









# Project Management

Manage your evolving project portfolio from a single, centralised store of information.

IRIS PROJECTminder builds up a picture of your whole portfolio of projects across the business and holds this valuable information securely in a single centralised store. Your users can quickly and easily search this store to gain a comprehensive view of all projects in a simple list or as a Gantt view with customisable filters.

Your team will find it easy to set up new projects, using a consistent process in compliance with your rules. They can create multiple projects from a central point of reference with ease and flexibility, break down projects into tasks, and assign resources to those tasks.

IRIS PROJECTminder saves time by using previously entered information; applying previously established templates, rules and processes; and accelerating the entry, transfer and update of project data.

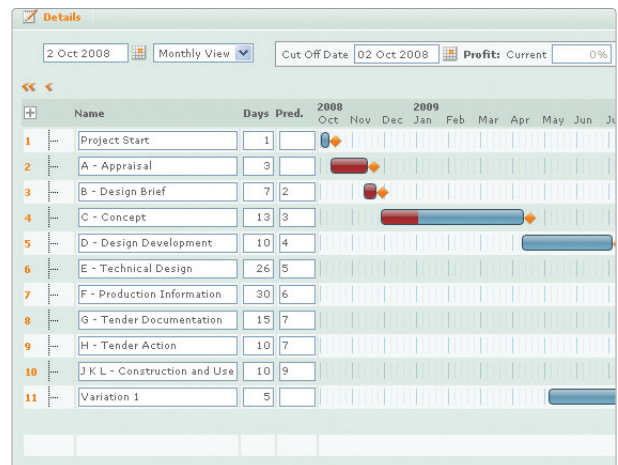
## Comprehensive support for your project managers and administrators

IRIS PROJECTminder offers all the following functionality, which is made available to users according to their level of authorisation:

- tabular and Gantt view of projects
- default project settings
- project templates
- project summary details with user-defined custom fields
- project team allocation
- project contact management
- fee and cost budgeting at project and task level
- 'drag and drop' Gantt charts
- detailed task scheduling with user-defined custom fields
- expense forecasting
- real-time project profitability analysis
- transfer data tool for quick transfer of project time and expenses
- global updates feature for bulk project updates
- import/export facility for Microsoft Project plans.

## Key benefits

- Centralised project data store with text search function for quick access to all projects
- Time-saving project set up, with default settings and project templates
- Easy management of projects with a graphical drag and drop Gantt chart interface
- Project team allocation to ensure access control to authorised users only
- Comprehensive reports, including unlimited project and task custom fields to enable reporting on all bespoke information
- Microsoft Project integration eliminates duplicate data entry
- Full integration with budgets & actuals, contacts, resources, forecasts, billing and invoicing management, saving time and increasing data accuracy
- SaaS delivery enables access to key project data from any location with an Internet connection



DELIVER

REVIEW

For more information please call 02 9380 6220

# Budgets & Actuals

Achieve your profit targets through accurate project budgeting and time & expense management.

Setting a project budget at the beginning of a project for time and expenses and then keeping to it throughout are fundamentals of a profitable business. IRIS PROJECTminder Budgets & Actuals helps you to agree, maintain and monitor project budgets against actual time and expense costs.

Comprehensive reporting analysis enables project managers to monitor progress against the set budget, quickly and easily identify any problems and take effective decisions to bring costs back on track. Alternatively, where the original milestones have demonstrably moved, the forecast can be adjusted accordingly.

IRIS PROJECTminder also allows you to factor in projects on which you are currently bidding to analyse their impact on committed projects, should your bid be successful.

## Gain tighter control, without increasing your management overheads

IRIS PROJECTminder Budgets & Actuals ensures all tasks are consistently completed from start to finish. Integrated workflow management with ready-to-go resource and invoice plans reduce initial project set up time and ensure that financial forecasts are aligned with agreed budgets.

Budgeting screens are designed according to industry or sector best practice to ensure that project and task level budgets can be set and managed efficiently.

