

**INTELLIGENT
SOLUTIONS**
FOR PROJECT AND
SERVICE ENTERPRISES



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Architects, Engineers & Project Managers

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Introduction

iPROsoft has served the needs of various types of project and service enterprises including; design, project and construction management consultancies. These organisations take on the responsibility for the managing projects in part or in full from concept through design, implementation and hand over phases. Their projects often relate directly to construction of infrastructure, industrial plants and buildings, and to our environment. Where full project implementations are concerned these enterprises manage their own resources as well those of external organisations and in so doing manage huge quantities of information and channel large financial sums. They require a sophisticated, end-to-end and integrated system to bear their business processes so all their people work effectively together.

This brief description focuses on only 12 highlights of *iPROsoft* incorporated as configurable options to assist the consultancy project enterprise.

Marketing and Sales Support

The *iPROsoft* Clients / Prospects and Quotes / Estimates modules interact to assist marketing / sales departments track clients, prospects and contacts within those organisations. Prospective clients can be classified by industry and location as well as by secondary classifications. Sales personnel can be allocated to clients. Sales enquiries can be registered and tracked. They can also be linked to lead source to evaluate advertising and promotion. Proposals also can be registered and tracked.

These modules are of critical importance in assisting sales effectiveness, market analysis and sales forecasting.

Estimating, Proposals and Budgeting

The estimating module can be configured in a number of ways. Some estimators prefer to use composite rates to perform rapid estimates. Others prepare templates for modeling projects. Each approach reduces risk and facilitates check listing.

With the proforma bills and rates in place a target estimate is created by copying the proforma. The target estimate is edited to become the project estimate. The editing tools include simple components copying, merging sections of other estimates into the current estimate, price list and tender lookups and quantity calculations.

The labour required for proposals and other work done can be tracked and charged as the works progress, charged at a later time or simply valued and not charged at all.

Project budgets can be read directly from estimates saving time and duplication. Once linked to a project the estimate is available to procurement and main contract fee application processes. Estimates can similarly be used to provide the budgets for contract variations. Depending on your business rules these budgets can be created and edited without the estimating module.

Project budgets can be expressed in terms of financials for each cost center / work type and also for labour hours. This includes variations where lump sum contract arrangements are in place.

Contract Types Support by iPROsoft

iPROsoft can support the following fee arrangements and formulae.

- Lump sum or fixed fee.
- Do and Charge with labour charged at cost plus on-cost plus percentage value add margin. Labour charges are based on WHO does the work while purchases / disbursements costs are charged at cost plus another value add percentage.
- Do and Charge with labour charged at rates (3 scales of charge) determined by WHO does the work plus purchases / disbursements charged at cost plus a percentage.
- Do and Charge with labour charged at rates determined by WHO does the work plus purchases / disbursements charged at cost plus a percentage with all charge-out rates uniquely ascribed to an individual client.
- Do and Charge with labour charged at rates (3 scales of charge) determined by WHAT type of work is done plus purchases / disbursements charged at cost plus a percentage.
- Fees determined by a percentage of the agreed value of construction works complete.

Detailed Construction Management Contracts

Some construction management contracts will necessitate same levels of supply and subcontract control as would be required in a design and construct lump sum contract. *iPROsoft* is amply functional for the design and construct turnkey contractor.

For a construction management contract it is necessary to charge fees and not have the detailed construction logistics accounts included in those of the construction management consultancy. *iPROsoft* can be readily configured to isolate the accounts of multiple projects managed on behalf of clients from those of the consultancy.

Bills of Quantities, Measurements and percentage Fee Assignments

Frequently, “estimate” can be a misnomer. Estimates comprise bills of quantities, they can be a fully specified bill of quantities for a job detailing either or both of logistics and claims applications. When that is the case additional *iPROsoft* tools can be brought to bear.

Purchase order and subcontract programs can copy and merge data stored in estimate bills of quantities, price lists and tender schedules into orders and subcontracts. Optionally orders can be bulk generated from estimate bills in project batches.

With this approach procurement can be more effectively controlled and risks reduced by tying sub-consultants to arrangements planned and agreed in earlier projects phases.

Main contract progress fee applications / invoices can be supported by a range of system generated supporting documentation including:

- Summary Progress Certificates
- Schedules of Agreed Values and Proportions Complete.
- Detailed Report of Works Done, Priced Inclusive of Margin.
- Bills of Quantities of Works Complete for Percentage Fee Contracts

For Project Managers Controlling Project Processes

Support for project process is extensive. A common and requisite sample is summarized in the following list of *iPROsoft*-supported activities.

