

Ajera Project Templates

PRESENTED BY:

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Meet Your Presenters



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WELCOME

- Please submit your questions in the questions box, we do not monitor the chat box
- We will answer as many questions as possible during today's class
- If we don't get to your question during the class, we will follow up with an email
- After today's class we will send out a survey, your feedback is invaluable
- The handout for today's class is in the Handout section of the GoToWebinar pane
- You will be receiving a follow up email with the dashboard from today's class
- If you are interested in the CPE credit, you **MUST** answer all 5 polling questions, complete the follow up survey and indicate the CPE requirement

Agenda

- What do Project Templates offer
- Budgeting Methods
- Building Best Practice Templates
- Using Templates for Project Setup
- Project Template relation to Resource Management
- Project Template relation to Schedule Manager

Polling Question 1

How do you create your project estimates/budgets?



Polling Question 2

Do you use Project Templates to setup your new projects?



What do Ajera Templates Offer You?

- **EFFICIENCY:** Properly setup Project Templates can replace Excel tools for budgeting and estimating which creates efficiency.
- **ACCURACY:** Templates provide a way to have accuracy in financial information without having to train your entire team on Accounting functions.
- **PIPELINE REPORTING:** Properly setup Project Templates will provide the ability to report on Business Development pipelines and Hit Rate metrics.
- **FORECASTING:** Properly setup Project Templates will set the stage for resource labor forecasting and reporting.
- **SCHEDULING:** Properly setup Project Templates will prepare the Schedule Manager for use.
- **CONSISTENCY:** Consistency in project work breakdown structure and phase naming will lend itself to optimal reporting.
- **CONSULTANT MANAGEMENT:** Set up for commitment management.

Polling Question 3

Do your project managers setup templates?



Project Template – Who creates them?



- The Ajera Champion(s) should setup templates
- Project Managers (PMs) should NOT have access for Templates setup
- Templates contain both project and financial information; PMs do not want to be trained as Accountants
- Having too many Templates will lead to confusion and setup issues



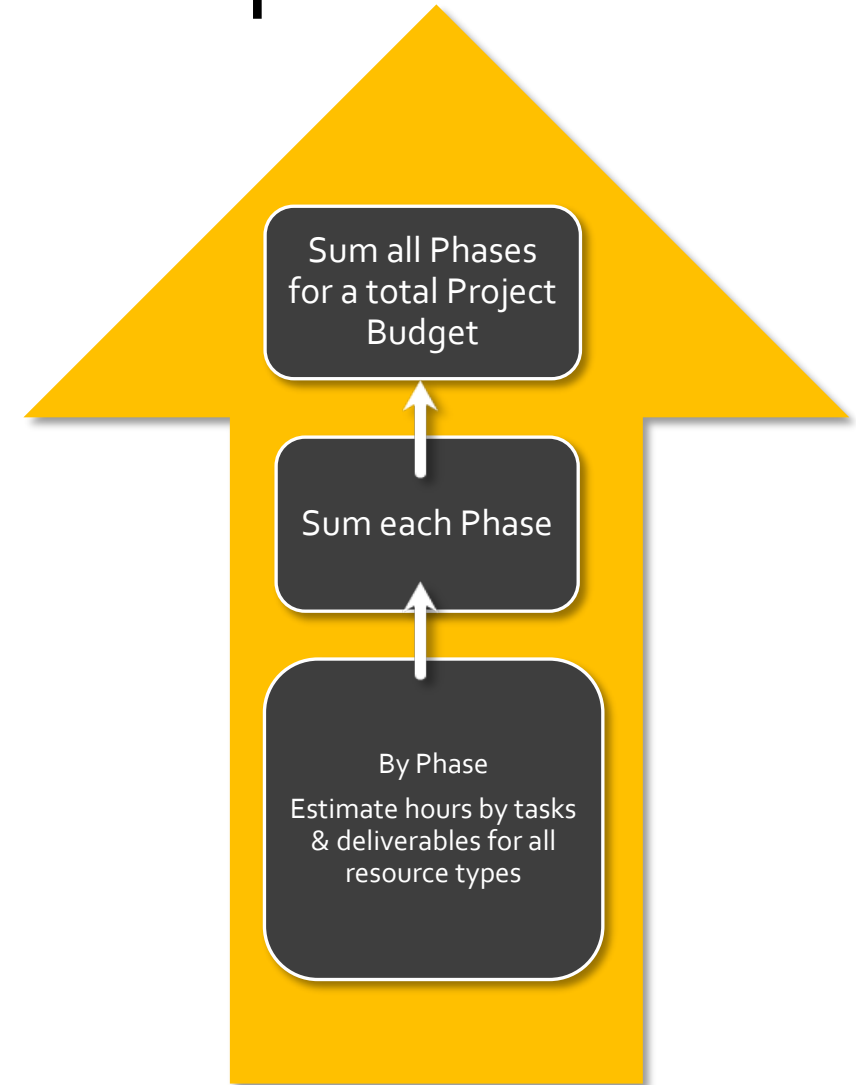
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Budgeting Methods – Bottom Up

