

## I. Vacation Request Changes

PTS

PROJECT TRACKING SYSTEM

v6.3

Home Jobs Firms/Clients Vendors Cases Maintenance Reports Tasks Time Cards Log Out

Litigation Solution, Inc.: Jonnathan Resendiz : Dallas

Add Time Clock Entry

Add Holiday Entry

Print All TimeCards

1 — Request Vacation

### Employee Time Cards

Time Card Period: 12/29/2008 to 1/4/2009 Update

2 — Black = Regular Hours
Red = Vacation Hours
Green = Holiday Hours

#### Hourly Employees

Employee Name	Mon	Tues	Wed	Thu	Fri	Sat	Sun	Reg Hrs	OT Hrs	Vacation	Holiday	
<a href="#">Gloria Palacios</a>	5.3	6	8	8	8	0.0	0.0	11.3	0	8	16	
<a href="#">Jeff Sanders</a>	7.95	4.35	8	8	9.37	0.0	0.0	21.67	0	0	16	
<a href="#">Kisha Harden</a>	8.5	7.58	8	8	6.4	0.0	0.0	22.48	0	0	16	
<a href="#">Sherrel Clark</a>	8.68	8.72	8	8	6.75	0.0	0.0	24.15	0	0	16	
<a href="#">Cheryl Sampson</a>	8.8	8.42	8.35 / 8	8	8.8	0.0	0.0	34.37	0	0	16	
<a href="#">Phil Anderson</a>	7.35	7.63	8	8	7.4	0.0	0.0	22.38	0	0	16	
<a href="#">Rich Guerra</a>	8	8	8	8	8	0.0	0.0	0	0	24	16	
<a href="#">Daniel Erwin</a>	2.9	3.95	8	8	0.0	0.0	0.0	6.85	0	0	16	
<a href="#">Jativa Mays</a>	4.5	4.97	8	8	4.05	0.0	0.0	13.52	0	0	16	

#### Salary Employees

Employee Name	Mon	Tues	Wed	Thu	Fri	Sat	Sun	Reg Hrs	OT Hrs	Vacation	Holiday	
Case Watkins	8	8	8	8	8	0.0	0.0	40	0	0	0	
Jimmy Dorman	8	8	8	8	8	0.0	0.0	40	0	0	0	
Jason Rowan	8	8	8	8	8	0.0	0.0	40	0	0	0	
Nate Newcomb	8	8	8	8	8	0.0	0.0	40	0	0	0	
ShanCorey Lockridge	8	8	8	8	8	0.0	0.0	24	0	0	16	

Timeclock/TimeCard.asp

1. All employees that have access to the 'Time Cards' tab will be able to request vacation by clicking this button (this link will also be in everybody's index page).
2. A legend indicates the meaning of different colors in employees' timecards.
3. When selecting multiple periods or even within a single period, it will now be possible to differentiate when employees have regular, vacation, or holiday hours within a single day. A forward slash separates each type.
4. Holiday hours are now being displayed in green.
5. Vacation Hours are now being displayed in red.

## Vacation Request Button

The screenshot shows a software interface with two main sections. The top section, 'Jobs in Progress', contains a table with columns for Job #, Date / Time Due, Firm, Item, and a status icon. The bottom section, 'Revenue Per Hour Leaders', contains a table with columns for Rank, Operator, Hours Worked, Total Revenue, Hourly Goal, and Rev. Per Hour. A red arrow points to a 'New Request' button in the 'My Vacation Requests' section at the bottom.

Job #	Date / Time Due	Firm	Item	Status
30760	4/15/2009 12:00:00 PM	ALLJ		🟡
30716	4/15/2009 5:00:00 PM	FIRI		🟡
30766	4/15/2009 12:00:00 PM	BRDE		🟡
30767	4/15/2009 12:00:00 PM	BRDE		🟡
30770	4/16/2009 2:00:00 PM	HABO		🟡
30749	4/17/2009 5:00:00 PM	BAHO		🟡
30759	4/16/2009 5:00:00 PM	HABO		🟡
30763	4/23/2009 5:00:00 PM	HCHA		🟡
30775	4/24/2009 4:57:36 PM	BNSF		🟡
30662	4/20/2009 12:06:25 PM	CACA		🟡

