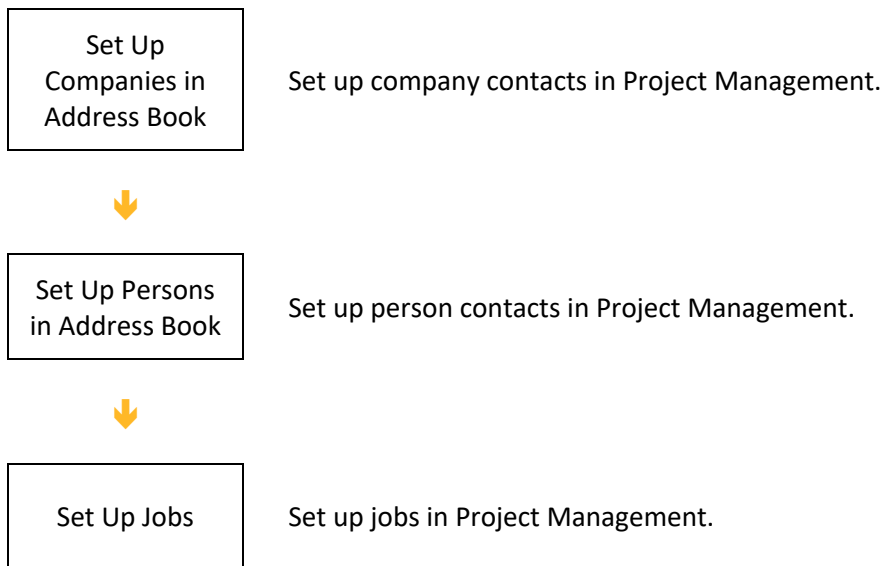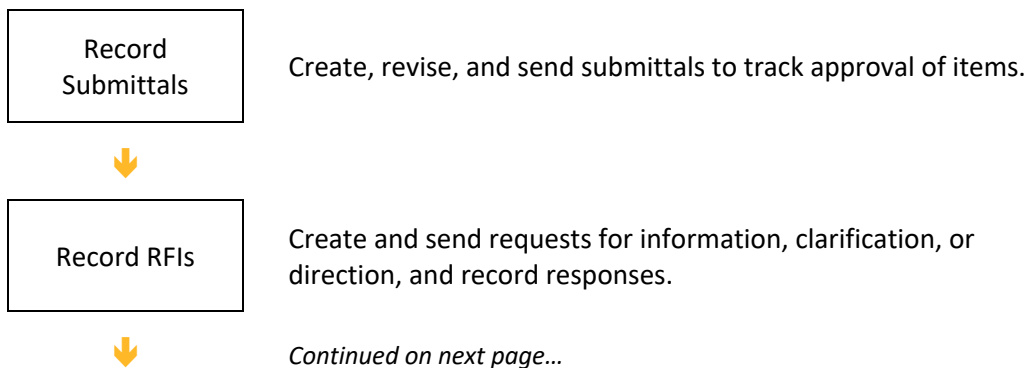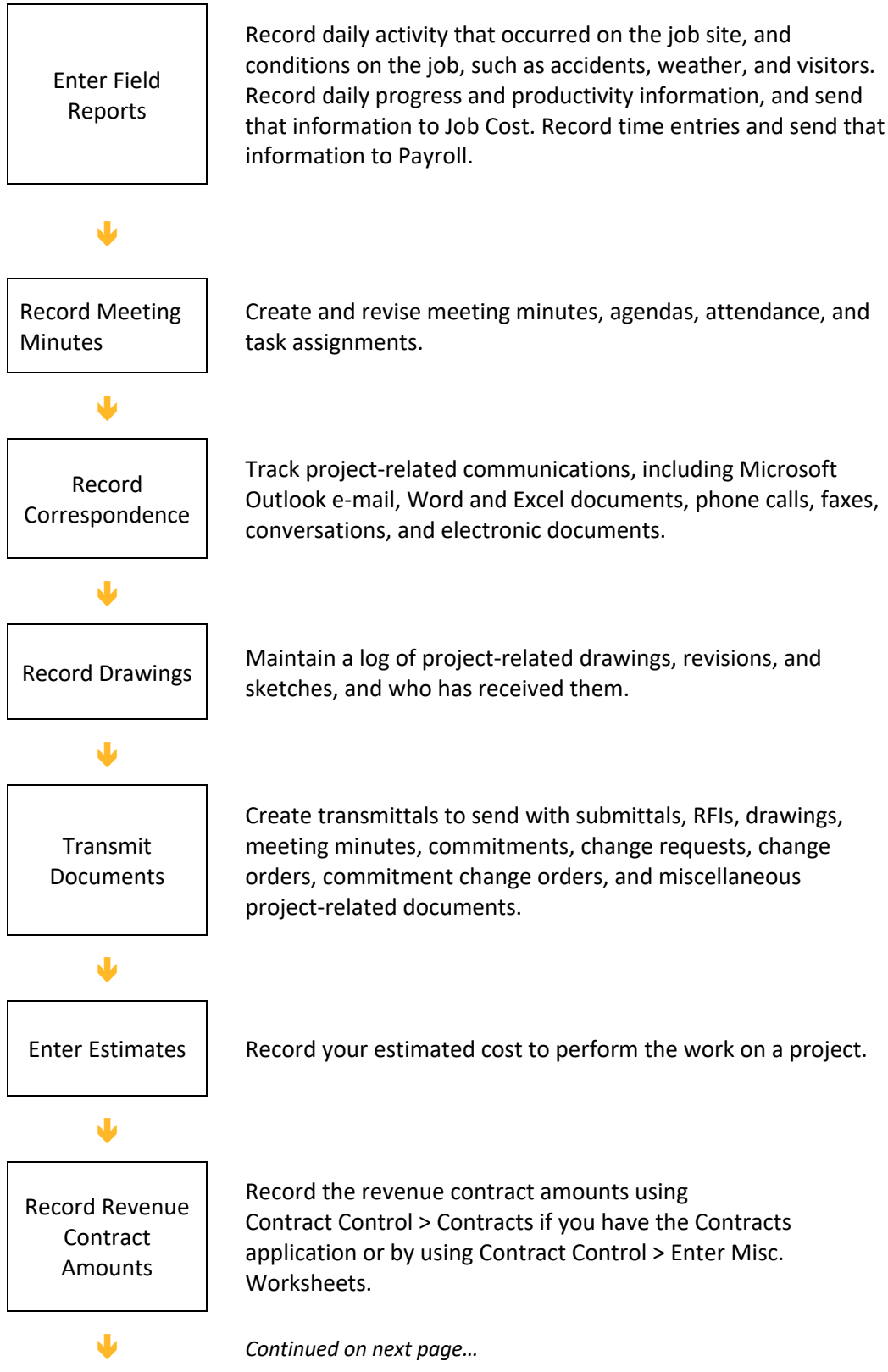# Project Management

