

Product Fact Sheet

Enhance Your View

Would your project manager's benefit from access to the project and job information in WennSoft Job Cost?

Available anytime, anywhere via Web browser, WennSoft Job Cost Portal allows project managers to easily access job and project details within WennSoft Job Cost, including information pertaining to cost codes, forecast revisions, customer invoices, transaction details and change orders, without logging in to WennSoft Job Cost.

Access to detailed, up-to-date project information eliminates timely searches for information and will enable project managers to make informed decisions based on real-time data and maintain greater control over projects, resulting in increased efficiency and a positive impact on your bottom line.

Access to Project and Job Information

- Job Cost Portal gives you the ability to control the information your project managers can access. Based on employee ID, security features allow you to easily define staff member access to job details and history data for all projects or assigned projects only.
- Upon log in, users are directed to the Job Cost Portal home page, which can be customized to suit your organizational needs. Filters to specified parameters allow you to create links to the information your project managers need most.
- From the home page, users can select their projects and view the jobs within that project. Drill-down functionality allows users to access the specific labor costs they need to effectively supervise their jobs.
- Documents attached to records in Job Cost can be viewed via Job Cost Portal. If a record has an attached document, the attached image button will be visible on the field.

Projects

The Projects page displays a list of projects for which the user has view access. The scroll bar allows the user to view additional columns of information pertaining to projects. Displayed fields depend on set up in Job Cost Portal security. This page requires the Job Cost Project Level module.

Project Status

- Selecting a project opens the Project Status page. The Project Status page displays project-level information, which is a roll up of the information from all jobs assigned to a project.
- The Project Contract Status page displays original contract amount, change order and expected contract information for the selected project.

Project Billed Position

- The Project Billed Position page displays contract earned, over/under billed and cash position for the selected project by tallying the amounts from all jobs assigned to the project.

Project Jobs Summary

- The Projects Job Summary page displays all jobs assigned to a project. The user can drill down on any job to open the Job Status page, which displays job-level details for the selected job.



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Jobs

The Jobs page displays all active jobs for the selected contract type. Information on the Jobs page can be filtered by job, job description, scheduled completion date or project manager. Clicking the job number opens the Job Status page, which allows users to view job details. If you are using the Project Manager's Advisor module, the Jobs page displays only those jobs to which the user is assigned as project manager.

Job Status

- This page displays the same job-level information displayed by the Job Cost Job Status window, including committed, posted, estimated and forecasted costs for the job, along with expected contract and anticipated markup or margin. In addition, this page displays cost to complete and total committed cost (committed plus actual).
- Project managers can view contract status, billed position, billing, change order and job maintenance information for a job. Zooming in on the posted cost amount for any cost element allows the user to see cost information at the cost code and transaction level for the job.
- Users can also view Margin Percent or Markup Percent. If you are using the Job Cost setup option to display Margin Percent rather than Markup Percent, Anticipated Margin and Margin Percent are displayed on the Job Status and Project Status pages.

Job Maintenance

- The Job Maintenance page displays job setup information including division, project manager, contract information and customer details.

Cost Code Summary

- The Cost Code Summary page displays all cost codes and related information. Selecting a cost code allows the user to view the Cost Codes Detail page, which contains committed, original estimated, change order estimated and forecasted hours, units and costs.

Transaction Summary

- The Transaction Summary page displays a list of transaction posted to the selected cost code. The details in this page include transaction number, type and General Ledger posting date.

Forecast Cost Revision

- This page allows project managers to view all cost codes for a job's cost elements and filter cost code displays by making a selection from the Cost Element drop-down list. Further, project managers can enter forecast revisions and field percent complete for jobs. If a job has had a cost revision posted, project managers can drill down to details contained within the Forecast Cost Revision Detail page.

Change Orders

- Job Cost Portal allows project managers to enter change orders for jobs and displays change orders that have been saved or posted to a job. Drill-down capabilities allow the user view additional details (change order amount, estimated costs and margin percent) for a selected change order.

Invoices

The Invoices page displays contract billed, retention withheld, retention billed, application number, purchase order number and any notes attached to the invoice. Additionally, project managers can view cash received and amount remaining.

Security and Configurability

Job Cost Portal utilizes the WennSoft Portal Security platform, which supports data security at the table and column level. Role-based security allows you to limit the information that is accessible by the application.

- Set-up options include standard templates or the ability to configure based on your unique requirements.
- Configuring based on your organizational needs will allow you to expose dozens of additional fields within each page based on user role.
- Additional configurability allows you to modify field labels, determine field order and visibility and decide which fields can be edited by users.

