, usually appearing next to one or several data fields. Each of these buttons serves one of two purposes:

- Lets you execute some infrequently used function relating to the field or fields that the action-hint button is next to
- Displays a dialog box that gives you additional, clarifying information, telling you how to properly use the field or fields that the button is next to

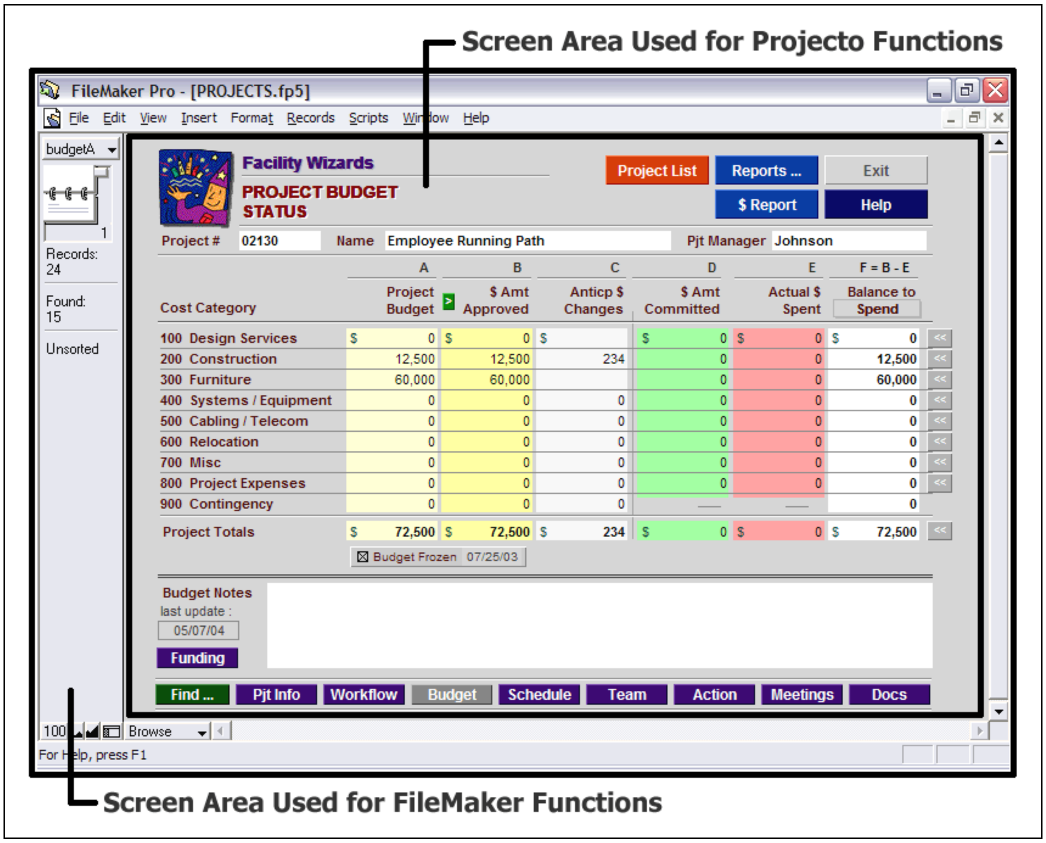


Action-Hint Buttons

3.2 FileMaker Operations

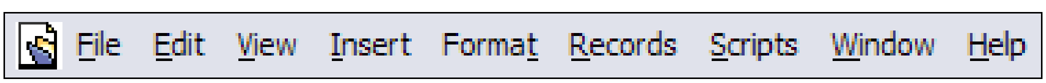
Projecto is implemented using *FileMaker*, a leading database and application development platform. Using FileMaker's rich set of capabilities, Facility Wizards has developed Facility Management software that is simple and intuitive, and at the same time is powerful, with the ability to handle demanding Facility Management requirements.

Because this software has been implemented using FileMaker, there are some FileMaker functions you will need to be able to use in order to successfully use Projecto. Like all parts of Projecto, these functions are easy to learn. To get started, let's distinguish between the display area that is used to display Projecto's screens (containing Projecto's menus, data fields, and buttons among the fields), and the display area that is used to perform FileMaker functions:



Display Areas used for FileMaker Functions and for Projecto Functions

As shown in this image, there are two distinct portions of the display area that is used to perform FileMaker functions: these contain the *FileMaker menu* and the *FileMaker status bar*. The FileMaker menu is like the application menu found in many Windows and Macintosh software applications. There are only a few operations that you will perform using the FileMaker menu; most Projecto operations are accomplished using Projecto's menus and the other buttons that are contained in Projecto's screens. Here's a close-up of the FileMaker menu:



FileMaker Menu

The FileMaker status bar contains a *record marker* that is useful for moving between your records, as well as displaying a count of how many total records you have. The FileMaker status bar also contains buttons that allow you to change the magnification of your screen, and a button that lets you toggle on or off the part of the status bar containing the record marker and record count. Also important, the status bar contains a button that tells you what *FileMaker mode* you are in, and allows you to switch modes (FileMaker modes are discussed below). Here's a close-up of the FileMaker status bar:

FileMaker Status Bar

3.2.1 FileMaker Modes

FileMaker has four modes: *Browse mode*, *Find mode*, *Preview mode*, and *Layout mode*. Layout mode will rarely be used by a Projecto user (it is used for customizing Projecto). The other three modes, however, are key for your day-to-day use of Projecto. You will find yourself toggling between these modes often, and it's important to know what each mode does. Within each FileMaker mode you have certain capabilities:

Browse Mode

You use Browse mode to normally view, enter, and edit data. This is the default mode that is in effect when you enter Projecto, and usually you will not need to tell Projecto to switch into Browse mode. If, during your work, you find that you cannot view or enter data, then probably your Projecto system has been accidentally placed in another mode, and you will need to switch back into Browse mode.

To switch to Browse mode use the shortcut:

Windows: CONTROL + B

Macintosh: MacCOMMAND + B

Find Mode

Find mode lets you locate a record or a group of records. You will only be in Find mode when you switch into it, and up until you retrieve your records. We refer to these operations as *Find* operations (this is discussed in more detail later in this chapter).

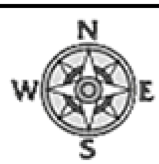
Preview Mode

Preview mode lets you view a report prior to printing. This is valuable because it allows you to see what the printed page will look like, letting you make sure that your desired information is contained in the report.

To switch to Preview mode, use the shortcut:

Windows: CONTROL + U

Macintosh: MacCOMMAND + U



Reports are covered later in this manual, in Chapter 5 – Projecto Reports.

3.2.2 Entering and Editing Data

Entering and editing data couldn't be easier using Projecto's read/write data fields. For character fields, you simply type in your data. To edit data, you simply either type over the existing data, or delete the existing data and type in your new data. For checkboxes and radio buttons, you just click the checkbox or radio button to change it to the setting you desire.

As a reminder, value lists are data fields in which there is a predefined set of values to select from. To enter data into a value list, you simply click on the field and select the desired value.

3.2.3 Find Operations

You use Find mode to retrieve a record or a group of records. To locate one or more records, you switch into Find mode from the FileMaker status bar, enter your Find criteria into one or more data fields, and then execute the Find operation by pressing the Return Key. In a list display or a portal, the retrieved records will be displayed; in a detail display, one of the records will be displayed (the detail display only displays one record at a time), and the other found records are also available for viewing and editing.

As a result of a Find operation, the number of records found will be shown in the record marker in the status bar. Also, in a detail display, you can use the record marker to move between the found records.

Find operations are important for viewing a desired subset of your Projecto data. You can also use Find operations to create a report. In this case, you first perform a Find to locate the records you want to appear in the report, and then you create and print the report.

To switch to Find mode use the shortcut:

Windows: CONTROL + F

Macintosh: MacCOMMAND + F

Find can be repeated to refine the last executed Find operation. This means that you can do an initial Find to locate a group of record**s**, and then based on your examination of those records, you can perform another Find operation with more limiting criteria, further narrowing the set of returned record**s.** You can repeat this procedure as many times as necessary to get just the records you need.

For Find operations, the status bar contains a button that lets you include logical operators and pattern-matching operators in the fields. Once you learn the meaning of these symbols, you can optionally just type them into the fields instead of using the button. These symbols give you the ability to do things like Find projects that are managed by a particular project manager, or Find a specific vendor that contributes to your organization's capital projects. The symbols that you can use for Find operations are:

<	less than
<=	less than or equal
>	greater than
>=	greater than or equal
=	exact match
…	numeric range
!	Duplicates
//	today's date
@	one character
*	zero or more characters
““	literal text

When in Find mode, the status bar also contains an ***Omit** button*. This lets you omit the records that were found, based on your Find criteria. This has the effect of returning all the records in your data except the records found by your criteria. In other words, this has the opposite effect of performing a normal find, as we described above.

Most Projecto screens also contain a bottom menu that includes a ***Find** button*. This button does the same thing as selecting the ***Find** mode button* that is part of the FileMaker display area.

3.2.4 Sorting Records

Sort operations determine the order in which you view your records. You can sort and view them in numerical order, alphabetical order, or by date. For the tabular types of data displays (list displays and portals), you can sort the records quickly by clicking a column heading. You can also perform a more complex sort by executing the **Records>Sort** command from the FileMaker menu. This displays the dialog box that lets you define a sort order using any of the data fields, including two or more data fields, as well as giving you full control over all other sort parameters.

Sort operations also work with Find operations, and with reports. If you execute a Find, and then perform a sort of your data, then just your found records will be sorted; if you perform a sort prior to creating a report, then (given that the report is intended to operate on the data you have sorted) the report will contain your data in the sorted order.

To perform a complex sort:

Windows: CONTROL + S

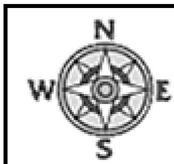
Macintosh: MacCOMMAND + S

3.2.5 Spelling Correction

Another useful FileMaker function that is available in Projecto is spelling correction. To check and correct spelling, select **Edit>Spelling** from the FileMaker menu. This function gives you the choice of checking all of your data, the current record, an individual data field, or even just the selected text within a field.

3.2.6 Printing

The **File**>**Print** selection from the FileMaker menu prints the record or records that are displayed on your screen. However, generally, instead you will want to use Projecto's printing capabilities. These consist of a ***Print*** *button* that is part of the top menu on many Projecto screens, and Projecto's reporting capability.



The use of the top menu's **Print** button is described for each screen in Chapter 4 – Section 4.2 – Projecto Screens in Detail; Projecto's reporting capability is described in Chapter 5 – Projecto Reports.

3.2.7 Exporting Data

You can also use a FileMaker function to export data from Projecto. To do this, use the **File>Export** selection from the FileMaker menu. This displays a dialog box that lets you specify the record fields to be exported, as well as the output file format. The output options include Comma-Separated Value (.csv), database File (.dbf), and eXtensible Markup Language (.xml). Export operations also will export only the records found by Find operations.

Chapter 4 Using Projecto

In the previous chapters we described Projecto's major features, and the parts of Projecto's user interface: its data fields, buttons, menus, and display types, as well as FileMaker's functions. In this chapter, we'll expand on these topics to walk through Projecto's user interface in detail, and to show you how to use Projecto to perform capital project management tasks.

> Projecto's reports are not covered in this chapter, and instead are covered in their own chapter: Chapter 5 – Projecto Reports.

4.1 Overview of Projecto Screens

Projecto's screens present your data using data fields, and also display menus and buttons that you use to execute the software's functions and to navigate between the screens. The next section covers each of Projecto's screens used for managing capital projects. However, it's a good idea to first give you a high-level perspective of Projecto's screens, including the relations between the screens, and Projecto's databases and records that we defined earlier in Chapter 2. The following two tables lists these screens.

This first table lists Projecto's screens that you use to access Projecto's databases, and the records within the databases:

Screen	Databases	Records
– *Project List screen* – *New Project screen* – *General Project Information screen* – *Change Project Number screen* – *Project Photos screen* – *Project Photo Detail screen* – *Project Workflow/Checklist screen* – *Project Checklist/Detail screen* – *Project Budget Status screen* – *Project Funding screen* – *Project Budget/ Approvals screen* – *Anticipated Costs screen* – *Anticipated Cost Detail screen*	Projects database	– Project records – Project Image records – Workflow/Checklist records – Schedule Phase records – Funding records – Budget records – Anticipated Cost records – Team Member/Contact records – Note/Action Item records – Meeting records – Meeting Minutes records – Document records

– *Project Schedule screen* – *Project Team screen* – *Project Contact screen* – *Project Notes/Action Items screen* – *Project Meetings/Meeting Minutes screen* – *Project Meeting Minutes screen* – *Project Documents screen* – *Action Items screen*		
– *Vendor List screen* – *Vendor Data screen*	Vendors database	– Vendor records
– *Project Cost Tracking screen*	Cost Tracking database	– Cost records
– *Project Cost Detail screen*	Cost Tracking database	– Cost records
	Projects database	– Change Order Detail records
– *Pick Cost Account screen* – *Cost Account Categories screen* – *Chart of Cost Accounts screen*	Cost Accounts database	– Cost Account records
– *Project Schedule Default Items screen* – *Project Workflow Default Items screen* – *Building List screen* – *Department List screen* – *System User List screen* – *System User List Passwords screen*	Setup and Defaults database	– Default Workflow/Checklist records – Default Schedule Phase records – Primary Facility Location records – Department records – User records

This table lists additional Projecto screens that do not directly affect one of Projecto's databases:

Screen	**Purpose**
Main Menu screen	Main switchboard for accessing all of Projecto's features and functions. Provides access to the Projects database, Vendors database, Cost Tracking database, and Cost Accounts database

Project Help screen	Provides question and answer help for Projecto
Project Cost Tracking Help screen	Provides help for Projecto's cost tracking feature
Projecto System Diagram screen	Displays a diagram showing the major Projecto system elements
Custom Projecto Interfaces screen	Displays a diagram showing the Projecto's custom interfaces
Menu of Reports screen	Provides access to Projecto's reports
Bar Chart Report Setup screen	Sets-up parameters for Projecto's Bar Chart reports
Projecto Setup/Customization screen	Provides access to Projecto's setup and configuration settings
Projecto Backup screen	Provides access to Projecto's function for performing automatic backups of database files

Most of these screens (in the above tables) are covered in this chapter, next, in Section 4.2 – Projecto Screens in Detail. The screens that are not covered in this chapter are covered later, as follows:

- These screens are covered in Chapter 5 – Projecto Reports:
  - Menu of Reports screen
  - Bar Chart Report Setup screen
- These screens are covered in Chapter 6 – Section 6.1 – Software Configuration and Preparation Screens:
  - Projecto Setup/Customization screen
  - Project Schedule Default Items screen
  - Project Workflow Default Items screen
  - Building List screen
  - Department List screen
  - System User List screen
  - System User List Passwords screen
  - System Preferences/Settings screen
  - Projecto Backup screen

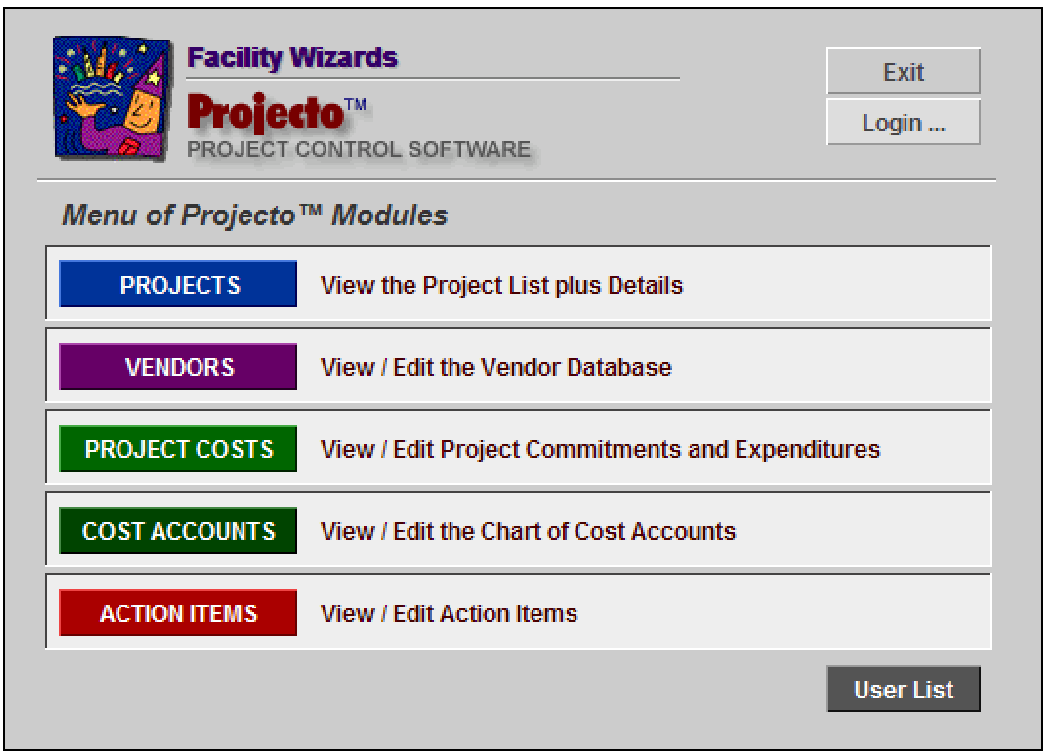
4.2 Projecto Screens in Detail

Now we're into the details of Projecto features and functions. The best way to gain a comprehensive understanding of Projecto is to review each of Projecto's screens, and each screen's menus, data fields, and buttons. We'll start with the Main Menu screen:

In this section, we'll walk through most of Projecto's screens. We'll accomplish this by first showing an image of the screen. Then, when applicable, we'll walk through (1) the screen's top menu, (2) the screen's data fields and buttons, and (3) the screen's bottom menu. We'll often also show additional images of parts of a screen to further clarify a screen's description.

MAIN MENU SCREEN

The Main Menu screen is at Projecto's top level. From this screen you can get to all of Projecto's features and functions. This screen consists of the *main menu* itself, and a top menu and bottom menu.



Main Menu Screen

Top Menu

The Main Menu screen's top menu contains these buttons:

- **Exit** [button] – Ends the Projecto session
- **Login** [button] – Provides user name and password authentication for logging-into a multi-user client-server Projecto installation

Main Menu Buttons

The main menu portion of the Main Menu screen contains these buttons:

- **PROJECTS** [button] – Goes to the Project List screen, providing access to the Projects database
- **VENDORS** [button] – Goes to the Vendor List screen, providing access to the Vendors database
- **PROJECT COSTS** [button] – Goes to the Project Cost Tracking screen, providing access to the Cost Tracking database
- **COST ACCOUNTS** [button] – Goes to the Cost Account Categories screen, providing access to the Cost Accounts database
- **ACTION ITEMS** [button] – Goes to the Action Items screen, providing access to action items for all projects

Bottom Menu

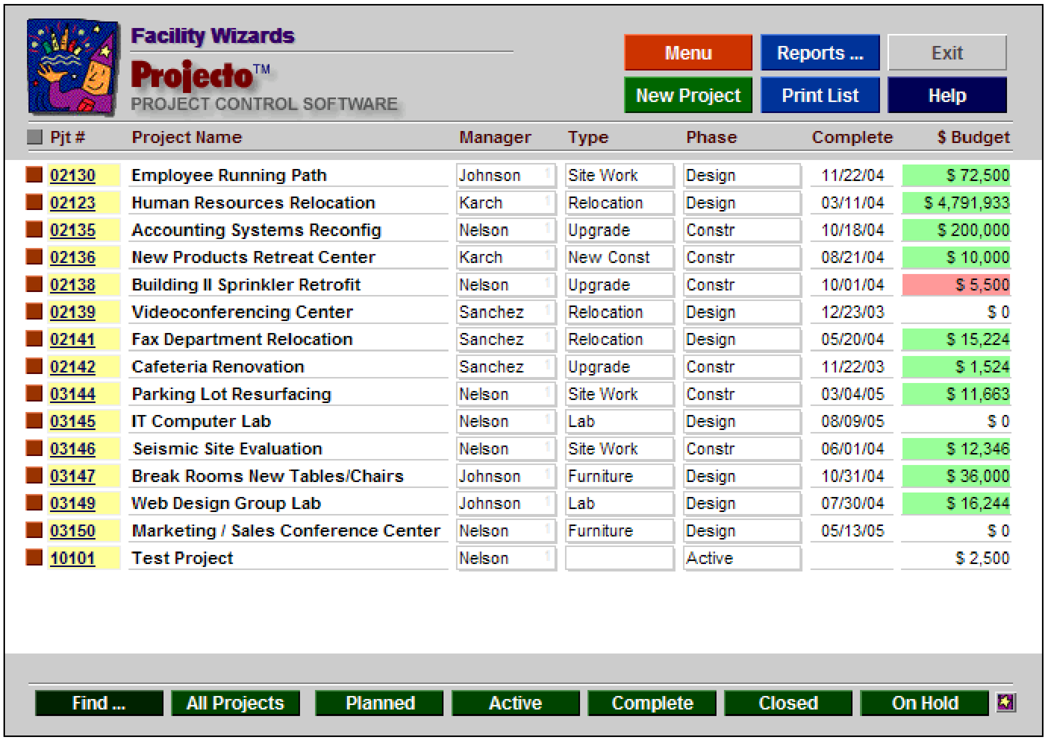
The Main Menu screen's bottom menu contains these buttons:

- **User List** [button] – For a multi-user client-server Projecto installation, goes to the System User List screen, providing access to Projecto user and authorization data

PROJECT LIST SCREEN

The Project List screen lets you access your organization's capital projects. From this screen you can navigate to the screens providing detailed project information.

This screen presents your data using a list display, displaying a Project record for each project. The Project List screen also has a top menu and bottom menu.



Project List Screen

Top Menu

The Project List screen's top menu contains these buttons:

- **Menu** [button] – Goes back to the Main Menu screen
- **New Project** [button] – Creates a new project, and goes to the General Project Information screen, standing-by for data entry
- **Reports** [button] – Goes to the Menu of Reports screen
- **Print List** [button] – Prints a Project List report listing the projects stored in Projecto
- **Exit** [button] – Ends the Projecto session
- **Help** [button] – Goes to the Project Help screen

Data Fields and Buttons

The main portion of the Project List screen has these data fields and buttons:

- [detail view button] – Goes to the General Project Information screen for the project
- **Pjt #** [button enabled character field] – Project ID. When selected, Projecto goes to the General Project Information screen for the project (selecting this field behaves exactly the same as selecting the detail view button).
- **Project Name** [read/write character field] – Project name
- **Manager** [read/write character field] – Project manager
- **Type** [value list] – Project type. Selections include "**New Const**", "**Renovation**", etc.

- **Phase** [value list] – Current phase that the project is in
- **Complete** [read-only date field] – Project completion date
- **$ Budget** [read-only character field] – Overall project budget amount

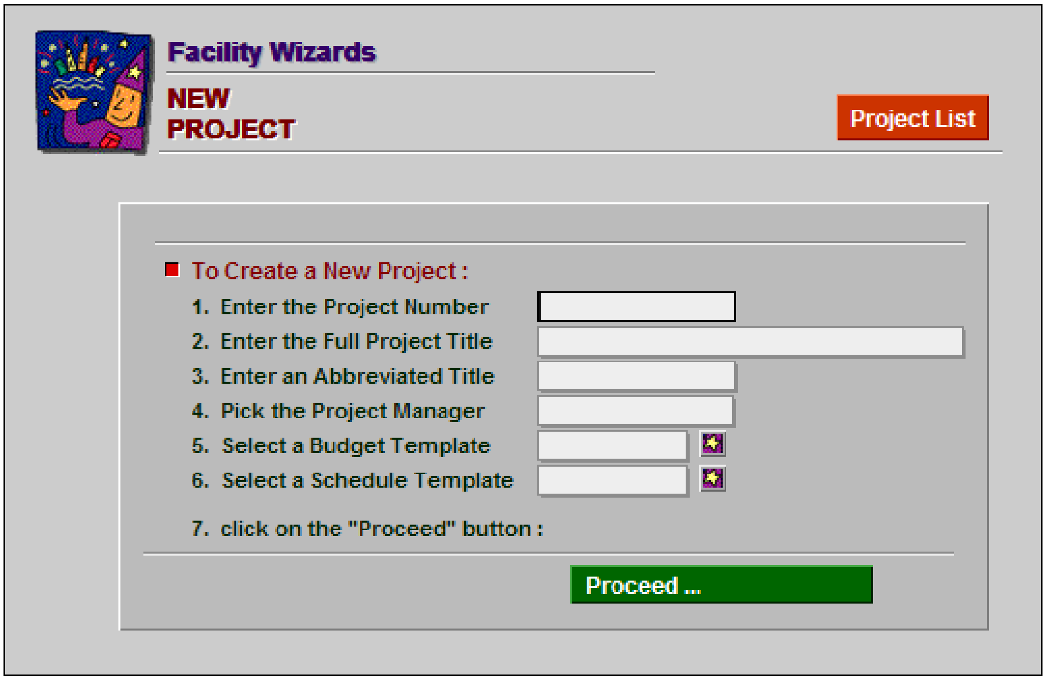
Bottom Menu

The **Project List screen's** bottom menu contains these buttons:

- **Find** [button] – Switches into Find mode, allowing projects to be found
- **All Projects** [button] – Causes all projects to be displayed
- **Planned** [button] – Causes only Planned projects to be displayed
- **Active** [button] – Causes only Active projects to be displayed
- **Complete** [button] – Causes only Complete projects to be displayed
- **Closed** [button] – Causes only Closed projects to be displayed
- **On Hold** [button] – Causes only On-Hold projects to be displayed

NEW PROJECT SCREEN

Use the New Project screen to create a new project. Using this screen, you specify data that includes the project ID and a project name. This screen is a simple detail display with a top menu.



New Project Screen

Top Menu

The New Project screen's top menu contains this button:

- **Project List** [button] – Goes back to the Project List screen

Data Fields and Buttons

The main portion of the New Project screen has these data fields and buttons:

- **1. Enter the Project Number** [read/write character field] – Project ID
- **2. Enter the Full Project Title** [read/write character field] – Project name
- **3. Enter an Abbreviated Title** [read/write character field] – An abbreviated project name
- **4. Pick the Project Manager** [value list] – Project manager

- The list of project managers in the **Pick the Project Manager** value list is defined using the System User List screen. This screen is covered in Chapter 6 – Section 6.1 – Software Configuration and Preparation Screens – SYSTEM USER LIST SCREEN.
- For standalone Projecto installations, the **Pick the Project Manager** value list can be easily manually populated with the names of your organization's project managers. Contact Facility Wizards or your Facility Wizards distributor for information on how to do this.

- **5. Select a Budget Template** [value list] – The Budget Template to use. There are three available Budget Templates: "**Small**", "**Medium**", and "**Large**". This determines the cost accounts that will be available to the project.
- **6. Select a Schedule Template** [value list] **–** The Schedule Template to use. There are three available Schedule Templates: "**Small**", "**Medium**", and "**Large**". This determines the beginning schedule phases that are loaded into Projecto's schedule (as shown in the Project Schedule screen).

- The cost accounts that belong to a particular Budget Template are set using the Chart of Cost Accounts screen. This screen is described later in this chapter.
- The default schedule phases that belong to a particular Schedule Template are set using the Project Schedule Default Items screen. This screen is described in Chapter 6 – Section 6.1 – Software Configuration and Preparation Screens – PROJECT SCHEDULE DEFAULT ITEMS SCREEN.

- **Proceed** [button] – Creates the new project

The New Project screen does not have a bottom menu.

GENERAL PROJECT INFORMATION SCREEN

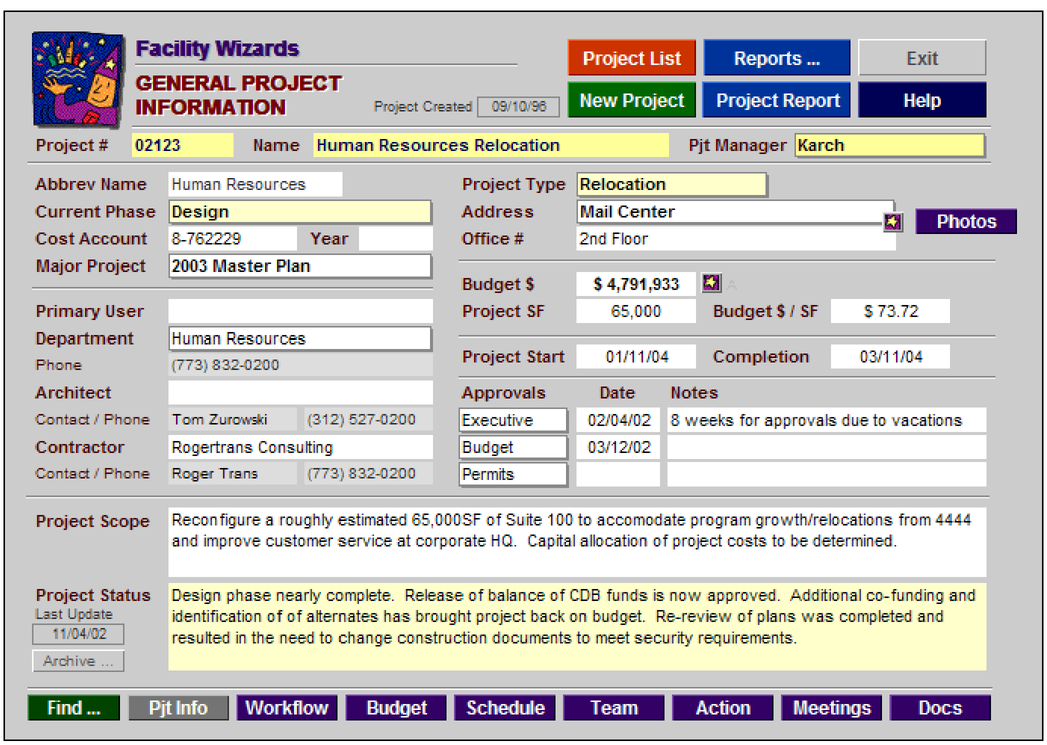
The General Project Information screen lets you view, enter, and edit general information about one of your organization's projects. The data contained in this screen includes:

- Project Name
- Project manager
- Project scope
- Facility location affected by the project
- Project budget
- Project start and completion
- Project approvals

From each project screen you can navigate to all of the other project screens that provide additional project information, consisting of the Project's:

- Workflow/Checklist
- Budget
- Schedule
- Team/contacts
- Action items
- Meetings and meeting minutes
- Documents

The General Project Information screen presents your data using a detail display, and has a top menu and bottom menu.



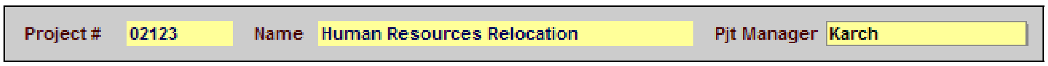
General Project Information Screen

Top Menu

The General Project Information screen's top menu contains these buttons:

- **Project List** [button] – Goes back to the Project List screen, providing access to all projects
- **New Project** [button] – Creates a new project, and stands-by for data entry to the new project
- **Reports** [button] – Goes to the Menu of Reports screen
- **Project Report** [button] – Prints a Project Summary Sheet report, which provides a summary of the project's scope, budget, and status. This button first displays a dialog box, allowing an optional project schedule to also be printed.
- **Exit** [button] – Ends the Projecto session
- **Help** [button] – Goes to the Project Help screen

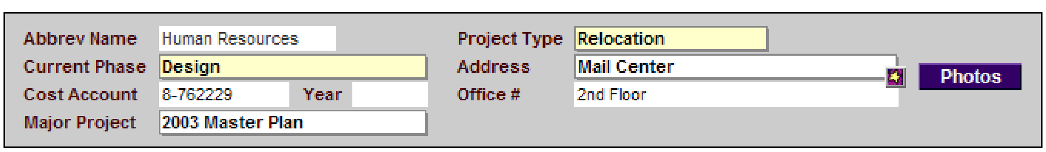
Data Fields and Buttons



Use this part of the General Project Information screen to view the project ID and project name for the project. It has these data fields and buttons:

- **Project #** [button enabled character field] – Project ID. Selecting this field displays a dialog box that leads to the Change Project Number screen, enabling the project ID to be changed.
- **Project Name** [read/write character field] – Project name
- **Pjt Manager** [value list] – Project manager

- The list of project managers in the **Pjt Manager** value list is defined using the System User List screen. This screen is covered in Chapter 6 – Section 6.1 - Software Configuration and Preparation Screens – SYSTEM USER LIST SCREEN.
- For standalone Projecto configurations, the **Pjt Manager** value list can be easily manually populated with the names of your organization's project managers. Contact Facility Wizards or your Facility Wizards distributor for information on how to do this.



Use this part of the General Project Information screen to access basic project information. It has these data fields and buttons:

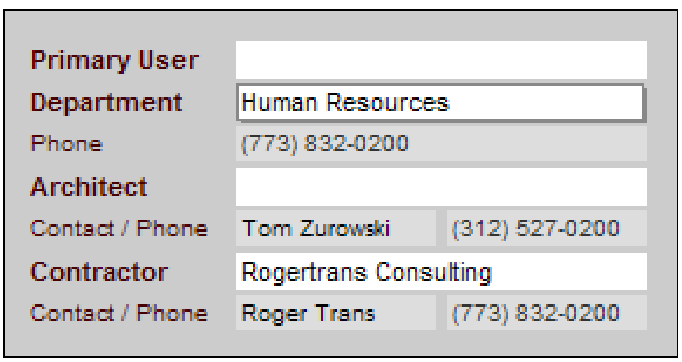
- **Abbrev Name** [read/write character field] – Abbreviated project name
- **Current Phase** [value list] – Current schedule phase that the project is in
- **Cost Acct** [aaaa] – Cost account for project costs
- **Year** [read/write character field] – Year in which the project costs will be charged to the cost center

- **Major Project** [value list] – Name of an overarching major project that this project belongs to
- **Project Type** [value list] – Project type. Selections include “**New Const**”, “**Renovation**”, etc.
- **Address** [value list] – Primary Facility Location where the project work is being done
- **Office #** [read/write character field] – Secondary Facility Location where the project work is being done

The **Building** field is Projecto’s *Primary Facility Location field* and the **Location** field is Projecto’s *Secondary Facility Location field.* Using Projecto’s setup and customization feature, the labels for these fields can be changed. For example, the Primary Facility Location field can be changed to “**Campus**”, and the Secondary Facility Location field can be changed to “**Building**”.

The use of Projecto’s setup and customization feature, for setting these Primary and Secondary Facility Location fields, is covered in Chapter 6 – Section 6. 1 – Software Configuration and Preparation Screens – PROJECTO SETUP/CUSTOMIZATION SCREEN.

