

Sage Timberline Enterprise

Job Management

Job Management is the Sage Timberline Enterprise resource that collects all project-related information and stores it in a format you customize to fit your business.

From a simple costing structure with basic job codes and standard cost codes, to a sophisticated structure with multi-sectioned jobs, multi-sectioned cost codes, and multiple cost categories, Job Management can handle virtually any level of tracking complexity.

Job Management gives you complete control over subcontract, purchase order, contracts, and change order management. Enter subcontracts and purchase orders directly into Job Management, then track them against invoices for total control over committed costs. And manage every step of the change order process—from pending through approval—to ensure change order profitability.

Sage Timberline Enterprise provides you with the tools you need to create and track common project documents, such as RFIs, submittals, and transmittals. Take a look at which RFIs haven't yet been responded to and understand the potential impact of outstanding requests on a project's cost and schedule. You always know what tasks remain, assuring that nothing falls through the cracks.

Using integrated information access tools, your project information is always immediately available. Interactive workspaces let employees view information—such as potential cost overruns, percent complete, and production units in place—on the screen in seconds. And customizable reports let you calculate and print information for in-depth project analysis.

Following is a detailed list of the features that Job Management offers to help you keep projects on track:

Job tracking

- Track contract amounts, estimates, costs, subcontracts, purchase orders, quantity totals, production information, customer information, billings, and other project information in as much detail as you need.
- Format job IDs with up to 20 alphanumeric characters and up to as many sections as you like.
- Format cost code IDs with up to 20 alphanumeric characters and up to as many sections as you like.
- Track an unlimited number of user-definable cost categories.
- Use an optional sub-job level to isolate special cost areas without disassociating them from the main job. Set up standard cost codes and categories to streamline job setup and to improve consistency of cost analysis.
- Setup job types and job templates to make the process of job setup easier and to standardize on default settings.
- Add user-defined custom fields to several Job Management records to track additional job information.
- Track project totals by job, year, quarter, month or week.
- Track period-to-date accumulators daily, weekly, bi-weekly, or semi-monthly.
- Track job status and scheduling dates.
- Define tax groups for each job by cost type.
- Set up GL cost account groups to debit GL cost accounts by type of job.
- Enter and maintain future costs, project status, bought out status, and score progress using Excel integration.

Entry and processing

- Send all job-related information from other Sage Timberline Enterprise applications to Job Management.
- Enter direct costs and adjustments into Job Management, (for example, overhead allocations, and miscellaneous cost adjustments).
- Enter contract change orders, subcontracts, subcontract change orders, purchase orders, purchase order change orders, and estimates.

BENEFITS

- Project information is always a click away
- Easily control subcontracts, purchase orders, contracts, and change order management
- Handle virtually any level of job costing complexity
- Improve project communication between team members
- Eliminate duplicate efforts by sharing data between departments and work processes

- Easily edit entries even after they've been posted (security permitting).
- Capture daily labor hours for certified jobs.

Subcontract and purchase order management

- Enter subcontracts and purchase orders for any combination of jobs, sub-jobs, cost codes or categories.
- Break out subcontracts or purchase orders into unlimited line items.
- Track item descriptions, scopes of work, scheduling information, and insurance requirements.
- Track payment and performance bond information.
- Track detailed contract approval information.
- Track schedule dates for each subcontract.
- Retrieve and change vendor insurance information from Accounts Payable to reflect separate insurance for a project.
- Track miscellaneous requirements with user-defined custom fields.
- Mark cost codes or categories as "bought out" to analyze contract variances.

Change order management

- Enter and track client requested change orders, subcontract change orders, and purchase order change orders
- Document who initiated the request, who prepared the change order, who approved it and when.
- Track changes to the original contract, estimate, subcontracts, purchase orders, and production totals.
- Track the status of each change order item with customizable descriptions (for example, requested, verbal O.K.).
- Associate subcontract/purchase order change orders with client change orders.
- Tie change orders to contracts and budgets.
- Record billable or internal change orders.
- Enter revisions to production units.

Document Control

- Create, track, and easily distribute documents, such as RFIs, submittals, and transmittals using automated delivery methods; e-mail and fax documents directly from an entry screen.
- Issue contracts, subcontracts, purchase orders, potential change orders, and change orders, then release these items to accounting for review, approval, and use.
- Access subcontract and purchase order status, initial and revised totals, pending and approved changes, and amounts invoiced, retained, and paid.
- Work with contracts, estimates, forecasts, change orders, and cost details.
- Create a job directory with job-specific contact information and set up unlimited distribution lists.
- Document and coordinate the distribution of current drawings and sketches to all interested parties.
- Access pre-designed reports or design your own.

- Secure access to information or the ability to perform tasks by individual or by job.
- Customize drop-down lists and add custom fields to fit your business.

Workspaces

- Choose from several pre-designed Job Management workspaces.
- Drill down on summary information to view supporting detail (for example, click on a job to see cost code information).
- Apply filters to display only the information you want to see.
- Insert columns of data on-the-fly to quickly access additional information.
- Use linked panes to display associated information. (for example, select a vendor in pane 1, which will cause all purchase orders and subcontracts to be displayed for that vendor in the second pane. Then, select a subcontract, which will cause all subcontract line items to be displayed in the third pane).
- Select a webcam in a workspace panel to monitor job sites.

Reporting

- Choose from several pre-designed Job Management reports to calculate and print information at any time (for example, cost at completion trends, committed cost detail, and, change order log).
- Apply conditions and ranges to print exactly the information you need.
- Modify nearly all of the reports, or create new reports using Sage Report Designer.
- Gain better control over your jobs with the following reports:
 - Job status overview combining accounting and project management detail on one report.
 - Job cost by date range, monthly cost, and cost type analysis, including unposted costs.
 - Contract status showing accounts receivable invoices and payments.
 - Purchase orders and subcontracts showing accounts payable invoices and checks.
 - RFI overdue and unanswered logs and summaries.
 - Submittal logs by company, status, and summary report.
 - Transmittal logs by date, company, and status.
 - Insurance and lien documents.

Additional features

- Enter additional project information with customizable field worksheets (for example, percent completes, production units in place, anticipated change orders).
- Enter notes and attach electronic files throughout Job Management for additional documentation (for example, spreadsheets or word processing documents).
- Track jobs for multiple companies in the same general ledger.
- Define security rights by user or group.
- Change descriptions that are on the screen to match your company's standard terminology.