## Key benefits

- Market-specific budgeting screens provide the right process and terminology
- Set high-level project and task budgets to focus project managers on cost and profit targets
- Separate budgets by time and expense, ensuring costs are effectively managed
- Streamlined workflows save time, eliminate duplication of effort and ensure tasks are completed in line with your established processes
  - Use preliminary work estimates to create initial resource schedules for projects
  - Generate invoice schedules directly from budgets
- Security controls ensure staff see only the budget data you want them to see
- Quickly identify variations in actual data against budgets, to bring projects back on track
- Full integration with project, contacts, resources, forecasts, billing and invoicing management, so that information is shared across your system and data entry is minimised
- Comprehensive reports
  - Project budget versus actual costs analysis
  - Itemised and grouped time analysis for billing



BUDGET

PLAN

# Contact Management

Create an easily accessible centralised store of accurate data on clients, contacts and suppliers.

Projects involve the engagement of clients and suppliers for successful delivery. IRIS PROJECTminder enables users to maintain an accurate, up-to-date register of these companies and their line of responsibility through your business and quickly find the information they need.

Time is saved by ensuring data is entered once - a change of address, a new contact name or a change in role - can be accessed, shared and used by all your team. What's more, data entered or changed anywhere else in IRIS PROJECTminder flows through to the contact management function.

As well as recording all the parties associated with a project, you can carry out searches on a client to view your business with them or your reliance on a particular supplier.

## Key benefits

- Centralised contact data store with filter, sort and text search function for quick access
- Link contacts to projects and vice versa
- Define roles for your project contacts for clear visibility of responsibilities
- Easily view, analyse and report on all historical and current projects by client or supplier
- Full integration with project, budgets & actuals, resources, forecasts, billing and invoicing management - data entered or updated elsewhere flows through to contact management

The image displays three overlapping screenshots of the IRIS PROJECTminder software interface:

- Top Left:** A 'New Client' search and list screen. It features dropdown menus for 'Name', 'Town', 'Postcode', and 'E-mail'. Below is a table listing various construction companies such as Abas Construction, Active Construction, ADH plc, and others, with their respective locations and postcodes.
- Top Right:** A 'Delete Contact' dialog box and a 'Contact Details' form. The 'Contact Details' form includes fields for Title, First Name (Angela), Last Name (Arbut), E-mail (aarbut@altd.com), Job Role (Operations Director), and Company (ADH plc). It also shows contact information like phone and mobile numbers.
- Bottom:** A 'Project Details' form for 'Banks of Bristol Limited'. It includes fields for Project Code (PRO0001), Project Name (Office Redevelopment), Project Type (Commercial), Project Owner (Generic, Unallocated), Project Manager (Ashurst, Rodney), and Department (Manchester Office). It also shows 'Project Team' and 'Project Contact' lists with checkboxes for selecting individuals like Abbot, Adam, Allen, and Ballington.

DELIVER

REVIEW

For more information please call 02 9380 6220

# Resource Planning & Forecasting

Deploy your own and third-party resources with optimum impact and accurately forecast work to complete.

Careful scheduling and management of resources are central to the performance and profitability of your projects. It's hard to strike the right balance between under-utilising scarce or expensive resources and over-committing them.

Consolidated resource plans from all projects give you a true view of staff utilisation to identify those that have spare capacity. By utilising time and cost data logged to similar projects, IRIS PROJECTminder enables you to more accurately plan the resources required to complete tasks, measure usage through timesheets and also forecast requirements to complete.

IRIS PROJECTminder calculates a user's holiday entitlement depending on the number of core hours worked each day. It monitors not only holiday entitlement and usage but also allows tracking of additional absence requests on top of holidays so it is now even easier to keep an audit of staff absence requests and resource availability.

## Gain greater clarity to build an agile business

Project specific resource cost and charge rates ensure that you have a clear, up-to-the-minute view of actual costs to date and forecast costs remaining against budgets and fees.

For each project, you can see which resources are booked, enabling you to better plan and prepare for future eventualities. You can also see work that is planned but not yet allocated or that is still awaiting final confirmation. In the event of sickness, project cancellations or delays, this allows you to move fast to reorganise and reallocate resources at short notice.

View future commitments and schedule appropriate resources with ease.