Rank	Operator	Hours Worked	Total Revenue	Hourly Goal	Rev. Per Hour
1	Jatava Mays	58.4	\$4,935.61	\$100.00	\$84.53
2	Rasha Harden	68.15	\$5,629.73	\$100.00	\$82.63
3	Kendra Hollister	4.62	\$325.65	\$100.00	\$70.49
4	Bheral Clark	63.13	\$4,252.92	\$100.00	\$68.97
5	Devarius Sampson	39.83	\$2,740.00	\$100.00	\$68.79
6	Chuck Davis	80	\$2,240.00	\$100.00	\$55.34
7	Gloria Palacios	152.44	\$3,710.00	\$100.00	\$24.87
8	Armand Lim	80	\$660.00	\$100.00	\$8.25
9	Don Johnson	0	\$0.00	\$100.00	\$0.00
10	Charletha Sampson	3.2	\$0.00	\$100.00	\$0.00
11	Rhonda Heame	0	\$0.00	\$100.00	\$0.00
12	Derrick Cushingberry	0	\$0.00	\$100.00	\$0.00

Date Submitted	Hours Requested	Requested Day	Status	Submitted To
<a href="#">New Request</a>				

Vacation Requests can also be accessed from everyone's index page in the "My Vacation Request" section. Click on the button that reads 'New Request.'

## Vacation Request

The screenshot shows the 'Vacation Request' form in the PTS Project Tracking System. The form includes the following fields and labels:

- Requestor's Name:** Jonnathan Resendiz (labeled with a red '2')
- Approver's Name:** Jason Rowan (labeled with a red '3')
- Vacation Hours Available:** 22.34 (labeled with a red '1')
- Start Date:** \* (labeled with a red '4')
- End Date:** \*
- Notes to Manager:** \* (labeled with a red '5')

A 'Next' button is located at the bottom of the form. A red asterisk indicates required fields.

This is the Vacation Request screen. You will be taken here whether you access this page through your index or timecard page.

1. Your current available vacation hours will be displayed on the right of the screen
2. Your name will be displayed.
3. Your vacation approver's name will be shown. Each employee will have a designated vacation approver. Your approver will be responsible for approving/denying your requests. An employee can change their approver under 'User Maintenance' if you have access to that section.
4. The start and end date can span multiple days.
5. A brief description of a vacation request should be entered which will allow the vacation approver make an informed decision when reviewing your submission and deciding whether to approve or deny.

Here is sample of a completed form. When you click on 'Next' you will be taken to the 'Set Vacation Request Time' page. In this page you will be able to customize the number of hours per day.

The screenshot shows the PTS Project Tracking System interface. The header includes the logo 'PTS' and 'PROJECT TRACKING SYSTEM v6.3'. A navigation menu contains links for Home, Jobs, Firms/Clients, Vendors, Cases, Maintenance, Reports, Tasks, Time Cards, and Log Out. The user is identified as 'Litigation Solution, Inc.: Jonnathan Resendiz : Dallas'. The main section is titled 'Vacation Request'. It displays the Requestor's Name as 'Jonnathan Resendiz' and the Approver's Name as 'Jason Rowan'. The 'Vacation Hours Available' is shown as '22.34'. The 'Start Date' is set to '04/17/2009' and the 'End Date' is '04/20/2009'. The 'Notes to Manager' field contains the text 'I need to spend time with my family'. A 'Next' button is located below the notes field. A legend at the bottom left indicates that an asterisk (\*) denotes 'Required Fields'.

**PTS** PROJECT TRACKING SYSTEM v6.3

Home Jobs Firms/Clients Vendors Cases Maintenance Reports Tasks Time Cards Log Out

Litigation Solution, Inc.: Jonnathan Resendiz : Dallas

### Vacation Request

Requestor's Name: Jonnathan Resendiz Vacation Hours Available: 22.34  
Approver's Name: Jason Rowan

Start Date: \* 04/17/2009  
End Date: \* 04/20/2009

Notes to Manager: \* I need to spend time with my family

Next

\*Required Fields

## Setting Vacation Request Time per Day

**PTS** PROJECT TRACKING SYSTEM v6.3

Home Jobs Firms/Clients Vendors Cases Maintenance Reports Tasks Time Cards Log Out

Litigation Solution, Inc.: Jonnathan Resendiz : Dallas

### Set Vacation Request Time

Days set to zero hours will be ignored

**Vacation Hrs Available:** 22.34 hours — 1

Thursday, May 21, 2009	8	hours	— 2
Friday, May 22, 2009	8	hours	
Saturday, May 23, 2009	0	hours *Weekend	— 3
Sunday, May 24, 2009	0	hours *Weekend	
Monday, May 25, 2009	0	hours *Paid Holiday	— 4
Tuesday, May 26, 2009	4	hours	— 5

7 —   — 6

\*This day is either Saturday, Sunday, or a Paid Holiday. You might want to set the number of hours equal to zero.