- Create purchase orders and sub-consultancies, applying cash retentions and other conditions.
- Expedite purchase orders and sub-consultancies; measure and control progress, value work in progress.
- Monitor and control purchase order and sub-consultancy variations.
- Value, approve and hold / release sub-consultancy claim applications.
- Generate “punch” and “snagging” lists.
- Produce sub-consultancy progress certificates and payment vouchers.
- Monitor time and activities.
- Forecast cost to complete in both terms of financials and labour hours.
- Generate project cost cash flow history and forecasts.
- Manage main contract variations and link them to sub-consultancy variations.
- Process main fee claim applications along with supporting progress certificates, claim break down schedules and bills of quantities measures.
- Standardise, create and control documentation ranging from correspondence, instructions and minutes of meeting through to drawings and specifications issue.

Tracking and Forecasting Events for Management and Financial Planning

The *iPROsoft* Milestone Scheduling module can be used to track activities / milestones, to compare performances of project managers or job types and forecast revenue flows.

Milestone Scheduling lets you know what’s been, what’s coming up, how much you will invoice and when.

Timesheets and Pay Roll

Times are captured for each person and any number of jobs and work types. Options include daily and weekly timesheet capture. *iPROsoft* timesheet form options are extensive and can involve batch or on-line processes. Timesheet capture by many individual operators over local and wide areas is a common requirement.

Data captured in timesheets contributes directly to job costing, charges for do and charge jobs and pay roll.

iPROsoft pay roll is fully featured, construction industry focused and timesheet based. Pay roll can incorporate the latest enterprise bargaining agreements and yield time and activity reporting.

Many design offices are populated by employees and contract personnel. Where the personnel are contractors *iPROsoft* can distinguish them from employees. Timesheets can be captured from employees and contractors alike using identical processes. In so doing the labour costs are all calculated precisely and all captured the same way. In the case of contractors the person is related to their company or labour agency. Their accounts are readily handled in the creditors module, while their accounts are also reconcilable against the timesheet captured hours and cost relationship.

For Department Managers – Job Cost, Performance and Forecasting

iPROsoft Job Cost, Forecast and Performance reporting can provide data details and summaries for projects and groups of projects. All have extensive “drill-down” capability. The same reporting can be output by Project Manager. Management work in progress reporting tracks the all-important claims in advance / arrears and the funding relationship.

For Chief Financial Officers

The *iPROsoft* accounting package is absolutely reliable and supports the CFO at every turn. Some significant inclusions are as follows.

- Multi-company and multi-branch capacity.
- Flexible roll down chart of accounts with totaling link accounts.
- Branch, company and group consolidations.
- General Ledger enquiry with transaction analysis filters and transaction drill downs into general and subsidiary ledgers.
- Extensive reporting covering profit and loss, balance, trial balance and account transactions.
- Accounts budgeting.
- Recurrent and auto-reversing journal options.
- Prior period data capture options.
- Ready control account reporting and reconciliation for creditors, debtors, retentions, GST and VAT as well as multiple bank and loan accounts. This reporting and reconciliation capability exists for current period, all prior periods in the current year and all periods in prior years.
- Compliance and supporting functionality for Withholding Tax (Australia) and CIS (United Kingdom).
- Compliance and supporting functionality option for CITB (United Kingdom).
- Multi-company options can provide for inter-company loan processes, which facilitate sophisticated funding arrangements common to property developments and join-ventures. Multiple treasuries are supported.
- Fully featured sub-ledgers including; creditors, debtors, payroll, inventory, job, cashbook and fixed assets.

Project Documentation

iPROsoft's integrates documentation management as an optional module. Management can define all document structures and forms. Users can create and extensively cross reference documents. The module covers all forms of correspondence, instructions, drawings, specifications, transmittals (cover sheets) and minutes of meeting with actions tracking. Documents are stored in the repository. The cross referencing and database simplify documentation identification and recovery.

The documentation module draws recipients data from the Clients / Prospects, Supplier / Sub-Consultant Database and Personnel Modules.

Projects involve reams of documentation. Effective document control yields cost and time savings, reduces risks and is at the core of quality in projects.

Document control need not be confined to projects.

U-LAUNCH Technology

U-LAUNCH is unique to *iPROsoft*. This technology is absolutely unequalled in providing “drill-downs” and user definable continuous paths of navigation, data capture and reporting. It’s the winning advance yielding absolute user friendliness and quantum increases in productivity.

Other Features

Other features of *iPROsoft* cater to consultancy enterprises as well as the broader spectrum of the project and service organisations in Australia, New Zealand and the United Kingdom. *iPROsoft* system features are calculated to boost the effectiveness of project and service enterprises.

The *iPROsoft* package provides an integrated and flexible framework for consultancy organisation managers to implement policies and procedures across the whole enterprise. *iPROsoft* facilitates “everyone singing the same song”.