Set Up Overview

The diagram below identifies the typical setup processes that are performed frequently. For the most current and detailed information, refer to Help.
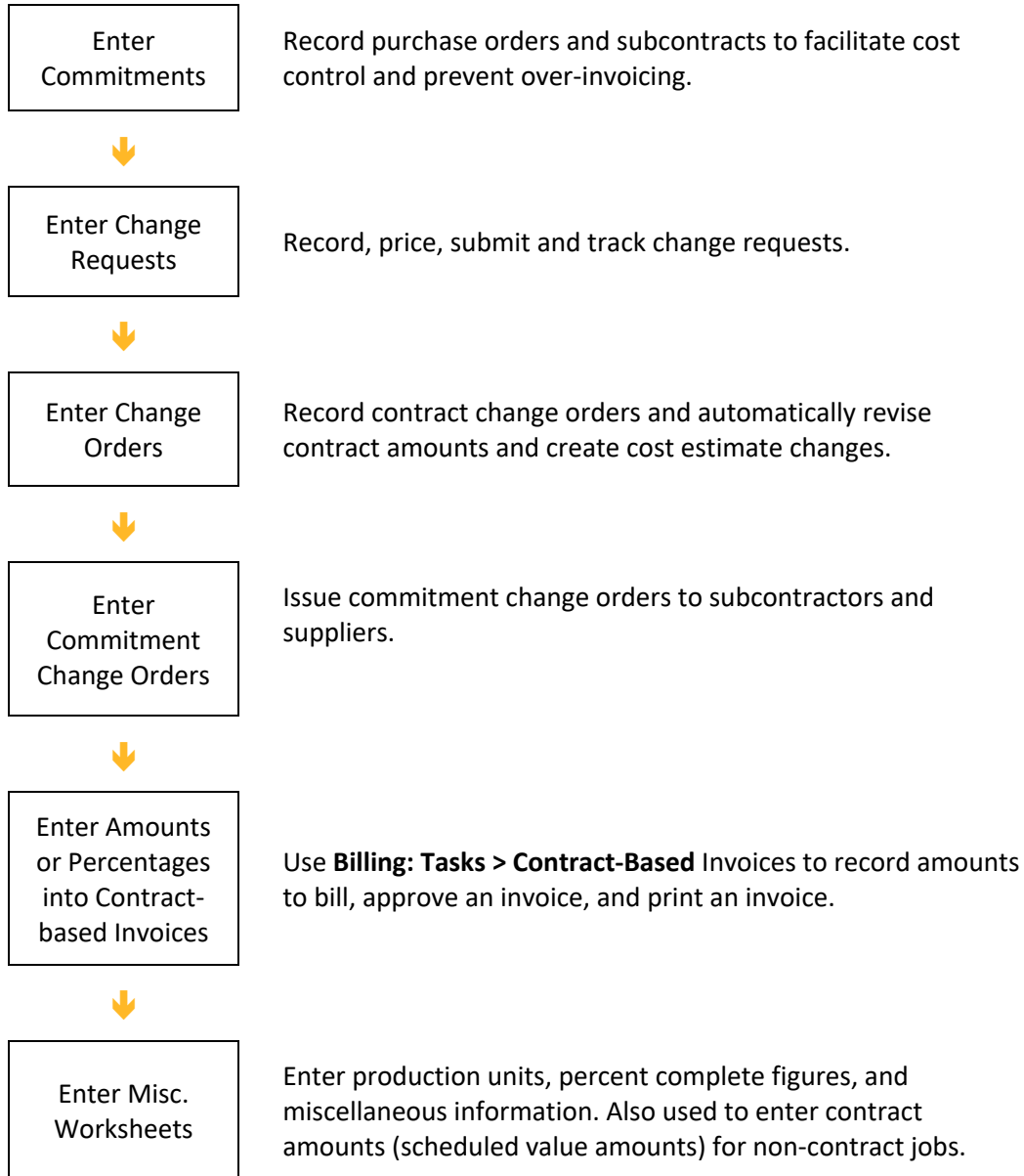
Set Up Companies in Address Book	Set up company contacts in Project Management.
⬇	
Set Up Persons in Address Book	Set up person contacts in Project Management.
⬇	
Set Up Jobs	Set up jobs in Project Management.