Let us assume that you entered a vacation request with start date of May 21st and end date of May 26th. In this screen you will be able to customize the actual vacation hours that you will be using for this period.

1. PTS will remind you again about the available number of vacation hours.
2. Work days will be automatically set to 8 hour days. However, you have the ability to select up to 16 hours if your work schedule so requires.
3. PTS will mark Saturdays and Sundays with an asterisk and set the number of hours to zero by default; nevertheless, you will be able to modify this amount in case your work schedule includes weekends.
4. PTS will also inform you about paid holidays and it will also set the number of hours to zero.
5. This is an example showing how you can select only half a day of vacation. In other words, set the amount of hours to 4 if you work 8 hours regularly.
6. The 'Preview' button will display a summary of your request which will include a new vacation time balance.
7. The 'Edit' button will allow you to go back to the 'Vacation Request' screen and modify the start-end range.

## Confirm Vacation Request Time

**PTS** PROJECT TRACKING SYSTEM v6.3

[Home](#) [Jobs](#) [Firms/Clients](#) [Vendors](#) [Cases](#) [Maintenance](#) [Reports](#) [Tasks](#) [Time Cards](#) [Log Out](#)

Litigation Solution, Inc.: Jonnathan Resendiz : [Dallas](#)

### Confirm Vacation Request Time

Requestor's Name:	Jonnathan Resendiz	} 1
Current Hours Available:	22.34 hours	
Approver's Name:	Jason Rowan	
Notes to Manager:	I am going to spend Memorial Day in Houston	
Thursday, May 21, 2009:	8 hours	} 2
Friday, May 22, 2009:	8 hours	
Tuesday, May 26, 2009:	8 hours	
Hours Left After Request:	-1.66 hours	— 3

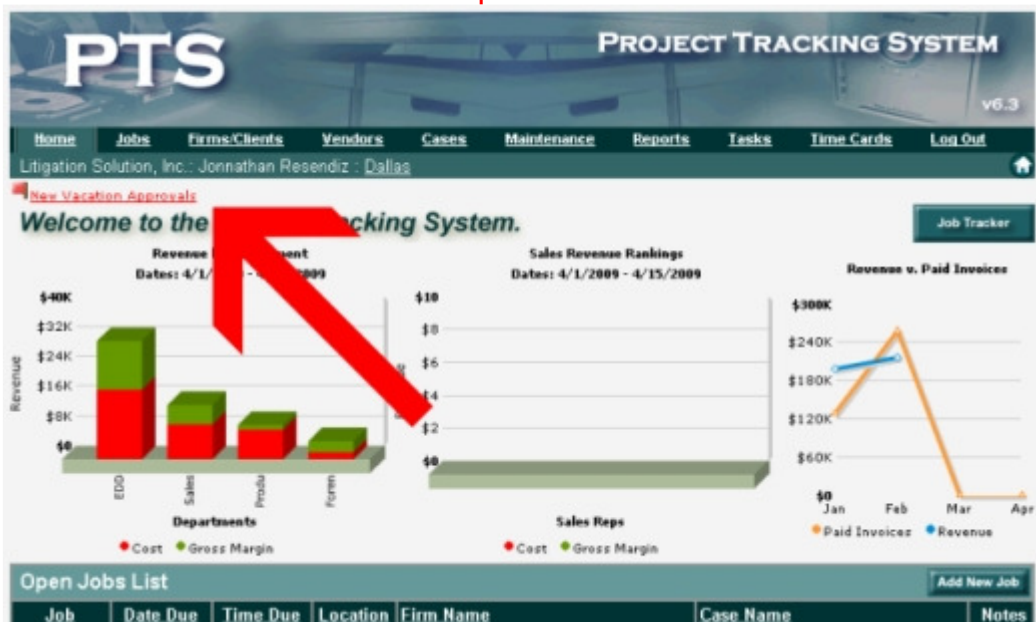
4 —   — 5

\*An e-mail will be sent to your vacation supervisor for approval

This screen will present a summary of your vacation request.