## Key benefits

- Review and adjust resource requirements against projects
- Identify critical path task duration through resource assignments
- See the forecast cost impact, based on resources assigned to your projects
- Ensure you have enough staff to fulfil your commitments, and conversely, ensure you are not over staffed
- Ensure user, department and company-wide staff target utilisations are being achieved
- Track actual project time against initial forecasts, thus helping to better plan future project work
- Manage and report on utilisation and realisation
- SaaS delivery ensures access to key resource information from any location with an Internet connection

## Comprehensive reports:

- Resource utilisation versus target by week/month
- Revenue versus target by week/month
- Forecast and actual revenue versus costs
- Work-in-progress financial analysis



BUDGET

PLAN

## Billing Schedules

Improve your flexible billing schedules and rules to support specific invoicing practices.

A key strength of IRIS PROJECTminder is its project specific billing schedules and rules. However you need to invoice, on specific dates, at project milestones, on a time and costs basis... you'll have a high degree of flexibility.

With a clear and flexible invoice schedule, you will better manage project delivery in terms of cash flow and revenue recognition. Easily generated reports will help you to keep your business on track by measuring actual revenues and costs against forecasts and identifying potential problems.

### Be free to focus on your business

With IRIS PROJECTminder billing schedules in place, the time saved can be invested in revenue earning activities, rather than on important but essentially routine administration.

Once you have established the billing rule(s) for each client and their projects (fixed cost, cost plus charging...), IRIS PROJECTminder will then invoice the client according to the specified rule. This means not a minute is wasted at the billing stage in adapting invoices for different clients.

### Key benefits

- Create forecast revenue schedules based on recharging time and expenses logged to a project or on a fixed fee basis
- Schedule invoicing points on specific dates or related project milestones
- Apply changes to the billing schedule easily with intuitive monthly schedule view utilising 'drag and drop' interaction
- Full integration with projects, budgets & actuals, contacts and resources

### Comprehensive reports:

- Revenue versus target forecasts
- Revenue versus cost analysis to ensure projects meet profit targets
- Accurate cash flow forecasting

Define billing schedules for individual projects with a high degree of flexibility so you can better manage project delivery in terms of cash flow and revenue recognition.



DELIVER

REVIEW

For more information please call 02 9380 6220

# Invoicing

Improve your cash flow and eliminate revenue leakage with efficient, automated invoicing.

Timely, accurate invoicing is essential to your profitability but can consume many hours in collating and formatting the information. Whether you invoice on the basis of fixed fee, time and/or expenses, in a single or multiple currencies IRIS PROJECTminder provides every help to automate the creation and delivery of invoices.

Your efficiency improves with many time-saving features. 'Drag and drop' enables you to draw on previously entered data. Custom invoice templates let you decide how invoices should be laid out and what they display or hide, such as the summary costs or full breakdown.

Your team save time by not having to continually re-enter and format data, while you ensure your processes are consistently followed and that clients receive accurate, professionally produced invoices. Easy reporting helps you to understand invoicing and payment status and brings greater control over your finances.

IRIS PROJECTminder takes on the task of remembering to prepare and send an invoice. Invoices can be generated for any reason: a specific 'milestone' date or on completion of stages, on receipt of timesheets with accumulated costs versus budget comparisons. Whichever rule you choose, the system can automatically create an appropriate invoice, drawing on data held in other IRIS PROJECTminder functions.

## Key benefits

- Reduce time to invoice through automatic invoice generation
- Create invoice templates with bespoke headers and logos
- Invoice in different currencies using user-defined exchange rates
- Manage invoice history within the system to better understand status
- Link to accounting systems with our Accounts Link solutions and API
- Full integration with projects, budgets & actuals, contacts, resources and forecast management
- Comprehensive reports including aged debtors and invoices/credit notes

### Invoice Page 1 of 1

**Billing Contact**

ADH plc  
Angela Arbut  
Unit 3 Ground Floor  
Downtown Triangle  
London  
Warwickshire  
SM1 4LD

**Invoice No.** 24

**Invoice Date** 17-02-2009

**Invoice Reference** ADH002

**Account No.**

**Project No.**

**Invoice Details**

Project: PRO0001 - Office Redevelopment	
Time - Derek Leyton - Office Redevelopment / C2 - Briefing 8.0 hours @ 150.00	1,200.00
Time - Derek Leyton - Office Redevelopment / C2 - Briefing 8.0 hours @ 150.00	1,200.00
Time - Derek Leyton - Office Redevelopment / C1 - Appraisal 4.0 hours @ 100.00	400.00

**Total Net**

	Jan 2009	Feb 2009
London Office		
PRO0002 - Urban Regeneration		
Non Task Specific	0.00	0.00
Planning	27,012.27	27,012.27
Working Drawings	10,500.00	10,500.00
On site	0.00	0.00
PRO0005 - Home Eye Centre	82,241.00	82,241.00

BUDGET

PLAN

# Reporting

Benefit from fast access to relevant, timely and accurate information.