Workflow Overview

The diagram below identifies frequent workflow tasks. For the most current and detailed information, refer to Help.

Record Submittals	Create, revise, and send submittals to track approval of items.
⬇	
Record RFIs	Create and send requests for information, clarification, or direction, and record responses.
⬇	*Continued on next page…*

Enter Field Reports	Record daily activity that occurred on the job site, and conditions on the job, such as accidents, weather, and visitors. Record daily progress and productivity information, and send that information to Job Cost. Record time entries and send that information to Payroll.
Record Meeting Minutes	Create and revise meeting minutes, agendas, attendance, and task assignments.
Record Correspondence	Track project-related communications, including Microsoft Outlook e-mail, Word and Excel documents, phone calls, faxes, conversations, and electronic documents.
Record Drawings	Maintain a log of project-related drawings, revisions, and sketches, and who has received them.
Transmit Documents	Create transmittals to send with submittals, RFIs, drawings, meeting minutes, commitments, change requests, change orders, commitment change orders, and miscellaneous project-related documents.
Enter Estimates	Record your estimated cost to perform the work on a project.
Record Revenue Contract Amounts	Record the revenue contract amounts using Contract Control > Contracts if you have the Contracts application or by using Contract Control > Enter Misc. Worksheets.

Continued on next page…

Enter Commitments	Record purchase orders and subcontracts to facilitate cost control and prevent over-invoicing.
⬇	
Enter Change Requests	Record, price, submit and track change requests.
⬇	
Enter Change Orders	Record contract change orders and automatically revise contract amounts and create cost estimate changes.
⬇	
Enter Commitment Change Orders	Issue commitment change orders to subcontractors and suppliers.
⬇	
Enter Amounts or Percentages into Contract-based Invoices	Use **Billing: Tasks > Contract-Based** Invoices to record amounts to bill, approve an invoice, and print an invoice.
⬇	
Enter Misc. Worksheets	Enter production units, percent complete figures, and miscellaneous information. Also used to enter contract amounts (scheduled value amounts) for non-contract jobs.

Set Up Companies in Address Book

1. From the **Setup** menu, select **Company**.

2. Enter the **Company name**.

3. Select a company **Type**.

4. Click the down-arrow above the [**Address**] button. Select the appropriate address type.

5. Click [**Address**]. Enter the address information and click [**OK**].

6. Enter phone numbers, if available.

7. Select the appropriate **Trade** from the list.

8. In the **Sort by** box enter the company name, as you wish it to be sorted in lists.

9. Enter an **E-mail address** and **Web address**, if applicable.

10. In the **Send via** box, select the primary method of sending documents to this company.

11. Click [**Save**] when you have completed the entry for this company.

12. To add another company, click [**New**], and repeat steps 2 –10.

13. Click [**Close**] when you are done entering companies.

Set Up Persons in Address Book

1. From the **Setup** menu, select **Person**.

2. Enter the person's **Full name**.

3. Select the **Company** this individual is associated with, if applicable.

4. Enter **Job title** and **Department**, if applicable.

5. In the **Sort by** box, enter the name, as you want it to be sorted in selection lists.

6. Enter address, phone, and other contact information.

7. In the **Send via** box, select the preferred method of sending documents to this person.

8. Click [**Save**] when you have completed the entry for this person.

9. To add another person, click [**New**], and repeat steps 2 – 8.

10. Click [**Close**] when you are done entering persons.

Set Up Jobs in Project Management

This process sets up the job in Project Management, but not in Job Cost.