1. General information about your request will be at the top of the page.
2. Only days with actual usage of vacation hours will be displayed in the request summary. In the same way, only those days will be submitted as part of your request.
3. A vacation balance will be shown at the bottom of the page. A negative balance will be shown in red. A negative balance does not indicate that the vacation request will not be sent or approved. A negative balance only reminds the user that this request if approved as-is, will make the employee's vacation balance to be less than zero.
4. A user can always go back an edit the hours set in the previous screen.
5. An email will be sent to the requestor and the requestor's approver when this form is submitted. The vacation approver will then make the decision regarding this request.

## Vacation Requests Notifications



If an employee is designated as a vacation approver, a new vacation approval notification will appear on the leftmost top part of their index page.

## Pending Vacation Requests

My Vacation Requests					New Request
Date Submitted	Hours Requested	Requested Day	Status	Submitted To	
4/14/2009	4 hours	4/24/2009	Approved	Jonnathan Resendiz	
4/15/2009	8 hours	5/21/2009	Under Review	Jonnathan Resendiz	
4/15/2009	8 hours	5/22/2009	Under Review	Jonnathan Resendiz	
4/15/2009	8 hours	5/26/2009	Under Review	Jonnathan Resendiz	

Vacation Requests will be displayed in the 'My Vacation Requests' section. Each request can have three different status: Approved, Under Review or Denied.

Users will have the ability to click on denied vacations and resubmit their requests, starting the process again.

## Denied Vacation Requests

My Vacation Requests					New Request
Date Submitted	Hours Requested	Requested Day	Status	Submitted To	
4/14/2009	4 hours	4/24/2009	Approved	Jonnathan Resendiz	
4/15/2009	8 hours	5/21/2009	<a href="#">Denied</a>	Jonnathan Resendiz	
4/15/2009	8 hours	5/22/2009	<a href="#">Denied</a>	Jonnathan Resendiz	
4/15/2009	8 hours	5/26/2009	<a href="#">Denied</a>	Jonnathan Resendiz	

## II. User Maintenance Modifications

The section of User Maintenance has undergone many modifications in order to accommodate this new vacation request. Also, several cosmetic alterations were done in order to make these pages more readable.

The screenshot shows the Project Tracking System (PTS) interface. At the top, there is a header with the PTS logo and the text "PROJECT TRACKING SYSTEM v6.3". Below the header is a navigation menu with links: Home, Jobs, Firms/Clients, Vendors, Cases, Maintenance, Reports, Tasks, Time Cards, and Log Out. The current user is identified as "Litigation Solution, Inc.: Jonnathan Resendiz : Dallas".

The main content area is titled "Edit User Information:" and includes several tabs: General Information, Location & Views, Payroll & Commissions, and Schedule & Vacation. The "General Information" tab is selected.

The user's name is "Jonnathan Resendiz". The form contains the following fields:

- Username: JResendiz
- Password: [Redacted]
- User Level: Corporate / Approver (Dropdown menu) Determines access to the site. Practice caution when assigning this value.
- Department: Management (Dropdown menu)
- First Name: Jonnathan
- Last Name: Resendiz
- Short Name: JResen
- Email: jresendiz@doculogix.com
- Phone #: 972-722-3507
- Mobile #: 214-952-9431
- Fax #: 214-939-9736
- InActive:

An "Update" button is located at the bottom of the form.

This is the new view you will encounter when modifying a user's information. The first distinguishable upgrade is that we have split the data in four main sections. These new sections are pretty intuitive and contain data that relate to their name. The new sections are:

- General Information
- Location and Views
- Payroll and Commissions
- Schedule and Vacation

Information in section one, two, and three is what you are used to seeing in this page. The upgrade came in section schedule and vacation. We will go over them shortly.