The most detailed approach for project estimating + budgeting

Bottom-Up budgeting is the most accurate approach to estimating as the budget is developed from the resource or task level.

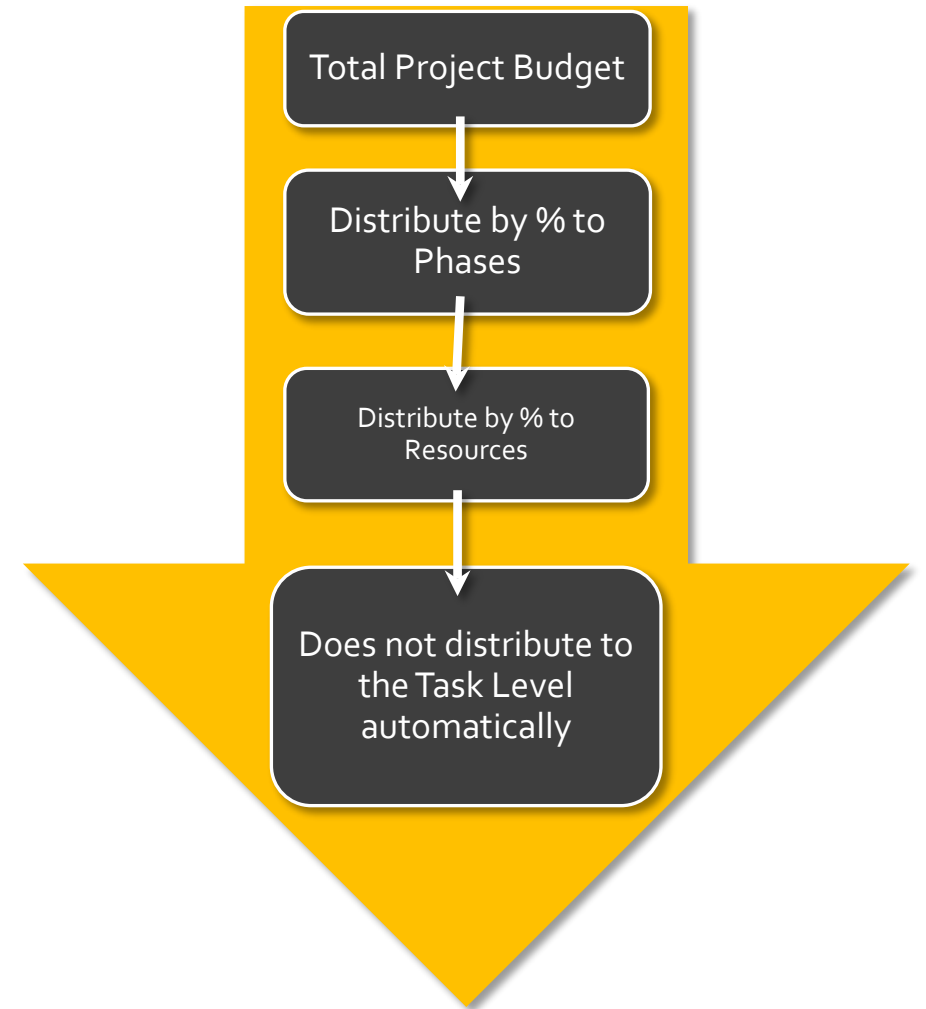
If team members provide input, this method can also provide the most “buy in” from the project team.