- [action-hint button] between the **Building** and **Location** fields – Provides help on using the Primary and Secondary Facility Location fields
- **Photos** [button] – Goes to the Project Photos screen, providing access to any project related images



Use this part of the General Project Information screen to access information about the project’s user, affected department, architect, and contractor. It has these data fields and buttons:

- **Primary User** [read/write character field] – Person who is the primary user of the result of the project
- **Department** [value list] – Organizational department that is the primary user of the result of the project
- **Phone** [read/write character field] – Phone number of the person or department that is the primary user of the result of the project
- **Architect** [read/write character field] – Architect responsible for the design of the work being performed by the project
- **Contact** (for **Architect**) [read/write character field] – Name of the architect’s contact person

- **Phone** (for **Architect**) [read/write character field] – Phone number of the architect's contact person, or of the architecture firm
- **Contractor** [read/write character field] – Contractor responsible for the work being performed by the project
- **Contact** (for **Contractor**) [read/write character field] – Name of the contractor's contact person
- **Phone** (for **Contractor**) [read/write character field] – Phone number of the contractor's contact person, or of the contracting firm

Use this part of the General Project Information screen to access the project's overall budget amount, and the square footage area affected by the project. It has these data fields and buttons:

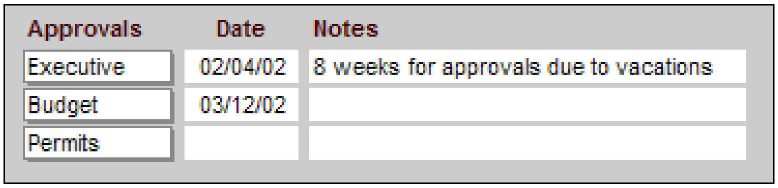
- **Budget $** [read-only character field] – Overall project budget amount
- [action-hint button] next to **Budget $** field – Imports the **Budget $** amount from either the total original budget amount or the total approved budget amount from the Project Budget Status screen. First displays a dialog box for making this selection.
- **Project SF** [read/write character field] – Facility square footage area affected by the project
- **Budget $ / SF** [calculated character field] – Budget amount per square footage area affected by the project

Use this part of the General Project Information screen to access the overall project timeframe. It has these data fields and buttons:

- **Project Start** [read/write date field] – Project start date
- **Completion** [read/write date field] – Project completion date

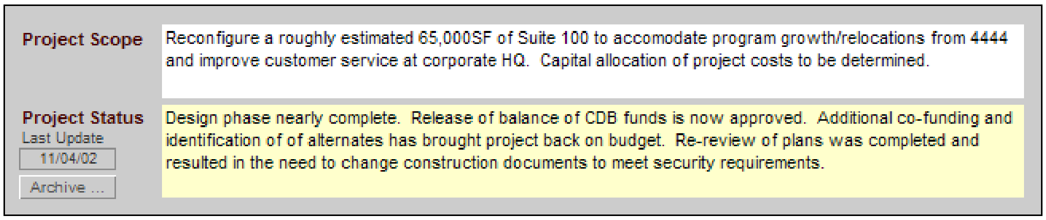
Projecto normally calculates the dates in the **Project Start** and **Completion** fields from the project's schedule phases, which you enter using the Project Schedule screen. However, you can override these calculated values by typing a date directly into either, or both of, the **Project Start** and **Completion** fields. When you do this, two asterisks (**) are displayed in each affected field.

The Project Schedule screen is described later in this chapter.



Use this portion of the General Project Information screen to enter and view project approvals. It has these data fields and buttons:

- **Approvals** [3 value lists] – Type of approval. Selections include "**Executive**", "**Budget**", etc.
- **Date** [3 read/write date fields] – Approval date
- **Notes** [3 read/write character fields] – Any notes regarding the approval



Use this part of the General Project Information screen to access descriptions of the project's scope and status. It has these data fields and buttons:

- **Project Scope** [read/write character field] – Summary of the scope of the work being done by the project
- **Project Status** [read/write character field] – Summary of the current status of the project
- **Last Update** [read/write date field] – Date the **Project Status** field was last updated
- **Archive** [button] – Archives the current project status description in the **Project Status** field, allowing the project history to be reviewed

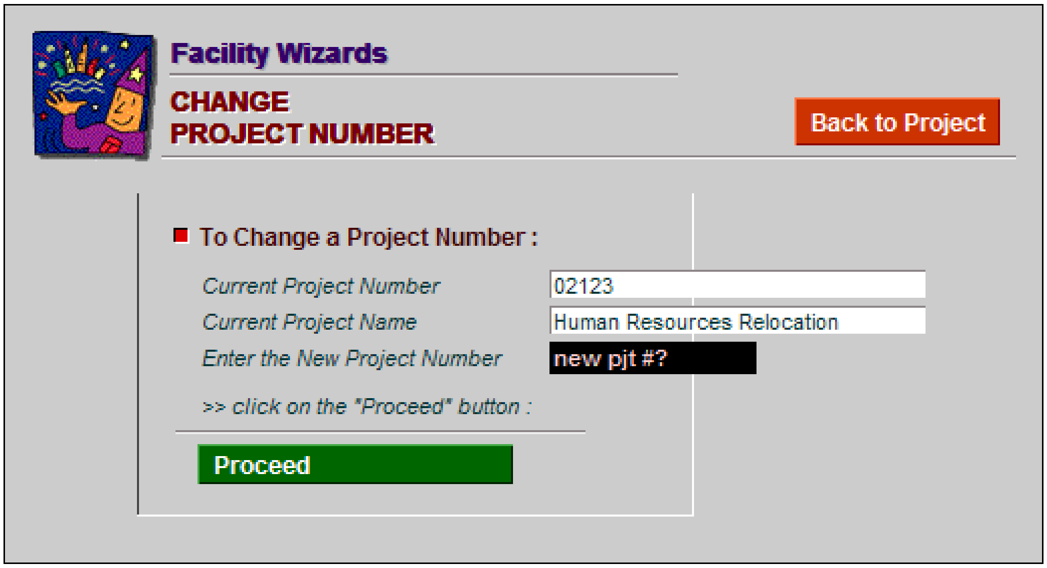
Bottom Menu

The General Project Information screen's bottom menu contains these buttons:

- **Find** [button] – Switches into Find mode, allowing projects to be found
- **Workflow** [button] – Goes to the Project Workflow/Checklist screen
- **Budget** [button] – Goes to the Project Budget Status screen
- **Schedule** [button] – Goes to the Project Schedule screen
- **Team** [button] – Goes to the Project Team screen
- **Action** [button] – Goes to the Project Notes/Action Items screen
- **Meetings** [button] – Goes to the Project Meetings/Meeting Minutes screen
- **Docs** [button] – Goes to the Project Documents screen

CHANGE PROJECT NUMBER SCREEN

Use the Change Project Number screen to change a project's ID. This is a detail display with a top menu.



Change Project Number Screen

Top Menu

The Change Project Number screen's top menu contains this button:

- **Back to Project** [button] – Goes back to the General Project Information screen

Data Fields and Buttons

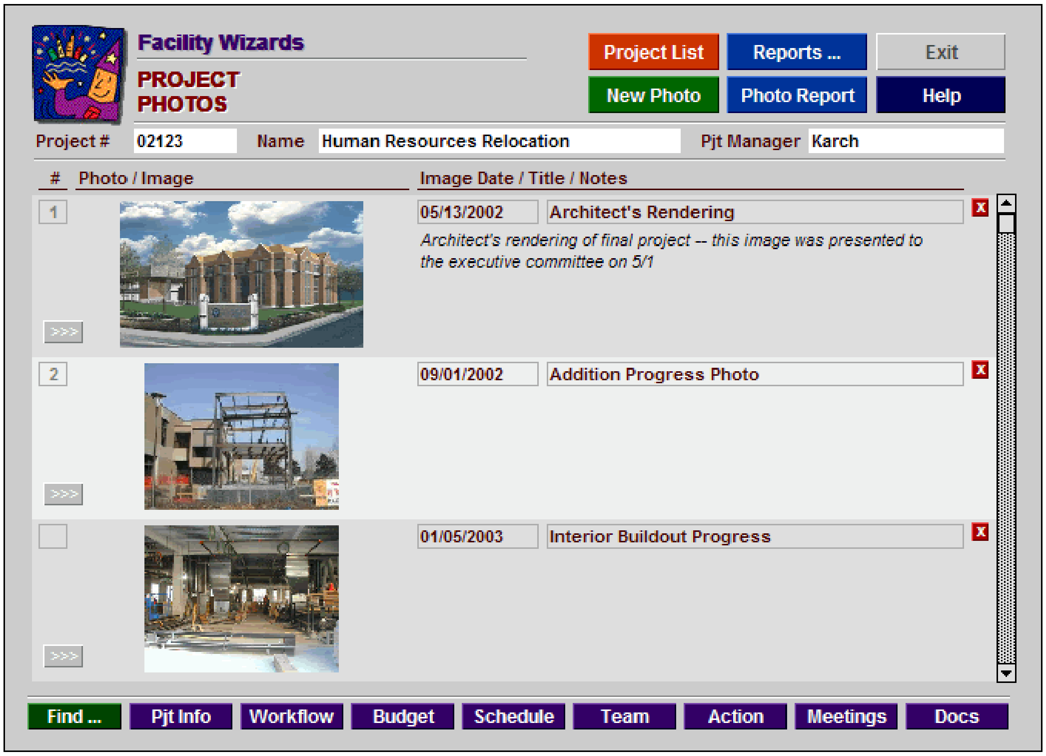
The main portion of the Change Project Number screen has these data fields and buttons:

- **Current Project Number** [read-only character field] – Current project ID before the change
- **Current Project Name** [read-only character field] – Project name
- **Enter the New Project Number** [read/write character field] – New project ID
- **Proceed** [button] – Changes the project ID

The Change Project Number screen does not have a bottom menu.

PROJECT PHOTOS SCREEN

The Project Photos screen lets you view, enter, and change project related images such as photos of your organization's facilities and architect's drawings. This screen presents your data using a detail display, with a large portal that displays a Project Image record for each project image. The Project Photos screen also has a top menu and bottom menu.



Project Photos Screen

Top Menu

The Project Photos screen's top menu contains these buttons:

- **Project List** [button] – Goes to the Project List screen, providing access to the Projects database
- **New Photo** [button] – Creates a new Project Image record, and stands-by for data entry. Paste the image file into the **Photo/Image** container field in order to attach it and display it.
- **Reports** [button] – Goes to the Menu of Reports screen
- **Photo Report** [button] – Prints a Photo report showing the project images
- **Exit** [button] – Ends the Projecto session
- **Help** [button] – Goes to the Project Help screen

Data Fields and Buttons

The main portion of the Project Photos screen has these data fields and buttons:

- **Project #** [read-only character field] – Project ID
- **Name** [read-only character field] – Project name
- **Pjt Manager** [read-only character field] – Project manager
- # [read/write character field] – Image ID
- **Photo/Image** [container field] – The image itself

- **Image Date** [read/write date field] – Date the image was created or imported into Projecto
- **Title** [read/write character field] – Image title
- **Notes** [read/write character field] – Any notes about the image
- [delete button] – Deletes the Project Image record. The image file itself will not be deleted.

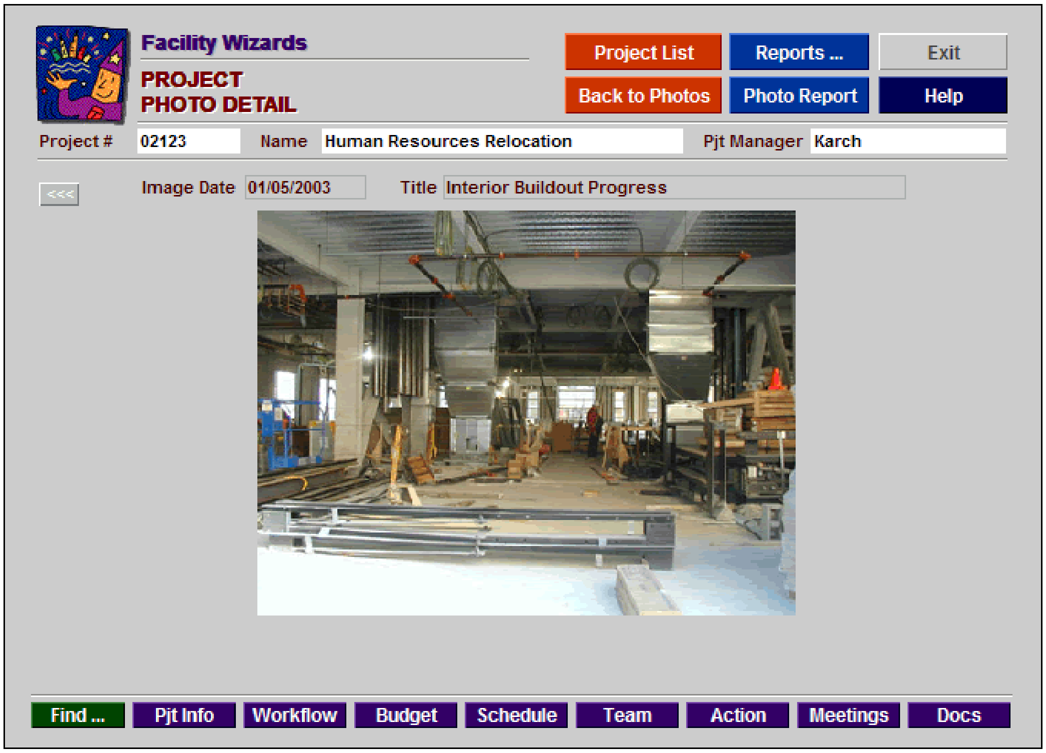
Bottom Menu

The Project Photos screen’s bottom menu contains these buttons:

- **Find** [button] – Switches into Find mode, allowing project images to be found
- **Pjt Info** [button] – Goes to the General Project Information Screen
- **Workflow** [button] – Goes to the Project Workflow/Checklist screen
- **Budget** [button] – Goes to the Project Budget Status screen
- **Schedule** [button] – Goes to the Project Schedule screen
- **Team** [button] – Goes to the Project Team screen
- **Action** [button] – Goes to the Project Notes/Action Items screen
- **Meetings** [button] – Goes to the Project Meetings/Meeting Minutes screen
- **Docs** [button] – Goes to the Project Documents screen

PROJECT PHOTO DETAIL SCREEN

The Project Photo Detail screen lets you view, enter, or change a specific project image. This screen presents your data using a simple detail display, and has a top menu and bottom menu.



Project Photo Detail Screen

Top Menu

The Project Photo Detail screen's top menu contains these buttons:

- **Project List** [button] – Goes to the Project List screen, providing access to the Projects database
- **Back to Photos** [button] – Goes back to the Project Photos screen
- **Reports** [button] – Goes to the Menu of Reports screen
- **Photo Report** [button] – Prints a Photo report showing the project images
- **Exit** [button] – Ends the Projecto session
- **Help** [button] – Goes to the Project Help screen

Data Fields and Buttons

The main portion of the Project Photo Detail screen has these data fields and buttons:

- **Project #** [read-only character field] – Project ID
- **Name** [read-only character field] – Project name
- **Pjt Manager** [read-only character field] – Project manager
- **Image Date** [read/write date field] – Date the image was created or inserted into Projecto
- **Title** [read/write character field] – Image title
- [container field] – The image itself

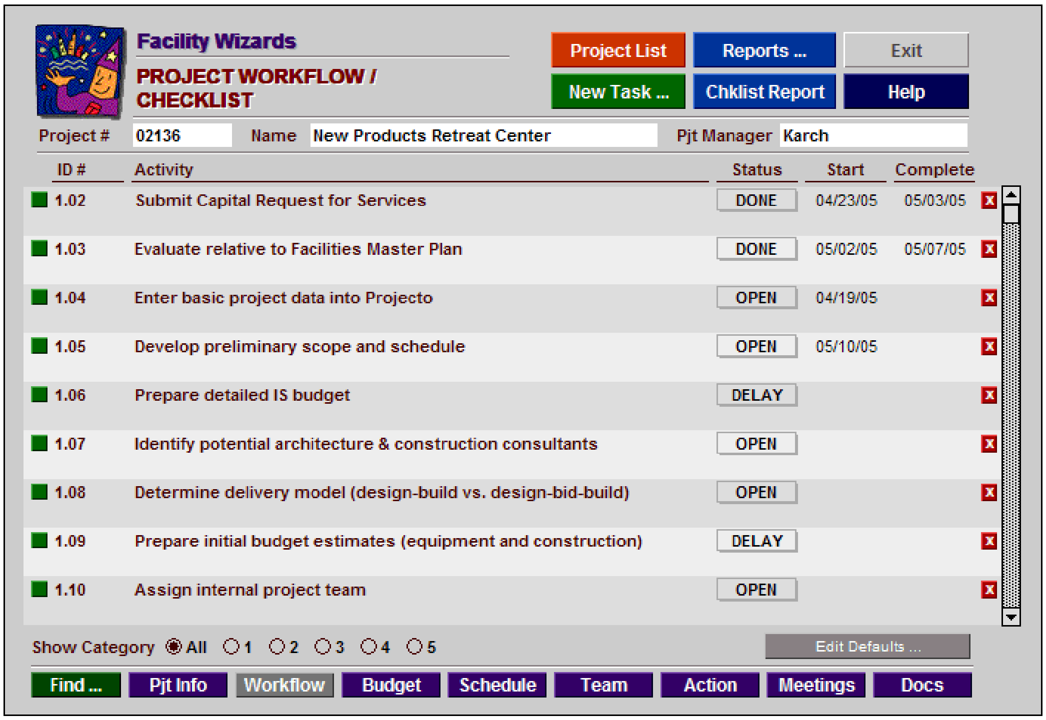
Bottom Menu

The Project Photo Detail screen's bottom menu contains these buttons:

- **Find** [button] – Switches into Find mode, allowing project images to be found
- **Pjt Info** [button] – Goes to the General Project Information Screen
- **Workflow** [button] – Goes to the Project Workflow/Checklist screen
- **Budget** [button] – Goes to the Project Budget Status screen
- **Schedule** [button] – Goes to the Project Schedule screen
- **Team** [button] – Goes to the Project Team screen
- **Action** [button] – Goes to the Project Notes/Action Items screen
- **Meetings** [button] – Goes to the Project Meetings/Meeting Minutes screen
- **Docs** [button] – Goes to the Project Documents screen

PROJECT WORKFLOW/CHECKLIST SCREEN

The Project Workflow/Checklist screen lets you view, enter, and edit a capital project's Workflow/Checklist, which contains a detailed set of steps for accomplishing the project. This screen presents your data using a detail display, which contains a large portal that displays a Workflow/Checklist record for each Workflow/Checklist Activity. The Project Workflow/Checklist screen also has a top menu and bottom menu.



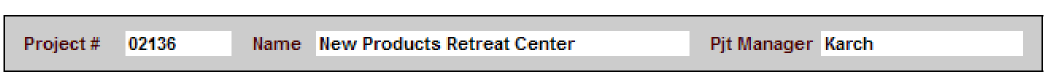
Project Workflow/Checklist Screen

Top Menu

The Project Workflow/Checklist screen's top menu contains these buttons:

- **Project List** [button] – Goes to the Project List screen, providing access to all of the projects in the Projects database
- **New Task** [button] – Creates a new Workflow/Checklist Activity, and stands-by for data entry
- **Reports** [button] – Goes to the Menu of Reports screen
- **Chklist Report** [button] – Prints a Project Workflow report, showing the project's Workflow/Checklist Activities
- **Exit** [button] – Ends the Projecto session
- **Help** [button] – Goes to the Project Help screen

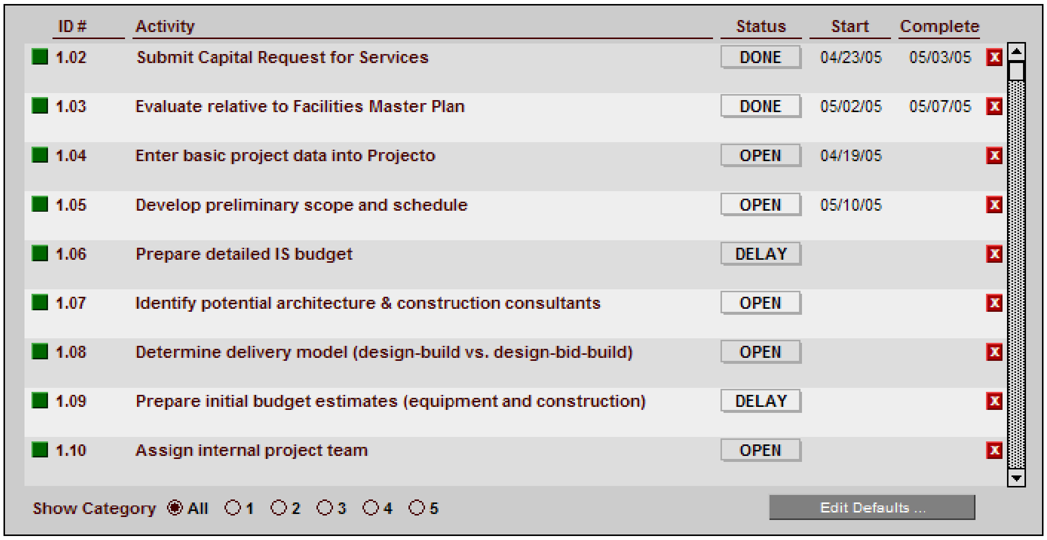
Data Fields and Buttons



Use this part of the Project Workflow/Checklist screen to view the project ID and project name for the project. It has these data fields and buttons:

- **Project #** [read-only character field] – Project ID

- **Name** [read-only character field] – Project name
- **Pjt Manager** [read-only character field] – Project manager



Use this part of the Project Workflow/Checklist screen to access the Workflow/Checklist itself. It consists of a portal followed by some buttons and radio buttons.

The portal provides access to the specific Workflow/Checklist Activities, which are displayed in the sequence in which they should be accomplished. Critical Workflow/Checklist Activities are color-coded in pink. The portal contains these data fields and buttons:

- [detail view button] – Goes to the Project Checklist/Detail screen, providing the details of the Workflow/Checklist Activity
- **ID #** [read/write character field] – Workflow/Checklist Activity ID, using outline numbering that groups the items into numeric categories. For example, the Workflow/Checklist Activities with ID's of "**1.01**", "**1.02**", etc., belong to category 1.
- **Activity** [read/write character field] – Description of the Workflow/Checklist Activity
- **Status** [value list] – Status of the Workflow/Checklist Activity. Selections are "**OPEN**", "**DONE**", "**HOLD**", and "**DELAY**".
- **Start** [read/write date field] – Scheduled start date for the Workflow/Checklist Activity
- **Complete** [read/write date field] – Scheduled completion date for the Workflow/Checklist Activity
- [delete button] – Deletes the Workflow/Checklist Activity

Once you delete a Workflow/Checklist Activity you cannot get it back (except by reentering the data or loading the last backup of the data). Be careful to make sure that you actually want to perform the deletion operation before you click the delete button.

The area below the portal contains these data fields and buttons:

- **Show Category-All, 1, 2, 3, 4, 5** [radio buttons] – Causes only the specified Workflow/Checklist Activities to be displayed. "**All**" results in all Workflow/Checklist Activities being displayed, whereas each numbered radio button causes the items belonging to just that category, based on the major outline number of their IDs, to be displayed.

- **Edit Defaults** [button] – Goes to the Project Workflow Default Items screen, allowing the Default Workflow/Checklist for a new project to be defined or changed

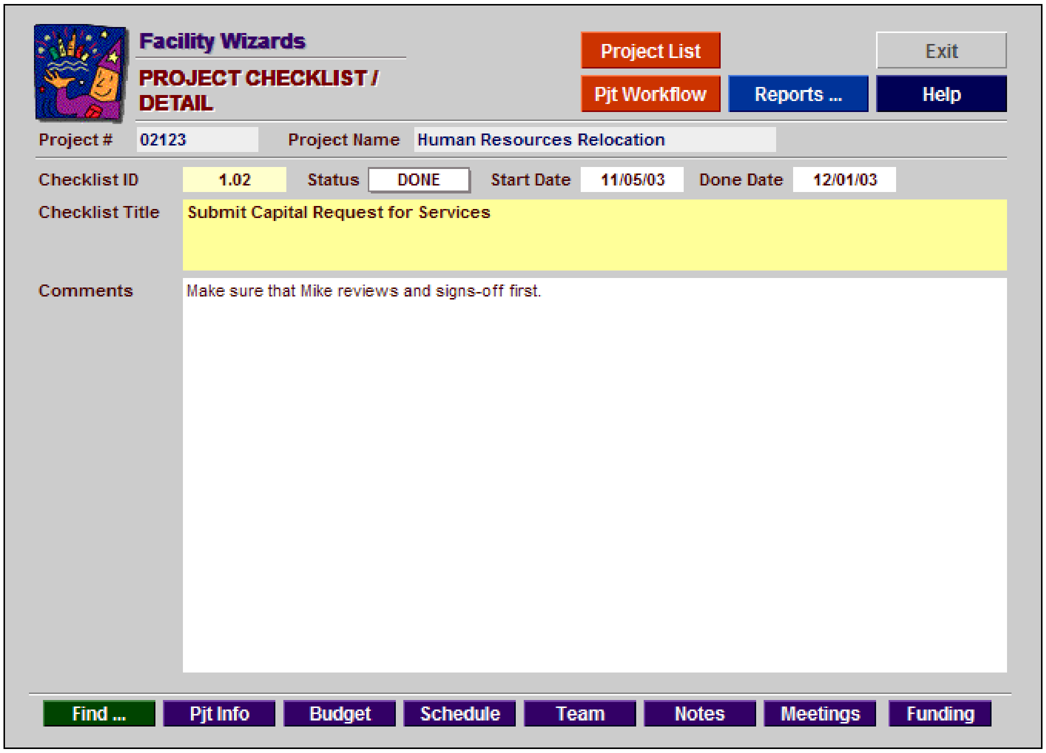
Bottom Menu

The Project Workflow/Checklist screen's bottom menu contains these buttons:

- **Find** [button] – Switches into Find mode, allowing Workflow/Checklist Activities to be found
- **Pjt Info** [button] – Goes to the General Project Information screen
- **Budget** [button] – Goes to the Project Budget Status screen
- **Schedule** [button] – Goes to the Project Schedule screen
- **Team** [button] – Goes to the Project Team screen
- **Action** [button] – Goes to the Project Notes/Action Items screen
- **Meetings** [button] – Goes to the Project Meetings/Meeting Minutes screen
- **Docs** [button] – Goes to the Project Documents screen

PROJECT CHECKLIST/DETAIL SCREEN

The Project Checklist/Detail screen lets you view, enter, and edit the detailed information for a project Workflow/Checklist Activity. This screen presents your data using a detail display, and has a top menu and bottom menu.



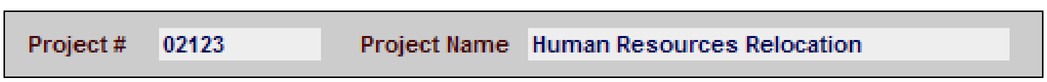
Project Checklist/Detail Screen

Top Menu

The Project Checklist/Detail screen's top menu contains these buttons:

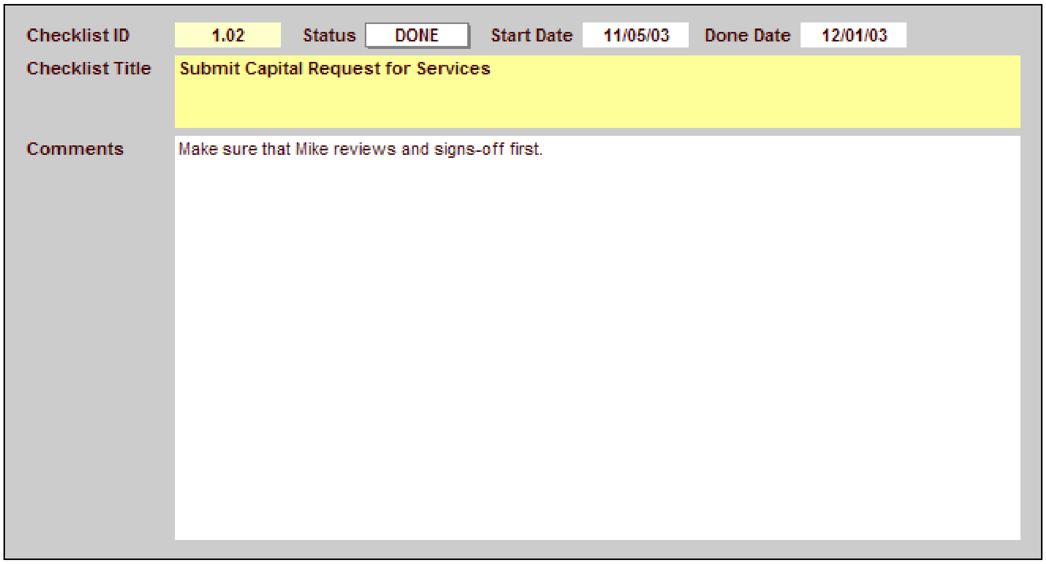
- **Project List** [button] – Goes back to the Project List screen, providing access to all projects
- **Pjt Workflow** [button] – Goes back to the Project Workflow/Checklist screen
- **Reports** [button] – Goes to the Menu of Reports screen
- **Exit** [button] – Ends the Projecto session
- **Help** [button] – Goes to the Project Help screen

Data Fields and Buttons



Use this part of the Project Checklist/Detail screen to view the project ID and project name for the project. It has these data fields and buttons:

- **Project #** [read-only character field] – Project ID
- **Project Name** [read-only character field] – Project name



Use this part of the Project Checklist/Detail screen to access an individual Workflow/Checklist Activity. It has these data fields and buttons:

- **Checklist ID** [read/write character field] – Workflow/Checklist Activity ID (using outline numbering that groups the items into numeric categories)
- **Status** [value list] – Status of the Workflow/Checklist Activity. Selections include "**OPEN**", "**HOLD**", etc.
- **Start Date** [read/write date field] – Scheduled start date for the Workflow/Checklist Activity
- **Done Date** [read/write date field] – Scheduled completion date for the Workflow/Checklist Activity
- **Checklist Title** [read/write character field] – A title for the Workflow/Checklist Activity
- **Comments** [read/write character field] – Any comments regarding the Workflow/Checklist Activity

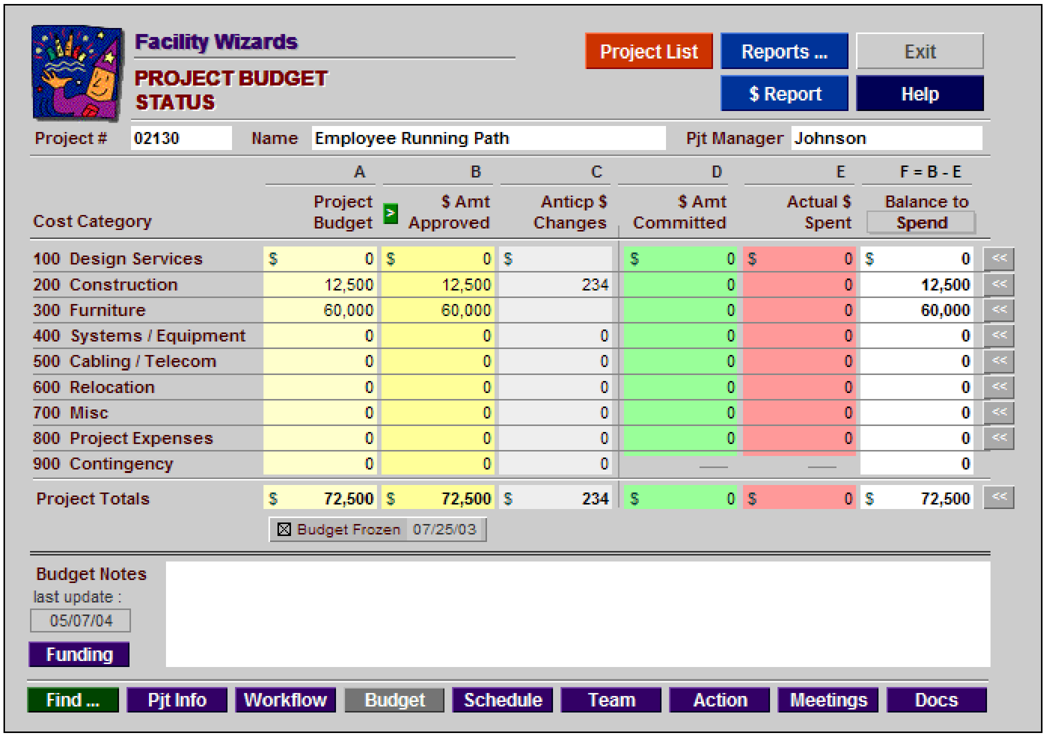
Bottom Menu

The Project Checklist/Detail screen's bottom menu contains these buttons:

- **Find** [button] – Switches into Find mode, allowing Workflow/Checklist Activities to be found
- **Pjt Info** [button] – Goes to the General Project Information screen
- **Budget** [button] – Goes to the Project Budget Status screen
- **Schedule** [button] – Goes to the Project Schedule screen
- **Team** [button] – Goes to the Project Team screen
- **Action** [button] – Goes to the Project Notes/Action Items screen
- **Meetings** [button] – Goes to the Project Meetings/Meeting Minutes screen
- **Docs** [button] – Goes to the Project Documents screen

PROJECT BUDGET STATUS SCREEN

The Project Budget Status screen lets you view, enter, and edit a capital project's detailed budget, and allows you to access a project's funding information. This screen presents your data using a detail display, and has a top menu and bottom menu.