1. From the **Setup** menu, select **Jobs**.

2. Enter the job **Number** and **Description**. This is the minimum information required on the **General** tab.

3. Click the various tabs, and enter the information applicable for the job being set up.

4. Click **[Save]** when you have completed entries for this job.

5. Repeat steps 2 – 4 for each job being set up, then click **[Close]**.

Set Up Jobs in Job Cost

When you want the job you set up in Project Management to be available in Job Cost, perform the following steps.

1. In Project Management, from the **Setup** menu, select **Jobs**.

2. Click [**Find**] and select the job.

3. On the **General** tab, select the **Create JC job** check box.

4. The **Add New Job** window opens. The minimum information you need to enter is the **GL account prefix**, the **Billing Method** (if you use Accounts Receivable, Contracts, and Billing), and the **Billing Level**.

5. Click [**OK**] when you are done entering information in the **Add New Job** window. The job now exists in Job Cost.

6. Click [**Save**]; then click [**Close**].

Record Submittals

1. From the **Documents** menu, select **Submittals**.

2. Select the appropriate **Job**.

3. Select the **Spec. Section**.

4. The **Number** field automatically fills with the next available submittal number for this spec. section.

5. Enter appropriate information to **Description** field.

6. Select an **Urgency** level, and enter the **Number of items** you expect to send with this submittal.

7. In the **Revision** area, enter or select the **Received Date** and **Sent Date**. Other dates will be completed as the submittal is processed.

8. In the **Distribution** area, click the down arrow key to select a contact. Indicate from whom you received the items, and to whom you are sending the items.

9. In the **Schedule** information area, use the calendar buttons to select the required dates.

10. In the General Information area, select the **Type** of items you are sending. In **Copies to send** and **Copies to forward**, specify how many of each item you are sending for a first submittal, and how many you will eventually forward to the original submitter.

11. Click [**Save**].

12. If you want to print or send this submittal form without a transmittal form, click [**Print**] or [**Send**].

13. To send this document with a transmittal, click [**Transmittal**]. (See the Send a Transmittal procedure below for additional information.)

Record RFIs

1. From the **Documents** menu, select **RFIs**.

2. Select the **Job**.

3. Select the appropriate contact in the **To** box and, if applicable, in the **Cc** box.

4. Enter the **Subject**. Select an **Urgency** level.

5. If the RFI is related to a drawing, select the **Drawing**.

6. If necessary, specify the **Spec. section** related to the RFI.

7. Enter appropriate information in the **Issue** area, including contact names, and the date by which a response is required.

8. Complete the **Impact Information** section to indicate how the schedule and costs will be affected.

9. Click [**Save**].

10. If you want to print or send this RFI without a transmittal form, click [**Print**] or [**Send**].

11. To send this document with a transmittal, click [**Transmittal**]. (See the Send a Transmittal procedure below for additional information.)

12. When you receive a response to this RFI, record it in the **Answer** area. Complete the **Forward** information area as needed.

Enter Field Reports

You can enter information for an existing field report, or create a new field report. The following procedure is for creating a new field report. You can create an RFI at any time from the Field Report window by selecting **Create RFI**.

1. From the **Documents** menu, select **Field Reports**.

2. When the **Field Reports List** window opens, click **New**.

3. In the **Job** box, select the appropriate job ID.

4. In the **Prepared by** box, enter the name of the person preparing the report by selecting the name from the job contact list. If you add a new name, an Address Book person is created and is added to the job contact list when you save the field report.

5. Type a **Description** of this report.

6. Enter the **Date** of the field report.

7. In the **Type** box, select the report type. This list can be modified in **Custom Descriptions**.

8. In the **Number** box, type the number of the report.

9. Enter the daily activity or conditions on the appropriate tab.

10. Click **Save** to store the information you entered.

11. If you entered hours worked for employees on the PR Time tab, select **Send to Payroll** on the PR Time tab before you finalize the field report. Once time is sent to Payroll, you can no longer make changes to those lines of time. You can create additional time entries for the same job for the same period end date from the same field report until you finalize the field report.

12. When you are certain that the information you entered is complete, select the **Finalized** check box, and click **Save**. Field reports that have been marked as **Finalized** and saved can no longer be edited.