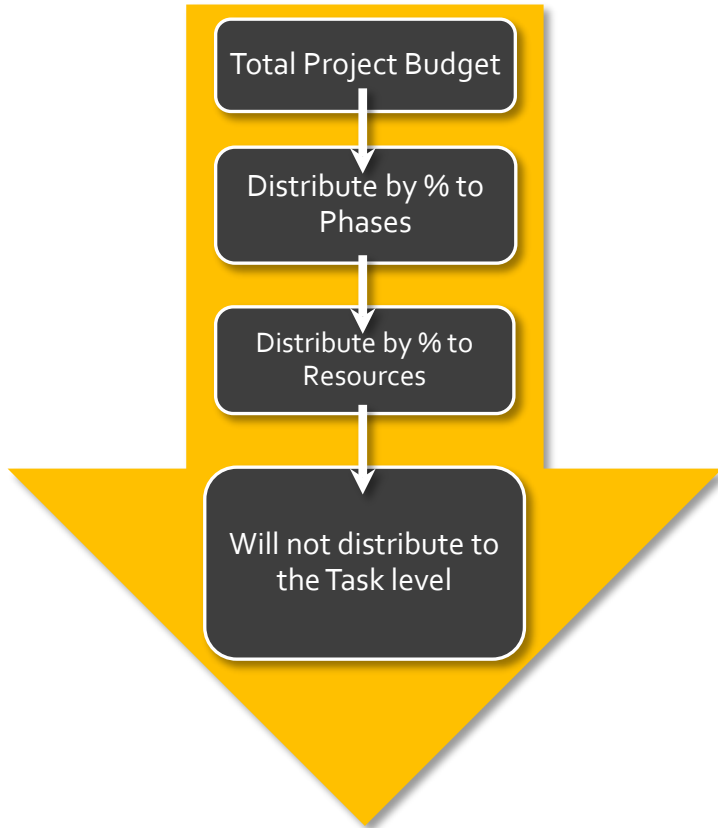
Budgeting Methods – Top Down

The top-down method starts with the total project budget

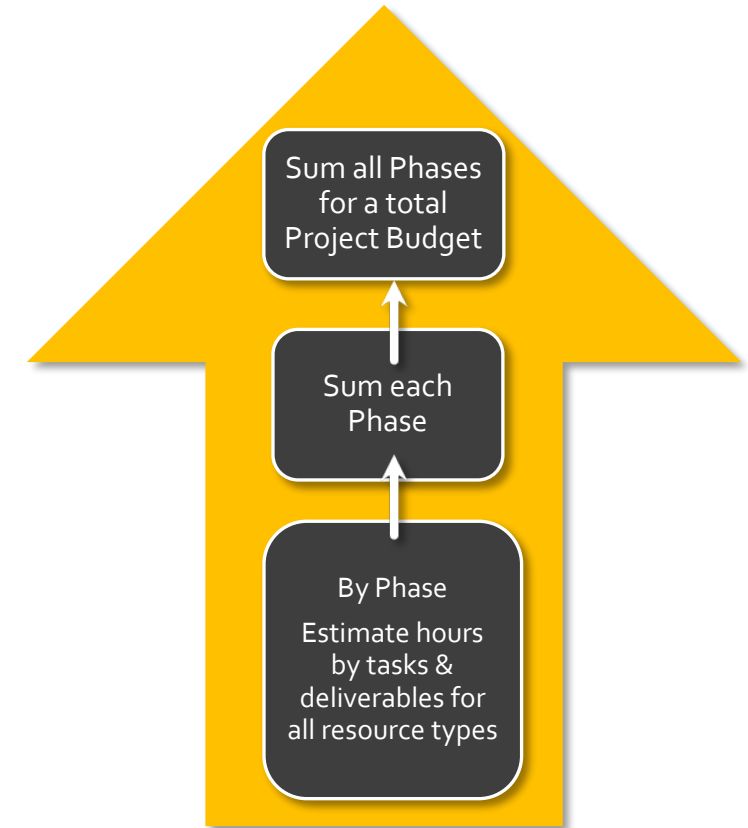
The Top-Down budgeting approach begins with a total project budget or contract amount and then breaks the fee into smaller segments of phases and resources. This method generally employs the experience and expertise of Project Managers and/or Principals or another method such as % of Construction Cost.