## User Maintenance [General Information]

The screenshot shows the 'Edit User Information' page for Jonnathan Resendiz. The page has a dark green header with the PTS logo and 'PROJECT TRACKING SYSTEM v6.3'. Below the header is a navigation menu with links: Home, Jobs, Firms/Clients, Vendors, Cases, Maintenance, Reports, Tasks, Time Cards, and Log Out. The current user is identified as 'Litigation Solution, Inc.: Jonnathan Resendiz : Dallas'. The main content area is titled 'Edit User Information:' and includes sub-links for 'General Information', 'Location & Views', 'Payroll & Commissions', and 'Schedule & Vacation'. The form contains several fields, some marked as required with a red asterisk. A red '3' points to the asterisks on the Username, Password, and User Level fields. A red '1' points to the user's name 'Jonnathan Resendiz' in the top right corner. A red '2' points to the 'Short Name' field, which contains 'JResen'. The 'Update' button is at the bottom of the form.

**\* Required Fields — 3** **1 — Jonnathan Resendiz**

Username:\* JResendiz

Password:\* ●●●●

User Level:\* Corporate / Approver Determines access to the site. Practice caution when assigning this value.

Department:\* Management

First Name:\* Jonnathan

Last Name:\* Resendiz

Short Name:\* JResen **— 2**

Email: jresendiz@doculogix.com

Phone #: 972-722-3507

Mobile #: 214-952-9431

Fax #: 214-939-9736

InActive:

The general information section has the following update.

1. The name of the user's data that it is being updated is now displayed in the top right most corner of the screen.
2. There is a new field called Short Name. This field will be used as an abbreviated id for users. PTS will specially use this field in reports and charts.
3. Required fields are now identified with a red asterisk.

## User Maintenance [Locations and Views]

**Edit User Information:** [General Information](#) | [Location & Views](#) | [Payroll & Commissions](#) | [Schedule & Vacation](#)

*Jonnathan Resendiz*

### Location Settings:

Select one or more locations below that this user should have access to by clicking the corresponding checkbox. Also denote which location is this user's primary location. Your current location is selected by default. The primary location is presented when he or she logs in. Corporate / Approvers have access to all locations.

Location Name	Primary Location	Licenses Available
<input checked="" type="checkbox"/> Dallas	<input checked="" type="radio"/>	Unlimited
<input checked="" type="checkbox"/> Fort Worth	<input type="radio"/>	1

### Multiple View Settings:

If this user needs to have multiple views, for example a manager/administrator who is also a sales person, please select the appropriate options below. The user can then change his or her view by clicking the "Home" icon in the top right of each page.

Corporate / Approver View:	<input checked="" type="checkbox"/>
GM / Administrator View:	<input checked="" type="checkbox"/>
Project Coordinator View:	<input checked="" type="checkbox"/>
Sales Person View:	<input checked="" type="checkbox"/>
Operator View:	<input checked="" type="checkbox"/>
Forensic Operator View:	<input checked="" type="checkbox"/>
Business Mgr / Accounting	<input checked="" type="checkbox"/> Subscribers to the Collections module with this view gain access to the Accounts Receivable Pipeline

### Other User View Settings:

User Maintenance Access:	<input checked="" type="checkbox"/> Yes, this user can manage user maintenance.
Pricing Change Approver:	<input type="checkbox"/> Yes, this user can approve standard pricing change requests.
Error Report Investigator:	<input type="checkbox"/> Yes, this user should be provided access to conduct error report investigations.
Approved IP Location: <sup>1</sup>	<input type="text"/>

The Location and Views section remained the same except for the creation of a new category within this tab. The new category is called Other User Views Settings. You will find a new field for Error Report Investigation. We will elaborate on that functionality shortly; however, this is where a user can gain access to error report functionality.

## User Maintenance [Payroll and Commission]

**PTS** PROJECT TRACKING SYSTEM v6.3

Home Jobs Firms/Clients Vendors Cases Maintenance Reports Tasks Time Cards Log Out

Litigation Solution, Inc.: Jonnathan Resendiz : Dallas

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**Edit User Information:** [General Information](#) | [Location & Views](#) | [Payroll & Commissions](#) | [Schedule & Vacation](#)

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*Jonnathan Resendiz*

**Commission Settings:**  
Choosing "Yes" below will allow this user to be selected as a Sales Person when creating a Case or Job.

Payout Commission: No  Yes

Commission Start Date:

Pay Commission Based On:  Top Line  Gross Margins

Hurdle Needed To Obtain Commission: \$

If hurdle is not met does the balance carry forward?  No  Yes

What is your standard sales range and bonus %? From: \$  To: \$  Pay  %

Do you pay a bonus % for high sales?  No  Yes

\*Note that bonus commissions will not be reflected on individual reports.