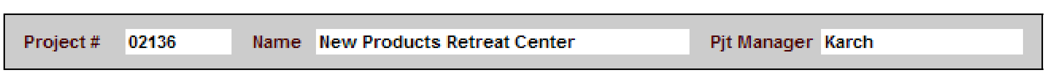
Project Budget Status Screen

Top Menu

The Project Budget Status screen's top menu contains these buttons:

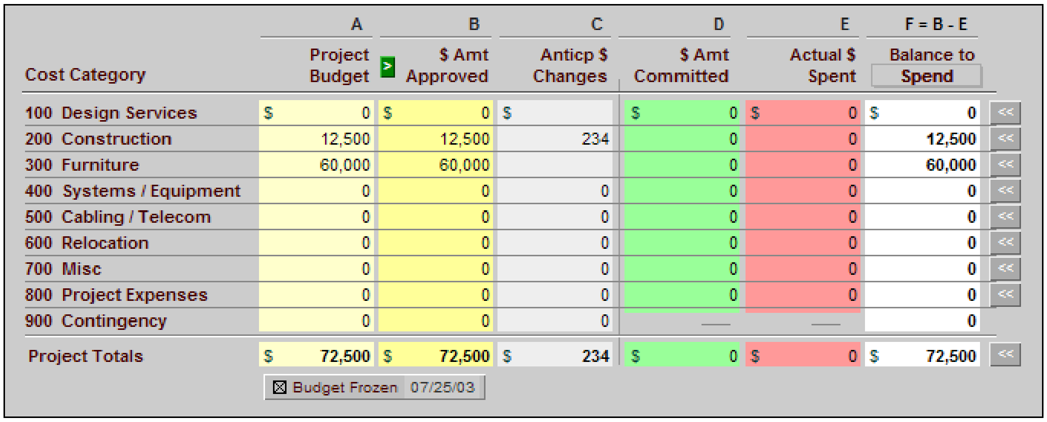
- **Project List** [button] – Goes back to the Project List screen, providing access to all of the projects in the Projects database
- **Reports** [button] – Goes to the Menu of Reports screen
- **$ Report** [button] – Prints either a Summary Budget Analysis report or a Detailed Budget Analysis report. First displays a dialog box in which the specific report to be printed is selected.
- **Exit** [button] – Ends the Projecto session
- **Help** [button] – Goes to the Project Help screen

Data Fields and Buttons



Use this part of the Project Budget Status screen to view the project ID and project name for the project. It has these data fields and buttons:

- **Project #** [read-only character field] – Project ID
- **Name** [read-only character field] – Project name
- **Pjt Manager** [read-only character field] – Project manager



	A		B	C	D	E	F = B - E	
Cost Category	Project Budget	>	$ Amt Approved	Anticp $ Changes	$ Amt Committed	Actual $ Spent	Balance to Spend	
100 Design Services	$ 0		$ 0	$	$ 0	$ 0	$ 0	<<
200 Construction	12,500		12,500	234	0	0	12,500	<<
300 Furniture	60,000		60,000		0	0	60,000	<<
400 Systems / Equipment	0		0	0	0	0	0	<<
500 Cabling / Telecom	0		0	0	0	0	0	<<
600 Relocation	0		0	0	0	0	0	<<
700 Misc	0		0	0	0	0	0	<<
800 Project Expenses	0		0	0	0	0	0	<<
900 Contingency	0		0	0			0	
Project Totals	$ 72,500		$ 72,500	$ 234	$ 0	$ 0	$ 72,500	<<

☒ Budget Frozen 07/25/03

Use this part of the Project Budget Status screen to access a project's detailed budget. It has these data fields and buttons:

- **Project Budget** [button enabled character fields] – Current budget amounts for the different cost account categories. Selecting this field goes to the Project Budget/Approvals screen, allowing the budget amount for a cost account category to be set.
- [button] between column headers **Project Budget** and **$ Amt Approved** – Causes the project budget amounts to be approved, copying the values into the **$ Amt Approved** column
- **$ Amt Approved** [button enabled character fields] – Current approved budget for the different cost account categories. Selecting this field goes to the Project Budget/Approvals screen, allowing the approved budget amount for a cost account category to be set.
- **Anticp $ Changes** [read-only character fields] – Any anticipated budget changes for the different cost account categories. Selecting the field goes to the Anticipated Costs screen, allowing the anticipated cost amount for a cost account category to be set.
- **$ Amt Committed** [read-only character fields] – Committed budget amounts for the different cost account categories. Selecting the field goes to the Project Cost Tracking screen, allowing the committed budget amount for a cost account category to be set.
- **Actual $ Spent** [read-only character fields] – Actual project expenditures for the different cost account categories. Selecting the field goes to the Project Cost Tracking screen, allowing the actual expenditure for a cost account category to be set.
- **Balance to** [value list and read-only character fields] – When the value list selection is set to "**Commit**", displays the budget values that have yet to be committed for the different cost account categories; when the value list selection is set to "**Spend**", displays the budget values that have yet to be spent for the different cost account categories.
- << [buttons] to the right of each **Cost Category** row, and to the right of the **Project Totals** row – Goes to the Project Cost Tracking screen, showing the detail of the committed and spent amounts for the cost account category, or for the overall project
- **Project Totals** – When selecting each field, appropriately goes to the either the Project Budget/Approvals screen, Anticipated Costs screen, or the Project Cost Tracking screen, showing the details of the column's amounts across the various cost accounts
- **Budget Frozen** [button, read-only checkbox, and read-only date field] – Freezes the project budget amounts. When this button is clicked, the checkbox will become checked, and the current date will be entered into the date field.

Use this part of the Project Budget Status screen to access notes regarding a project's budget. It has these data fields and buttons:

- **Budget Notes** [read-only character field] – Any notes about the project budget
- **Last update** [read/write date field] – Date that the notes in the **Budget Notes** field were entered or last updated
- **Funding** [button] – Goes to the Project Funding screen for the project

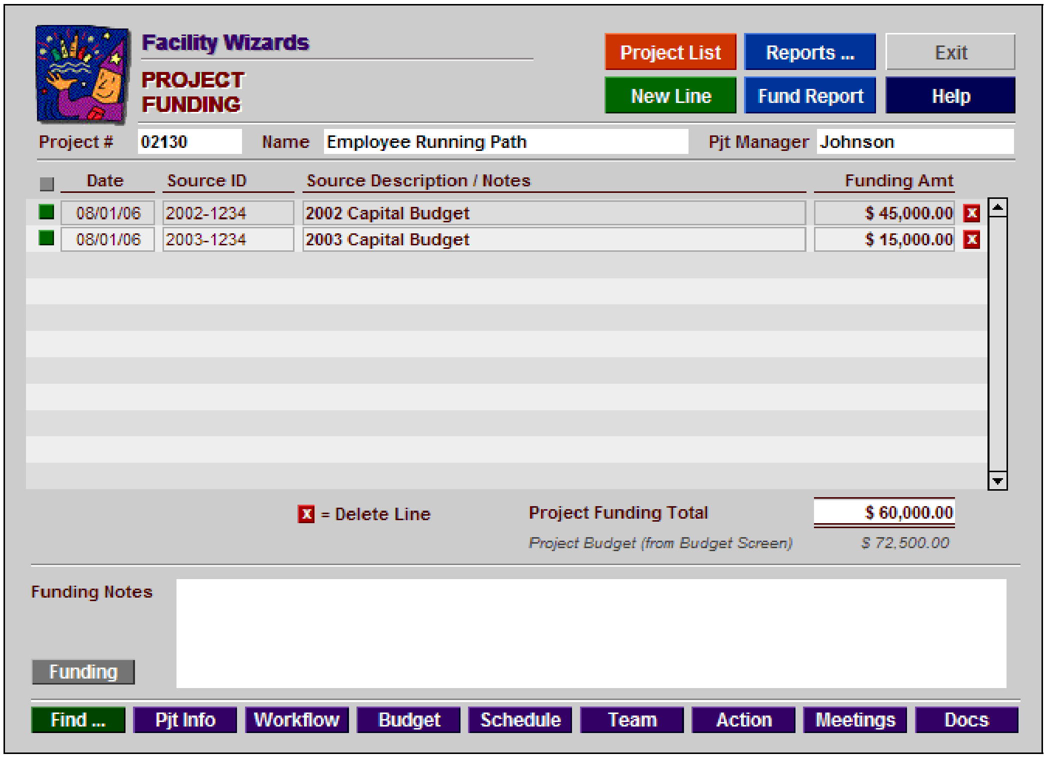
Bottom Menu

The Project Budget Status screen's bottom menu contains these buttons:

- **Find** [button] – Switches into Find mode, allowing projects and their budgets to be found
- **Pjt Info** [button] – Goes to the General Project Information screen
- **Workflow** [button] – Goes to the Project Workflow/Checklist screen
- **Schedule** [button] – Goes to the Project Schedule screen
- **Team** [button] – Goes to the Project Team screen
- **Action** [button] – Goes to the Project Notes/Action Items screen
- **Meetings** [button] – Goes to the Project Meetings/Meeting Minutes screen
- **Docs** [button] – Goes to the Project Documents screen

PROJECT FUNDING SCREEN

The Project Funding screen lets you view, enter, and edit the funding information for a capital project. This screen presents your data using a detail display, which contains a portal that displays a Funding record for each funding source and amount. The Project Funding screen also has a top menu and bottom menu.



Project Funding Screen

Top Menu

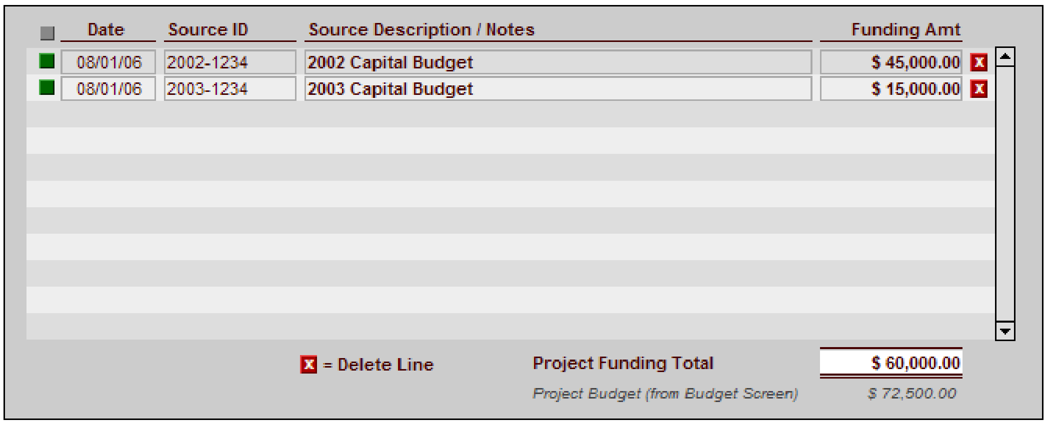
The Project Funding screen's top menu contains these buttons:

- **Project List** [button] – Goes to the Project List screen, providing access to the Projects database
- **New Line** [button] – Creates a new Funding record in the portal, and stands-by for data entry
- **Reports** [button] – Goes to the Menu of Reports screen
- **Fund Report** [button] – Prints a Project Funding Source report listing funding sources and amounts. First displays a dialog box to select whether to print funding information for the current project or for all projects.
- **Exit** [button] – Ends the Projecto session
- **Help** [button] – Goes to the Project Help screen

Data Fields and Buttons

Use this portion of the Project Funding screen to view the project ID and project name for the project. It has these data fields and buttons:

- **Project #** [read-only character field] – Project ID
- **Name** [read-only character field] – Project name
- **Pjt Manager** [read-only character field] – Project manager



Use this part of the Project Funding screen to access a project's funding sources and amounts. It consists of a portal followed by a button and some data fields:

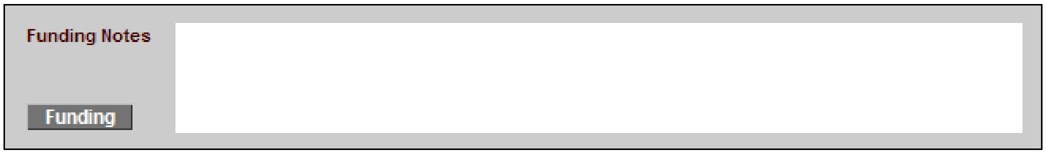
The portal contains these buttons and data fields:

- **Date** [read/write date field] – Date when the funding was arranged, or when the funding item was logged into Projecto
- **Source ID** [value list] – Funding item ID
- **Source Description / Notes** [read/write character field] – Description of the funding source and/or a note about the funding item
- **Funding Amt** [read/write character field] – Funding amount
- [delete button] – Deletes the Funding record

Once you delete a Funding record you cannot get it back (except by reentering the data or loading the last backup of the data). Be careful to make sure that you actually want to perform the deletion operation before you click the delete button.

The area below the portal contains these data fields and buttons:

- **New Funding Line** [button] – Creates a new Funding record, and stands-by for data entry
- **Project Funding Total** [read-only character field] – Total project funding amount
- **Project Budget (from Budget** screen**)** [read-only character field] – Total project budget amount



Use this part of the Project Funding screen to access notes about the project funding. It has one data field:

- **Funding Notes** [read/write character field] – Any notes about the project funding

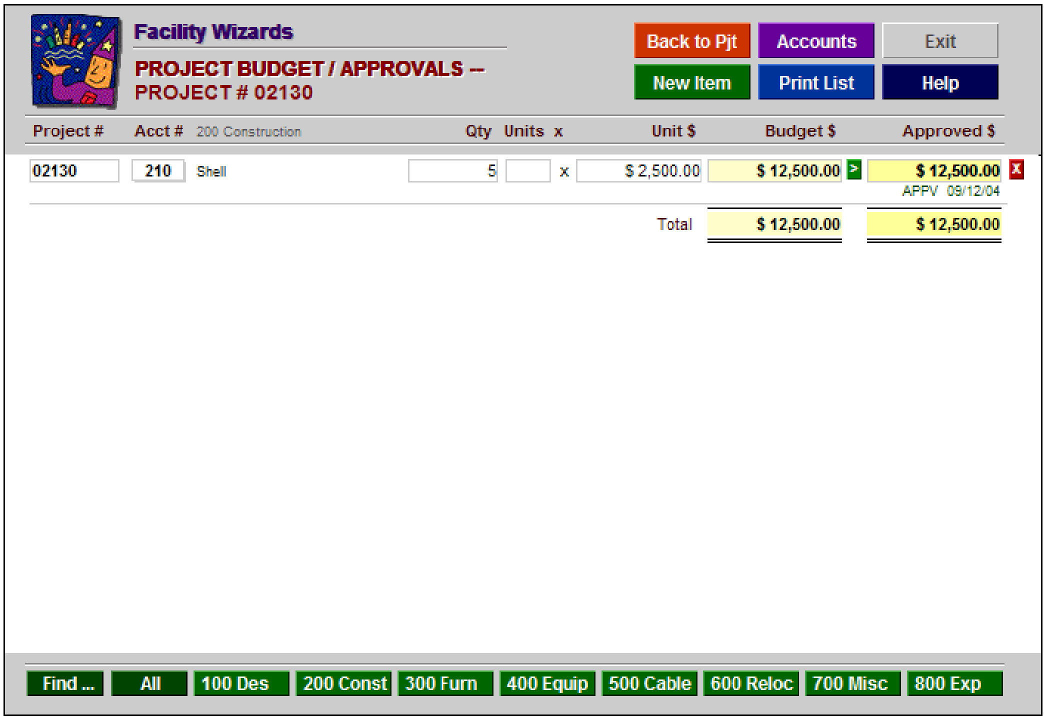
Bottom Menu

The Project Funding screen's bottom menu contains these buttons:

- **Find** [button] – Switches into Find mode, allowing Funding records to be found
- **Pjt Info** [button] – Goes to the General Project Information screen
- **Workflow** [button] – Goes to the Project Workflow/Checklist screen
- **Budget** [button] – Goes to the Project Budget Status screen
- **Schedule** [button] – Goes to the Project Schedule screen
- **Team** [button] – Goes to the Project Team screen
- **Action** [button] – Goes to the Project Notes/Action Items screen
- **Meetings** [button] – Goes to the Project Meetings/Meeting Minutes screen
- **Docs** [button] – Goes to the Project Documents screen

PROJECT BUDGET/APPROVALS SCREEN

The Project Budget/Approvals screen lets you view, enter, and edit project budget items, including approved budget items. This screen presents your data using a list display, displaying a Budget record for each budget item. The Project Budget/Approvals screen also has a top menu and bottom menu.



Project Budget/Approvals Screen

Top Menu

The Project Budget/Approvals screen's top menu contains these buttons:

- **Back to Pjt** [button] – Goes back to the Project Budget Status screen
- **New Item** [button] – Creates a new budget item, and stands-by for data entry
- **Accounts** [button] – Goes to the Cost Account Categories screen, allowing cost accounts to be created or edited
- **Print List** [button] – Prints a image of the Project Budget/Approvals screen
- **Exit** [button] – Ends the Projecto session
- **Help** [button] – Goes to the Project Help screen

Data Fields and Buttons

The main portion of the Project Budget/Approvals screen has these data fields and buttons:

- **Project #** [read/write character field] – Project ID
- **Acct #** [value list] – Cost account category or cost account number for the budget item
- [button enabled character field] between the column headers **Acct #** and **Qty** – Selecting this field determines the range of cost account categories or cost accounts that appear in the **Acct #** value list

There is an important interaction between the button enabled character field between the column headers **Acct #** and **Qty**, and the **Acct #** value list:

1. When the button enabled character field shows **MAJOR ACCOUNTS**, the selections in the **Acct #** value list will contain the defined cost account categories

2. Then, when the cost account category is selected using the **Acct #** value list, clicking the button enabled character field again will show that cost account category. At that point, the range of selections in the **Acct #** value list will show the detailed cost accounts within the cost account category, allowing the specific cost account to be selected.

- **Qty** [read/write character field] – Quantity of cost items comprising the budget item
- **Units** [value list] – Unit of measure for the cost items comprising the budget item. Selections include "**SF**", "**EA**", etc.
- **Unit $** [read-only character field] – Calculated cost of the budget item, based on the values in the **Qty** and **Units** fields
- **Budget $** [read/write character field] – Total budgeted amount of the budget item
- > [button] – Causes the budget item's budgeted amount to be marked as approved, copying the value into the **Approved $** field
- **Approved $** [read/write character field] – Approved budgeted amount of the budget item
- **APPV** [read-only date field] – Date that the budget item was approved
- **Total** [calculated character field] below the displayed budget items in **Budget $** column – Total of all displayed budget item budgeted amounts
- **Total** [calculated character field] below the displayed budget items in **Approved $** column – Total of all displayed budget item approved budgeted amounts
- [delete button] – Deletes the budget item

Once you delete a budget item you cannot get it back (except by reentering the data or loading the last backup of the data). Be careful to make sure that you actually want to perform the deletion operation before you click the delete button.

Bottom Menu

The Project Budget/Approvals screen's bottom menu contains these buttons:

- **Find** [button] – Switches into Find mode, allowing budget items to be found
- **100 Des** [button] – Causes budget items to be shown only for cost account category 100 – Design Services – and its cost accounts
- **200 Const** [button] – Causes budget items to be shown only for cost account category 200 – Construction – and its cost accounts
- **300 Furn** [button] – Causes budget items to be shown only for cost account category 300 – Furniture – and its cost accounts
- **400 Equip** [button] – Causes budget items to be shown only for cost account category 400 – Systems/Equipment – and its cost accounts
- **500 Cable** [button] – Causes budget items to be shown only for cost account category 500 – Cabling/Telecom – and its cost accounts

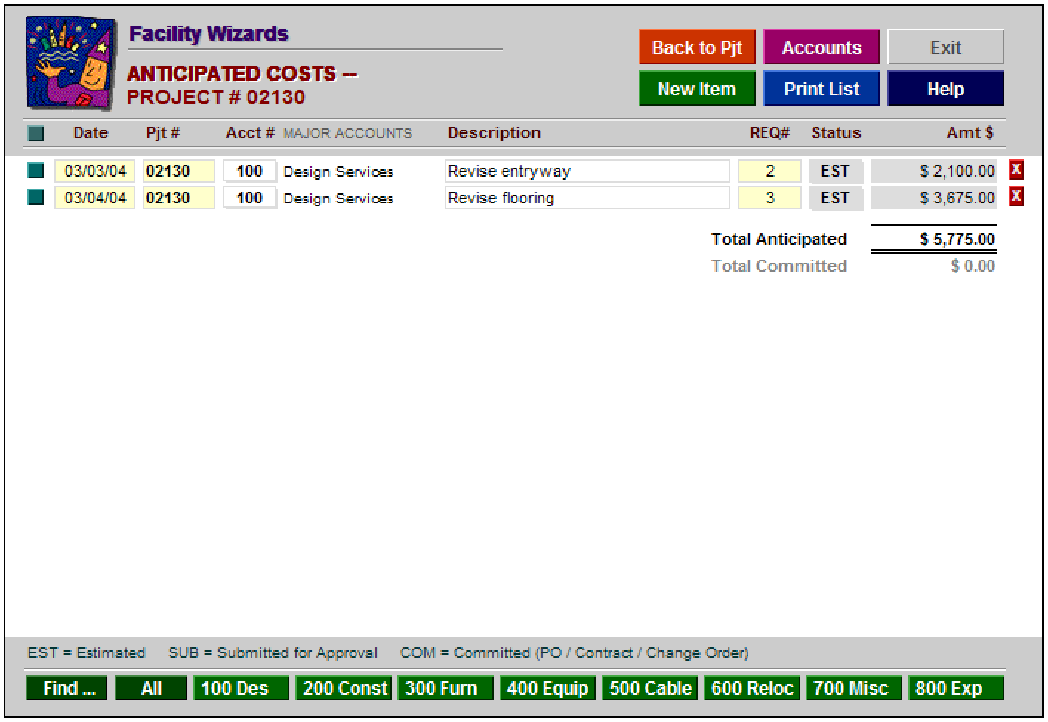
- **600 Reloc** [button] – Causes budget items to be shown only for cost account category 600 – Relocation – and its cost accounts
- **700 Misc** [button] – Causes budget items to be shown only for cost account category 700 – Miscellaneous – and its cost accounts
- **800 Exp** [button] – Causes budget items to be shown only for cost account category 800 – Project Expenses – and its cost accounts

Projecto's cost account categories, and their abbreviations that appear in this bottom menu, can be customized. This is done using the Cost Account Categories screen, which is described later in this chapter.

ANTICIPATED COSTS SCREEN

The Anticipated Costs screen lets you view, enter, and edit a project's anticipated costs. Anticipated costs are newly determined project costs, which are anticipated changes to the previously established project budget. From this screen you can navigate to the screen that provides more detail for each anticipated cost.

This screen presents your data using a list display, displaying an Anticipated Cost record for each anticipated cost. The Anticipated Costs screen also has a top menu and bottom menu.



Anticipated Costs Screen

Top Menu

The Anticipated Costs screen's top menu contains these buttons:

- **Back to Pjt** [button] – Goes back to the Project Budget Status screen
- **New Item** [button] – Creates a new anticipated cost, and stands-by for data entry
- **Accounts** [button] – Goes to the Cost Account Categories screen, allowing cost accounts to be created or edited
- **Print List** [button] – Prints a Project Cost Change report, listing the project's anticipated costs, and approved and committed cost changes
- **Exit** [button] – Ends the Projecto session
- **Help** [button] – Goes to the Project Help screen

Data Fields and Buttons

The main portion of the Anticipated Costs screen has these data fields and buttons:

- [detail view button] – Goes to the Anticipated Cost Detail screen for the anticipated cost
- **Date** [read/write date field] – Date when the anticipated cost was determined or entered
- **Pjt #** [read/write character field] – Project ID

- **Acct #** [value list] – Cost account category or cost account number that the anticipated cost applies to
- [button enabled character field] between the column headers **Acct #** and **Description** – Selecting this field determines the range of cost account categories or cost accounts that appear in the **Acct #** value list

There is an important interaction between the button enabled character field between the column headers **Acct #** and **Qty**, and the **Acct #** value list:

1. When the button enabled character field shows **MAJOR ACCOUNTS**, the selections in the **Acct #** value list will contain the defined cost account categories

2. Then, when the cost account category is selected using the **Acct #** value list, clicking the button enabled character field again will show that cost account category. At that point, the range of selections in the **Acct #** value list will show the detailed cost accounts within the cost account category, allowing the specific cost account to be selected.

- **Description** [read/write character field] – Description of the anticipated cost
- **REQ#** [read/write character field] – Request number for the anticipated cost. This field assists in the sorting the anticipated cost items.
- **Status** [read/write character field] – Status of the anticipated cost. Selections are "**EST**" for estimated, "**SUB**" for submitted, "**COM**" for committed, and "**HOLD**" and "**VOID**".
- **Amt $** [read/write character field] – Amount of the anticipated cost
- **Total Anticipated** [calculated character field] below the displayed anticipated costs in the **Amt $** column – Total of all displayed anticipated costs with a status of "**EST**" (estimated) or "**SUB**" (submitted)
- **Total Committed** [calculated character field] below the **Total Anticipated** field in the **Amt $** column – Total of all displayed anticipated costs with a status of "**COM**" (committed)
- [delete button] – Deletes the anticipated cost

Once you delete an anticipated cost you cannot get it back (except by reentering the data or loading the last backup of the data). Be careful to make sure that you actually want to perform the deletion operation before you click the delete button.

Bottom Menu

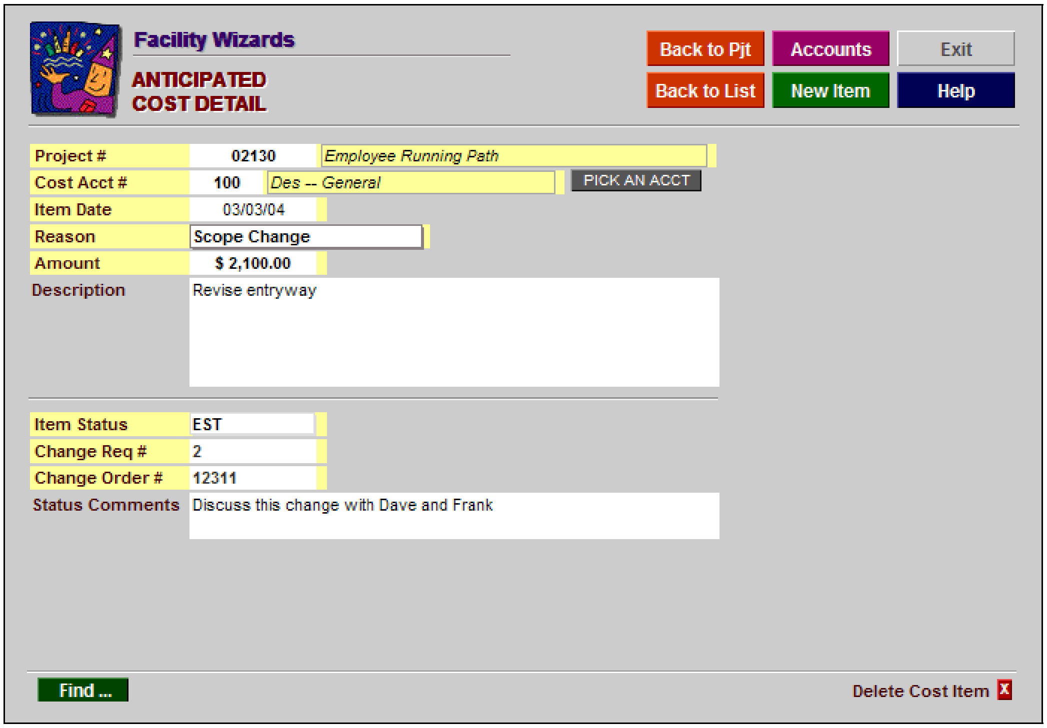
The Anticipated Costs screen's bottom menu contains these buttons:

- **Find** [button] – Switches into Find mode, allowing anticipated costs to be found
- **100 Des** [button] – Causes anticipated costs to be shown only for cost account category 100 – Design Services – and its cost accounts
- **200 Const** [button] – Causes anticipated costs to be shown only for cost account category 200 – Construction – and its cost accounts
- **300 Furn** [button] – Causes anticipated costs to be shown only for cost account category 300 – Furniture – and its cost accounts

- **400 Equip** [button] – Causes anticipated costs to be shown only for cost account category 400 – Systems/Equipment – and its cost accounts
- **500 Cable** [button] – Causes anticipated costs to be shown only for cost account category 500 – Cabling/Telecom – and its cost accounts
- **600 Reloc** [button] – Causes anticipated costs to be shown only for cost account category 600 – Relocation – and its cost accounts
- **700 Misc** [button] – Causes anticipated costs to be shown only for cost account category 700 – Miscellaneous – and its cost accounts
- **800 Exp** [button] – Causes anticipated costs to be shown only for cost account category 800 – Project Expenses – and its cost accounts

ANTICIPATED COST DETAIL SCREEN

The Anticipated Cost Detail screen lets you view, enter, and edit the details of a project's anticipated cost. This includes the reason for the change, and the change request number and change order number. This screen presents your data using a detail display, with a top menu and bottom menu.



Anticipated Cost Detail Screen

Top Menu

The Anticipated Cost Detail screen's top menu contains these buttons:

- **Back to Pjt** [button] – Goes back to the Project Budget Status screen
- **Back to List** [button] – Goes back to the Anticipated Costs screen
- **Accounts** [button] – Goes to the Cost Account Categories screen, allowing cost accounts to be created or edited
- **New Item** [button] – Creates a new anticipated cost, and stands-by for data entry
- **Exit** [button] – Ends the Projecto session
- **Help** [button] – Goes to the Project Help screen

Data Fields and Buttons

The main portion of the Anticipated Cost Detail screen has these data fields and buttons:

- **Project #** [read-only character field] – Project ID
- [read-only character field] to the right of the **Project #** field – Project name
- **Cost Acct $** [value list and read-only character field] – Cost account name and cost account number that the anticipated cost applies to
- **PICK AN ACCT** [button] – Goes to the Pick Cost Account screen, allowing the cost account to be selected
- **Item Date** [read/write date field] – Date when the anticipated cost was determined or entered

- **Reason** [read/write character field] – Reason for the newly anticipated cost
- **Amount** [read/write character field] – Anticipated cost amount
- **Description [**read/write character field] – Description of the anticipated cost
- **Item Status** [read/write character field] – Status of the anticipated cost. Selections are "**EST**" for estimated, "**SUB**" for submitted, "**COM**" for committed, "**HOLD**", and "**VOID**".
- **Change Req #** [read/write character field] – Change request number for the anticipated cost
- **Change Order #** [read/write character field] – Change order number for the anticipated cost
- **Status Comments** [read/write character field] – Any comments regarding the status of the anticipated cost

Bottom Menu

The Anticipated Cost Detail screen's bottom menu contains these buttons:

- **Find** [button] – Switches into Find mode, allowing anticipated costs to be found
- [delete button] – Deletes the anticipated cost

> Once you delete an anticipated cost you cannot get it back (except by reentering the data or loading the last backup of the data). Be careful to make sure that you actually want to perform the deletion operation before you click the delete button.

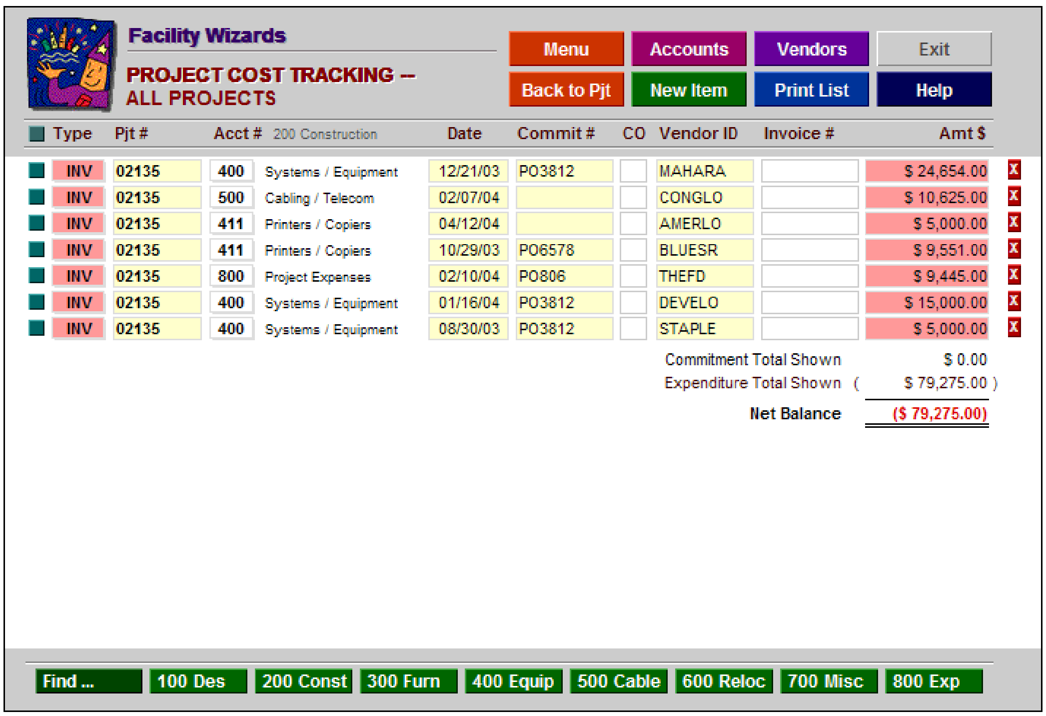
PROJECT COST TRACKING SCREEN

The Project Cost Tracking screen lets you view, enter, and edit individual project costs. The costs are logged against cost accounts, and can reference commitments, POs, and vendors. From this screen you can navigate to the screen that provides more detail for each cost.

There are several versions of this screen:

- This screen shows committed costs for a single project when you go to this screen from one of the **$ Amt Committed** data fields in the Project Budget Status screen
- This screen shows actual expenditures for a single project when you go to this screen from one of the **Actual $ Spent** data fields in the Project Budget Status screen
- This screen shows actual expenditures for all projects when you go to this screen from the **PROJECT COSTS** button in the Main Menu screen

The Project Cost Tracking screen presents your data using a list display, displaying a Project Cost record for each project cost. This screen also contains a top menu and bottom menu.



Project Cost Tracking Screen

Top Menu

The Project Cost Tracking screen's top menu contains these buttons:

- **Menu** [button] – Goes to the Main Menu screen
- **Back to Pjt** [button] – Goes back to the Project Budget Status screen for the selected project. If costs for just one project are shown in the Project Cost Tracking screen, then that project is the selected project. If costs for multiple projects are shown, then the selected project will either be the first project in the list, or a project that can be determined by clicking on one of the project's fields.
- **Accounts** [button] – Goes to the Cost Account Categories screen, providing access to Projecto's cost accounts
- **New Item** [button] – Creates a new project cost, and stands-by for data entry

- **Vendors** [button] – Goes to the Vendor List screen
- **Print List** [button] – Prints a Project Cost report listing the displayed project costs
- **Exit** [button] – Ends the Projecto session
- **Help** [button] – Goes to the Project Help screen

Data Fields and Buttons

The main portion of the Project Cost Tracking screen has these data fields and buttons:

- [Detail View] – Goes to the Project Cost Detail screen for the project cost
- **Type** [value list] – Cost Type. Selections are "**REQ**" for purchase requisition, "**PO**" for purchase order, "**CON**" for contract, "**CHG**" for change, "**INV**" for invoice, and "**EXP**" for a minor expense.
- **Pjt #** [read/write character field] – Project ID
- **Acct #** [value list] – Cost account category or cost account number for the expenditure
- [button enabled character field] between the column headers **Acct #** and **Date** – Selecting this field determines the range of cost account categories or cost accounts that appear in the **Acct #** value list

There is an important interaction between the button enabled character field between the column headers **Acct #** and **Date**, and the **Acct #** value list:

1. When the button enabled character field shows **MAJOR ACCOUNTS**, the selections in the **Acct #** value list will contain the defined cost account categories

2. Then, when the cost account category is selected using the **Acct #** value list, clicking the button enabled character field again will show that cost account category. At that point, the range of selections in the **Acct #** value list will show the detailed cost accounts within the cost account category, allowing the specific cost account to be selected.