Budgeting Methods – Best Practice



Reverse engineering a top-down fee with the bottom-up approach will ensure that the budget is sufficient to match the scope, timeline, and resources required.



Polling Question 4

Do your templates have an Active status at the project and/or phase level?



Polling Question 5

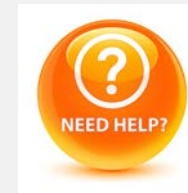
Do you use labor and consultant resources when setting up your projects?



Project Template – Best Practices

The screenshot displays the 'Project Templates' interface. At the top, there is a header 'Project Templates' and a table with a 'Description' column. Below the table, there are two templates: 'Architecture Only' and 'Full Services'. A blue callout '1' points to the 'Architecture Only' template. Below the table, there is a 'Project Info' section with a 'Manage' button. The 'Project Info' section has a 'Description' dropdown menu. The dropdown menu is open, showing a list of options: 'Architecture Only', 'Business Development', 'Schematic Design', 'Design Development', 'Construction Docs', 'Bidding & Negotiation', 'Construction Admin', 'Reimbursable Expense', and 'Additional Services'. Blue callouts '2', '3', and '4' point to 'Business Development', 'Reimbursable Expense', and 'Additional Services' respectively. To the right of the dropdown menu, there is a 'General' tab with sub-tabs for 'Billing', 'Invoice', 'Revenue', 'Contacts', and 'Permissions'. The 'General' tab is active, showing a form with fields for 'Description', 'ID', 'Department', 'Project type', 'Project manager', 'Principal in charge', 'Marketing contact', 'Marketing phase', and 'Location'. The 'Description' field contains 'Additional Services'. The 'Department' field contains 'Architectural'. The 'Project type' field is empty. The 'Project manager' field is empty. The 'Principal in charge' field is empty. The 'Marketing contact' field is empty. The 'Marketing phase' field is empty. The 'Location' field is empty.

1. Templates should be named for project type or Client and easily identifiable
2. Include a Business Development Phase
3. Consider breaking Reimbursable Expense out in a separate phase
4. Include an Additional Services Phase that is ready to be used when necessary



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Project Template – Best Practices

Project Info		Manage					
<input checked="" type="checkbox"/> Show resource rows		<input type="checkbox"/> Show task rows		Architecture Only / Design Development / Consultant			
Description	Phase ID	Type	Resource	Reference/Commitment#	Status	% Dist	
[-] Architecture Only	R				Preliminary	%	
Business Development	R				Marketing		
[-] Schematic Design	R				Hold	15.00	
Labor	R	Principal				5.00	
Labor	R	Project Manager				70.00	
Labor	R	Architect				10.00	
Labor	R	Drafter				15.00	
Consultant	R	Mechanical Consultant					
Consultant	R	Electrical Consultant					
[-] Design Development	R				Hold	20.00	
Labor	R	Project Manager				50.00	
Labor	R	Architect				25.00	
Labor	R	Drafter				25.00	
Consultant	R	Mechanical Consultant					
Consultant	R	Electrical Consultant					
[-] Construction Docs	R				Hold	40.00	
Labor	R	Project Manager				20.00	
Labor	R	Architect				40.00	
Labor	R	Drafter				40.00	
Consultant	R	Mechanical Consultant					
Consultant	R	Electrical Consultant					
[-] Bidding & Negotiation	R				Hold	5.00	
Labor	R	Project Manager				80.00	
Labor	R	Architect				5.00	
Labor	R	Administration				15.00	
Consultant	R	Mechanical Consultant					
Consultant	R	Electrical Consultant					
[-] Construction Admin	R				Hold	20.00	
Labor	R	Principal				10.00	
Labor	R	Project Manager				65.00	
Labor	R	Architect				20.00	
Labor	R	Administration				5.00	
Consultant	R	Mechanical Consultant					
Consultant	R	Electrical Consultant					
[-] Reimbursable Expense	R				Hold		
Expense	R	Mileage					
Additional Services	R				Hold		

1. Templates should be resourced for top and down budgeting. This sets the stage for resource forecasting and Schedule Manager
2. If you practice Top-Down Budgeting your Templates should include % distribution for both Phase and Resource
3. If you regularly use Consultants include them in your Templates
4. Expenses can be resourced for efficient budgeting