Standard Pay Rate: <sup>2</sup> \$  / hr

Overtime Pay Rate: <sup>2</sup> \$  / hr

Starting Working Time:  :

2. Enter the pay rate per hour. For salaried employees, calculate the amount they would receive per hour, factoring in any bonus payouts, etc. The hourly pay rate would be calculated as follows: (Salary / # Pay Periods) / #Hours in Pay Period. For example, (40k per year / 26 pay periods) / 80 hours in pay period = \$19.23 per hour.

The Payroll and Commission section also remained the same. The single change that was incorporated to this page could be found at the bottom. There, you will find a Starting Working Time. This will help you set different users to various starting working times. In case, your location happens to have a second or third shift.

## User Maintenance [Schedule and Vacation]

**PTS** PROJECT TRACKING SYSTEM v6.3

Home Jobs Firms/Clients Vendors Cases Maintenance Reports Tasks Time Cards Log Out

Litigation Solution, Inc.: Jonnathan Resendiz : Dallas

**Edit User Information:** [General Information](#) | [Location & Views](#) | [Payroll & Commissions](#) | [Schedule & Vacation](#)

*Jonnathan Resendiz*

**TimeClock Settings:**

Is this user required to clock in and out? No  Yes

For employees not required to clock in, please enter an approximate work schedule below (working hours per day). This will be used to calculate productivity for those employees without time cards.

M  T  W  Th  F  Sa  Su

---

**Vacation Settings:** — 1

\* Required Fields — 2

Hire Date:\* 3

Carryover Hours? Yes  No  4

Current Number of Hours:\* 5

Vacation Approver:\*  6

---

Maximum Hours Per Schedule:\* 8  Schedule One 7

Accrual Period:\*  9

Accrual Rate per Period:\* 10

Vacation Accrual Period Start Date:\*  } — 11

Vacation Accrual Period End Date:\*

The 'Schedule and Vacation' section is the one that has undergone the most modifications. Timeclock settings remain the same. On the other hand, Vacation Settings is a brand new section that you will need to update when trying to save a record.

The following are the highlights of this section.

1. Start of the Vacation Settings Section.
2. All of the fields with a red asterisk are required in order to continue.
3. A hire date is required for each user. Once the date has been initially set up, this field will become un-editable.
4. Carry over hours refers to the ability of this user to continue accumulating their vacation every year or if a reset is needed.
5. This will not only display the vacation hours for each employee but it will let you modify directly this value. Please use this field with caution

since PTS will not keep a history of vacation accrual. If you modify this field, the old value will be lost.

6. Each employee is linked to another employee that will approve their vacation. Currently all corporate users and administrators are shown in this list.
7. Each employee can have many schedules. Schedules are defined are periods of time where a user accrues vacation according to certain rules. In this way, you will not be required to reset an employee vacation time several times. Just enter various schedules spanning a long period of time and PTS will do the calculations and rollovers from schedule to schedule.
8. The first part of the schedule is the maximum amount of hours a user can accumulate during this given period of time. If a user hits this cap, no more accrual will take place.
9. Currently PTS has 5 different accrual periods:
  - a. Hourly
  - b. Weekly
  - c. Bi-Weekly
  - d. Monthly
  - e. Hire Anniversary
10. The accrual rate period will tell PTS how many hours to accrue every accrual period. In the case of the graphic, this employee will accrue .77 hours every week. The following chart should indicate what rates to consider given the amount of hours of vacation per year.

	Hours Per Year			
	40hrs	80hrs	120hrs	160hrs
Rate				
Hourly	0.02	0.04	0.06	0.08
Weekly	0.77	1.54	2.31	3.08
Bi-Weekly	1.54	3.08	4.62	6.16
Monthly	3.33	6.66	10.00	13.33
Yearly	40.0	80.0	120.0	160.0

11. The start and end date of the schedule will mark the duration of time this user will continue to accrue at the specified rate.