- **Date** [read/write date field] – Date when the expenditure was incurred or entered
- **Commit #** [read/write character field] – Commitment number for the cost item. This is typically a PO number.
- **CO** [read/write character field] – Change order number for the change order that resulted the project cost, if the cost was a result of a budget change that was reviewed and approved using a change order
- **Vendor ID** [value list] – Vendor ID, if the expenditure is payable to a vendor company
- **Invoice #** [aaaa] – Invoice number for the expenditure
- **Amt $** [read/write character field] – Amount of the expenditure
- [delete button] – Deletes the project cost

Once you delete a project cost you cannot get it back (except by reentering the data or loading the last backup of the data). Be careful to make sure that you actually want to perform the deletion operation before you click the delete button.

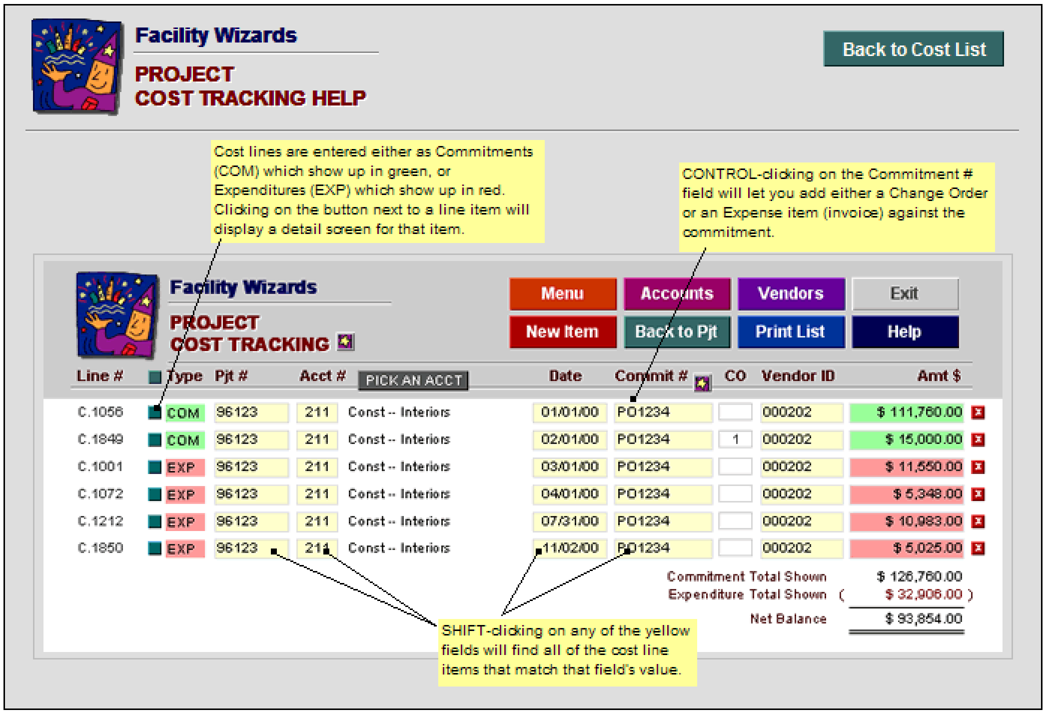
Bottom Menu

The **Project Cost Tracking screen's** bottom menu contains these buttons:

- **Find** [button] – Switches into Find mode, allowing project costs to be found
- **100 Des** [button] – Causes project costs to be shown only for cost account category 100 – Design Services – and its cost accounts
- **200 Const** [button] – Causes project costs to be shown only for cost account category 200 – Construction – and its cost accounts
- **300 Furn** [button] – Causes project costs to be shown only for cost account category 300 – Furniture – and its cost accounts
- **400 Equip** [button] – Causes project costs to be shown only for cost account category 400 – Systems/Equipment – and its cost accounts
- **500 Cable** [button] – Causes project costs to be shown only for cost account category 500 – Cabling/Telecom – and its cost accounts
- **600 Reloc** [button] – Causes project costs to be shown only for cost account category 600 – Relocation – and its cost accounts
- **700 Misc** [button] – Causes project costs to be shown only for cost account category 700 – Miscellaneous – and its cost accounts
- **800 Exp** [button] – Causes project costs to be shown only for cost account category 800 – Project Expenses – and its cost accounts

PROJECT COST TRACKING HELP SCREEN

The Project Cost Tracking Help screen provides help information on how to use the functions of the Project Cost Tracking screen. This screen consists primarily of an annotated image of the Project Cost Tracking screen, with a top menu with a single button.



Project Cost Tracking Help Screen

Top Menu

The Project Cost Tracking Help screen's top menu contains this button:

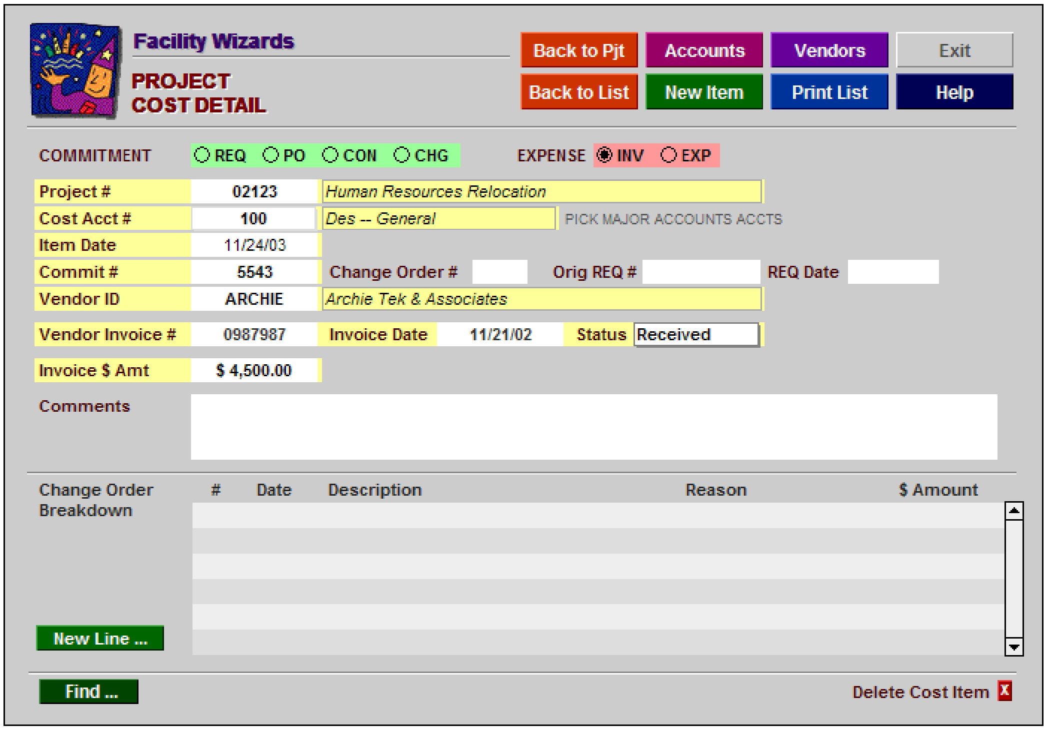
- **Back to Cost List** [button] – Goes back to the Project Cost Tracking screen

The Project Cost Tracking Help screen does not have a bottom menu.

PROJECT COST DETAIL SCREEN

The Project Cost Detail screen lets you view, enter, and edit detailed information for an individual project cost. Some of the fields in this screen change depending on the type of cost, allowing costs resulting from purchase requisitions, purchase orders (POs), contracts, changes, invoices, and expenses to be properly tracked. In addition, for a cost that is a change to the established project budget, this screen lets you roll-up a set of anticipated costs to determine the overall cost amount.

This screen presents your data using a detail display, which contains a portal that displays a Change Order Detail record for each anticipated cost or other cost item that constitutes the overall project cost. The Project Cost Detail screen also has a top menu and bottom menu.



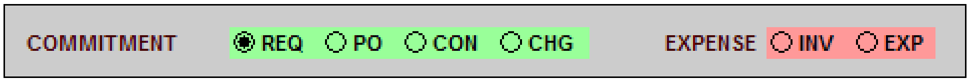
Project Cost Detail Screen

Top Menu

The Project Cost Detail screen's top menu contains these buttons:

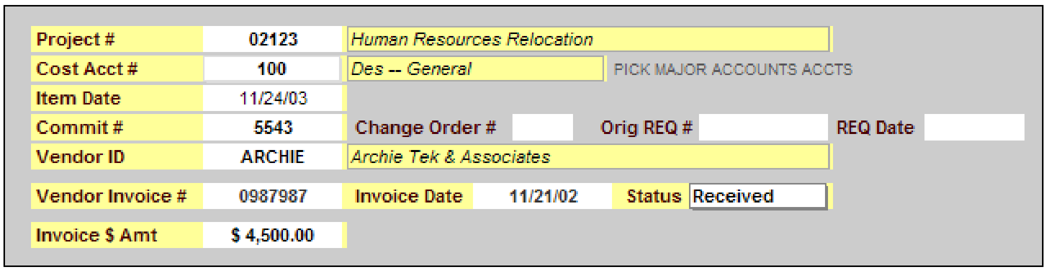
- **Back to Pjt** [button] – Goes back to the Project Budget Status screen for the project
- **Back to List** [button] – Goes back to the Project Cost Tracking screen
- **Accounts** [button] – Goes to the Cost Account Categories screen
- **New Item** [button] – Creates a new project cost, and stands-by for data entry
- **Vendors** [button] – Goes to the Vendor List screen
- **Print List** [button] – Prints a Project Cost report listing the project costs
- **Exit** [button] – Ends the Projecto session
- **Help** [button] – Goes to the Project Help screen

Data Fields and Buttons



Use this part of the Project Cost Detail screen to enter and view the type of the project cost. It has these data fields and buttons:

- **COMMITMENT-REQ**, **PO**, **CON**, **CHG** [radio buttons] – Commitment Type. "**REQ**" indicates purchase requisition, "**PO**" indicates purchase order, "**CON**" indicates contract, and "**CHG**" indicates change.
- **EXPENSE-INV, EXP** [radio buttons] – Expense Type. "**INV**" indicates an invoice and "**EXP**" indicates a minor expense.



Use this part of the Project Cost Detail screen to access core information about a project cost. It has these data fields and buttons:

- **Project #** [read-only character field] – Project ID
- [read-only character field] to the right of **Project #** field – Project name
- **Cost Acct #** [value list and read-only character field] – Cost account number and cost account name for the cost
- [button enabled character field] to the far right of the **Cost Acct #** field (in the screen image, this has the value "**PICK MAJOR ACCTS**") – Selecting this field determines the range of cost account categories or cost accounts that appear in the **Cost Acct #** value list

There is an important interaction between the button enabled character field to the far right of the **Cost Acct #** field (which has the value "**PICK MAJOR ACCTS**" in the screen image), and the **Cost Acct #** value list and read-only character field:

1. When the button enabled character field shows "**PICK MAJOR ACCTS**", the selections in the **Cost Acct #** value list will contain the defined cost account categories.

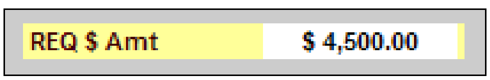
2. Then, when the cost account category is selected using the **Cost Acct #** value list, the cost account category number and name will be displayed in the **Cost Acct #** value list and read-only character field. The button enabled character field will show a value of "**PICK COST ACCT**"

3. At this point, the range of selections in the **Cost Acct #** value list will show the detailed cost accounts within the cost account category, letting a you select a specific cost account.

- **Item Date** [read/write date field] – Date when the cost was incurred or entered

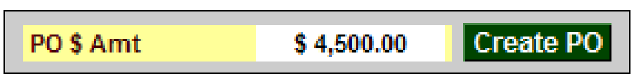
- **Commit #** [read/write character field] – The commitment number for the cost. This is typically a PO number.
- **Change Order #** [read/write character field] – Change order number for the change order that resulted in the project cost, if the cost was a result of a budget change that was reviewed and approved using a change order
- **Orig REQ #** [read/write character field] – Original purchase requisition number for a cost resulting from a budget change (RFC)
- **REQ Date** [read/write date field] – Date of the original purchase requisition number for a cost resulting from a budget change
- **Vendor ID** [value list] – Vendor ID for the vendor company that the expenditure is payable to
- [read-only character field] to the right of the **Vendor ID** field – Vendor name
- **Vendor Invoice #** [read/write character field] – Vendor's invoice number, for payment of the expenditure to a vendor company
- **Invoice Date** [read/write date field] – Date of the vendor's invoice, for payment of the expenditure to a vendor company
- **Status** [value list] – Vendor's invoice status. Selections are "**Received**", "**Submitted**", "**Approved**", "**Paid**"

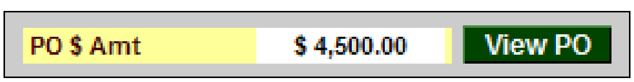
The following screen area, consisting of a field and an optional button, will change depending on the value of the **COMMITMENT** and **EXPENSE** radio buttons:



This variation will appear when the **REQ** radio button is selected. It consists of this data field:

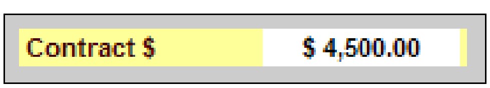
- **REQ $ Amt** [read/write character field] – Purchase requisition amount





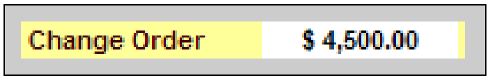
These variations will appear when the **PO** radio button is selected. One of two variations of this screen area will be displayed, depending on whether a PO has been generated for the cost item. This screen area consists of the following data field, and one of two different buttons:

- **PO $ Amt** [read/write character field] – PO amount
- **Create PO** [button] – Creates a PO for the project cost
- **View PO** [button] – Displays a previously created PO number for the project cost



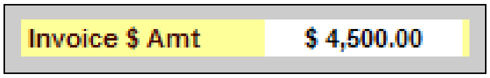
This variation will appear when the **CON** radio button is selected. It consists of this data field:

- **Contract $** [read/write character field] – Contractual cost amount



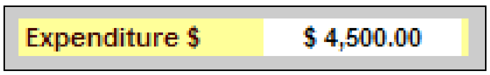
This variation will appear when the **CHG** radio button is selected. It consists of this data field:

- **Change Order** [read/write character field] – Cost amount of the change



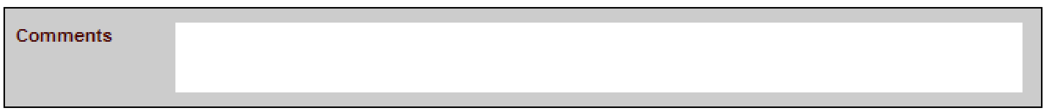
This variation will appear when the **INV** radio button is selected. It consists of this data field:

- **Invoice $ Amt** [read/write character field] – Invoice amount



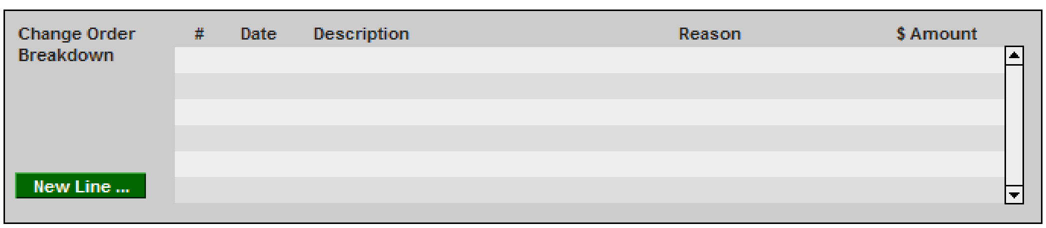
This variation will appear when the **EXP** radio button is selected. It consists of this data field:

- **Expenditure $** [read/write character field] – Minor expenditure amount



Use this part of the Project Cost Detail screen to enter and view comments about the project cost. It consists of this data field:

- **Comments** [read/write character field] – Any comments regarding the expenditure



Use this part of the Project Cost Detail screen to compile and view the details behind a change order. The Change Order Detail records displayed in this portal are rolled-up to constitute the project cost. This screen area consists of a portal and a button.

The portal itself has these data fields:

- **#** [read-only character field] – Change order number
- **Date** [read-only date field] – Change order date
- **Description** [read-only character field] – Change order description
- **Reason** [read-only character field] – Reason for the change order
- **$ Amount** [read-only character field] – Change order amount

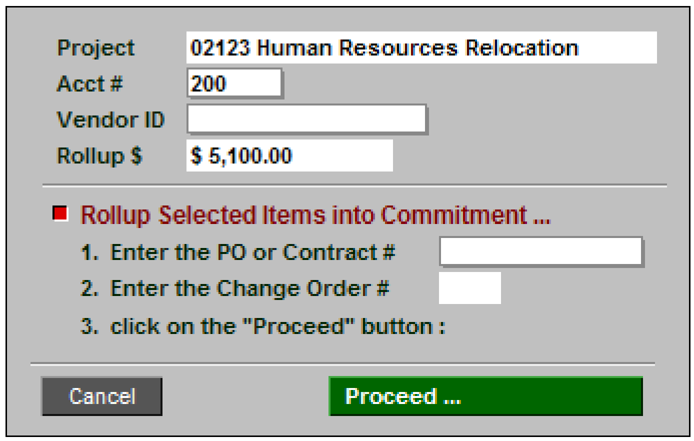
The button is as follows:

- **New Line** [button] – Creates a new Change Order Detail record, and stands-by for data entry

The Change Order Detail records that appear in the **Change Order Breakdown** portal can be anticipated costs that were originally entered using the Anticipated Costs screen. Perform the following steps to roll-up these anticipated costs into the project cost shown in this portal and screen:

1. You first log one or more anticipated costs into the Anticipated Costs screen. You get to the Anticipated Costs screen from the Project Budget Status screen, by clicking on one of the **Anticp $ Changes** fields.

2. From the Anticipated Costs screen, using the FileMaker menu, select **Scripts > rollup_into_commit**. This will first display a dialog asking you to confirm the operation. Upon clicking **OK**, a second dialog will be displayed:



3. Answer the questions in this dialog and then click the **Proceed** button. This will display a third dialog asking whether the change is governed by a contract or a PO.

4. Appropriately answer the third dialog by clicking either **Contract** or **PO**.

Bottom Menu

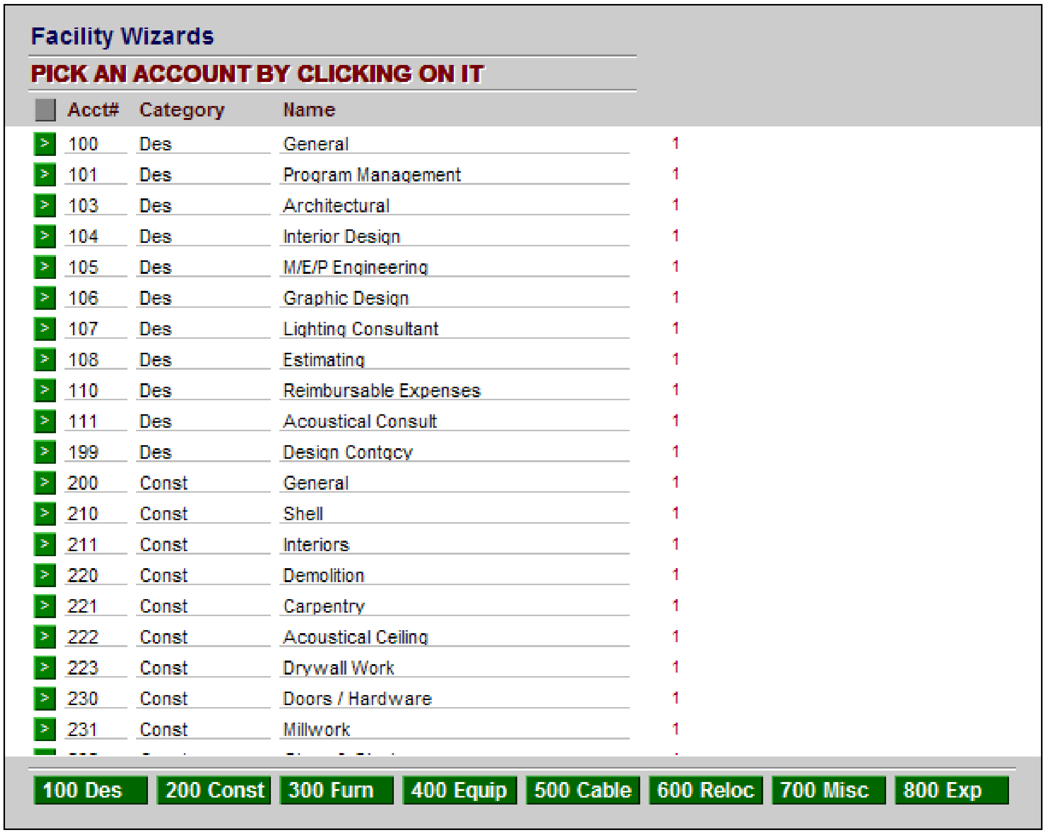
The Project Cost Detail screen's bottom menu contains these buttons:

- **Find** [button] – Switches into Find mode, allowing project costs to be found
- **Delete Cost Item** [button] – Deletes the project cost

Once you delete a project cost you cannot get it back (except by reentering the data or loading the last backup of the data). Be careful to make sure that you actually want to perform the deletion operation before you click the delete button.

PICK COST ACCOUNT SCREEN

The Pick Cost Account screen lets you select a specific cost account, within a cost account category, to associate with a project cost. This screen is a list display, displaying a Cost Account record for each cost account. The Pick Cost Account screen also has a bottom menu.



Pick Cost Account Screen

The Pick Cost Account screen does not have top menu

Data Fields and Buttons

The main portion of the Pick Cost Account screen has these data fields and buttons:

- > [button] – Selects the cost account and goes back to the previous cost screen
- **Acct #** [button enabled character field] – Cost account number. Selecting this field also selects the cost account and goes back to the previous cost screen.
- **Category** [button enabled character field] – Cost account category abbreviation for the cost account. Selecting this field also selects the cost account and goes back to the previous cost screen.
- **Name** [button enabled character field] – Cost account name. Selecting this field also selects the cost account and goes back to the previous cost screen.

Bottom Menu

The Pick Cost Account screen's bottom menu contains these buttons:

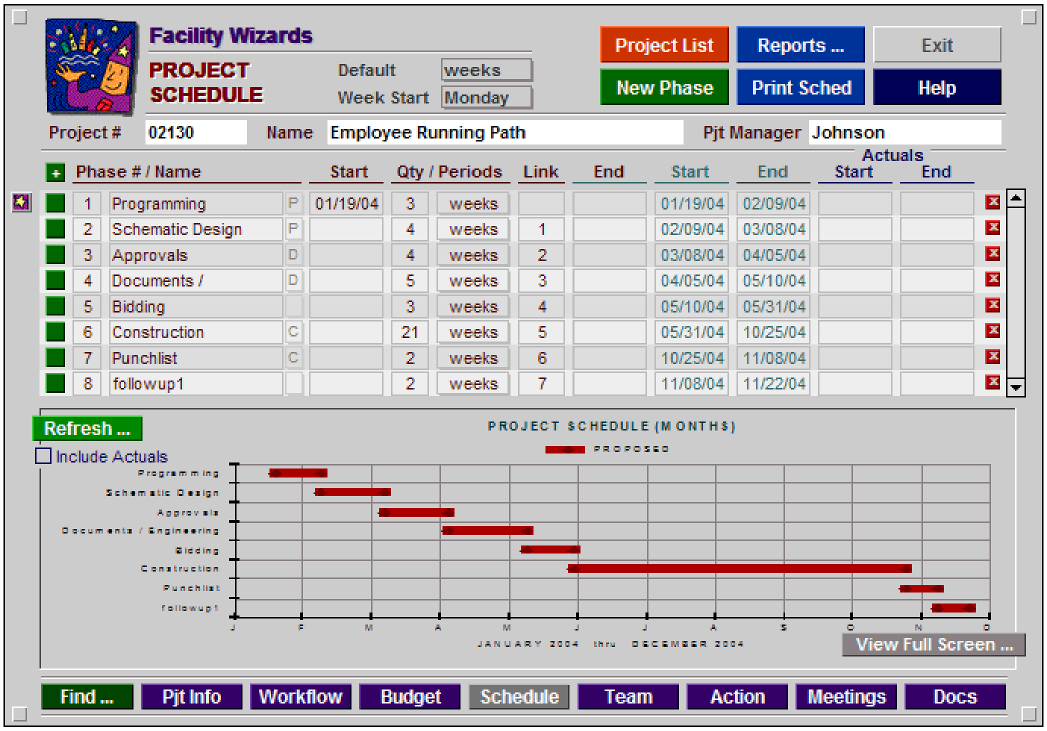
- **100 Des** [button] – Causes cost accounts to be shown only for cost account category 100 – Design Services

- **200 Const** [button] – Causes cost accounts to be shown only for cost account category 200 – Construction
- **300 Furn** [button] **–** Causes cost accounts to be shown only for cost account category 300 – Furniture
- **400 Equip** [button] – Causes cost accounts to be shown only for cost account category 400 – Systems/Equipment
- **500 Cable** [button] – Causes cost accounts to be shown only for cost account category 500 – Cabling/Telecom
- **600 Reloc** [button] **–** Causes cost accounts to be shown only for cost account category 600 – Relocation
- **700 Misc** [button] – Causes cost accounts to be shown only for cost account category 700 – Miscellaneous
- **800 Exp** [button] – Causes cost accounts to be shown only for cost account category 800 – Project Expenses

PROJECT SCHEDULE SCREEN

The Project Schedule screen lets you view, enter, and edit a project's schedule. A project's schedule consists of a set of schedule phases, each of which has a start and completion date, and which also can be linked together to identify dependencies between the phases.

This screen presents your data using a detail display, which contains a portal, and a screen area that graphically displays the schedule. The portal displays a Schedule Phase record for each schedule phase. The Project Schedule screen also has a top menu and bottom menu.



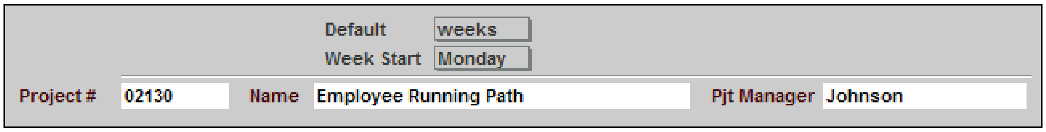
Project Schedule Screen

Top Menu

The Project Schedule screen's top menu contains these buttons:

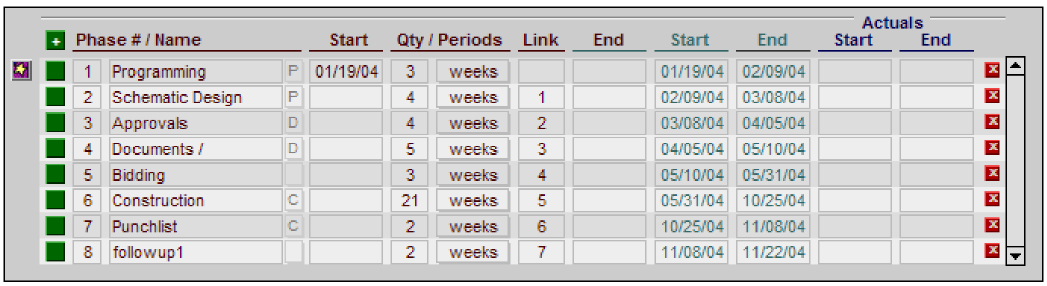
- **Project List** [button] – Goes back to the Project List screen, providing access to all of the projects in the Projects database
- **New Phase** [button] – Creates a new schedule phase, and stands-by for data entry
- **Reports** [button] – Goes to the Menu of Reports screen
- **Print Sched** [button] – Prints a Project Schedule report showing the project schedule
- **Exit** [button] – Ends the Projecto session
- **Help** [button] – Goes to the Project Help screen

Data Fields and Buttons



Use this part of the Project Schedule screen to access core information about the project and its schedule. It has these data fields and buttons:

- **Default** [value list] – Selects the default periods for the schedule phases. Selections are "**days**", "**wkdays**", "**weeks**", and "**months**".
- **Week Start** [value list] – Defines when the working week starts. Selections are "**Monday**" or "**Sunday**". This affects the calculation of the schedule when the **Periods** field (described below) is set "**weeks**".
- **Project #** [read-only character field] – Project ID
- **Name** [read-only character field] – Project name
- **Pjt Manager** [read-only character field] – Project manager



Use this portion of the Project Schedule screen to access the project's schedule phases. It consists of a portal, with a button above the portal, and an action-hint button to the left of the portal.

This button is above the portal:

- ***** [button] at the top of the portal and to the left of the **Phase # / Name** column headers – Creates a new schedule phase, and stands-by for data entry

This action-hint button is to the left of the portal:

- [action-hint button] to the left of the first action-hint button – Displays a dialog box providing help on inserting a new schedule phase into the schedule

The portal contains these data fields and buttons:

- [detail view button] – Changes the columns displayed in the portal to show notes regarding the schedule phases (this changed screen area is shown below). Once a note has been added to a phase, this button will show a capital "**N**".

To insert a new schedule phase at a particular point in the current schedule, hold down the CONTROL key while clicking the detail view button of the phase that you want to insert the new phase above.

- **Phase #** [read/write character field] – Phase number. These phase numbers determine the sort order of the displayed schedule phases. Entering integer values into this field causes the phases to be displayed in the designated order, including both in the portal and in the graphical schedule.

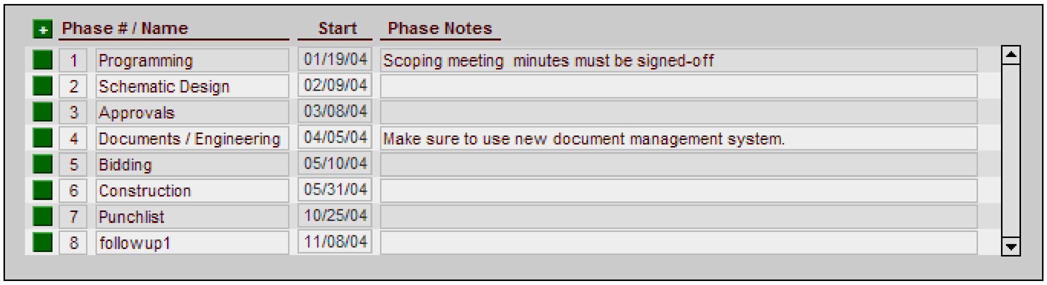
- **Name** [read/write character field] – Name of the project schedule phase
- [value list] directly to the right of the **Name** field – Marks the schedule phase as PDC phase. Selections are "**P**" for Planning, "**D**" for Design, and "**C**" for Construction. PDC phases can be optionally shown in the Project Schedule Summary report that is accessible from the Menu of Reports screen.
- **Start** (1) [read/write date field] – Start date for the schedule phase. The start date for the first phase must be specified. Then the start dates for the following phases can be calculated using the **Qty**, **Periods**, and **Link** fields (described next). If used for phases other than the first phase, this field will override the calculated start dates for the phases.
- **Qty** [read/write character field] – The quantity of schedule periods (described next) that is estimated it will take to accomplish the phase, from start to end
- **Periods** [value list] – The period used to calculate the duration of the phase. Selections are "**days**", "**wkdays**", "**weeks**", and "**months**".

The two selections in the **Periods** value list that allow schedule phases to be defined at a level of granularity of "**days**" are defined as follows:

- **days** include both weekdays and weekend days, equaling seven days in one week
- **wkdays** include only weekdays, but does not include weekends, equaling five days in one week

- **Link** [read/write character field] – Phase number for another schedule phase, defining a dependency between the two phases. For any two schedule phases, this causes the start date for the second phase to be based on the end date for the first phase.
- **End** (1) [read/write date field] – End date for the schedule phase. This field will override the phase duration calculated from the values in the **Qty** and **Periods** fields**.**
- **Start** (2) [calculated date field] – Calculated start date for the schedule phase, based on the **Start** (1), **Qty**, **Periods**, **Link**, and **End** (1) fields.
- **End** (2) [calculated date field] – Calculated end date for the schedule phase, based on the **Start** (1), **Qty**, **Periods**, **Link**, and **End** (1) fields.
- **Actuals-Start** (3) [read/write date field] – Actual start date of the schedule phase
- **Actuals-End** (3) [read/write date field] – Actual completion date of the schedule phase
- [delete button] – Deletes the schedule phase

Once you delete a schedule phase you cannot get it back (except by reentering the data or loading the last backup of the data). Be careful to make sure that you actually want to perform the deletion operation before you click the delete button.



Phase # / Name		Start	Phase Notes
1	Programming	01/19/04	Scoping meeting minutes must be signed-off
2	Schematic Design	02/09/04	
3	Approvals	03/08/04	
4	Documents / Engineering	04/05/04	Make sure to use new document management system.
5	Bidding	05/10/04	
6	Construction	05/31/04	
7	Punchlist	10/25/04	
8	followup1	11/08/04	

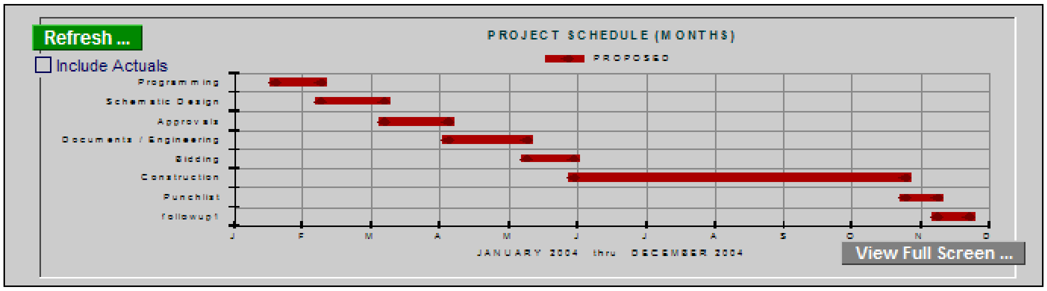
This is basically the same screen area shown above, which displays differently after one of the detail view buttons has been clicked: this changed screen area consists of a portal, with a button above the portal.