    If you add or edit an entry on the **Work Activities and Progress** tab, a transaction is sent to Job Cost when you finalize and save the field report. The transaction type sent depends on the entry you create or edit. The transaction is only sent if the new percent complete (or new production units) value differs from the current percent complete (or the current production units) value for this job.

    NOTE: The percent completion transactions can be at the job, extra, cost code, or category levels in Job Cost. The production units in place transactions are sent at the cost code levels.

13. To print the default field report design (as designated in **File > Company Settings > PJ Settings > Document Forms**), select the print icon in the **Field Reports** window (**Documents > Field Reports**). To print a specific field report, select **Reports > Field Reports**. Information that you enter in the **Field Reports** window is included on printed Field Reports even if it has not yet been finalized.

To Edit a Finalized Field Report

Finalizing your field report prevents additional changes from being made to the report. After you finalize the field report, only users who have security access to change the **Finalized** status are able to edit the report.

1. To edit a finalized field report, from the **Documents** menu, select **Field Reports**.

2. When the **Field Reports List** window opens, select the field report you want to edit.

3. In the **Field Reports** window, clear the **Finalized** check box.

4. Make the edits on the appropriate tab or tabs.

5. Select the **Finalized** check box, and then save the changed field report.

   A tracking log records all changes made to a finalized field report when it is saved.

Record Meeting Minutes

You can view or change minutes for an existing meeting, create minutes for a new meeting, or create minutes for a new meeting based on an existing meeting. The following procedure is for creating a new meeting.

1. From the **Documents** menu, select **Meeting Minutes**.

2. Under **What do you want to do?**, click **Create a new meeting**.

3. Select the **Job** and meeting **Type**. Click [**OK**].

4. Record **General Information** about this meeting.

5. Click the expand button for the **Attendees and distribution** area if it is not viewable.

6. In the **Attendee** column, select every attendee for the meeting, and regular attendee. Select the check box in the **Attended** column to indicate who attended.

7. In the **Cc** area, select those people who need a copy of the meeting minutes, but do not attend.

8. Click the expand button if the **Items** and **Detail for Item** areas are not viewable.

9. Enter meeting items, and necessary detail.

10. Click [**Save**] to store the meeting information.

11. If you want to print or send the meeting minutes without a transmittal form, click [**Print**] or [**Send**].

12. To send the meeting minutes with a transmittal, click [**Transmittal**]. (See the Send a Transmittal procedure below for additional information.)

Note: The form used to create the printed or transmitted document is specified in **Files > Company Settings > PJ Settings > Document Forms**.

Record Correspondence

The correspondence log is a list of all your correspondence on a project, including e-mail, letters, phone calls, and faxes. The log works with Microsoft Word, Excel, and Outlook, so that you can add documents, spreadsheets, and e-mail entries to the log by making a simple selection. Project Management does not have to be open to add entries to the correspondence log from Outlook, Excel, or Word.

To Add to the Log From Outlook

1. Open the e-mail item that you want to add to the log.

2. Click [**Add to Log**] in the **PJ Correspondence Log** toolbar at the top of the e-mail window.

3. You may be asked to specify the Sage Timberline Office data folder, if this is the first time you are adding to the log from this session of Outlook.

4. In the **Correspondence Log – Entry Form** window, select the appropriate job. Enter other details if you wish. Click [**OK**].

5. The entry is added to the correspondence log when you send it or close it.

6. To log subsequent e-mails, open the e-mail item, and in the **PJ Correspondence Log** toolbar, select the related job. The entry is added to the correspondence log when you send it or close it.

Note: If the PJ Correspondence Log toolbar is not visible, while an e-mail item is open select **Tools > Customize**. Select the **PJ Correspondence Log** check box.

To Add New Correspondence Directly to the Log

1. From the **Documents** menu, select **Correspondence Log**.

2. Select the appropriate **Job**.

3. Existing correspondence log entries are sorted in order by date, with the most recent at the end of the list.

4. In the empty row at the end of the list, select the **Date** of the correspondence.

5. Complete the other columns in the row.

6. To add an attachment to the item, click the paperclip button in the far right column of your entry row. Then click the **File Links** tab, and click [**Add**]. Double click the file to add, then click [**OK**].

7. Press [**TAB**] or [**ENTER**] at the end of the row to add it to the log.

Record Drawings

Entries you make in the drawing log represent drawings, revisions, and sketches and are not the actual drawings, revisions, or sketches themselves.

To Add a New Drawing

1. From the **Documents** menu, select **Drawing Log**.

2. Select the **Job**.

3. Select the **Discipline**.

4. Click [**New Drawing**] to move to a new blank row in the drawing grid.

5. In the blank row, enter the drawing number, title, date, and any other information that applies to the drawing.

6. When you finish entering information in the row, click [**Save**] to save the entry.

7. Click [**Transmittal**] to send the drawing. Select the drawing log entries that you want to include on the transmittal. (See the Send a Transmittal procedure below for additional information.)