IRIS PROJECTminder does all the work of collating real-time information automatically across your projects and then presenting it in the formats you have defined as bringing most value to your business and managers. This enables you to equip your decision-makers with instant access to meaningful information on your projects, so that they can closely monitor and control your costs and time commitments against revenue.

They can analyse the data in a multitude of ways and in varying degrees of complexity, from viewing a high-level graphical dashboard down to examining detailed reports. Whatever they need to know, IRIS PROJECTminder delivers it.

## Greater control with less effort

IRIS PROJECTminder frees up valuable fee-earning time, whilst ensuring you always have the most up-to-date picture of your projects. In producing reports, you can use the pre-defined report templates provided or easily create your own. By drawing on data from previous work, you'll also be able to capitalise on reserves of experience and knowledge to plan and cost similar projects accurately in the future.

### Key benefits

- Comprehensive suite of graphical and numerical reports provided as standard saves valuable time
- Visual Report Builder tool to create your own custom reports provides greater flexibility
- User-defined dashboards provide instant access to KPIs
- Export any report data to Microsoft Excel or Adobe PDF to view or circulate in your preferred format
- Access to complete forecast and actual data for revenue, costs and time
- Analysis of the full project lifecycle
- Analyse information by many parameters: industry sector, project type, region...
- Cash flow and profit forecasts
- Costs and time reporting for previous projects enables more precise planning of fees and costs for future projects

**Project Progress**  
Date 18 Jan 2010

---

**London Office**

Project	Task	Budget Fee	Current Fee	Budget Cost	Current Cost	Budget Profit	Current Profit
PRO0002	Urban Regeneration	78,750	49,083	52,763	34,600	26,667	14,483
PRO0005	Hove Eye Centre	20,000	22,000	18,000	4,000	2,000	18,000
<b>Sub Total</b>		<b>98,750</b>	<b>71,083</b>	<b>70,763</b>	<b>38,600</b>	<b>28,667</b>	<b>32,483</b>

**Manchester Office**

Project	Task	Budget Fee	Current Fee	Budget Cost	Current Cost	Budget Profit	Current Profit
PRO0001	Office Redevelopment	81,417	34,600	63,900	45,000	17,517	11,600
PRO0003	New Build and Refurbishment	75,000	39,968	55,125	30,000	19,875	9,968
PRO0004	Retail Park - Mixed use	160,000	37,868	132,240	12,000	27,760	25,868
<b>Sub Total</b>		<b>316,417</b>	<b>112,436</b>	<b>251,265</b>	<b>88,000</b>	<b>65,142</b>	<b>47,436</b>
<b>Total</b>		<b>415,167</b>	<b>183,519</b>	<b>322,027</b>	<b>126,600</b>	<b>93,809</b>	<b>80,019</b>

Page 1 of 1 - generated on 18 January 2010

Instant access to meaningful project information ensures you control your costs and time commitments against revenue.

DELIVER

REVIEW

## Integration and customisation

Align IRIS PROJECTminder closely with your business processes and share the data generated with your other IT systems.

While IRIS PROJECTminder is continually developed and refined to incorporate sector best practice, it is also highly configurable to your business.

Using flexible administration screens, you can set up IRIS PROJECTminder to suit your business requirements, support your teams, save time and ensure consistency by defining business processes, such as approval hierarchies, working hours and rates of pay, customised reports, document formats, events that trigger email alerts, and so on.

### An invaluable business asset

In addition, IRIS PROJECTminder can be integrated with your other business systems to play an important part in your IT infrastructure. Manual data entry is eliminated as data flows from IRIS PROJECTminder to other systems, such as your accounting system. Information 'silos' become a thing of the past, as authorised users across your business draw on the wealth of information created and stored in IRIS PROJECTminder.