This button is above the portal:

- ***** [button] at the top of the portal and to the left of the **Phase # / Name** column headers – Creates a new schedule phase, and stands-by for data entry

The portal contains these data fields and buttons:

- [detail view button] – Changes the columns displayed in the portal back to the those showing just the phase definitions, and not showing the notes for the phase. Again, once a note has been added to a phase, this button will show a capital "**N**".
- **Phase #** [read/write character field] – Phase number. These phase numbers determine the sort order of the displayed schedule phases. Entering integer values into this field causes the phases to be displayed in the designated order, including in both the portal and the graphical schedule.
- **Name** [read/write character field] – Name of the project schedule phase
- **Start** [calculated date field] – Calculated start date for the schedule phase
- **Phase Notes** [read/write character field] – Any notes about the schedule phase



Use this part of the Project Schedule screen to view a graphical representation of a project's schedule. It displays a project schedule that shows the planned and actual project schedule phases. Planned phases are shown as red lines, and actual phases are shown as gray lines. In addition to the graphical schedule, this screen area contains the following data fields and buttons:

- **Refresh** [button] – Updates the graphical display of the project schedule to ensure that it accurately depicts the schedule data in the portal
- **Include Actuals** [checkbox] – Causes the actual schedule phase dates and durations, that it took to accomplish the phases, to be displayed alongside the planned phase dates and durations. Actual phase dates and durations come from the **Actuals-Start** and **Actuals-End** fields in the portal.
- **View Full Screen** [button] – Displays a full-screen view of the graphical schedule

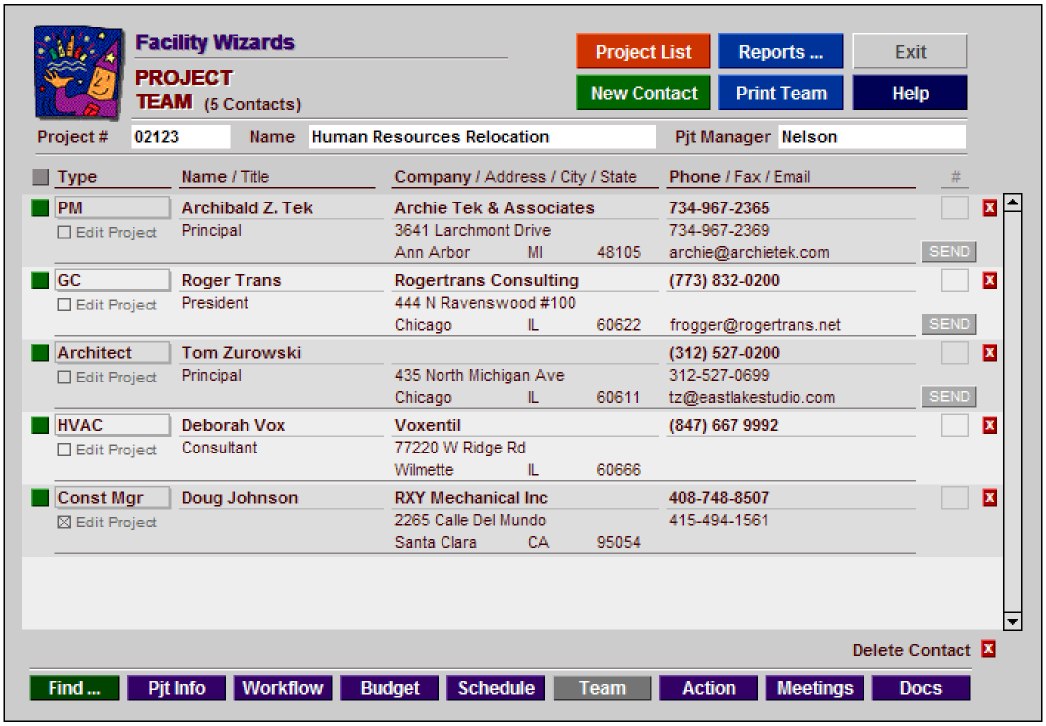
Bottom Menu

The Project Schedule screen’s bottom menu contains these buttons:

- **Find** [button] – Switches into Find mode, allowing schedule phases to be found
- **Pjt Info** [button] – Goes to the General Project Information screen
- **Workflow** [button] – Goes to the Project Workflow/Checklist screen
- **Budget** [button] – Goes to the Project Budget Status screen
- **Team** [button] – Goes to the Project Team screen
- **Action** [button] – Goes to the Project Notes/Action Items screen
- **Meetings** [button] – Goes to the Project Meetings/Meeting Minutes screen
- **Docs** [button] – Goes to the Project Documents screen

PROJECT TEAM SCREEN

The Project Team screen lets you view, enter, and edit the project's team, consisting of individual project team members/project contacts. This screen presents your data using a detail display, which contains a large portal that displays a Team Member/Contact record for each project team member/project contact. The Project Team screen also has a top menu and bottom menu.



Project Team Screen

The phrases project team member and project contact both refer to a person involved with the project in any capacity. That is, these two terms mean the same thing.

Top Menu

The Project Team screen's top menu contains these buttons:

- **Project List** [button] – Goes back to the Project List screen, providing access to the Projects database
- **New Contact** [button] – Creates a new project team member/project contact in the portal, and stands-by for data entry
- **Reports** [button] – Goes to the Menu of Reports screen
- **Print Team** [button] – Prints a Project Team report listing the project team members/project contacts and their contact information
- **Exit** [button] – Ends the Projecto session
- **Help** [button] – Goes to the Project Help screen

Data Fields and Buttons

Use this part of the Project Team screen to view the project ID and project name for the project that the project team members/project contacts belong to. It has these data fields and buttons:

- **Project #** [read-only character field] – Project ID
- **Name** [read-only character field] – Project name
- **Pjt Manager** [read-only character field] – Project manager

Use this part of the Project Team screen to access the individual project team members/project contacts. It consists of a portal followed by button:

The portal contains these data fields and buttons:

- [detail view button] – Goes to the Project Contact screen, providing access to detailed information for the project team member/project contact
- **Type** [value list] – Type of project team member/project contact. Selections include "**User**", "**Architect**", "**Const Mgr**".
- **Edit Project** [checkbox] in the **Type** column under the value list – Indicates that the project team member/project contact has permission to edit the project, for a multi-user client-server Projecto installation
- **Name** [read/write character field] – Project team member/project contact name
- **Title** [read/write character field] – Project team member's/project contact's title
- **Company** [read/write character field] – Project team member's/project contact's company, for a project team member who is employed by a vendor
- **Address** [read/write character field] – Project team member/project contact street address
- **City** [read/write character field] – Project team member/project contact city
- **State** [read/write character field] – Project team member/project contact state or province
- **Phone** [read/write character field] – Project team member/project contact phone number
- **Fax** [read/write character field] – Project team member/project contact fax number
- **Email** [read/write character field] – Project team member/project contact email address

- **#** [read/write character field] – An integer defining the sort order of the displayed project team member/project contacts. Entering integer values into this field causes the project team member/project contacts to be displayed in the designated order.
- **SEND** [button] – Creates a blank email message addressed to the project team member/project contact email address shown in the **Email** field
- [delete button] – Deletes the project team member/project contact

Once you delete a project team member/project contact you cannot get it back (except by reentering the data or loading the last backup of the data). Be careful to make sure that you actually want to perform the deletion operation before you click the delete button.

The area below the portal contains this button:

- **New Contact** [button] – Creates a new project team member/project contact, and stands-by for data entry

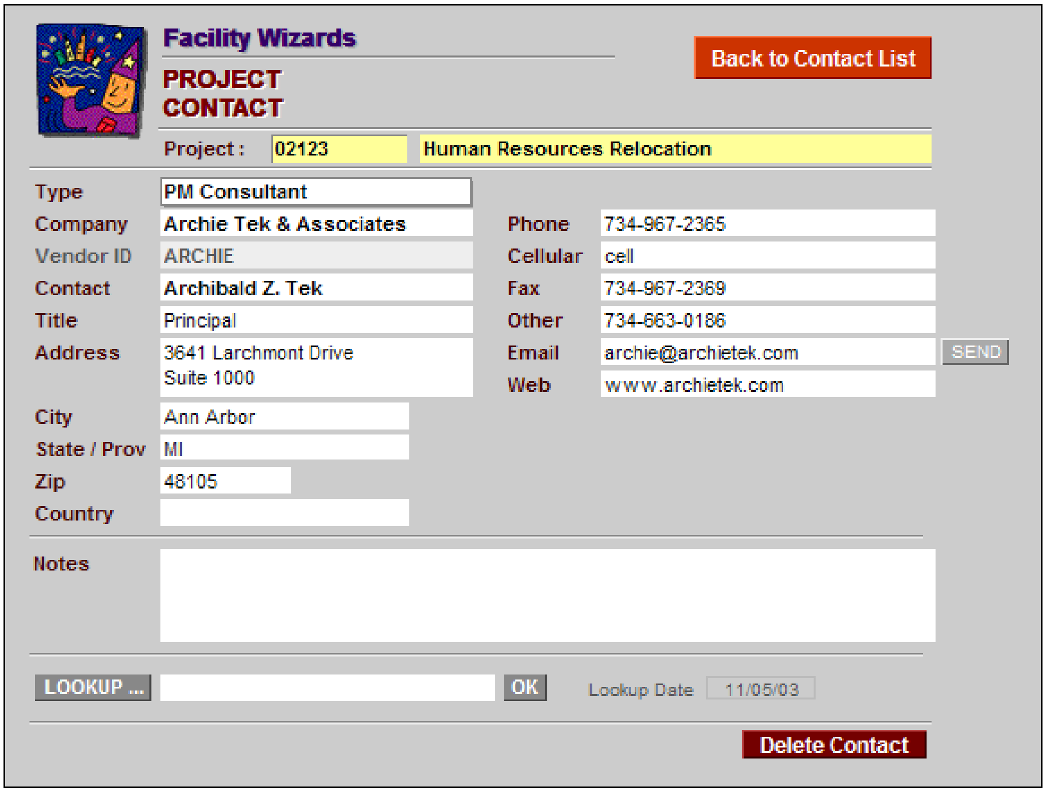
Bottom Menu

The Project Team screen's bottom menu contains these buttons:

- **Find** [button] – Switches into Find mode, allowing project team members/project contacts to be found
- **Pjt Info** [button] – Goes to the General Project Information screen
- **Workflow** [button] – Goes to the Project Workflow/Checklist screen
- **Budget** [button] – Goes to the Project Budget Status screen
- **Schedule** [button] – Goes to the Project Schedule screen
- **Action** [button] – Goes to the Project Notes/Action Items screen
- **Meetings** [button] – Goes to the Project Meetings/Meeting Minutes screen
- **Docs** [button] – Goes to the Project Documents screen

PROJECT CONTACT SCREEN

The Project Contact screen lets you view, enter, and edit contact information for an individual project team member/project contact. This screen presents your data using a detail display, and has a top menu and bottom menu.



Project Contact Screen

Top Menu

The Project Contact screen's top menu contains this button:

- **Back to Contact List** [button] – Goes back to the Project Team screen, providing access to all project team members/project contacts

Data Fields and Buttons

The main portion of the Project Contact screen has these data fields and buttons:

- **Project** [read-only character field] – Project ID
- [read-only character field] next to the **Project** field – Project name
- **Type** [value list] – Type of project contact. Selections include "**User**", "**Architect**", "**Const Mgr**".
- **Company** [read/write character field] – Name of the company that employs the project team member/project contact, for a project team member who is employed by a vendor
- **Vendor ID** [read/write character field] – Vendor ID, for a project contact who is employed by a vendor
- **Contact** [read/write character field] – Project contact name
- **Title** [read/write character field] – Project contact's title
- **Address** [read/write character field] – Project contact street address
- **City** [read/write character field] – Project contact city

- **State / Prov** [read/write character field] – Project contact state or province
- **Zip** [read/write character field] – Project contact zip-code or postal code
- **Country** [read/write character field] – Project contact country
- **Phone** [read/write character field] – Project contact phone number
- **Cellular** [read/write character field] – Project contact cell phone number
- **Fax** [read/write character field] – Project contact fax number
- **Other** [read/write character field] – Alternate phone number for the project contact
- **Email** [read/write character field] – Project contact email address
- **SEND** [button] – Creates a blank email message addressed to the project contact email address shown in the **Email** field
- **Web** [read/write character field] – Website URL for the company that employs the project contact, for a project contact who is employed by a vendor
- **Notes** [read/write character field] – Any notes regarding the project contact
- **LOOKUP** [button and value list] – Prepares an existing project team member/project contact for another project, or an existing vendor contact, to be imported as a new project team member/project contact for this project. The button first displays a dialog box asking whether to lookup the new project contact from another project team or from the Vendors database; the value list displays a list of the project contacts or vendor contacts, one of which is selected to import as the new project team member/project contact.
- **OK** [button] – Causes the project contact or vendor contact whose name is displayed in the value list to be loaded as the new project team member
- **Lookup Date** [read/write date field] – The date that the **LOOKUP** operation was performed

Bottom Menu

The Project List screen's bottom menu contains these buttons:

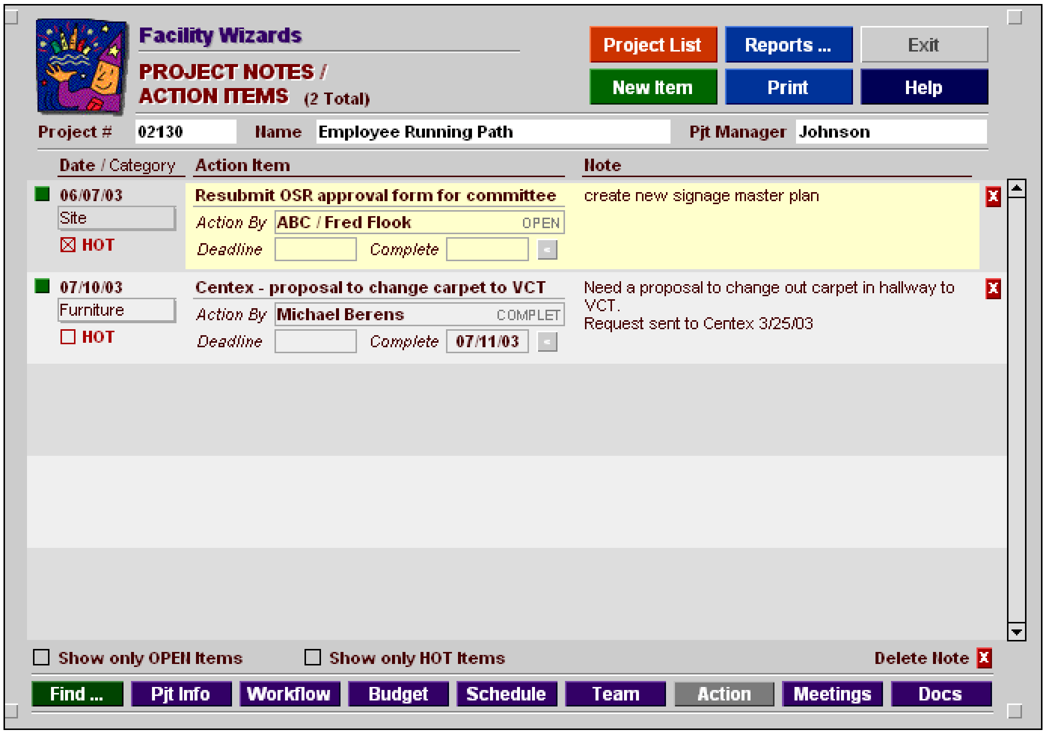
- **Delete Contact** [button] – Deletes the project team member/project contact

> Once you delete a project team member/project contact you cannot get it back (except by reentering the data or loading the last backup of the data). Be careful to make sure that you actually want to perform the deletion operation before you click the delete button.

PROJECT NOTES/ACTION ITEMS SCREEN

The Project Notes/Action Items screen lets you view, enter, and edit project related notes and action items. The data contained in this screen includes persons responsible for action items, due dates, and actual completion dates.

This screen presents your data using a detail display, with a large portal that displays a Note/Action Item record for each project note and action item. The Project Notes/Action Items screen also has a top menu and bottom menu.



Project Notes/Action Items Screen

Top Menu

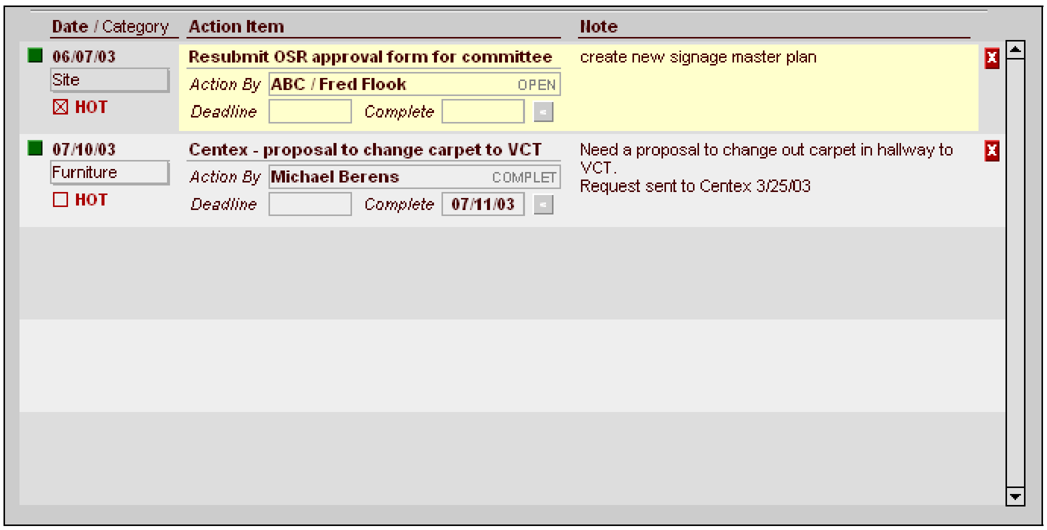
The Project Notes/Action Items screen's top menu contains these buttons:

- **Project List** [button] – Goes to the Project List screen, providing access to the Projects database
- **New Item** [button] – Creates a new project note or action item in the portal, and stands-by for data entry
- **Reports** [button] – Goes to the Menu of Reports screen
- **Print** [button] – Prints an Action Items report showing the either the project notes or action items. This button first displays a dialog box for selecting whether to print project notes or action items. A second dialog box is then displayed, for selecting how to sort the report.
- **Exit** [button] – Ends the Projecto session
- **Help** [button] – Goes to the Project Help screen

Data Fields and Buttons

Use this part of the Project Notes/Action Items screen to view the project ID, project name, and project manager for the project that the project notes and actions items belong to. It has these data fields and buttons:

- **Project #** [read-only character field] – Project ID
- **Name** [read-only character field] – Project name
- **Pjt Manager** [read-only character field] – Project manager



Use this part of the Project Notes/Action Items screen to access the project notes and action items. It consists of a portal followed by two checkboxes:

The portal contains these data fields and buttons:

- **Date** [read/write character field] – Date of the project note or action item
- **Category** [value list] – Category for the project note or action item. Selections include "**Design**", "**Permits**", "**Furniture**", etc.
- **HOT** [checkbox] – Specifies that the action item is HOT, indicating that the action item is more important than action items that are not HOT
- **Action Item** [read/write character field] – Description of the action item
- **Action By** [read/write character field] – Person responsible for accomplishing the action item
- [read-only character field] within and at the far right of the **Action By** field – Action item status. Values will be "**OPEN**" for Open action items that have not been accomplished, and "**COMPLET**" for Complete action items that have been accomplished.
- **Deadline** [read/write date field] – Date by which the action item must be accomplished
- **Complete** [read/write date field] – Actual action item completion date
- [button] directly to the right of the **Complete** date field – Marks the action item status as Complete, and writes the completion date into the **Complete** field
- **Note** [read/write character field] – Description of the project note or action item
- [delete button] – Deletes the project note or action item

Once you delete a project note or action item you cannot get it back (except by reentering the data or loading the last backup of the data). Be careful to make sure that you actually want to perform the deletion operation before you click the delete button.

The area below the portal contains these checkboxes:

- **Show Only Open Items** [checkbox] – Causes only Open action items to be displayed
- **Show Only HOT Items** [checkbox] – Causes only HOT action items to be displayed

Bottom Menu

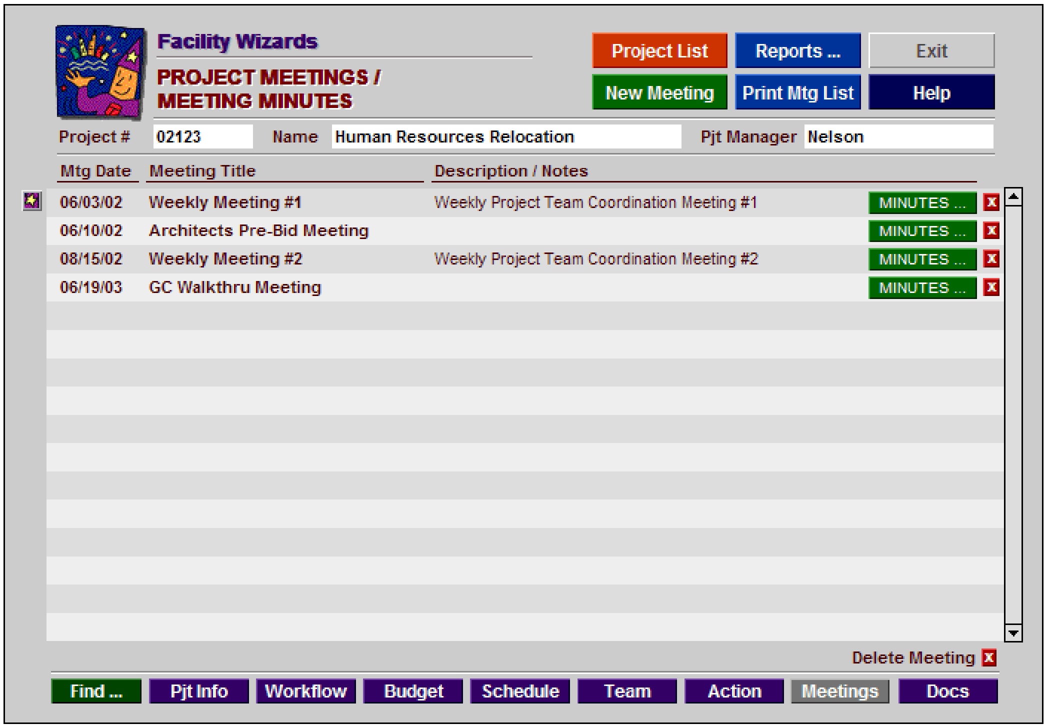
The Project Notes/Action Items screen's bottom menu contains these buttons:

- **Find** [button] – Switches into Find mode, allowing project notes and action items to be found
- **Pjt Info** [button] – Goes to the General Project Information screen
- **Workflow** [button] – Goes to the Project Workflow/Checklist screen
- **Budget** [button] – Goes to the Project Budget Status screen
- **Schedule** [button] – Goes to the Project Schedule screen
- **Team** [button] – Goes to the Project Team screen
- **Meetings** [button] – Goes to the Project Meetings/Meeting Minutes screen
- **Docs** [button] – Goes to the Project Documents screen

PROJECT MEETINGS/MEETING MINUTES SCREEN

The Project Meetings/Meeting Minutes screen lets you view, enter, and edit information about meetings for your organization's capital projects. You can also record minutes resulting from the project meetings.

This screen presents your data using a detail display, with a large portal that displays a Meeting record for each meeting. The Project Meetings/Meeting Minutes screen also has a top menu and bottom menu.



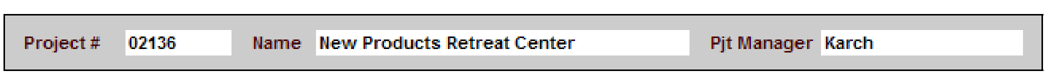
Project Meetings/Meeting Minutes Screen

Top Menu

The Project Meetings/Meeting Minutes screen's top menu contains these buttons:

- **Project List** [button] – Goes to the Project List screen, providing access to the Projects database
- **New Meeting** [button] – Creates a new meeting in the portal, and stands-by for data entry
- **Reports** [button] – Goes to the Menu of Reports screen
- **Print Mtg List** [button] – Prints a Meeting List report listing of the project meetings
- **Exit** [button] – Ends the Projecto session
- **Help** [button] – Goes to the Project Help screen

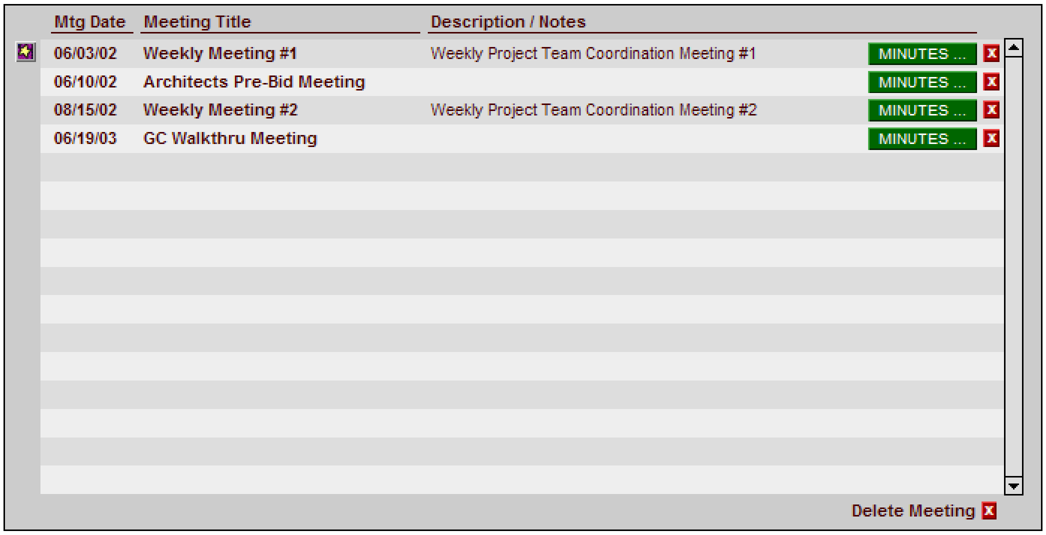
Data Fields and Buttons



Use this portion of the Project Meetings/Meeting Minutes screen to view the project ID and project name for the project that the meetings belong to. It has these data fields and buttons:

- **Project #** [read-only character field] – Project ID

- **Name** [read-only character field] – Project name
- **Pjt Manager** [read-only character field] – Project manager



Use this part of the Project Meetings/Meeting Minutes screen to enter and view the project meetings. It consists of an action-hint button, a portal, and another button:

The action-hint button is as follows:

- [action-hint button] to the left of the first row – Provides instructions on how to copy a set of meeting minutes from one meeting to another.

To copy a set of meeting minutes from one meeting to another, hold down the CONTROL key while clicking on the **MINUTES** button belonging to the meeting that the minutes are to be copied from.

The portal contains these data fields and buttons:

- **Mtg Date** [read/write date field] – Project meeting date
- **Meeting Title** [read/write character field] – Project meeting title
- **Description / Notes** [read/write character field] – Brief description of the meeting and any notes about the meeting
- **MINUTES** [button] – Goes to the Project Meeting Minutes screen for the meeting, allowing meeting minutes to the viewed, entered, and edited
- [delete button] – Deletes the project meeting

Once you delete a project meeting you cannot get it back (except by reentering the data or loading the last backup of the data). Be careful to make sure that you actually want to perform the deletion operation before you click the delete button.

Bottom Menu

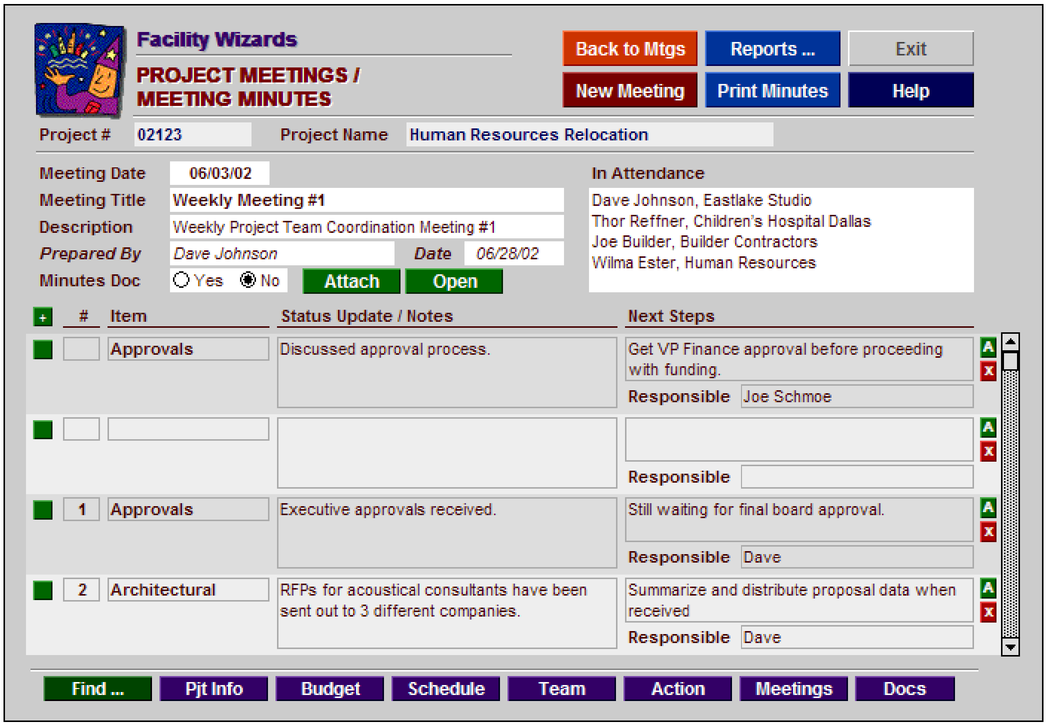
The Project Meetings/Meeting Minutes screen's bottom menu contains these buttons:

- **Find** [button] – Switches into Find mode, allowing project meetings to be found
- **Pjt Info** [button] – Goes to the General Project Information screen

- **Workflow** [button] – Goes to the Project Workflow/Checklist screen
- **Budget** [button] – Goes to the Project Budget Status screen
- **Schedule** [button] – Goes to the Project Schedule screen
- **Team** [button] – Goes to the Project Team screen
- **Action** [button] – Goes to the Project Notes/Action Items screen
- **Docs** [button] – Goes to the Project Documents screen

PROJECT MEETING MINUTES SCREEN

The Project Meeting Minutes screen lets you enter, view, and edit minutes resulting from your project meetings. This screen presents your data using a detail display, which contains a portal that displays the Meeting Minutes records. The Project Meeting Minutes screen also has a top menu and bottom menu.



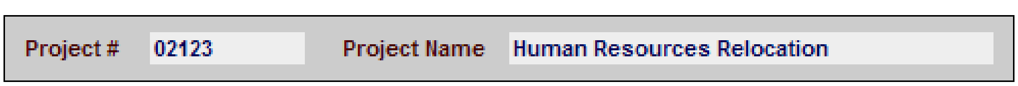
Project Meeting Minutes Screen

Top Menu

The Project Meeting Minutes screen's top menu contains these buttons:

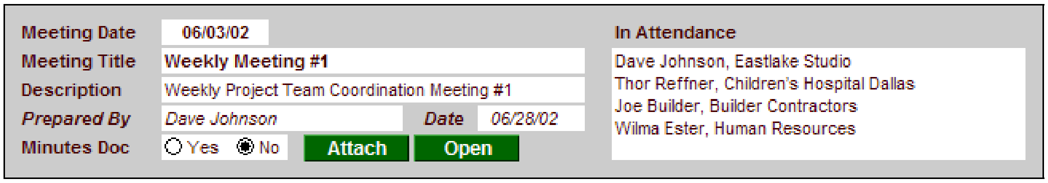
- **Back to Mtgs** [button] – Goes back to the Project Meetings/Meeting Minutes screen
- **New Meeting** [button] – Creates a new Meeting Minutes record in the portal, and stands-by for data entry
- **Reports** [button] – Goes to the Menu of Reports screen
- **Print Minutes** [button] – Prints the Project Meeting Minutes report showing the meeting minutes
- **Exit** [button] – Ends the Projecto session
- **Help** [button] – Goes to the Project Help screen

Data Fields and Buttons



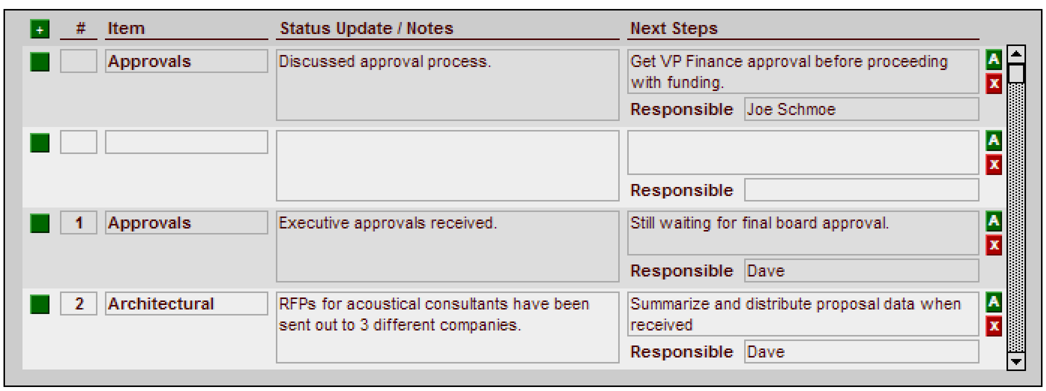
Use this part of the Project Meeting Minutes screen to view the project ID and project name for the project that the meeting minutes belong to. It has these data fields and buttons:

- **Project #** [read-only character field] – Project ID
- **Project Name** [read-only character field] – Project name



Use this part of the Project Meeting Minutes screen to access core information about a project meeting and its meeting minutes. It contains these data fields and buttons:

- **Meeting Date** [read/write date field] – Project meeting date
- **Meeting Title** [read/write character field] – Meeting title
- **Description** [read/write character field] – One line meeting description
- **Prepared By** [read/write character field] – Name of the person who prepared the meeting minutes
- **Date** [read/write date field] – Date that the meeting minutes were prepared
- **Minutes Doc-Yes, No** [read-only radio buttons] – Specifies whether there is an attached document containing the meeting minutes. Projecto internally sets these radio buttons to Yes when a document is attached using the **Attach** button (described next).
- **Attach** [button] – Attaches an external file that is a document containing the meeting minutes
- **Open** [button] – Opens the attached meeting minutes document
- **In Attendance** [read/write character field] – List of persons who attended the meeting



Use this portal to enter and view meeting minutes for a project meeting. It contains these data fields and buttons:

- + [button] – Creates a new Meeting Minutes record, and stands-by for data entry
- # [read/write character field] – An integer defining the sort order of the displayed Meeting Minutes records. Entering integer values into this field causes the records to be displayed in the designated order.
- **Item** [read/write character field] – A category for each Meeting Minutes record
- **Status Update / Notes** [read/write character field] – Any update to the status of the meeting, and notes regarding the topics discussed at the meeting
- **Next Steps** [read/write character field] – Description of project Next Steps that were decided at the meeting
- **Responsible** [read/write character field] – Name of the person who is responsible for accomplishing the project Next Step
- **A** [button] – Creates a project action item from the Meeting Minutes record, and goes to the Project Notes/Action Items screen, displaying the new project action item
- [delete button] – Deletes the Meeting Minutes record

Once you delete a Meeting Minutes record you cannot get it back (except by reentering the data or loading the last backup of the data). Be careful to make sure that you actually want to perform the deletion operation before you click the delete button.