To Add a Revision to a Drawing

1. From the **Documents** menu, select **Drawing Log**.

2. Select the **Job**.

3. Select the **Discipline**.

4. Clear the **Show only current drawing**s check box.

5. Click in the row for the drawing that has a new revision.

6. Click [**New Revision**].A new row appears in the grid, just below the row for the original drawing.

7. Enter a **Title** for the revision, a **Date**, the revision number, and any other information.

8. The **Current** check box in the new row is selected. The **Current** check box for the previous version of the drawing is cleared, because that is no longer current.

9. Click [**Save**].

10. Click [**Transmittal**] to send the revision. Select the drawing log entries that you want to include on the transmittal. (See the Send a Transmittal procedure below for additional information.)

Send a Transmittal

1. From the **Documents** menu, select **Transmittals** or click [**Transmittal**] from within the Submittal, RFI, Meeting Minutes, or Drawing windows, or from within Commitments, Change Requests, Change Orders, or Commitment Change Orders.

2. Select the **Job**.

3. Select the appropriate contacts in the **To** and **Cc** boxes.

4. The **Subject** will be automatically entered if you created the transmittal by clicking [**Transmittal**]. Change or enter the **Subject** if necessary.

5. Select the appropriate check boxes in the **WE ARE SENDING YOU** area.

6. The item grid will be automatically filled in if you created this transmittal by clicking [**Transmittal**]. To add items to the item grid, click in the first blank row, in the **Document Type** column, and select a document type. Complete the rest of the row.

7. In the item row, select the check box in the printer column if you want to send the item with the transmittal.

8. Scroll down to view the lower part of the **Transmittal** window.

9. Complete the section titled **THESE ARE TRANSMITTED**.

10. Enter additional information in the **REMARKS** section.

11. In the **From** box select the sender of the transmittal. Select an **Urgency** level.

12. Click [**Save**]; then click [**Send**].

13. Complete the **Timberline Sending** window, and click [**Send**].

Enter Estimates

Estimates provide a basis for cost comparisons, cost control, and cost projection. Estimates are entered at the category level. Because estimates are not actual costs, no General Ledger entries are created. If you are using Estimating or another estimating software, use **Import Estimates** to create the estimate entries. Otherwise, follow the steps below:

1. Manually itemize the estimated costs by job, extra (if used), cost code, and category.

2. From the **Contract Control** menu, select **Enter Estimates**.

3. Enter each estimate item into the grid. Press ENTER or TAB to move to the next column. Click [**List**] to select the job, extra, cost code, and category from existing records, or enter new values.

If you are using group cost codes, e.g. 03-000, you can enter estimates to only the individual cost codes within a group. When the entries are posted, both the individual and the group cost code totals are updated.

4. Click [**Totals**] to verify totals by cost type. Click [**Category Totals**] to verify totals by category; then click [**Close**] to return to the grid.

5. If the estimate has been finalized, click [**Finalize Original Estimate**]. Select the job to be marked as finalized, and click [**OK**].

6. Click [**Finish**] when all estimate entries have been made.

7. Change the options displayed in the **Print Selection** window or accept the defaults.

8. Click [**Start**].

9. Review the Estimates Journal (generated automatically) to verify totals and to check for errors.

10. To print an estimate report, select **Reports > Cost Control > Estimate Spreadsheet**.

Record Revenue Contract Amounts

If you have the Contracts application, set up contracts, contract items, and contract amounts by selecting **Contract Control > Contracts**. See the Contract Procedures document for procedures on setting up contracts and contract items, and entering contract amounts.

If you do not use the Contracts application, or to enter contract amounts for a Quick Bill job (a job that doesn't have a contract), follow the procedure in this document titled Enter Misc. Worksheets to enter contract (scheduled value) amounts.

Enter Commitments

Commitments is the term used to encompass both purchase orders and subcontracts. Entering commitments is the first step in tracking purchase orders and subcontracts. Commitments enhance job cost reporting by providing cost information before receiving invoices. During commitment entry, warnings are given when costs exceed the estimate, allowing for more effective project management.

1. Gather the required commitment information: vendor, job, PO or subcontract ID, cost code, category, tax group, amount, date, and other related information such as terms, ship date, and so on.

2. From the **Contract Control** menu, select **Commitments**.

3. In the **Commitment** box, enter the purchase order number or subcontract number.

4. Enter the description of this commitment, and select a vendor.

5. Select the commitment **Type**, either **Purchase Order** or **Subcontract**. If you select Purchase Order, the **Header Information** window opens. Complete this window and click [**OK**].