### III. Holiday Schedule

**PTS PROJECT TRACKING SYSTEM v6.3**

Home Jobs Firms/Clients Vendors Cases Maintenance Reports Tasks Time Cards Log Out

Litigation Solution, Inc.: Jonnathan Resendiz : Dallas

**Manage Paid Holiday Schedules** 1 2

Location : Dallas Year: 2009

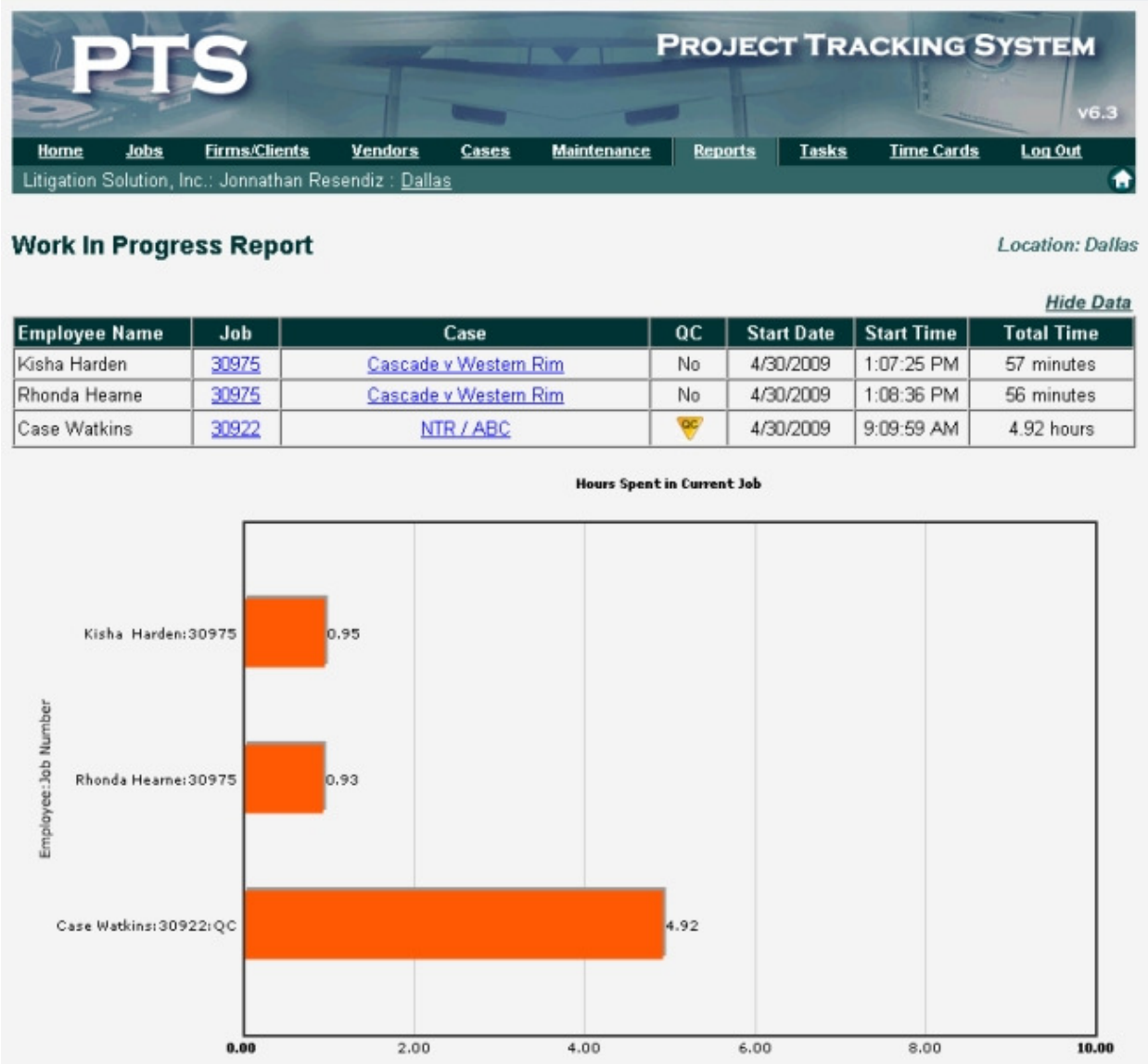
Paid Holiday Description	Date	Hours	Delete
New Year's Day	1/1/2009	8 hours	<input type="checkbox"/>
Good Friday	4/10/2009	8 hours	<input type="checkbox"/>
Memorial Day	5/25/2009	8 hours	<input type="checkbox"/>
Independence Day	7/4/2009	8 hours	<input type="checkbox"/>
Labor Day	9/7/2009	8 hours	<input type="checkbox"/>
Thanksgiving	11/26/2009	8 hours	<input type="checkbox"/>
Day After Thanksgiving	11/27/2009	8 hours	<input type="checkbox"/>
Christmas Eve	12/24/2009	8 hours	<input type="checkbox"/>
Christmas	12/25/2009	8 hours	<input type="checkbox"/>
New Year's Eve	12/31/2009	8 hours	<input type="checkbox"/>
3	4	5	<input type="checkbox"/>
		hours	<input type="checkbox"/>
		hours	<input type="checkbox"/>
		hours	<input type="checkbox"/>
		hours	<input type="checkbox"/>