Bottom Menu

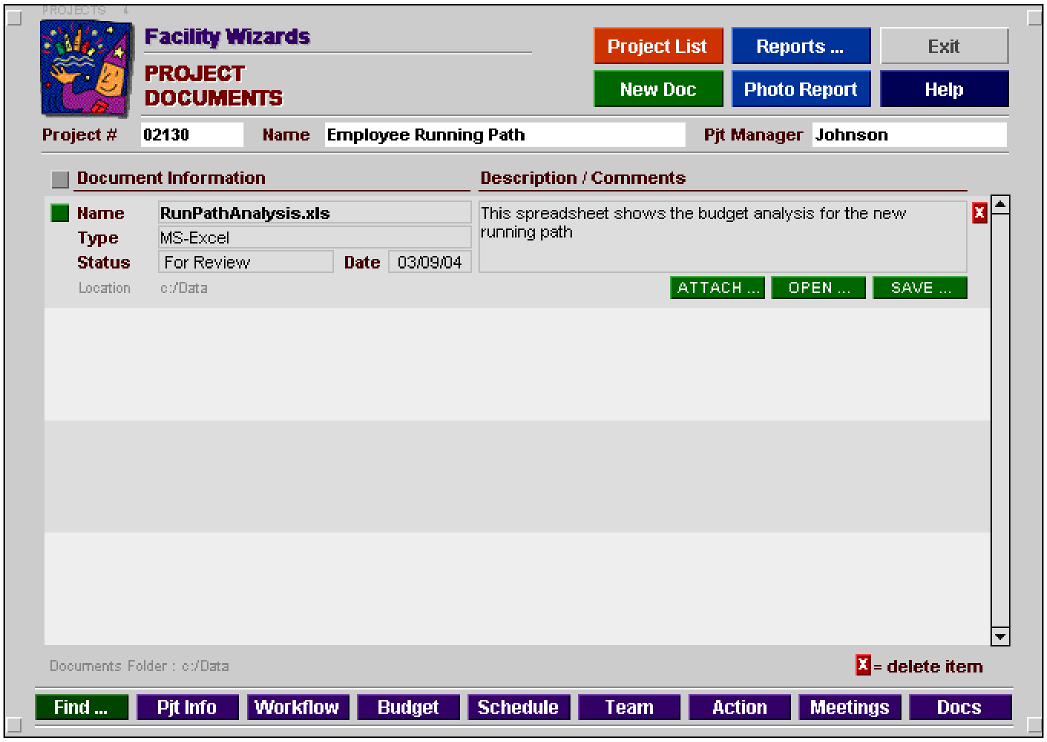
The Project Meeting Minutes screen's bottom menu contains these buttons:

- **Find** [button] – Switches into Find mode, allowing meeting minutes to be found
- **Pjt Info** [button] – Goes to the General Project Information screen
- **Workflow** [button] – Goes to the Project Workflow/Checklist screen
- **Budget** [button] – Goes to the Project Budget Status screen
- **Schedule** [button] – Goes to the Project Schedule screen
- **Team** [button] – Goes to the Project Team screen
- **Action** [button] – Goes to the Project Notes/Action Items screen
- **Docs** [button] – Goes to the Project Documents screen

PROJECT DOCUMENTS SCREEN

The Project Documents screen lets you attach, view, and change project document files that are stored on your computer or computer network. Examples of the types of files that may be worthwhile to attach within Projecto include CAD files, spreadsheets, and so forth.

This screen presents your data using a detail display, with a large portal that displays a Document record for each document. The Project Documents screen also has a top menu and bottom menu.



Project Documents Screen

Top Menu

The Project Documents screen's top menu contains these buttons:

- **Project List** [button] – Goes to the Project List screen, providing access to the Projects database
- **New Doc** [button] – Creates a new Document record in the portal, and stands-by for data entry. The document itself must still be attached using the **ATTACH** button that is part of the Document record.
- **Reports** [button] – Goes to the Menu of Reports screen
- **Photo Report** [button] – Prints a Photo report showing the project images
- **Exit** [button] – Ends the Projecto session
- **Help** [button] – Goes to the Project Help screen

Data Fields and Buttons

Use this part of the Project Documents screen to view the project ID and project name for the project that the documents belong to. It has these data fields and buttons:

- **Project #** [read-only character field] – Project ID
- **Name** [read-only character field] – Project name
- **Pjt Manager** [read-only character field] – Project manager

Use this part of the Project Documents screen to attach and view the project document files. It consists of a portal followed by button and a data field.

The portal contains these data fields and buttons:

- [detail view button] – Opens the attached document
- **Document Information-Name** [read/write character field] – Document name
- **Document Information-Type** [read/write character field] – Document type, for example "**MS-Excel spreadsheet**", "**text file**", "**AutoCAD file**", etc.
- **Document Information-Status** [read/write character field] – Document status, for example "**draft**", "**in-progress**", "**released**" , etc.
- **Document Information-Date** [read/write character field] – Date when the document was created, last edited, or was attached inside Projecto
- **Document Information-Location** [read-only character field] – Directory path and filename of the attached document
- **Description / Comments** [read/write character field] – Document description
- **ATTACH** [button] – Attaches the external document file within Projecto
- **OPEN** [button] – Opens the attached document file
- **SAVE** [button] – Saves a previously attached document file as the latest revision of the attached external document file. For this to work, the file must have first been changed and then saved within the file's application.

- [delete button] – Deletes the Document record, including the reference to the external document file. This does not delete the actual document file that exists outside of Projecto.

The area below the portal contains this data field:

- **Documents Folder** [read-only character field] – Shows the computer directory or computer network directory where attached document files are stored

Bottom Menu

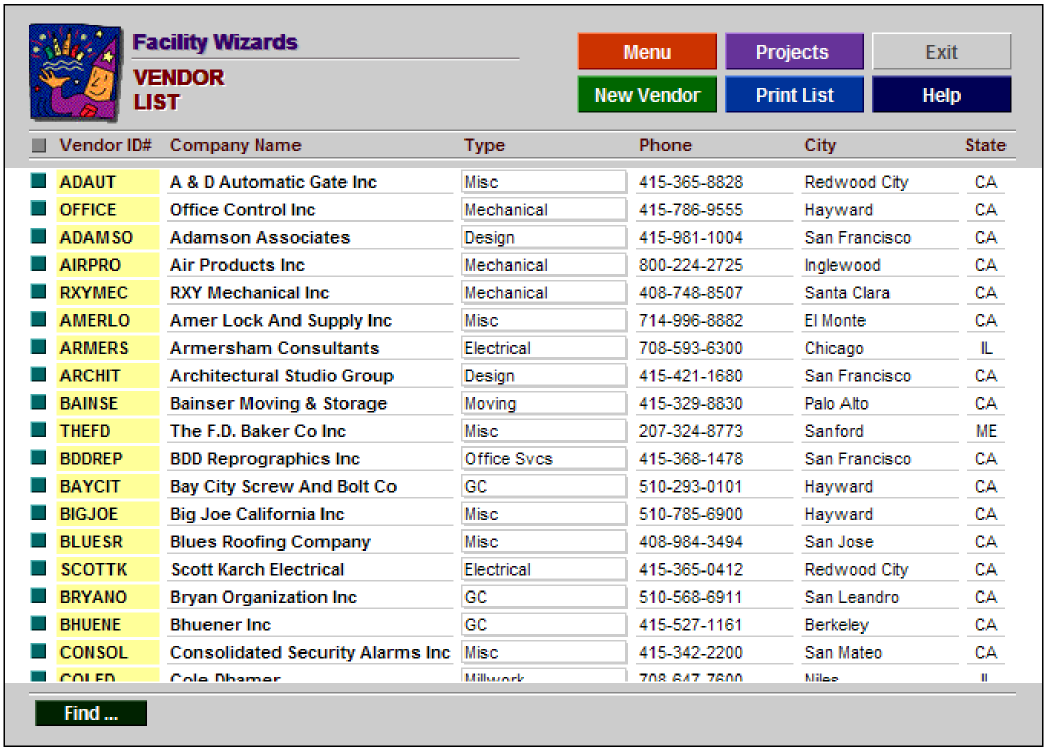
The Project Documents screen's bottom menu contains these buttons:

- **Find** [button] – Switches into Find mode, allowing project documents to be found
- **Pjt Info** [button] – Goes to the General Project Information screen
- **Workflow** [button] – Goes to the Project Workflow/Checklist screen
- **Budget** [button] – Goes to the Project Budget Status screen
- **Schedule** [button] – Goes to the Project Schedule screen
- **Team** [button] – Goes to the Project Team screen
- **Action** [button] – Goes to the Project Notes/Action Items screen
- **Meetings** [button] – Goes to the Project Meetings/Meeting Minutes screen

VENDOR LIST SCREEN

The Vendor List screen lets you access information about the vendors that are involved with your organization's capital projects. Vendor companies can include architectural firms, contracting companies, or any other company that is involved with your projects in some capacity. From this screen you can navigate to the screen that provides detailed information for a vendor.

This screen presents your data using a list display, displaying a Vendor record for each vendor. The Vendor List screen also has a top menu and bottom menu.



Vendor List Screen

Top Menu

The Vendor List screen's top menu contains these buttons:

- **Menu** [button] – Goes back to the Main Menu screen
- **New Vendor** [button] – Creates a new vendor, and stands-by for data entry
- **Projects** [button] – Goes to the Project List screen, providing access to the Projects database
- **Print List** [button] – Prints a Vendor Report, listing the vendors stored in Projecto including vendor specialties, locations, and contact information
- **Exit** [button] – Ends the Projecto session
- **Help** [button] – Goes to the Project Help screen

Data Fields and Buttons

The main portion of the Vendor List screen has these data fields and buttons:

- [detail view button] – Goes to the Vendor Data screen, providing complete detail for the vendor
- **Vendor ID#** [read/write character field] – Vendor ID

- **Company Name** [read/write character field] – Vendor company name
- **Type** [value list] – Vendor type. Selections include "**Design**", "**Mechanical**", "**Furniture**", etc.
- **Phone** [read/write character field] – Vendor company phone number
- **City** [read/write character field] – Vendor company city
- **State** [read/write character field] – Vendor company state or province

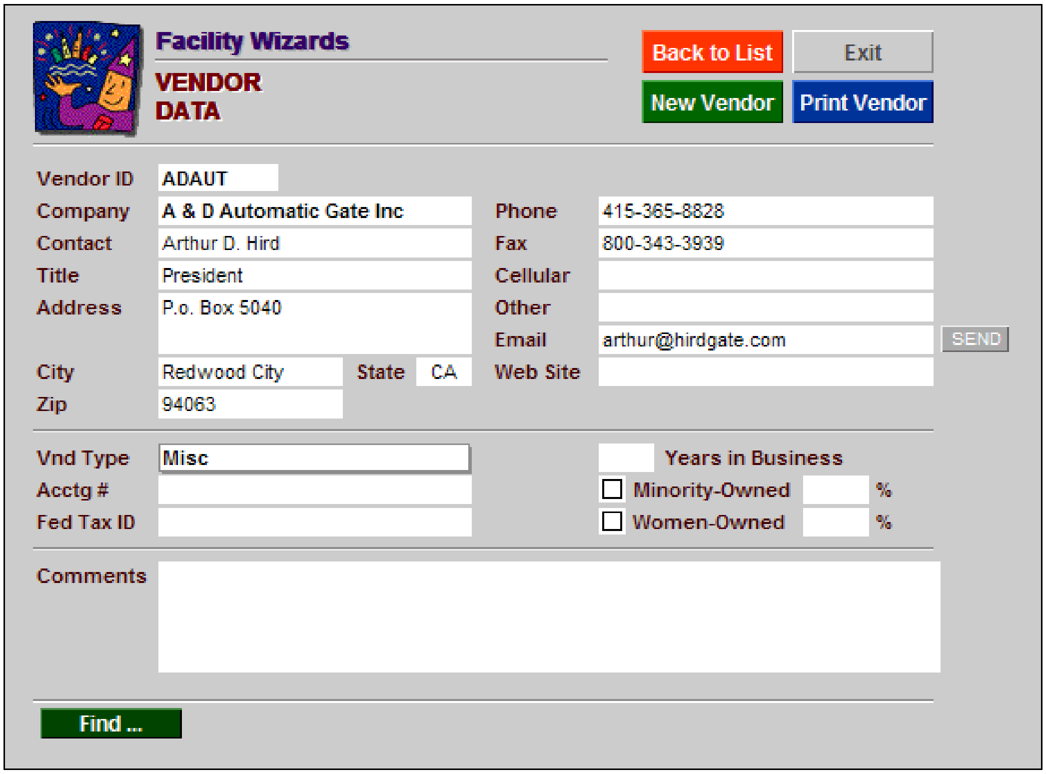
Bottom Menu

The Vendor List screen's bottom menu contains these buttons:

- **Find** [button] – Switches into Find mode, allowing vendors to be found

VENDOR DATA SCREEN

The Vendor Data screen lets you view, enter, and edit detailed information for a vendor that is involved with your organization's capital projects, including the vendor's contact information. This screen presents your data using a detail display, and has top menu and bottom menu.



Vendor Data Screen

Top Menu

The Vendor Data screen's top menu contains these buttons:

- **Back to List** [button] – Goes back to the Vendor List screen, providing access to all of the vendors in the Vendors database
- **New Vendor** [button] – Creates a new vendor, and stands-by for data entry
- **Exit** [button] – Ends the Projecto session
- **Print Vendor** [button] – Prints a Vendor Data Sheet report, showing the vendor's name, specialty, location, and contact information

Data Fields and Buttons

The main portion of the Vendor Data screen has these data fields and buttons:

- **Vendor ID** [read/write character field] – Vendor ID
- **Company** [read/write character field] – Vendor company name
- **Contact** [read/write character field] – Vendor contact person
- **Title** [read/write character field] – Vendor contact person's title
- **Address** [read/write character field] – Vendor street address
- **City** [read/write character field] – Vendor city
- **State** [read/write character field] – Vendor state or province

- **Zip** [read/write character field] – Vendor zip-code or postal code
- **Phone** [read/write character field] – Vendor phone number
- **Fax** [read/write character field] – Vendor fax number
- **Cellular** [read/write character field] – Vendor contact person's cell phone number
- **Other** [read/write character field] – Vendor's or vendor contact person's alternate phone number
- **Email** [read/write character field] – Vendor's or vendor contact person's email address
- **SEND** [button] – Creates a blank email message addressed to the vendor contact email address shown in the **Email** field
- **Web Site** [read/write character field] – Vendor website URL
- **Vnd Type** [value list] – Vendor type. Selections include "**Design**", "**Mechanical**", "**Furniture**", etc.
- **Acctg #** [read/write character field] – Vendor accounting ID
- **Fed Tax ID** [read/write character field] – Vendor Federal Tax ID
- **Years in Business** [read/write character field] – Number of years that the vendor company has been in-business
- **Minority-Owned %** [checkbox and read/write character field] – Percentage that the vendor company is minority owned
- **Women-Owned %** [checkbox and read/write character field] – Percentage that the vendor company is women owned

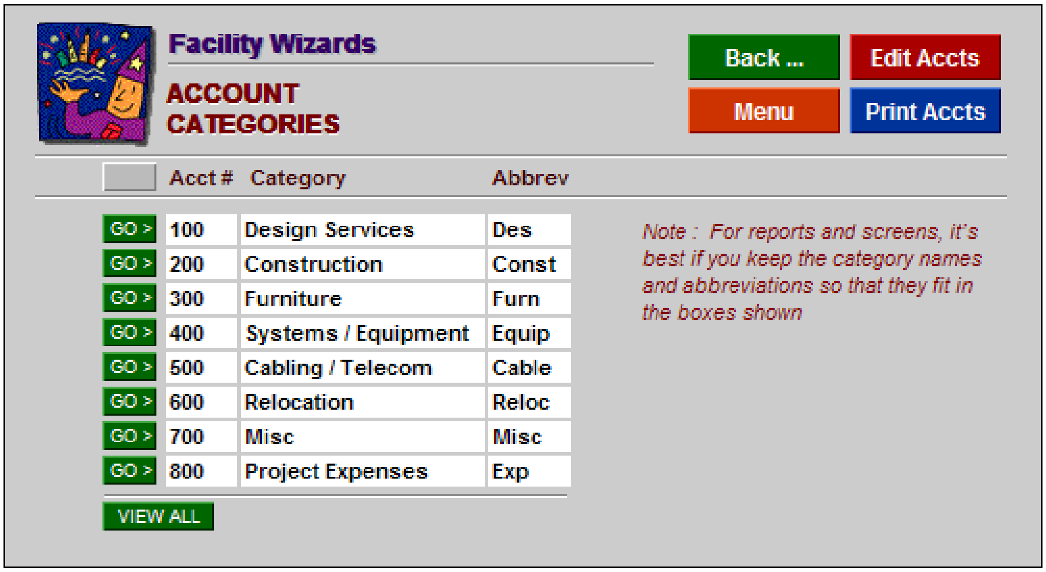
Bottom Menu

The Vendor Data screen's bottom menu contains these buttons:

- **Find** [button] – Switches into Find mode, allowing vendors to be found

COST ACCOUNT CATEGORIES SCREEN

The Cost Account Categories screen lets you view, enter, and edit the cost account categories that you use to track project budget items and project costs. From this screen you can navigate to the screen that lets you access the specific cost accounts. This screen presents your data using a detail display, with a top menu.



Cost Account Categories Screen

Top Menu

The Cost Account Categories screen's top menu contains these buttons:

- **Back** [button] – Goes back to the previous screen that was used to navigate to the Cost Account Categories screen
- **Menu** [button] – Goes to the Main Menu screen
- **Edit Accts** [button] – Provides instructions on how to edit the cost account categories
- **Print Accts** [button] – Prints a List of Project Cost Accounts report showing the cost account categories and cost accounts

Data Fields and Buttons

The main portion of the Cost Account Categories screen has these data fields and buttons:

- **GO** [button] – Goes to the Chart of Cost Accounts screen, allowing cost accounts belonging to the cost account category to be entered and edited
- **Acct #** [read-only character field] – Cost account category number
- **Category** [read/write character field] – Cost account category
- **Abbrev** [read/write character field] – An abbreviation for the cost account category

Bottom Menu

The Cost Account Categories screen's bottom menu contains these buttons:

- **VIEW ALL** [button] – Goes to the Chart of Cost Accounts screen, allowing cost accounts to be entered and edited for all cost account categories

CHART OF COST ACCOUNTS SCREEN

The Chart of Cost Accounts screen lets you view, enter, and edit the individual cost accounts that you use to track project budget items and project costs. This screen presents your data using a list display, displaying a Cost Account record for each cost account. The Chart of Cost Accounts screen also contains a top menu and bottom menu.

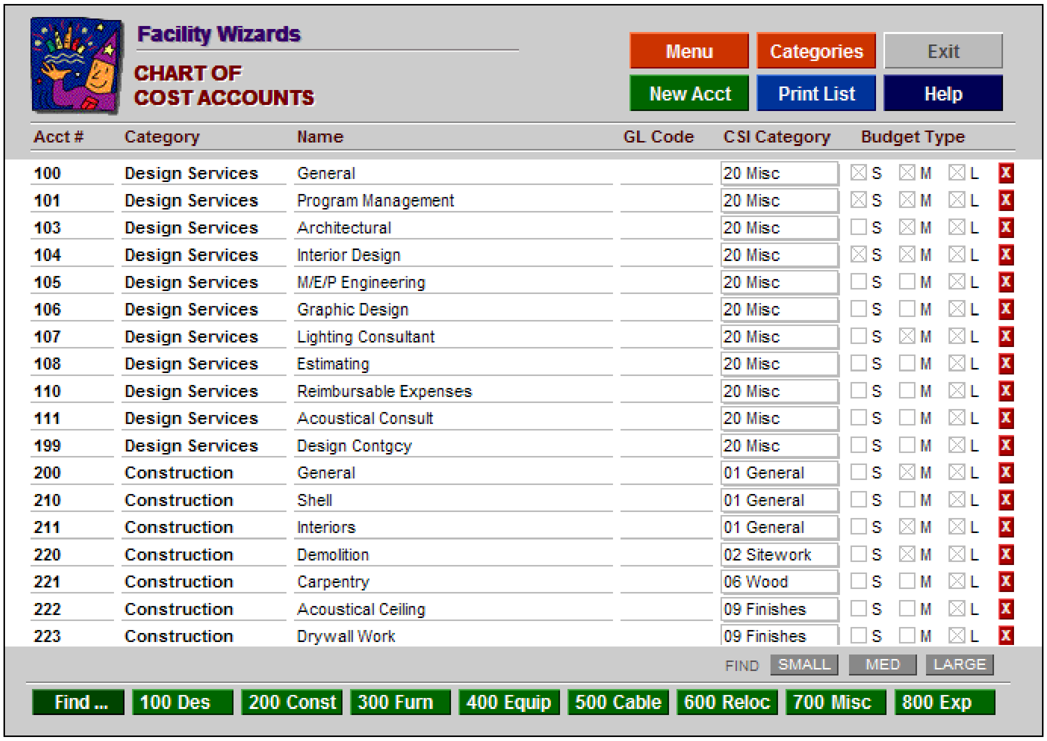


Chart of Cost Accounts Screen

Top Menu

The Chart of Cost Accounts screen's top menu contains these buttons:

- **Menu** [button] – Goes to the Main Menu screen
- **New Acct** [button] – Creates a new cost account, and stands-by for data entry
- **Categories** [button] – Goes back to the Cost Account Categories screen
- **Print List** [button] – Prints a List of Project Cost Accounts report showing the cost account categories and cost accounts
- **Exit** [button] – Ends the Projecto session
- **Help** [button] – Goes to the Project Help screen

Data Fields and Buttons

The main portion of the Chart of Cost Accounts screen contains these data fields and buttons:

- **Acct #** [read/write character field] – Cost account number
- **Category** [read-only character field] – Cost account category
- **Name** [read/write character field] – Cost account name
- **GL Code** [read/write character field] – Cost account General Ledger code
- **CSI Category** [value list] – CSI (Construction Specification Institute) Category that is associated with the cost account

- **Budget Type-S, M, L** [3 checkboxes] – Defines whether the cost account will be grouped in the Small, Medium, or Large Budget Template, causing the cost account to be available for projects that utilize that Budget Template
- [delete button] – Deletes the cost account

Bottom Menu

The Chart of Cost Accounts screen's bottom menu contains two sets of buttons:

The top portion of the bottom menu contains these three buttons to the right of the **FIND** label:

- **SMALL** [button] – Causes only cost accounts which have a Small (S) Budget Type to be displayed
- **MED** [button] – Causes only cost accounts which have a Medium (M) Budget Type to be displayed
- **LARGE** [button] – Causes only cost accounts which have a Large (L) Budget Type to be displayed

The bottom portion of the bottom menu contains these buttons:

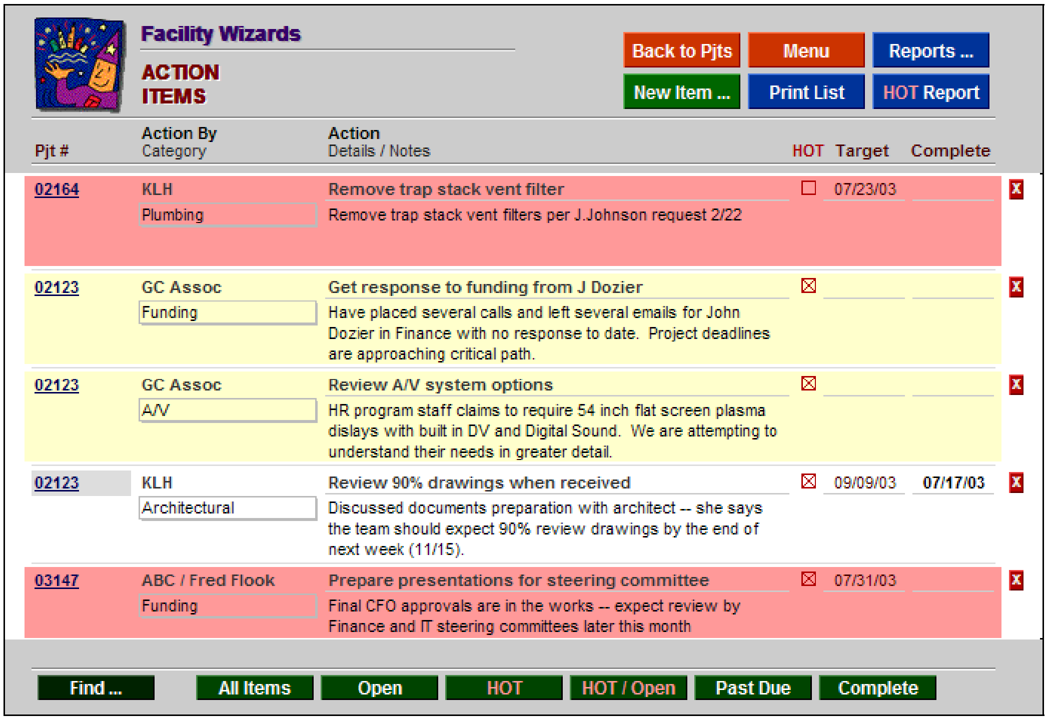
- **Find** [button] – Switches into Find mode, allowing cost accounts to be found
- **100 Des** [button] – Causes cost accounts to be shown only for cost account category 100 – Design Services – and its cost accounts
- **200 Const** [button] – Causes cost accounts to be shown only for cost account category 200 – Construction – and its cost accounts
- **300 Furn** [button] – Causes cost accounts to be shown only for cost account category 300 – Furniture – and its cost accounts
- **400 Equip** [button] – Causes cost accounts to be shown only for cost account category 400 – Systems/Equipment – and its cost accounts
- **500 Cable** [button] – Causes cost accounts to be shown only for cost account category 500 – Cabling/Telecom – and its cost accounts
- **600 Reloc** [button] – Causes cost accounts to be shown only for cost account category 600 – Relocation – and its cost accounts
- **700 Misc** [button] – Causes cost accounts to be shown only for cost account category 700 – Miscellaneous – and its cost accounts
- **800 Exp** [button] – Causes cost accounts to be shown only for cost account category 800 – Project Expenses – and its cost accounts

Projecto's cost account categories and their abbreviations that appear in this bottom menu can be customized. This is done using the Cost Account Categories screen, which was described earlier in this chapter.

ACTION ITEMS SCREEN

The Action Items screen lets you view, enter, and edit project action items for all of your organization's projects. This screen lets you review the status of all action items, including due dates and responsible persons.

This screen presents your data using a list display, displaying a Note/Action Item record for each action item. The Action Items screen also has a top menu and bottom menu.



Action Items Screen

Top Menu

The Action Items screen's top menu contains these buttons:

- **Back to Pjts** [button] – Goes to the Project List screen, providing access to the Projects database
- **New Item** [button] – Creates a new action item, and stands-by for data entry
- **Menu** [button] – Goes back to the Main Menu screen
- **Print List** [button] – Prints an Action Items report showing project action items for all projects
- **Reports** [button] – Goes to the Menu of Reports screen
- **HOT Report** [button] – Prints an Action Items report showing just HOT action items for all projects

Data Fields and Buttons

The main portion of the Action Items screen contains these data fields and buttons:

- **Pjt #** [read-only character field] – Project ID
- **Action By** [read/write character field] – Name of person responsible for performing the action item
- **Category** [value list] – Action item category. Selections include "**Design**", "**Permits**", "**Furniture**", etc.

- **Action** [read/write character field] – Action item description
- **Details/Notes** [read/write character field] – Any additional details or notes about the action item
- **HOT** [checkbox] – Specifies that the action item is HOT, indicating that the action item is more important than action items that are not HOT
- **Target** [read/write date field] – Date that the action item must be accomplished
- **Complete** [read/write date field] – Actual action item completion date
- [delete button] – Deletes the action item

> Once you delete an action item you cannot get it back (except by reentering the data or loading the last backup of the data). Be careful to make sure that you actually want to perform the deletion operation before you click the delete button.

Bottom Menu

The Action Items screen's bottom menu contains these buttons:

- **Find** [button] – Switches into Find mode, allowing action items to be found
- **All Items** [button] – Switches out of Find mode, causing all action items for all projects to be displayed
- **Open** [button] – Causes only Open action items to be displayed
- **HOT** [button] – Causes only HOT action items to be displayed
- **HOT / Open** [button] – Causes only HOT and Open action items to be displayed
- **Past Due** [button] – Causes only past due action items to be displayed
- **Complete** [button] – Causes only Complete action items to be displayed

PROJECT HELP SCREEN

The Project Help screen gives you answers to common questions about using Projecto. This is a detail display screen with a top menu and bottom menu.

Project Help Screen

Top Menu

The Project Help screen's top menu contains these buttons:

- **Setup** [button] – Goes to the Projecto Setup/Customization screen, which is used to specify Projecto configuration settings
- **Menu** [button] – Goes back to the Main Menu screen
- **Reports** [button] – Goes to the Menu of Reports screen
- **Backup Preferences** [button] – Goes to the Projecto Backup screen, which is used to setup automatic backups of Projecto database files
- **Exit** [button] – Ends the Projecto session

Data Fields and Buttons

The main portion of the Project Help screen consists of these two data fields:

1. A **Question** field, which is a value list, and
2. An **Answer** field, which behaves as both a read-only button enabled character field and a read-only character field.

The **Question** field first provides a set of categories of questions. Upon selecting a category, the set of questions is displayed in the **Answer** field (the field that takes up most of the screen area). Next, when a specific question is selected, that question is displayed is the **Question** Field, and the answer is displayed in the **Answer** field.

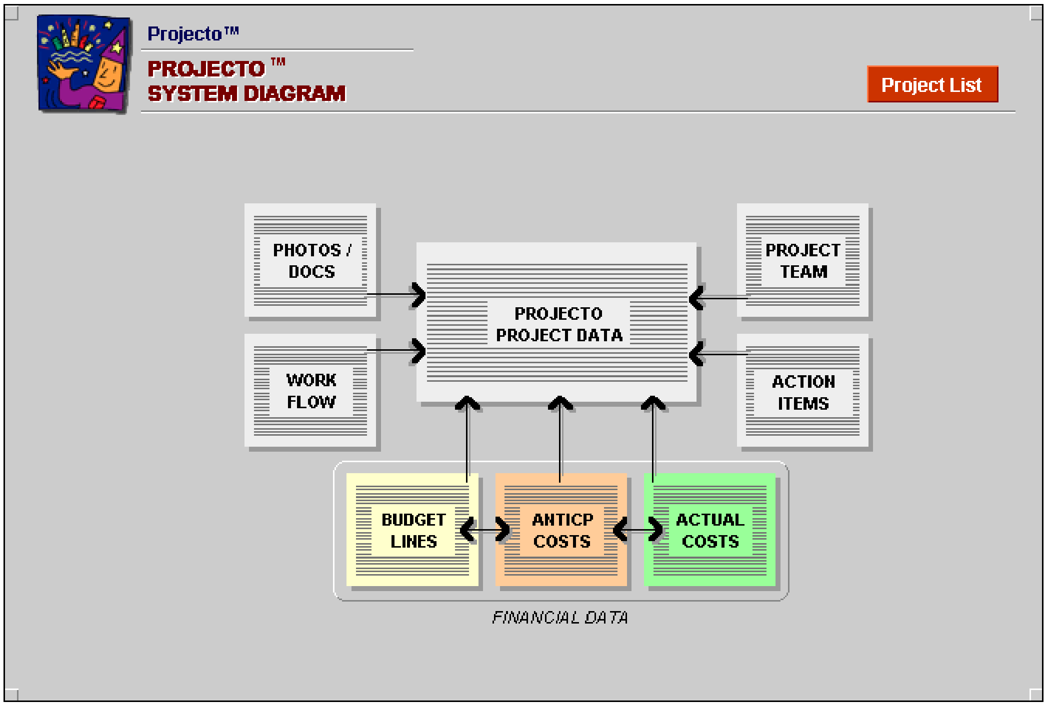
Bottom Menu

The Project Help screen's bottom menu contains these buttons:

- **Interfaces** [button] – Goes to the Custom Projecto Interfaces screen, displaying a diagram showing Projecto's custom interfaces
- **Sys Diagram** [button] – Goes to the Projecto System Diagram screen, displaying a diagram showing the relationship between Projecto's screens and menus
- **www.facilitywiz.com** [button] – Opens a browser window, and uses an Internet connection to go to Facility Wizard's website at http://www.facilitywiz.com/

PROJECTO SYSTEM DIAGRAM SCREEN

The Projecto System Diagram screen displays a diagram showing the major Projecto system elements. This screen contains a top menu, and the diagram itself.



Projecto System Diagram Screen

Top Menu

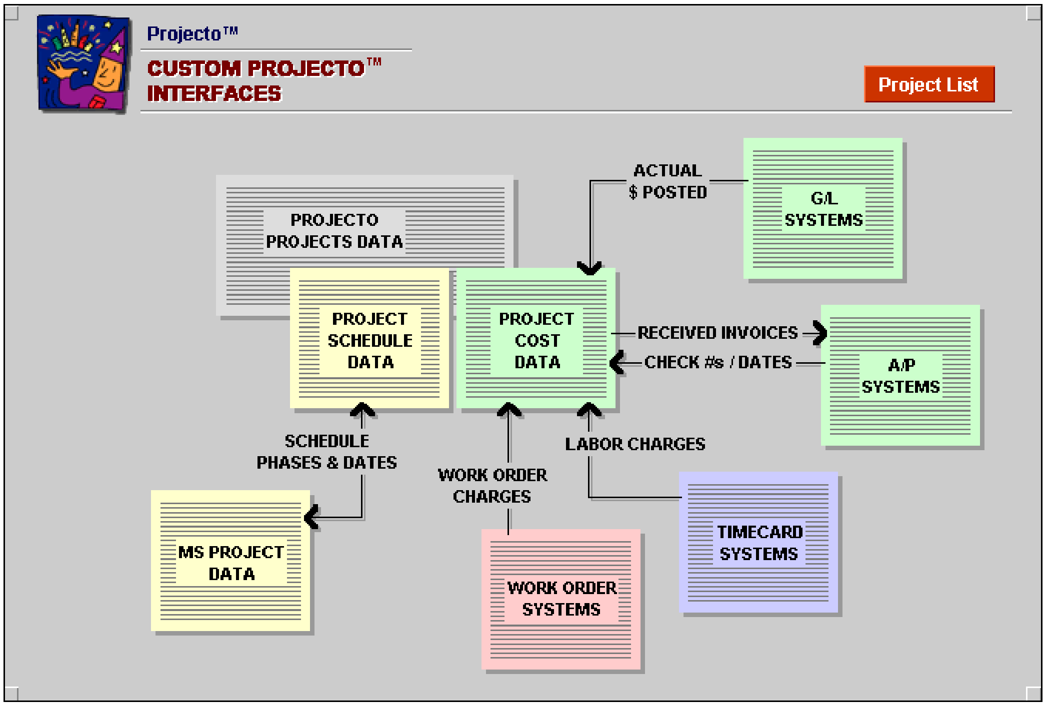
The Projecto System Diagram screen's top menu has these buttons:

- **Project List** [button] – Goes to the Project List screen, providing access to the Projects database

The Projecto System Diagram screen's does not have any other buttons or data fields, and does not have a Bottom Menu.