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Project Template – Best Practices

Project Info		Manage					
<input checked="" type="checkbox"/> Show resource rows	<input checked="" type="checkbox"/> Show task rows	Architecture Only / Schematic Design ves					
Description	Phase ID	Type	Status	Priority	% Dist	Notes	
[-] Architecture Only	R T		Preliminary		%		
Business Development	R T		Marketing				
[-] Schematic Design	R T		Hold		15.00		
[-] Labor	R T	Principal			5.00		
SD review meeting	T	Principal	Not Started	None			
[-] Labor	R T	Project Manager			70.00		
Team kickoff meeting	T	Project Manager	Not Started	None			
Confirm client submittal requirements	T	Project Manager	Not Started	None			
Prepare any special pre-design studies	T	Project Manager	Not Started	None			
Evaluate building alternatives	T	Project Manager	Not Started	None		This includes preparing evaluation... [...]	
Evaluate site alternatives	T	Project Manager	Not Started	None		This includes site design criteria and an...	
Prepare cost estimate	T	Project Manager	Not Started	None			
Get Schematic Design approval	T	Project Manager	Not Started	None			
[-] Labor	R T	Architect			10.00		
Team kickoff meeting	T	Architect	Not Started	None			
Identify code requirements	T	Architect	Not Started	None			
[-] Labor	R T	Drafter			15.00		
Team kickoff meeting	T	Drafter	Not Started	None			
Assemble schematic design package	T	Drafter	Not Started	None			

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1

1. If Tasks are a useful budgeting tool for your team including them in your templates will create efficiency.

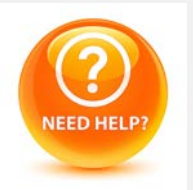
Project Template – Best Practices

Project Info		Manage	
<input checked="" type="checkbox"/> Show resource rows	<input type="checkbox"/> Show task rows	Architecture Only / Design Developme	
Description	Phase ID	Type	
[-] Architecture Only	R		
Business Development	R		
[-] Schematic Design	R		
Labor	R	Principal	
Labor	R	Project Manager	
Labor	R	Architect	
Labor	R	Drafter	
1 Consultant	R	1	Mechanical Consul...
Consultant	R		Electrical Consultant
[-] Design Development	R		
Labor	R	Project Manager	
Labor	R	Architect	
Labor	R	Drafter	
2 Consultant	R	2	
Consultant	R		

If your project budgets regularly include Consultants, include them in your template for efficiency.

1. This example shows a detailed Consultant budget resource line which adds efficiency if you always use certain type(s) of Consultants.
2. This example shows a generic Consultant budget resource line which is helpful when there are a variety of Consultants used and you want to keep your Template easy to populate when used.

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Project Template – Best Practices

Description	Phase ID	Status	% Dist
Architecture Only	1	Preliminary	%
Business Development	2	Marketing	
Schematic Design		Hold	15.00
Design Development		Hold	20.00
Construction Docs	3	Hold	40.00
Bidding & Negotiation		Hold	5.00
Construction Admin		Hold	20.00
Additional Services		Hold	
Reimbursable Expense		Hold	