### Key benefits

- Define the approval process for timesheets, expenses and holiday requests
- Custom invoice and purchase order templates can be created to fit with your company's branding
- Define security permissions for user groups to control which data users can view and edit
- Define users' working hours and overtime rates
- Define email alerts so users know when action is required
- Create custom fields to store and report on additional business critical information
- Export sales and purchase ledger transactions to accounts systems to remove the duplication of effort involved in re-keying data
- Application Programme Interface (API) to enable your other IT systems to access IRIS PROJECTminder data
- Export data to spreadsheets for further detailed analysis
- Build custom reports to display information exactly as your users need it



BUDGET

PLAN

## Implementation and support

Peace of mind with IRIS PROJECTminder's proven implementation processes and highly commended support.

Understanding strategic objectives, getting end user buy in and measuring progress through key milestone stages is essential to successfully implementing new business solutions.

Our implementation processes have been refined through years of experience, and combined with our highly commended support (Cisco Customer Kings 2009) ensure well defined, planned and delivered implementations backed by a first class customer support team.



### Proven implementation process:

- Project kick off meeting to confirm high level objectives
- PID (Project Initiation Documentation) creation and sign off to define scope and timelines
- Business consultancy to review your current working practices and how they will work with IRIS PROJECTminder
- System configuration with key administrators only
- Steering group training with your implementation team
- Project management workshop to ensure all projects set up and ready for successful go-live

### Ongoing support

- Full online help with training tutorials and webinars, perfect for new starters
- Support team available Monday to Friday 9am-5pm via phone and email
- Dedicated Account Management ensures regular ongoing contact with key stakeholders
- Online forum for interacting with other users and exchanging best practice ideas

Dedicated consultants manage the complete implementation process for you.

DELIVER

REVIEW

For more information please call 02 9280 6220

## IRIS PROJECTminder features...

	IRIS PROJECTminder
Ideal for organisations with...	10 - 300 users
<b>International</b>	
Multi-currency	Basic
<b>Platform</b>	
Software-as-a-Service (web-based)	•
<b>Time &amp; expense tracking</b>	
Timesheets	•
Expenses	•
Purchase order entry and reconciliation	•
Purchase invoices	•
Customisable absence requests (holiday, training, sickness)	•
Email alerts and approval process	•
Integrate expenses with ledger/payment system	Basic
<b>Project management &amp; planning</b>	
Tabular and Gantt view of projects	•
Default project settings	•
Project templates	•
Project summary details with user-defined custom fields	•
Project team allocation	•
Project contact management	•
Fee and cost budgeting at project and task level	•
'Drag and drop' Gantt charts	•
Detailed task scheduling with user-defined custom fields	•
Expense forecasting	•
Real-time project profitability analysis	•
Transfer data tool for quick transfer of project time and expenses	•
Import/export Microsoft Project plans	•
<b>Contact management</b>	
Client database with user-defined custom fields	•
Supplier database with user-defined custom fields	•
<b>Resource planning</b>	
Fixed date resourcing	•
Critical path resourcing	•
Calendar based resourcing	•

BUDGET



PLAN

**Fee scheduling and invoice production**

'Drag and drop' fixed fee invoice scheduling	•
Time based invoice scheduling	•
Expense based invoice scheduling	•
Invoice item generation	•
Invoice item write-off	•
Custom invoice templates	•
Fixed price, milestone, advance billing options	•

**Reporting**

Extensive best practice reports	•
Work in progress reporting and revenue forecasts	•
Report Builder for user driven custom reporting	Optional \$
Graphical management dashboard	Optional \$

**Administration**

Full system configuration	•
User profile management including cost and charge rates, holiday entitlements, time and expense approvers	•
Customised security groups by user and project for system access	•
Email alert management	•

**Integration**

Accounts link to IRIS Exchequer, Sage Line 50 and other major finance packages	Optional \$
Data export to Microsoft Excel	•
Read API (Application Programming Interface) for linking to third party systems	•
Integration with Microsoft Project	•



[www.projectminder.com.au](http://www.projectminder.com.au)