CUSTOM PROJECTO INTERFACES SCREEN

The Custom Projecto Interfaces screen displays a diagram showing the Projecto's custom interfaces. This screen contains a top menu, and the diagram itself.



Custom Projecto Interfaces Screen

Contact Facility Wizards or your Facility Wizards distributor for more information about these custom interfaces, and how they can be utilized for your Projecto implementation.

Top Menu

The Custom Projecto Interfaces screen's top menu has these buttons:

- **Project List** [button] – Goes to the Project List screen, providing access to the Projects database

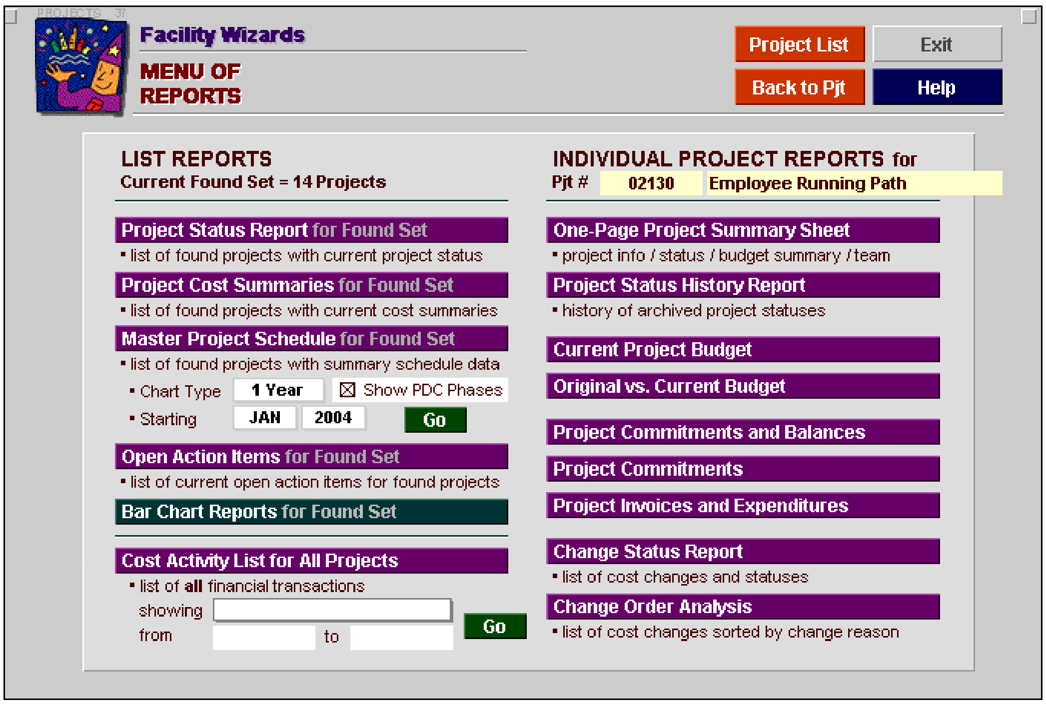
The Custom Projecto Interfaces screen's does not have any other buttons or data fields, and does not have a Bottom Menu.

Chapter 5 Projecto Reports

You will use Projecto's reports to print information from your Projecto software. You will use these reports to view the status and summaries of the capital project information stored in Projecto.

MENU OF REPORTS SCREEN

The Menu of Reports screen lets you create and print many of Projecto's reports. This screen consists of the *reports menu* itself, and a top menu and bottom menu.



Menu of Reports Screen

Some of the reports that you access using the Menu of Reports screen are reports for single, individual projects. To support this, when you first enter this screen, a *current project* is determined and displayed in a couple of this screen's data fields. The current project is determined in one of several ways:

- If you enter the Menu of Reports screen from one of the individual project screens (such as the General Project Information screen or the Project Meetings/Meeting Minutes screen) then the project that was displayed in that previous screen will be the current project.
- If you enter the Menu of Reports screen from the Project List screen (which is the Projecto screen that displays multiple projects), the current project will be the project displayed in the top-most Project record. The projects in the Project List screen can be sorted to cause a different top-most Project record to be displayed, and then that project will become the current project.
- On any screen that can be used to navigate to the Menu of Reports screen, you can perform a Find operation to locate a specific project, and then that project will become the current project.

Top Menu

The Menu of Reports screen's top menu contains these buttons:

- **Project List** [button] – Goes to the Project List screen, providing access to the Projects database
- **Back to Pjt** [button] – Goes to the General Project Information screen for the current project
- **Exit** [button] – Ends the Projecto session
- **Help** [button] – Goes to the Project Help screen

Menu Buttons

The reports menu portion of the Menu of Reports screen has these data fields and buttons:

- **Pjt #** [2 read-only character fields] – Project ID and project name for the current project, for which the individual project reports will be created
- **Project Status Report for Found Set** [button] – Creates and prints a Project Status report
- **Project Cost Summaries for Found Set** [button] – Creates and prints a Project Cost Summaries report
- The following data fields and button, directly under the **Master Project Schedule for Found Set** label, will create and print a Project Schedule Summary report:
  - **Chart Type** [value list] – Specifies the period for the report. Selections are "**3 Month**", "**6 Month**", "**1 Year**", "**2 Year**", and "**3 Year**".
  - **Show PDC Phases** [checkbox] – Causes the overall timeframes of PDC Phases to be shown using differently color coded bars within the overall graphical timeframe for each project
  - **Starting** [2 value lists] – Starting date for the report, consisting of the starting month and year
  - **Go** [button] – Creates and prints the Cost Activity report
- **Open Action Items for Found Set** [button] – Creates and prints an Open Action Items report
- **Bar Chart Reports for Found Set** [button] – Creates and prints a Bar Chart report
- **Cost Activity List for All Projects** [button] – Creates and prints a Cost Activity report. The inputs to this report are set using the following data fields that are under this button, labeled **list of all financial transactions**:
  - **showing** [value list] – Type of financial transactions that will appear in the report. Selections are "**All Items**", "**Commitments**", "**Invoices and Expenditures**", and "**Change Orders**".
  - **from** [read/write date field] – Beginning date for the financial transactions that will be shown in the report
  - **to** [read/write date field] – Ending date for the financial transactions that will be shown in the report
  - **Go** [button] – This button also creates and prints the Cost Activity report. This button provides the same function as the **Cost Activity Report for All Projects** button.
- **One Page Project Summary Sheet** [button] – Creates and prints a Project Summary Sheet report for the current project
- **Project Status History Report** [button] – Creates and prints a Project Status History report for the current project
- **Current Project Budget** [button] – Creates and prints a Current Project Budget report for the current project

- **Original vs. Current Budget** [button] – Creates and prints an Original Versus Current Budget report for the current project
- **Project Commitments and Balances** [button] – Creates and prints a Project Commitments and Balances report for the current project
- **Project Commitments** [button] – Creates and prints a Project Commitments report for the current project
- **Project Invoices and Expenditures** [button] – Creates and prints a Project Invoices and Expenditures report for the current project
- **Change Status Report** [button] – Creates and prints a Project Cost Change report for the current project
- **Change Order Analysis** [button] – Creates and prints a Change Order Analysis report for the current project

The following reports are not accessed through the Menu of Reports screen. Instead, you print each of these reports by selecting a Top Menu button on Projecto's screens:

- The Project List report is printed using the **Print List** button in the Top Menu of the Project List screen
- The Photo report is printed using the **Photo Report** button in the Top Menu of both the Project Photos screen and the Project Photo Detail screen
- The Project Workflow report is printed using the **Chklist Report** button in the Top Menu of the Project Workflow/Checklist screen
- The Summary Budget Analysis report and the Detailed Budget Analysis report are accessed using the **$ Reports** button in the Top Menu of the Project Budget Status screen
- The Project Funding Source report is printed using the **Fund Report** button in the Top Menu of the Project Funding screen
- The Project Cost report is printed using the **Print List** button of the Top Menu of both the Project Cost Tracking screen and the Project Cost Detail screen
- The Project Schedule report is printed using the **Print Schedule Report** button in the Top Menu of the Project Schedule screen
- The Project Team report is printed using the **Print Team** button in the Top Menu of the Project Team screen
- The Action Items report is printed using the **Print** button in the Top Menu of the Project Notes/Action Items screen, and using the **Print List** button in the Top Menu of the Action Items screen
- The Meeting List report is printed using the **Print Mtg List** button in the Top Menu of the Project Meetings/Meeting Minutes screen
- The Project Meeting Minutes report is printed using the **Print Minutes** button in the Top Menu of the Project

Meeting Minutes screen

- The Project Documents report is printed using the **Docs Report** button in the Top Menu of the Project Documents screen
- The Vendor report is printed using the **Print List** button in the Top Menu of the Vendor List screen
- The Vendor Data Sheet report is printed using the **Print Vendor** button in the Top Menu of the Vendor Data screen
- The List of Project Cost Accounts report is printed using the **Print Accts** button in the Top Menu of both the Cost Account Categories screen and the Chart of Cost Accounts screen
- The Default Schedule Activities report is printed using the **Print List** button in the Top Menu of the Project Schedule Default Items screen
- The Default Workflow Activities report is printed using the **Print List** button in the Top Menu of the Project Workflow Default Items screen
- The Building List report is printed using the **Print List** button in the Top Menu of the Building List screen
- The Department List report is printed using the **Department List** button in the Top Menu of the Department List screen

Most of these screens were covered in Chapter 4 – Section 4.2 – Projecto Screens in Detail; the Project Schedule Default Items screen, Project Workflow Default Items screen, Building List screen, and Department List screen are covered below in Chapter 6 – Configuring Projecto.

5.1 Project Status Report

The Project Status report prints a table providing descriptions of project statuses for the found set of projects.

Projecto™ Project Management Software
PROJECT STATUS REPORT July 02, 2

Project #	Project Name / Location / Phase	Manager	ProjectStatus
02123	**Radiology Lab Renovation** Mail Center 2nd Floor Design	Nelson	Design phase nearly complete. Release of balance of C funds is now approved. Additional co-funding and identification of of alternates has brought project back on budget. Re-review of plans was completed and resulted i the need to change construction documents to meet secu requirements.
02136	**OR Professional Ofc Addition** Professional Building 4th Floor Constr	Karch	Contractors are working on all floors. Punch list for finis only complete for the First and Second Floors. First floo contractor completing final finishes. Basement contracto installing finishes inc., paint and floor finishes. Consoles the Communication Room have been delivered and are beginning to be wired. MEP trades doing final installation and adjustments all floors.

Project Status Report

To create and print this report, select the **Project Status Report for Found Set** button on the Menu of Reports screen.

5.2 Project Cost Summaries Report

The Project Cost Summaries report prints a table listing approved budgets and estimated overall costs for the found set of projects.

Projecto™ Project Management Software
PROJECT BUDGET SUMMARY LIST

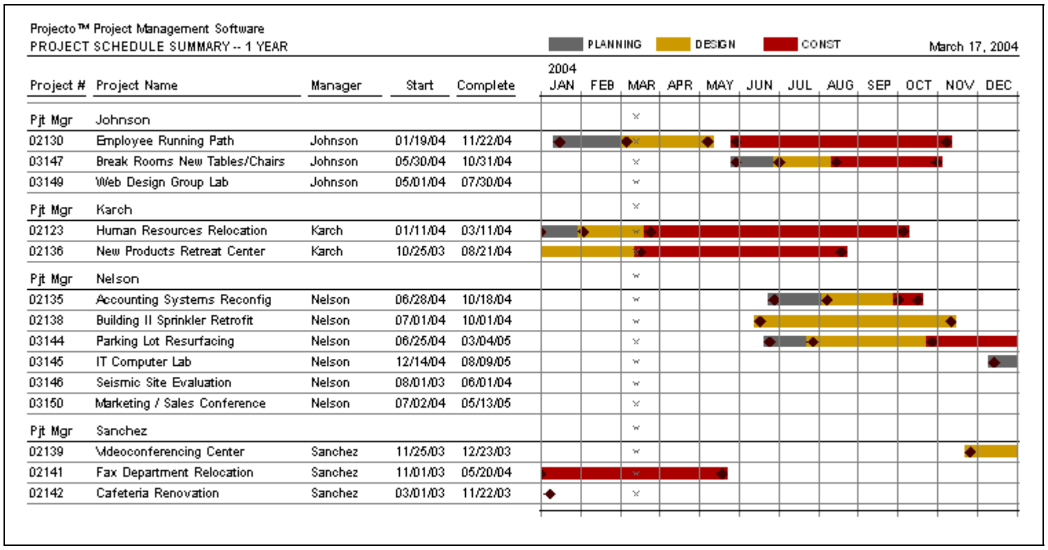
Pjt #	Project Title	Pjt Mgr	Status	Approved Budget	Est Final Pjt Cost
02123	Radiology Lab Renovation	Nelson	Design	4,736,933	4,736,933
02136	OR Professional Ofc Addition	Karch	Constr	10,000	10,000
02138	Building II Sprinkler Retrofit	Nelson	Constr	5,500	500
02139	Pediatrics Relocation	Sanchez	Design	16,022	16,022
	Total for All Projects			$ 4,768,455	$ 4,763,455

Project Cost Summaries Report

To create and print this report, select the **Project Cost Summaries for Found Set** button on the Menu of Reports screen.

5.3 Project Schedule Summary Report

The Project Schedule Summary report prints graphical overall project schedules for the found set of projects. Timeframes for PDC Phases can also optionally be printed (as shown in this report image), using differently color coded bars for planning, design, and construction phases.


Projecto™ Project Management Software
PROJECT SCHEDULE SUMMARY -- 1 YEAR

Project #	Project Name	Manager	Start	Complete
Pjt Mgr	Johnson			
02130	Employee Running Path	Johnson	01/19/04	11/22/04
03147	Break Rooms New Tables/Chairs	Johnson	05/30/04	10/31/04
03149	Web Design Group Lab	Johnson	05/01/04	07/30/04
Pjt Mgr	Karch			
02123	Human Resources Relocation	Karch	01/11/04	03/11/04
02136	New Products Retreat Center	Karch	10/25/03	08/21/04
Pjt Mgr	Nelson			
02135	Accounting Systems Reconfig	Nelson	06/28/04	10/18/04
02138	Building II Sprinkler Retrofit	Nelson	07/01/04	10/01/04
03144	Parking Lot Resurfacing	Nelson	06/25/04	03/04/05
03145	IT Computer Lab	Nelson	12/14/04	08/09/05
03146	Seismic Site Evaluation	Nelson	08/01/03	06/01/04
03150	Marketing / Sales Conference	Nelson	07/02/04	05/13/05
Pjt Mgr	Sanchez			
02139	Videoconferencing Center	Sanchez	11/25/03	12/23/03
02141	Fax Department Relocation	Sanchez	11/01/03	05/20/04
02142	Cafeteria Renovation	Sanchez	03/01/03	11/22/03

Project Schedule Summary Report

To create and print this report, use the data fields and button under the **Master Project Schedule for Found Set** label in the Menu of Reports screen. First enter the parameters for the report, and then select the **Go** button. Also, click the **Show PDC Phases** checkbox to show the PDC Phases as part of the project timeframes.

5.4 Open Action Items Report

The Open Action Items report prints a table listing project action items for the found set of projects.

Projecto™ Project Management Software
PROJECT ACTION ITEMS REPORT July 02, 2

Date	Action By	Category / Action Needed	Target	Compl
PROJECT 02123 RADIOLOGY LAB RENOVATION				PM NELS
Action By				
04/07/03		Prepare value engineering study.		
05/13/03		Prepare value engineering study.		
05/13/03		Prepare big value engineering study.		
Action By Dave				
05/14/03	Dave	Summarize and distribute proposal data when received		
Action By GC Assoc				
09/20/02	GC Assoc	Get response to funding from J Dozier	10/15/2002	

Open Action Items Report

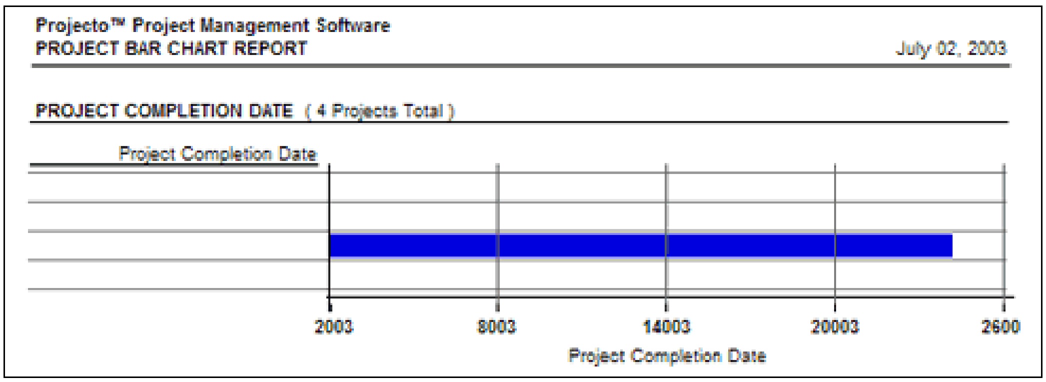
To create and print this report, select the **Open Action Items for Found Set** button on the Menu of Reports screen.

5.5 Bar Chart Report

There is a set of Bar Chart reports that provide graphical comparisons of various project data. The available Bar Chart reports show:

- Project budgets
- Square footage area for different projects
- Budget dollars per square footage area for different projects
- Project completion dates

These reports are useful for managing capital projects, because they let you easily view the distribution of various project data according to different important criteria.

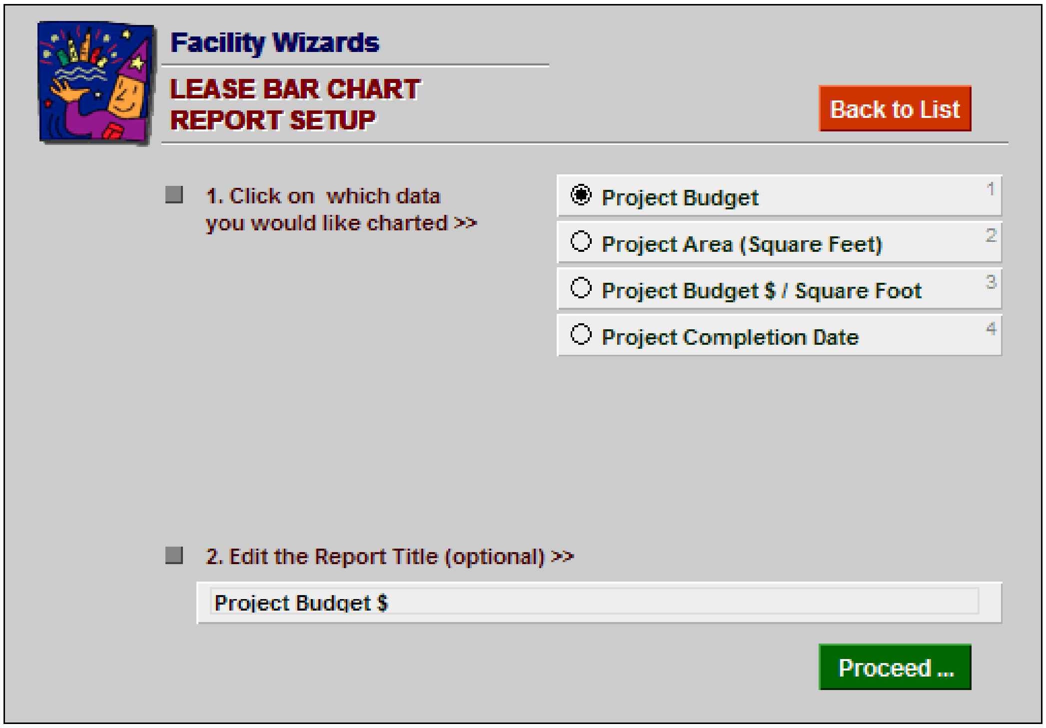


Bar Chart Report

To create and print a Bar Chart report, select the **Bar Chart Reports for Found Set** button on the Menu of Reports screen. This causes the Bar Chart Report Setup screen to be displayed, which you use to select options for the report, and then select a button to create and print the report. The Bar Chart Report Setup screen is described next:

BAR CHART REPORT SETUP SCREEN

You use the Bar Chart Report Setup screen to print a Bar Chart report. This screen lets you select the specific type of Bar Chart report to be created and printed. The Bar Chart Report Setup screen is a detail display with a top menu.



Bar Chart Report Setup Screen

Top Menu

The Bar Chart Report Setup screen's top menu contains this button:

- **Back to List** [button] – Goes to the Project List screen, providing access to the Projects database

Data Fields and Buttons

The main portion of the Bar Chart Report Setup screen has these data fields and buttons:

- **1. Click on which data you would like charted** >>: **Project Budget**, **Project Area (Square Feet)**, **Project Budget $ / Square Foot**, **Project Completion Date** [radio buttons] – Criteria for the Bar Chart report
- **2. Edit the Report Title (optional)** >> [read/write date field] – Report title
- **Proceed** [button] – Creates and prints the report

The Bar Chart Report Setup screen does not have a bottom menu.

5.6 Cost Activity Report

The Cost Activity report prints a list of project commitments and expenditures for the found set of projects.

Projecto™ Project Management Software
Project Cost Report **PROJECT COST ACTIVITY REPORT** July 02, 20

Project Pjt Manager <<pjt_manage

Type	Project #	Acct # / Name		Date	Commit #	CO	Vendor		Am
CHG		200	Const -- General	09/11/02	PO12345	4	CONGLO		$ 5,0
CHG		200	Const -- General	01/09/03	PO12345	4	CONGLO		$ 2,5
Subtotal Category		200	Construction				Commitments		$ 7,5
							Expenditures	(	$
							Balance		**$ 7,5**
Totals for Project	--						Commitments		**$ 7,5**
							Expenditures	(	$
							Balance		**$ 7,5**

Cost Activity Report

To create and print this report, select the **Cost Activity Report for All Projects** button on the Menu of Reports screen.

5.7 Project Summary Sheet Report

The Project Summary Sheet report prints a concise summary of the current project's scope, budget, schedule, and status.

Projecto™ Project Management Software
PROJECT SUMMARY SHEET Project : **02123** **RADIOLOGY LAB RENOVATION**

Project Manager	Nelson	**Building**	Mail Center		
Project Type	Renovation	**Location**	2nd Floor		
Current Phase	Design	**Project SF**	65,000	**Bud $ / SF**	$ 72.88
Cost Center	8-762229	**Approvals**	**Date**	**Notes**	
Project Start Date	01/11/03	Executive	02/04/02	8 weeks for approvals due to	
Completion Date	03/11/03	Budget	03/12/02		
Project Duration	8.4 weeks	Permits			

Project Scope / Description

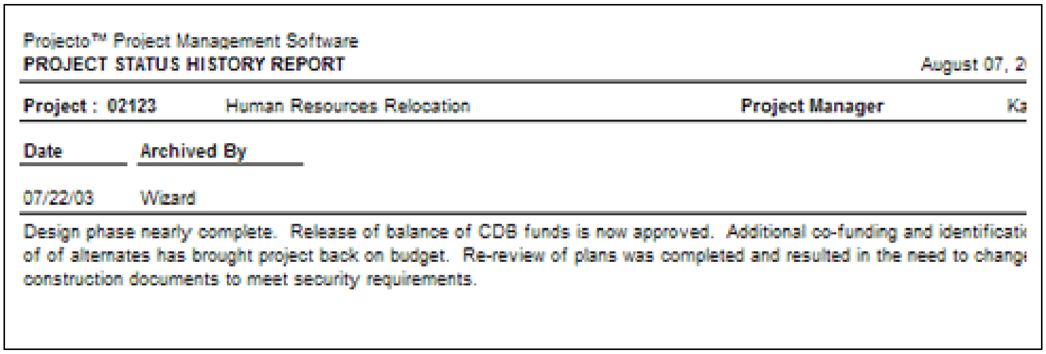
Reconfigure a roughly estimated 65,000SF of Suite 100 to accomodate program growth/relocations from 4444 and improve customer service at corporate HQ. Capital allocation of project costs to be determined.

Project Summary Sheet Report

To create and print this report, select the **One Page Project Summary Sheet** button on the Menu of Reports screen. You can also print this report using the **Project Report** Top Menu button on the General Project Information screen.

5.8 Project Status History Report

The Project Status History report prints a chronological list of previous project statuses for the current project: This lets you analyze the progression of a project through its various statuses.


Projecto™ Project Management Software
PROJECT STATUS HISTORY REPORT August 07, 2

Project : 02123 Human Resources Relocation Project Manager Ka

Date	Archived By
07/22/03	Wizard

Design phase nearly complete. Release of balance of CDB funds is now approved. Additional co-funding and identificati of of alternates has brought project back on budget. Re-review of plans was completed and resulted in the need to chang construction documents to meet security requirements.

Project Status History Report

To create and print this report, select the **Project Status History Report** button on the Menu of Reports screen.

5.9 Current Project Budget Report

The Current Project Budget report prints the current project's budget.

Projecto™ Project Management Software
Project Budget Report CURRENT BUDGET July 02, 20

Project 02123 Radiology Lab Renovation Pjt Manager Nels

Project #	Acct #		Description / Notes	Amt
02123	100	Des -- General	additional services for change in scope	$ 65,0
02123	100	Des -- General		
02123	103	Des -- Architectural		
02123	100	Des -- General		
Subtotal	**100**	**Design Services**		$ 65,0
02123	200	Const -- General	approved according to preliminary estimate	$ 400,0
02123	200	Const -- General		$ 1,862,0
02123	222	Const -- Acoustical Ceiling		$ 15,3
02123	230	Const -- Doors / Hardware		$ 10,0
02123	200	Const -- General		
Subtotal	**200**	**Construction**		$ 2,287,3

Current Project Budget Report

To create and print this report, select the **Current Project Budget** button on the Menu of Reports screen.

5.10 Original Versus Current Budget Report

The Original Versus Current Budget report prints both the original budget and the current budget for the current project. This allows you to compare the original and current budgets to identify changes, including budget growth issues.

Projecto™ Project Management Software
Project Budget Report **ORIGINAL VS CURRENT BUDGET** July 02, 20

Project 02123 **Radiology Lab Renovation** Pjt Manager Nels

Project #	Acct #		Approved Budget	Est Final Pjt Cost	Varian
02123	100	Des -- General > additional services for change in scope	$ 65,000	$ 65,000	$
02123	100	Des -- General	$ 0	$ 0	$
02123	103	Des -- Architectural	$ 5,000	$ 0	$ 5,0
02123	100	Des -- General	$ 100,000	$ 0	$ 100,0
Subtotal	**100**	**Design Services**	$ 170,000	$ 65,000	$ 105,0
02123	200	Const -- General > approved according to preliminary estimate	$ 400,000	$ 400,000	$
02123	200	Const -- General	$ 1,862,000	$ 1,862,000	$
02123	222	Const -- Acoustical Ceiling	$ 15,332	$ 15,332	$
02123	230	Const -- Doors / Hardware	$ 10,000	$ 10,000	$
02123	200	Const -- General	$ 0	$ 0	$
Subtotal	**200**	**Construction**	$ 2,287,332	$ 2,287,332	$

Original Versus Current Budget Report

To create and print this report, select the **Original vs. Current Budget** button on the Menu of Reports screen.

5.11 Project Commitments and Balances Report

The Project Commitments and Balances report prints a list of current project commitments, including affected vendors, as well as the project balance when expenditures are subtracted from commitments.

Projecto™ Project Management Software
Project Cost Report PROJECT COMMITMENTS AND EXPENDITURES July 02, 20

Project 02123 Radiology Lab Renovation Pjt Manager <<pjt_manage

Type	Project #	Acct # / Name		Date	Commit #	CO	Vendor	Am
PO	02123	100	Des -- General	10/15/01	5543		ARCHIE	$ 11,0
PO	02123	100	Des -- General	03/05/02	PO56565		AIRPRO	$ 262,0
CON	02123	100	Des -- General	03/13/02	5543		ARCHIE	$ 2,0
PO	02123	100	Des -- General	04/05/02	PO56565		AIRPRO	$ 85,0
PO	02123	100	Des -- General	05/26/02	345345345		BIGJOE	$ 4,1
INV	02123	100	Des -- General	08/26/02	PO12345		CONGLO	$ 85,0
INV	02123	100	Des -- General	10/26/02	5543		ARCHIE	$ 4,5
CHG	02123	100	Des -- General	04/03/03	5543	1	ARCHIE	$ 42,0
PO	02123	100	Des -- General	06/03/03			ARCHIE	$ 1,0
CHG	02123	100	Des -- General	06/18/03	345BBB	1	FARREL	$ 2,6
PO	02123	106	Des -- Graphic Design	03/08/02	PO989898		FARREL	$ 177,0
INV	02123	107	Des -- Lighting Consultant	04/01/03	PO56565		AIRPRO	$ 250,0
Subtotal Category		100	Design Services				Commitments	$ 586,7
							Expenditures	($ 339,5
							Balance	$ 247,2

Project Commitments and Balances Report

To create and print this report, select the **Project Commitments and Balances** button on the Menu of Reports screen.

5.12 Project Commitments Report

The Project Commitments report prints a list of current project commitments, including affected vendors.

Projecto™ Project Management Software
Project Cost Report **PROJECT COMMITMENTS** July 02, 20

Project 02123 Radiology Lab Renovation Pjt Manager <<pjt_manage

Type	Project #	Acct # / Name		Date	Commit #	CO	Vendor	Am
PO	02123	100	Des -- General	10/15/01	5543		ARCHIE	$ 11,0
PO	02123	100	Des -- General	03/05/02	PO56565		AIRPRO	$ 262,0
CON	02123	100	Des -- General	03/13/02	5543		ARCHIE	$ 2,0
PO	02123	100	Des -- General	04/05/02	PO56565		AIRPRO	$ 85,0
PO	02123	100	Des -- General	05/28/02	345345345		BIGJOE	$ 4,1
CHG	02123	100	Des -- General	04/03/03	5543	1	ARCHIE	$ 42,0
PO	02123	100	Des -- General	06/03/03			ARCHIE	$ 1,0
CHG	02123	100	Des -- General	06/18/03	345BBB	1	FARREL	$ 2,6
PO	02123	106	Des -- Graphic Design	03/08/02	PO989898		FARREL	$ 177,0
Subtotal Category		100	Design Services					$ 586,7

Project Commitments Report

To create and print this report, select the **Project Commitments** button on the Menu of Reports screen.

5.13 Project Invoices and Expenditures Report

The Project Invoices and Expenditures report prints a list of the current project's invoices and expenditures, including commitment numbers and vendors.

Projecto™ Project Management Software
Project Cost Report **PROJECT INVOICES + EXPENDITURES** July 02, 20

Project 02123 Radiology Lab Renovation Pjt Manager <<pjt_manager

Type	Project #	Acct # / Name		Date	Commit #	CO	Vendor	Am
INV	02123	100	Des -- General	08/26/02	PO12345		CONGLO	$ 85,0
INV	02123	100	Des -- General	10/26/02	5543		ARCHIE	$ 4,5
INV	02123	107	Des -- Lighting Consultant	04/01/03	PO56565		AIRPRO	$ 250,0
Subtotal Category		100	Design Services					$ 339,5
INV	02123	200	Const -- General	09/11/02	PO12345		BAINSE	$ 49,0
EXP	02123	200	Const -- General	10/04/02	PO12345		CONGLO	$ 78,5
EXP	02123	200	Const -- General	11/21/02	PO12345		CONGLO	$ 128,0
EXP	02123	200	Const -- General	01/20/03	PO12345		CONGLO	$ 50,0
EXP	02123	200	Const -- General	04/28/03	PO12345		CONGLO	$ 20,0
Subtotal Category		200	Construction					$ 325,5

Project Invoices and Expenditures Report

To create and print this report, select the **Project Invoices and Expenditures** button on the Menu of Reports screen.

5.14 Project Cost Change Report

The Project Cost Change report prints a list of the current project's anticipated costs, and approved and committed cost changes, including dates, descriptions, and change request and change order numbers.

Projecto™ Project Management Software
Project Cost Change Report
March 17, 2004

Date	Project #	Acct # / Name		Description	CR #	CO #	Status	Amt $
PROJECT 02123 HUMAN RESOURCES RELOCATION								PJT MANAGER KARCH
ESTIMATED								
07/14/03	02123	200	Const -- General	New soil boring samples			EST	$ 4,000.00
07/14/03	02123	294	Const -- Construction Mgmt	Additional trash removal			EST	$ 1,100.00
07/14/03	02123						EST	
07/23/03	02123						EST	
07/23/03	02123						EST	
07/23/03	02123						EST	
Subtotal	ESTIMATED							$ 5,100.00
COMMITTED								
02/19/03	02123	100	Des -- General	non-budgeted messenger / Fedex charges			COM	$ 1,000.00
07/02/02	02123	500	Cable -- General	extras to work with field conditions			COM	$ 2,600.00
12/06/02	02123	100	Des -- General	re-work piping to get around ductwork			COM	$ 1,100.00
10/16/02	02123	200	Const -- General	overtime required for drywall work			COM	$ 3,500.00
10/01/02	02123	300	Furn -- General	extra travel + lodging expenses			COM	$ 1,500.00
04/28/03	02123	800	Exp -- Travel / Lodging / Auto	request extra $ from travel budget			COM	$ 1,000.00
04/29/03	02123	200	Const -- General	hit water main -- new plumbing			COM	$ 50,000.00
05/07/03	02123	600	Reloc -- General	increase from actual mover bids			COM	$ 3,700.00
05/29/03	02123	200	Const -- General	hit water main -- need to fix			COM	$ 10,000.00
06/18/03	02123	100	Des -- General	redesign due to condition			COM	$ 1,500.00
06/19/03	02123	800	Exp -- Travel / Lodging / Auto	increase in airfare			COM	$ 500.00
06/19/03	02123	800	Exp -- Travel / Lodging / Auto	additional printing costs			COM	$ 2,000.00
07/13/03	02123	100	Des -- General				COM	$ 999.00
07/13/03	02123	100	Des -- General				COM	$ 800.00
07/14/03	02123	200	Const -- General	Testing for unforseen soil conditions			COM	$ 5,000.00
Subtotal	COMMITTED							$ 85,199.00

Project Cost Change Report

To create and print this report, select the **Change Status Report** button on the Menu of Reports screen. You can also print this report using the **Print List** Top Menu button on the Anticipated Costs screen.