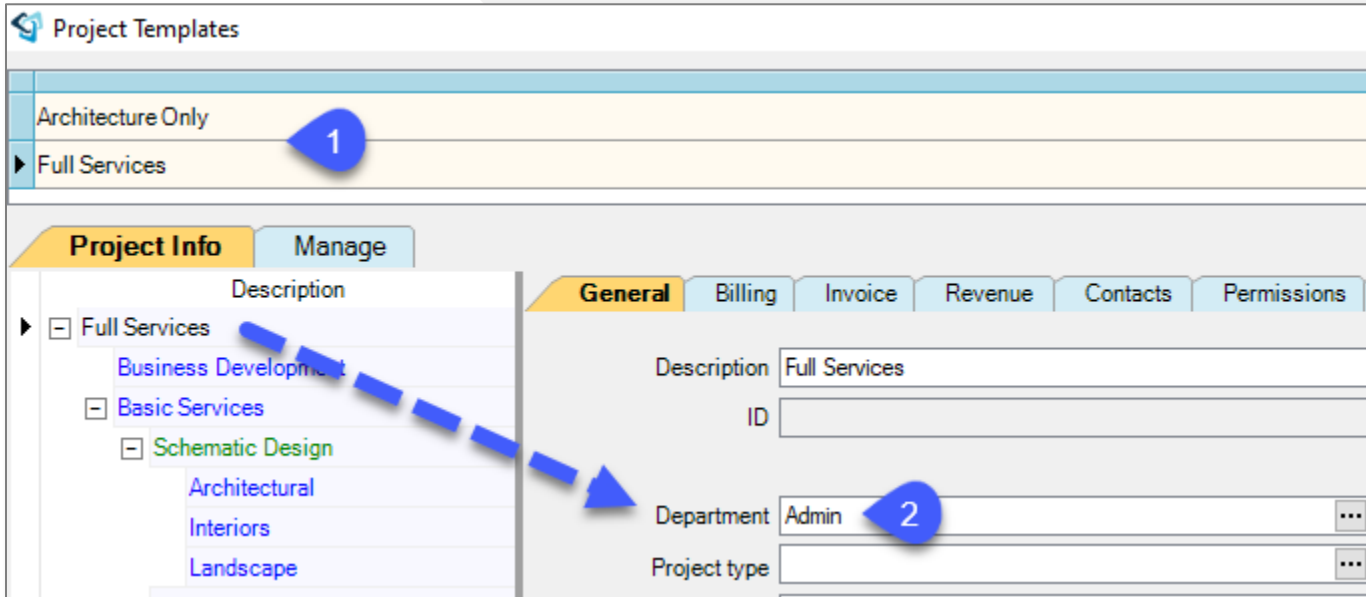
Status settings are important on your Templates

1. The Project status should be Preliminary. The project will appear on time/expense entry lists and be easy to segregate our Opportunity/BD projects from Active.
2. If you are going to engage the Business Development tools and reporting, you will need a phase with a status of Marketing.
3. All production phases should be assigned the status Hold. This will prevent your Opportunity/BD projects from creating Draft invoices.



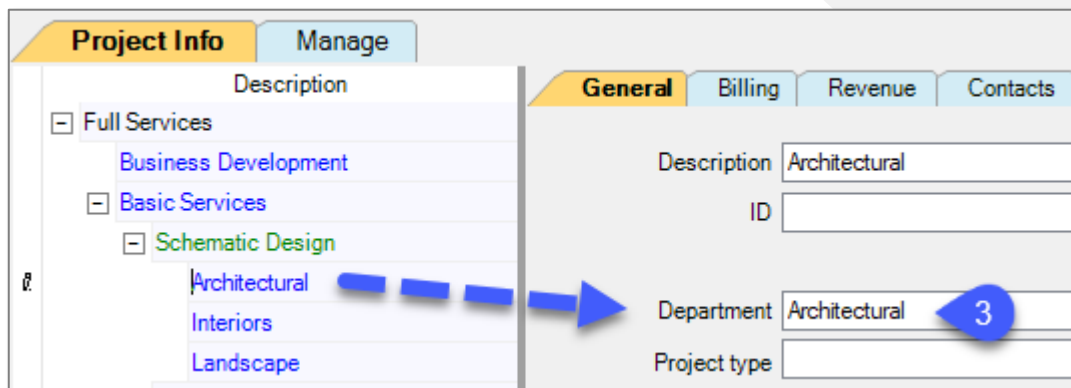
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Project Template – Best Practices



If you have engaged the Department tools in Ajera you need to incorporate them into your Templates.

1. You may find that you need templates for one department only as well as multi-department templates.
2. At the project level for multi-department templates, we recommend assigning your overhead department. This will ensure that the “owning” department is correct. Setup checks and balances to ensure project data is accurate.



3. All production phases should be assigned to services departments. Typically, we see the phase naming correlate to the department that is assigned to “own” the phase.



Best Practice Tips

- Control the creation of Templates – it is a TEAM effort
- Create Templates that will help with resource planning and forecasting
- Create Templates that will setup use of the Schedule Manager
- Create Templates that can be used for both Top-Down and Bottom-Up budgeting
- Update security to ensure projects can be created from Templates only
- Train the team!



Upcoming User Group Meeting

Next Virtual UG Meeting:

When: March 8, 2023

Where: At Your Desk

Time: 1:30 – 2:30 PM EST



Did you know series....Part I

In our day to day travels we find that there are many workflows and tools in Ajera that users are not aware of. In our Did You Know series we hope to shine a light on some of these.