6. Do not select the **Release to accounting** check box. Enter the **Retainage percent**, if appropriate.

7. In the grid, enter a line for each item of the commitment.

8. Verify the **Total** at the lower left of the window.

9. To record additional information about the commitment, select the appropriate button along the right side of the window, enter the information, and click [**OK**].

10. Click [**Save Commitment**]. When you are prompted to commit, click [**No**].

11. To send the commitment with a transmittal, click [**Transmittal**]. (See the Send a Transmittal procedure above for additional information.)

12. Repeat steps 3-11 until all commitments have been entered. Then click [**Finish**].

13. Change the options displayed in the **Print Selection** window or accept the defaults.

14. Click [**Start**].

15. Review the Commitment Journal (generated automatically) to verify totals and check for errors.

16. Review any commitment documents that may have printed.

17. To print Purchase Order documents, select **Reports > Purchase Order** and select the appropriate Purchase Order Form. To print Subcontract documents, select **Reports > Subcontract** and select the appropriate Subcontract Form.

Enter Change Requests

1. From the **Contract Control** menu, select **Change Requests**.

2. On the **Change Request** tab, select the appropriate **Job**.

3. Accept or change the change request number that is automatically generated.

4. Enter a **Description** of the change, and the date.

5. In the **To** field, select or enter the recipient of this change request.

6. Type a description of the change in the **Scope** area.

7. In the **From** box, indicate who is sending the change request. In the **Cc** box, select other contacts who should receive a copy of this change request.

8. Click the **Detail** tab. Complete required information on this tab. If this change affects a contract and contract item, enter that detail in the **Coding and reference** area.

9. Click the **Price/Cost Estimate** tab. Select a **Pricing method**. Select the **Price** view.

10. In the grid, enter change request items, detail, and prices.

11. Click [**Next Action**]. Select **Prefill Estimate**. When you receive the message **Cost Estimates Successfully Prefilled**, click [**OK**].

12. Select the **Cost estimate** view. Review your costs. Compare the **Total cost estimate** with the **Total price**. Make any needed adjustments to the item grid, and to the Markup/Add-on/Tax grid in the lower part of the window.

13. If you need to make adjustments to the **Total price**, select the **Price** view. Make adjustments to the item grid, and the Markup/Add-on/Tax grid, as needed.

14. To submit the change request, click the **Change Request tab**. Change the **Status** to **Submitted**.

14. Click [**Save**].

15. To send the change request with a transmittal, click [**Transmittal**]. (See the Send a Transmittal procedure above for additional information.)

16. To print change request documents from the **Reports** menu select **Change Request**, then select the appropriate CR Form.

Enter Change Orders

1. From the **Contract Control** menu, select **Change Orders**.

2. Select the appropriate **Job**. If the change is for an extra, also enter its ID. Accept or change the change order number that is automatically generated.

3. Enter a **Description**, and the **Date** of the change order.

4. Select the appropriate contacts for **To** and **From**.

5. Select the **Status** of this change order.

6. If this change order affects only one contract item, select the **Contract Item**. Otherwise, leave it blank.

7. Select the **Release to Accounting** check box if appropriate. If the **Status** is **Approved**, select the **Revise Contract Amount** check box, if appropriate.

8. Click [**Select Change Requests**]. Select the change requests that are included in this change order and click [**OK**]. To add a new change request for this change order, click [**New Change Request**] and complete the change request details.

9. The change requests that are included on this change order appear in the change request grid. To make changes to a change request, double-click the change request. Make your changes and click [**OK**].

10. Click [**Save**]. If you receive the message that cost estimates have not yet been sent as approved, click [**Yes**] to update them now. The **Update Job Estimate** window opens. Select whether you want to save the cost estimate to Job Cost as **Approved** or **Pending**. Enter the transaction date of the cost estimate entries. Click [**OK**].

11. Click [**Save**].

12. To send this change order with a transmittal, click [**Transmittal**]. (See the Send a Transmittal procedure above for additional information.)

13. If you have another change order to enter, click [**New**] and repeat steps 2 – 11.

14. When you are done entering change orders, click [**Close**].

15. To print change order documents, select **Reports > Change Order** and select the appropriate CO Form.

Enter Commitment Change Orders

If changes need to be made to purchase orders or subcontracts, use Commitment Change Orders to record those changes.

1. From the **Contract Control** menu, select **Commitment COs**.

2. Select the appropriate **Job**.

3. Select the **Commitment** that is affected by this change order.

   If you cannot identify the commitment, you can click [**Select Change Requests**] at this point, select the associated change request detail items, and click [**OK**].

4. Enter a **Description** for this commitment change order, and a **Date**.

5. If needed, change the contacts in the **To** and **From** boxes.

6. Select the **Status** of this commitment change order.

7. Select the **Release to Accounting** check box if appropriate. If the **Status** is **Approved**, select the **Revise Commitment** check box, if appropriate.