5.15 Change Order Analysis Report

The Change Order Analysis report prints a list of change orders for the current project, including dates, descriptions, and commitment numbers.

Projecto™ Project Management Software
Project Cost Report **PROJECT CHANGE ORDERS** July 02, 2

Project 02123 Radiology Lab Renovation Pjt Manager Nel

Type	Project #	Acct # / Name		Date	Commit #	CO	Vendor	An
CHG	02123	100	Des -- General	04/03/03	5543	1	ARCHIE	$ 42,
CHG	02123	210	Const -- Shell	04/05/03	PO12345	3	CONGLO	$ 41,
CHG	02123	200	Const -- General	05/07/03	PO12345	1	CONGLO	$ 210,
CHG	02123	200	Const -- General	05/29/03	PO77655	1	ACCOOP	$ 13,
CHG	02123	100	Des -- General	06/18/03	345BBB	1	FARREL	$ 2,
Subtotal								$ 309,
Change Order totals for Project 02123 -- Radiology Lab								**$ 309,**

Change Order Analysis Report

To create and print this report, select the **Change Order Analysis** button on the Menu of Reports screen.

Chapter 6 Configuring Projecto

This chapter provides information on the screens that you use to configure your Projecto software.

6.1 Software Configuration and Preparation Screens

You use some of Projecto's screens to configure and prepare the software for your organization's day-to-day use. Let's go-over each of these screens:

PROJECTO SETUP/CUSTOMIZATION SCREEN

The Projecto Setup/Customization screen lets you select configuration settings for your Projecto software. These settings let you:

- Change the headers and footers that are printed on reports
- Change the logo and company name that appear on Projecto's screens
- Specify how facility locations are recorded and displayed
- Specify defaults for schedule phases, and for Workflows/Checklists
- Specify facility locations
- Specify organizational departments

In addition, you can use this screen to access Projecto's cost accounts.

The Projecto Setup/Customization screen is a detail display with a top menu.

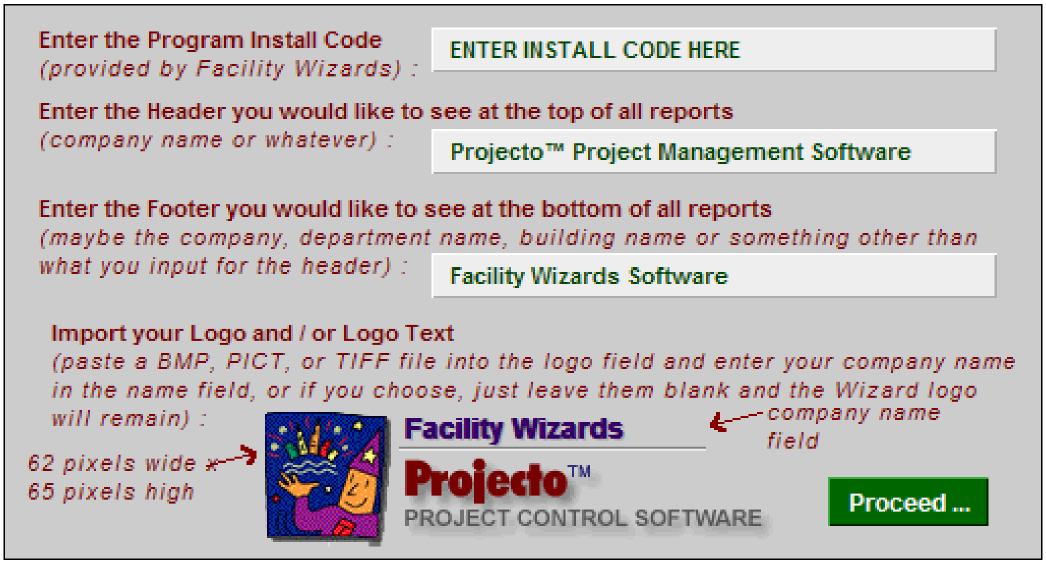
Projecto Setup/Customization Screen

Top Menu

The Projecto Setup/Customization screen's top menu contains these buttons:

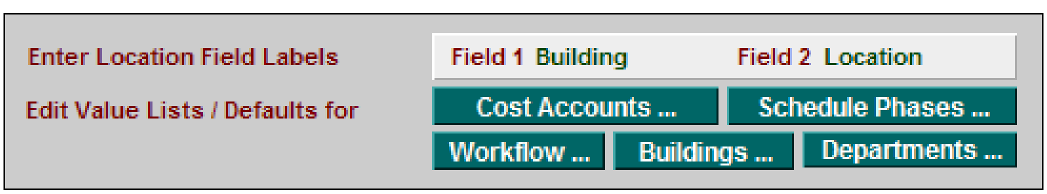
- **Project List** [button] – Goes to the Project List screen, providing access to the Projects database
- **Exit** [button] – Ends the Projecto session

Data Fields and Buttons



Use this screen area to change the report headers and footers, and to change the logo and company name that appear on Projecto's screens:

- **Enter the Program Install Code** [read/write character field] – Program installation code provided by Facility Wizards or by a Facility Wizards distributor
- **Enter the Header you would like to see at the top of all reports** [read/write character field] – Header that is printed in Projecto's reports
- **Enter the Footer you would like to see at the bottom of all reports** [read/write character field] – Footer that is printed in Projecto's reports
- **Import your Logo and / or Logo Text** [2 container fields] – Images for your organizations logo and logo text, which will replace the Facility Wizards logo and logo text in all screen displayed throughout Projecto. The images can be .BMP, .GIF, .JPG, .PICT, or .TIFF files.
- **Proceed** [button] – Executes the specified changes to the reports' headers and footers, and to the logo and logo text



Use this screen area to specify additional Projecto setup data and parameters. It contains these data fields and buttons:

- **Field 1** [value list] – Sets the label for Projecto's Primary Facility Location field. Selections include "**Campus**", "**Building**", "**Address**", etc.

- **Field 2** [value list] – Sets the label for Projecto's Secondary Facility Location field. Selections include "**Floor**", "**Room #**", "**Office #**", etc.

Use the Primary and Secondary Facility Location fields in the General Project Information screen to specify the location of the facility where the project work is taking place.

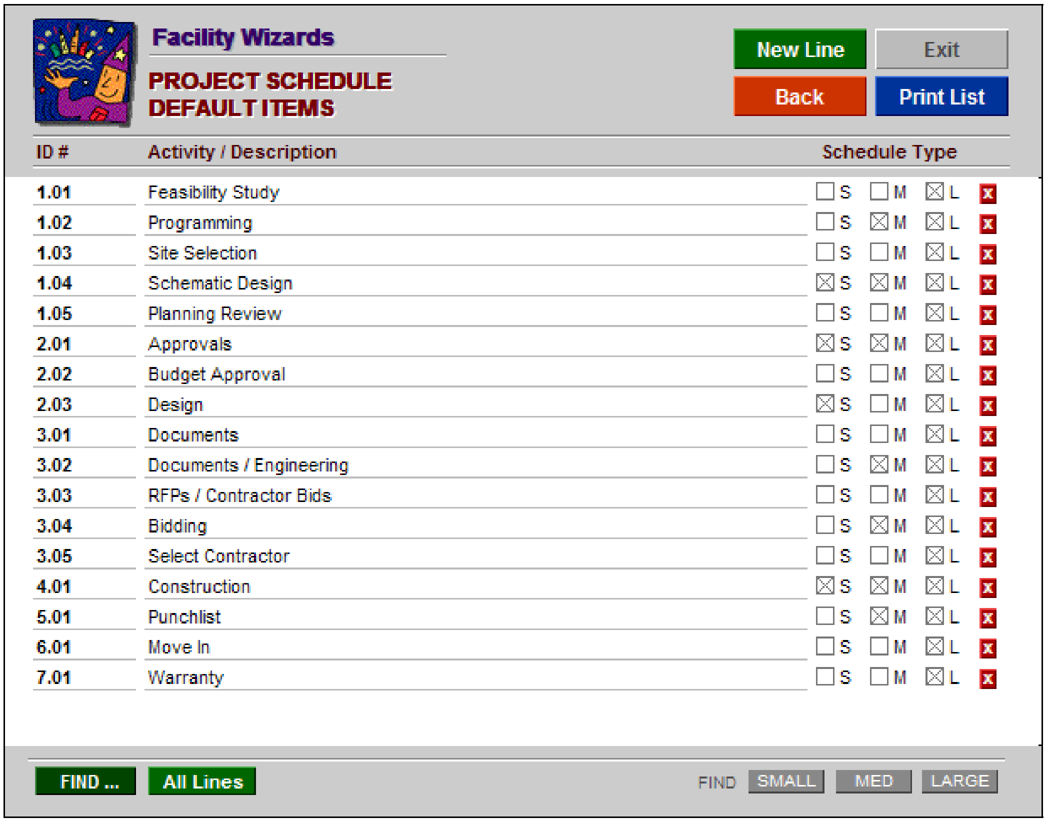
- **Cost Accounts** [button] – Goes to the Cost Account Categories screen, providing access to Projecto's cost accounts
- **Schedule Phases** [button] – Goes to the Project Schedule Default Items screen, providing access to the Schedule Templates for new projects
- **Workflow** [button] – Goes to the Project Workflow Default Items screen, providing access to the Default Workflow/Checklist for new projects
- **Buildings** [button] – Goes to the Building List screen, providing access to the Primary Facility Locations where project work is performed
- **Departments** [button] – Goes to the Department List screen, providing access to information about the departments that are affected by capital projects

The Projecto Setup/Customization screen does not have a bottom menu.

PROJECT SCHEDULE DEFAULT ITEMS SCREEN

The Project Schedule Default Items screen lets you view, enter, and edit default schedule phases. The default schedule phases constitute the Schedule Templates that are used for newly created projects.

This screen presents your data using a list display, displaying a Default Schedule Phase record for each default schedule phase. The Project Schedule Default Items screen also contains a top menu and bottom menu.



Project Schedule Default Items Screen

Top Menu

The Project Schedule Default Items screen's top menu contains these buttons:

- **New Line** [button] – Creates a new default schedule phase, and stands-by for data entry
- **Back** [button] – Goes back to the Projecto Setup/Customization screen
- **Exit** [button] – Ends the Projecto session
- **Print List** [button] – Prints a Default Schedule Activities report listing the default schedule phases

Data Fields and Buttons

The main portion of the Project Schedule Default Items screen has these data fields and buttons:

- **ID #** [read/write character field] – Default schedule phase ID, using outline numbering that groups the default schedule phases, and aids in sorting the default schedule phases for display

- **Activity / Description** [read/write character field] – One line description or title for the default schedule phase
- **Schedule Type-S, M, L** [3 checkboxes] – Specifies whether the default schedule phase will be placed into the Schedule Template for newly created projects of type Small, Medium, or Large
- [delete button] – Deletes the default schedule phase

> Once you delete a default schedule phase you cannot get it back (except by reentering the data or loading the last backup of the Projecto data). Be careful to make sure that you actually do want to perform the deletion operation before you click the delete button.

Bottom Menu

The Project Schedule Default Items screen’s bottom menu contains two sets of buttons:

The left side of the bottom menu contains these buttons:

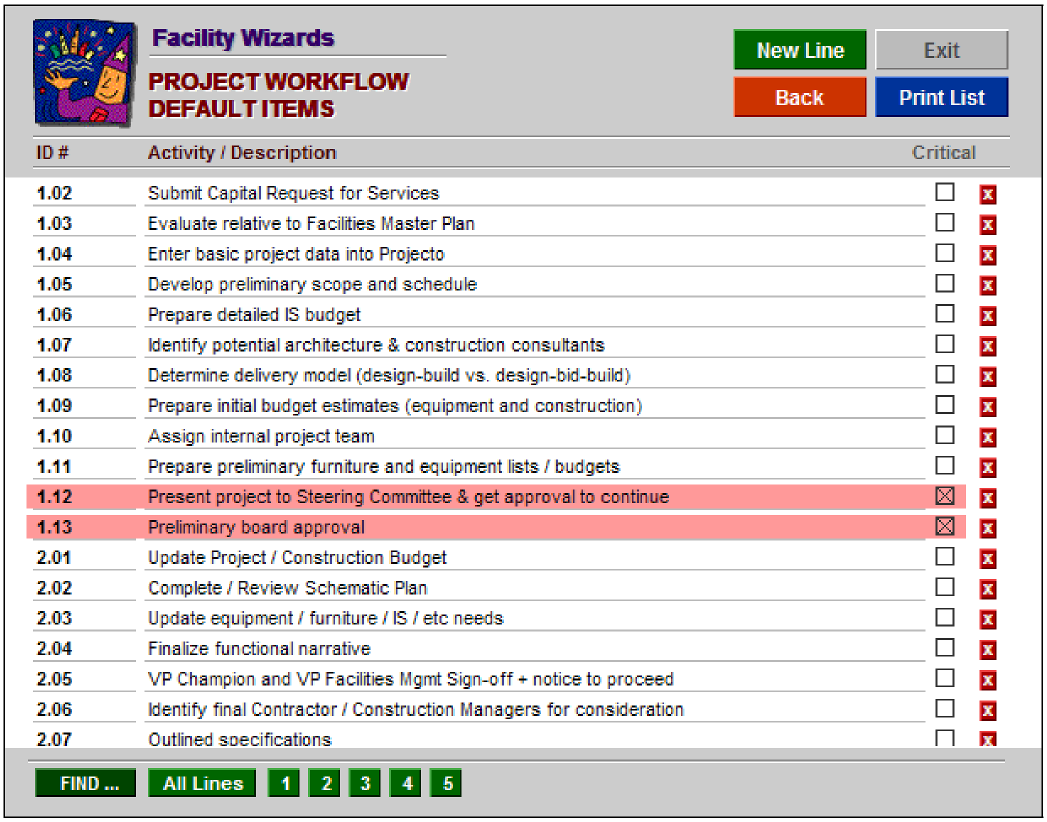
- **FIND** [button] – Switches into Find mode, allowing default schedule phases to be found
- **All Lines** [button] – Causes all default schedule phases to be displayed

The right side of the bottom menu, next to the label **FIND**, contains these buttons:

- **SMALL** [button] – Causes only default schedule phases which have a Small (S) Schedule Type to be displayed
- **MED** [button] – Causes only default schedule phases which have a Medium (M) Schedule Type to be displayed
- **LARGE** [button] – Causes only default schedule phases which have a Large (L) Schedule Type to be displayed

PROJECT WORKFLOW DEFAULT ITEMS SCREEN

The Project Workflow Default Items screen lets you view, enter, and edit Default Workflow/Checklist Activities, which constitute the Workflows/Checklists for newly created projects. This screen presents your data using a list display, displaying a Default Workflow/Checklist record for each Default Workflow/Checklist Activity. The Project Workflow Default Items screen also contains a top menu and bottom menu.



Project Workflow Default Items Screen

Top Menu

The Project Workflow Default Items screen's top menu contains these buttons:

- **New Line** [button] – Creates a new Default Workflow/Checklist Activity, and stands-by for data entry
- **Back** [button] – Goes back to the Projecto Setup/Customization screen
- **Exit** [button] – Ends the Projecto session
- **Print List** [button] – Prints a Default Workflow Activities report listing the Default Workflow/Checklist Activities

Data Fields and Buttons

The main portion of the Project Workflow Default Items screen has these data fields and buttons:

- **ID #** [read/write character field] – Default Workflow/Checklist Activity ID, using outline numbering that groups the items into numeric categories. For example, the Default Workflow/Checklist Activities with ID's of "**1.01**", "**1.02**", etc., belong to the category 1.

- **Activity / Description** [read/write character field] – One line description/title for the Default Workflow/Checklist Activity
- **Critical** [checkbox] – Identifies the Default Workflow/Checklist Activity as critical. This means that when the Default Workflow/Checklist Activity is included in a project's Workflow/Checklist, the resulting Workflow/Checklist Activity must be completed before work on the project can progress to the next Workflow/Checklist Activity. Critical Default Workflow/Checklist Activities, and their resulting Workflow/Checklist Activities are color-coded in pink.
- [delete button] – Delete the Default Workflow/Checklist Activity

> Once you delete a Default Workflow/Checklist Activity you cannot get it back (except by reentering the data or loading the last backup of the data). Be careful to make sure that you actually want to perform the deletion operation before you click the delete button.

Bottom Menu

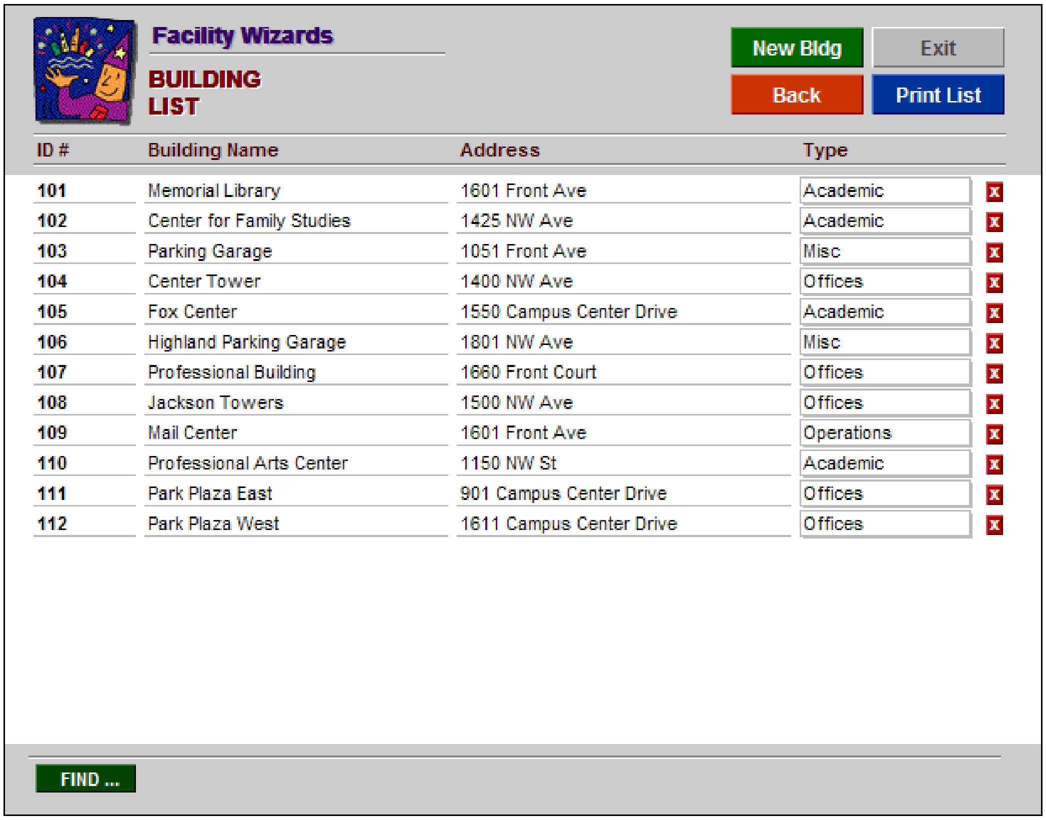
The Project Workflow Default Items screen's bottom menu contains these buttons:

- **FIND** [button] – Switches into Find mode, allowing Default Workflow/Checklist Activities to be found
- **All Lines** [button] – Causes all Default Workflow/Checklist Activities to be displayed
- **1** [button] – Causes only Default Workflow/Checklist Activities with an ID beginning with 1 to be displayed
- **2** [button] – Causes only Default Workflow/Checklist Activities with an ID beginning with 2 to be displayed
- **3** [button] – Causes only Default Workflow/Checklist Activities with an ID beginning with 3 to be displayed
- **4** [button] – Causes only Default Workflow/Checklist Activities with an ID beginning with 4 to be displayed
- **5** [button] – Causes only Default Workflow/Checklist Activities with an ID beginning with 5 to be displayed

BUILDING LIST SCREEN

The Building List screen lets you view, enter, and edit the Primary Facility Locations where project work is performed. The data contained in the Primary Facility Locations includes building names that become selections in Primary Facility Location value list in the General Project Information screen.

This screen presents your data using a list display, displaying a Primary Facility Location record for each Primary Facility Location. The Building List screen also has a top menu and bottom menu.



Building List Screen

Top Menu

The **Building List screen's** top menu contains these buttons:

- **New Bldg** [button] – Creates a new Primary Facility Location, and stands-by for data entry
- **Back** [button] – Goes back to the Projecto Setup/Customization screen
- **Exit** [button] – Ends the Projecto session
- **Print List** [button] – Prints a Building List report listing the Primary Facility Locations

Data Fields and Buttons

The main portion of the Building List screen has these data fields and buttons:

- **ID #** [read/write character field] – Primary Facility Location ID
- **Building Name** [read/write character field] – Building Name. These are the values that appear in the Primary Facility Location value list in the General Project Information screen.

- **Address** [read/write character field] – Building address
- **Type** [value list] – Building type. Selections include “**Offices**”, “**Operations**”, etc.
- [delete button] – Deletes the Primary Facility Location

> Once you delete a Primary Facility Location you cannot get it back (except by reentering the data or loading the last backup of the data). Be careful to make sure that you actually want to perform the deletion operation before you click the delete button.

Bottom Menu

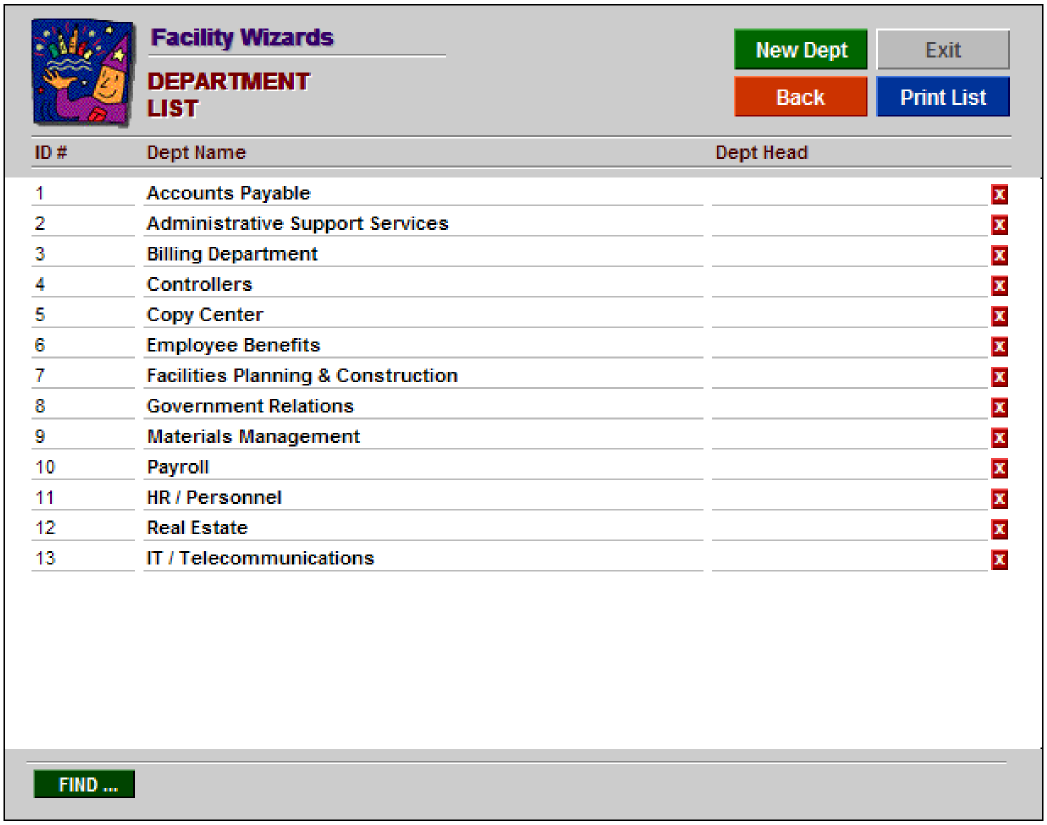
The Building List screen’s bottom menu contains this button:

- **FIND** [button] – Switches into Find mode, allowing Primary Facility Locations to be found

DEPARTMENT LIST SCREEN

The Department List screen lets you view, enter, and edit the departments within your organization that are affected by capital projects. The departments data includes department names that become selections in the **Department** value list in the General Project Information screen.

This screen presents your data using a list display, displaying a Department record for each department. The Department List screen also contains a top menu and bottom menu.



Department List Screen

Top Menu

The Department List screen's top menu contains these buttons:

- **New Dept** [button] – Creates a new department, and stands-by for data entry
- **Back** [button] – Goes back to the Projecto Setup/Customization screen
- **Exit** [button] – Ends the Projecto session
- **Print List** [button] – Prints a Department List report listing the departments

Data Fields and Buttons

The main portion of the Department List screen has these data fields and buttons:

- **ID #** [read/write character field] – Department ID
- **Dept Name** [read/write character field] – Department name
- **Dept Head** [read/write character field] – Person who is the head of the department
- [delete button] – Deletes the department

Once you delete a department you cannot get it back (except by reentering the data or loading the last backup of the data). Be careful to make sure that you actually want to perform the deletion operation before you click the delete button.

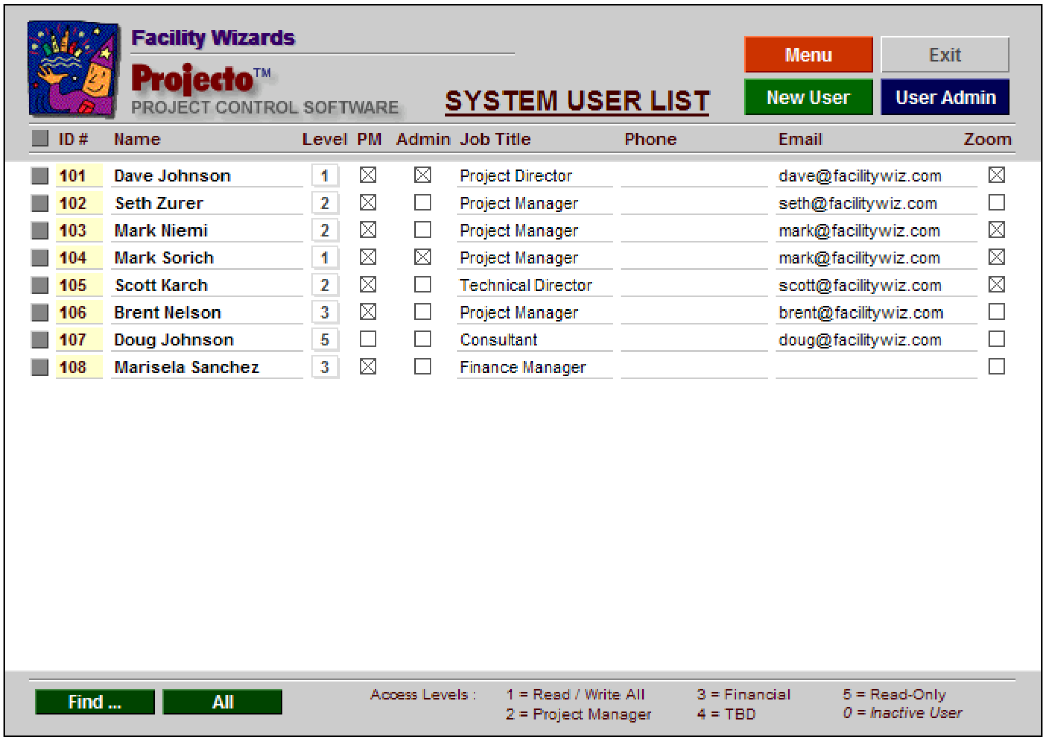
Bottom Menu

The Department List screen's bottom menu contains these buttons:

- **FIND** [button] – Switches into Find mode, allowing departments to be found

SYSTEM USER LIST SCREEN

Use the System User List screen to view, enter, and edit data about authorized users for a multi-user client-server Projecto installation. This screen is a list display, displaying a User record for each user. The System User List screen also has a top menu and bottom menu.



System User List Screen

Top Menu

The System User List screen's top menu contains these buttons:

- **Menu** [button] – Goes to the Main Menu screen, providing access to all of Projecto's features and functions
- **New User** [button] – Creates a new Projecto user, and stands-by for data entry to the new record
- **Exit** [button] – Ends the Projecto session
- **User Admin** [button] – Goes to the System User List Passwords screen

Data Fields and Buttons

The main portion of the System User List screen has these data fields and buttons:

- **ID #** [read/write character field] – User ID
- **Name** [read/write character field] – User name
- **Level** [read-only value list] – User Access Level. Allowable values are "**1**" for Read/Write All, "**2**" for Project Manager, "**3**" for Financial, "**4**" for TBD, "**5**" for Read-Only. This is set by the **Level** value list in the System User List Passwords screen (described next).
- **PM** [read-only checkbox] – Indicates that the user is a project manager. This is set by the **PM** checkbox in the System User List Passwords screen (described next).

- **Admin** [read-only checkbox] – Indicates that the user has *Administrator permission*. This is set by the **Admin** checkbox in the System User List Passwords screen (described next).
- **Job Title** [read/write character field] – User job title
- **Phone** [read/write character field] – User phone number
- **Email** [read/write character field] – User email address
- **Zoom** [checkbox] – Causes Projecto to be displayed such that it takes-up the user's entire computer screen

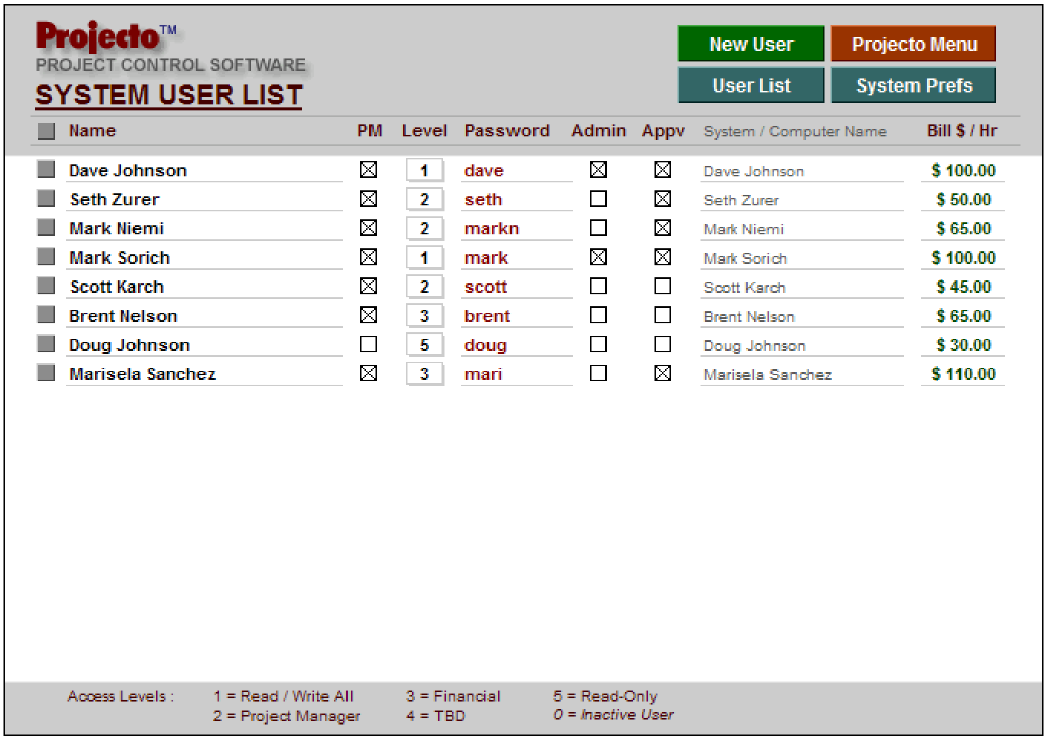
Bottom Menu

The System User List screen's bottom menu contains these buttons:

- **Find** [button] – Switches into Find mode, allowing users to be found
- **All** [button] – Causes all users to be displayed

SYSTEM USER LIST PASSWORDS SCREEN

You use the System User List Passwords screen to setup user passwords and authorization levels for a multi-user client-server Projecto installation. This screen is a list display, displaying a User record for each user. The System User List Passwords screen also has a top menu.



System User List Passwords Screen

Top Menu

The System User List Passwords screen's top menu contains these buttons:

- **New User** [button] – Creates a new user, and stands-by for data entry
- **User List** [button] – Goes back to the System User List screen
- **Projecto Menu** [button] – Goes to the Main Menu screen, providing access to all of Projecto's features and functions
- **System Prefs** [button] – Goes to the System Preferences/Settings screen

Data Fields and Buttons

The main portion of the System User List Passwords screen has these data fields and buttons:

- **Name** [read/write character field] – User name
- **PM** [checkbox] – Indicates that the user is a project manager. This causes the user name to become a selection the **Pjt Manager** value list in the General Project Information screen.

Defining a user as a project manager causes the last name of the user to be displayed as a project manager in the **Pjt Manager** value list in the General Project Information screen.

- **Level** [value list] – User Access Level. Allowable values are “**1**” for Read/Write All, “**2**” for Project Manager, “**3**” for Financial, “**4**” for TBD, “**5**” for Read Only
- **Password** [read/write character field] – User password
- **Admin** [checkbox] – Grants the user Administrator permission
- **Approv** [checkbox] – Indicates that the user has permission to approve project budgets, using the approval buttons in the Project Budget Status screen and in the Project Budget/Approvals screen
- **System / Computer Name** [read/write character field] – User’s system/computer name
- **Bill $ / Hr** [aaaa] – Billable hourly rate for the user

The System User List Passwords screen does not have a bottom menu.

PROJECTO BACKUP SCREEN

Projecto's automatic backup function provides some protection against lost data due to accidental changes to, or deletions of Projecto database files. Use the Projecto Backup screen to setup these automatic backups.

> Projecto's automatic backup function stores its backups on the same disk that your original data is stored on. This means that this backup function does not protect against disk crashes. We strongly recommend that your organization setups regular backups of your Projecto data onto separate media, which will need to be done outside of Projecto.

Projecto Backup Screen

Top Menu

The Projecto Backup screen's top menu contains this button:

- **Projecto Menu** [button] – Goes to the Main Menu screen, providing access to all of Projecto's features and functions

Data Fields and Buttons

The main portion of the Projecto Backup screen contains these data fields and buttons:

- **Automatically save backup copies every–day, Week, 2 Weeks, Month** [checkbox and radio buttons] – Indicates that automatic backups will be performed, and specifies the time period between the backups
- **last backup** [read-only date field] – Date of the last backup
- **Backup Now** [button] – Causes Projecto to perform a backup operation

The Projecto Backup screen does not have a bottom menu.