In our first part of the Did You Know Series we will tackle some of the questions that we commonly encounter.

During this user group, we'll provide an overview of:

- Did you know that overriding a Billing Rate affects project reporting?
- Did you know that using the Nonbillable status has serious impact on project and financial reporting?
- Did you know that you can tie out Client invoices to the General Ledger – EASILY?
- Did you know there is an easy way to revise Client Receipts?

Check out our live and on demand classes



February 27, 2023
12:00 p.m. - 1:30 p.m. MST

Automate Your Business
Development Activities in ...

\$200.00



March 13, 2023
11:00 a.m. - 12:30 p.m. MST

How to Modify Ajera's Standard
Invoice ...

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March 27, 2023
11:00 a.m. - 12:30 p.m. MST

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We hope to see you there!

Contact

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Thank You!

Stambaugh Ness

www.stambaughness.com



Val Higgins
Managing Director

Val assists clients with assessing workflows and finding efficiencies with their ERP systems. She specializes in assisting clients with Project Management training to leverage tools and processes to optimize delivery and profits.

Professional Highlights

- 30+ Years Experience in the A/E Industry
- National Presenter – PSMJ, Deltek, AUA
- Deltek Ajera Project Management Workshops
- Deltek Ajera Financial Excellence Workshops

Futuristic | Achiever | Responsibility | Relator | Strategic



Shawna Pace-Powers
Senior Consultant

Shawna has 19+ years experience in the A/E/C industry. She has assisted many clients with Implementation and optimizing of the Ajera Software

Professional Highlights

- Axiom Annual Client Conference Presenter
- Coach and mentor for Consultants
- Deltek Ajera Consultant

Learner | Individualization | Input | Includer | Positivity



Connie Haakinson
Consultant

Connie has over 20 years experience in the A/E space and brings a passion for assisting with all things Project to each of her Clients/Engagements.

Professional Highlights

- Long term Ajera User in an AZ Architectural firm
- Project Management Training Experience
- A gift for helping PMs understand the Financial aspect of Project Management

Input | Achiever | Learner | Intellection | Arranger



Amy McLawhorn
Consultant

Amy has years of experience as an Ajera user and engages with Clients to help them elevate their use of Ajera tools.

Professional Highlights

- Ajera Implementation experience
- Project Management Training Experience
- Experienced in all Ajera Accounting functions

Individualization | Input | Positivity | Responsibility | Connectedness



Jillian Dearing
Consultant

Jillian has 20+ years' government contracting & accounting experience. She has broad experience in training & managing accounting teams for efficiencies in workflows and processes.

Professional Highlights

- Ajera end user
- Experienced in all Ajera Accounting functions
- Extensive FAR/DCAA audit preparation experience

Strategic | Maximizer | Positivity | Connectedness | Learner



Julie Green
Consultant

Julie has 30+ years experience in the A/E industry and is a long time Ajera user. Julie is actively engaged with the Ajera Users Association and enjoys helping firms optimize their use of Ajera.

Professional Highlights

- ERP Implementation & Employee Training Experience
- Workflow Development
- Custom Dashboards & Widgets

Developer | Empathy | Relator | Responsibility | Maximizer



Sandy LaHendro
Consultant

Sandy has more than 15 years of accounting experience with a focus on the A/E industry. Controller level accounting skills include intercompany transactions and FAR audit preparation.

Professional Highlights

- 5+ years Ajera experience
- DOT overhead audit experience
- Inter-Company experience

Responsibility | Empathy | Developer | Harmony | Restorative



Stambaugh Ness has a seasoned team that provides Ajera Outsourced Accounting services. Many firms have realized ROI on outsourcing rather than employee F/T accounting teams.

For more information reach out to Val Higgins at Vhiggins@StambaughNess.com



The SN team provides expert assistance with

- Federal Acquisition Regulations
- State & Local Tax (SALT)
- Research & Development (R&D) Tax Credit
- Next Gen Advisory
- Workforce Solutions
- Outsourced Accounting Services
- Project Management Advisory Services
- Technology for the Project Based Firm

For more information reach out to Val Higgins at
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Just Endless Opportunities.

SN