8. If you have not already done so, click [**Select Change Requests**]. Select the change request detail items associated with this change order, and click [**OK**].

9. The Commitment CO detail grid fills with the change request detail items you selected.

10. Click [**Save**].

11. To send this commitment change order with a transmittal, click [**Transmittal**]. (See the Send a Transmittal procedure above for additional information.)

12. If you have another commitment change order to enter, click [**New**], and repeat steps 2 – 11.

13. When you are done entering commitment change orders, click [**Close**].

14. To print Purchase Order Change Order documents, select **Reports > Purchase Order** and select the appropriate Purchase Order CO form. To print Subcontract Change Order documents, select **Reports > Subcontract** and select the appropriate Subcontract CO form.

Enter Amounts into Contract-Based Invoices

Project managers can enter amounts or percents complete directly into an invoice, if your security setup allows them to do so.

1. Start the **Billing** application.

2. From the **Tasks** menu, select **Contract-Based Invoices**.

3. Select the contract and click [**OK**].

4. The **Contract-Based Invoices** window opens. The columns that display in the worksheet portion of the window are based on the Billing worksheet view that was selected for this contract (**CN: File > Open Contract > Billing** tab).

5. Complete the appropriate columns and rows in the worksheet to record the work that has been complete or the amount to bill this period for this invoice.

6. In the **Invoice Info** area in the lower part of the window, select the **Period to** date to indicate the period ending date for the entries you made.

7. Initially, leave the **Status** at **Pending**.

8. To print a draft of the invoice, click [**Print**] and select **Draft**.

9. To send a copy of this draft invoice to your customer for approval, click [**Send**]. Complete the Timberline Sending window, and click [**Send**].

10. In the Contract-Based Invoice window, click [**Finish**].

11. Select the appropriate options in the **Print Selection** window, and click [**Start**]. Review the Billing Contract-Based Invoices journal.

To Edit, Approve and Print a Final Invoice

Your company may establish security permissions to control who can complete these tasks.

1. In Billing, select **Tasks > Contract-Based Invoices**.

2. Select the contract and click [**OK**].

3. In the **Contract-Based Invoices** window, change any amounts or percents as appropriate.

4. Click [**Print**], and then select **Print Preview**. Review the invoice. Click [**Close**].

5. In the **Invoice Info** area of the window, change the **Status** to **Approved**.

6. Print a final invoice by selecting [**Print**] and then **Print Final**. In the **Print Selection** window, change or accept the **Invoice #**, **Draw #,** and **Invoice date**.

7. Make the appropriate selections for the print destination. Click [**Start**].

8. In the **Contract-Based Invoices** window, notice that the **Status** has changed to **Printed**. Click [**Finish**]. The software produces a journal that details the changes you made. Select the appropriate options in the **Print Selection** window, and click [**Start**] to produce the journal.

Enter Misc. Worksheets

A miscellaneous worksheet is a multi-purpose entry window that you can customize. The most common use of miscellaneous worksheets is to enter contract amounts (scheduled value amounts) if you do not use the Contracts application, or for jobs that are billed without setting up a contract. Miscellaneous worksheets can also be used to enter production units, percent complete figures, and other miscellaneous information related to a job. Job Cost transactions are created by miscellaneous worksheets. For more information, refer to Help, specifically the "Entering contract amounts, production units, and miscellaneous information" topic.

1. From the **Contract Control** menu in Project Management, select **Enter Misc. Worksheets** (or in Job Cost, select **Tasks > Enter Misc. Worksheets**).

2. Select the view you want to use to record entries. Click [**List**] to display available views and their descriptions.

3. Select the **Job**. In the **Report date** box enter the transaction date for your entries.

4. In the grid, move your cursor to each cost code that you have an entry for and enter the information in the appropriate columns. If the cost code does not appear in the grid, click [**Go to Cost Code**] to jump to the appropriate line.

5. To enter information for a category, select the category line item and enter the information. If the category does not appear in the grid, click [**Go to Category**] to jump to the applicable line. To return to the cost code entries, click
[**Cost Code View**].

6. To enter information applicable for only the job, click [**Job**]. Enter the information and click [**OK**].

7. If there is an extra ID displayed on the line and the information is applicable to only the extra, click [**Extra**], enter the information, and click [**OK**].

8. When you are done with entries for this job and its sublevels, click [**Save**].

9. If you have entries for other jobs, repeat steps 3-8.

   You can enter a job only once in each session. If you have two cumulative amounts to enter for a particular line, add the amounts together and enter the total.

10. Click [**Finish**].

11. Select the appropriate options in the **Print Selection** window and click [**Start**].

12. Review the Misc. Worksheet journal to verify totals and to check for errors. The Misc. Worksheet journal is generated automatically.