Update

This brand new section of PTS can be found under the 'Tasks' Tab by clicking on the 'Set Holiday Schedule' button. This page will let you enter dates that your location considers pay holidays.

1. You can select from all the locations you currently have access to. In that way, each location can have its own set of specific holidays according to its geographical area.
2. You have the ability to set holidays for several years ahead. This will be especially helpful in setting up days such as Good Friday or Labor Day that follow under different calendar days every year.
3. Here you enter a description of the holiday.
4. Select a date.
5. You have the ability to set any number of hours for each holiday. For instance, if your location only pays half a day for Good Friday, set the amount of hours to four.

## IV. Work In Progress Report



This report could be found under the 'Reports' Tabs in the Management sections by clicking in the Work In Progress button.

This brand new report will let you know what operators are currently logged into what job. Likewise, it will display if this operator is currently performing Quality Control Job. A start date and time are displayed along with a summary of total time spent performing this activity.

Finally, a chart is attached at the end of the quantitative data representation.



Editing the item list requires only to select the specific item from the list and hit update. Notice that items that are already linked to the job will not be able to be deleted.

**PTS PROJECT TRACKING SYSTEM v6.3**

Home | Jobs | Firms/Clients | Vendors | Cases | Maintenance | Reports | Tasks | Time Cards | Log Out

Litigation Solution, Inc.: Jonnathan Resendiz : Dallas

**Manage Item List View** Firm: *Holland & Hart*

Select items that you would like to add to a restricted view for this job. Case: *Tetra Tech v Herling Construction*

Having no items in your list indicates that all items are displayed at all times. JobNo: *30782*

Item List Category : Item List Name	Delete From View
Account Cleanup : Account Cleanup	<input type="checkbox"/>
Account Cleanup : Monthly Deferral Fee	<input type="checkbox"/>
Tech Time : EDD Tech Time	<input type="checkbox"/>
Tech Time : EDD Tech Time Overtime	<input type="checkbox"/>
<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="checkbox"/>

\*Items that are already tied to a job cannot be deleted from view.

1. Once you have updated the list to your satisfaction, go back to edit the job by clicking on the link to your right.
2. These are the current items that are available to be selected when adding work to a job. If there are no items displayed here, it means that you are currently displaying all default items for the job.
3. Items that are already tied to a job cannot be deleted.
4. Select as many items as you like from the list of default items. If you need more than ten items. Click update and then select more items to be added.

## VI. Delivery Receipts and Progress Reports

**PTS PROJECT TRACKING SYSTEM** v6.3

Home Jobs Firms/Clients Vendors Cases Maintenance Reports Tasks Time Cards Log Out  
Litigation Solution, Inc.: Jonnathan Resendiz : Dallas

### Edit a Progress Report [Print This Report](#)

Firm: [Griffith & Nixon](#)

Job No: [30975](#)

#### Completion Point Progress (Checkmark indicates completion)

Item Name <small>(Edit   Sort)</small>	Custom Description	Internal Due Date	Date Delivered	Deliver
<b>boxes 1</b>	1 of 2			<input type="checkbox"/>
<input type="checkbox"/> 1. Copy	<input type="checkbox"/> 2. QC Copy			
<b>boxes 2</b>	2 of 2			<input type="checkbox"/>
<input type="checkbox"/> 1. Copy	<input type="checkbox"/> 2. QC Copy			

\* You can quickly enter the current date for "Internal Due Date" by double clicking in each field.

Another section with a great deal of improvements is the Progress Report and their corresponding Delivery Receipt for each Completion Point.

1. The Progress Report has been redesigned so that selecting numerous items would not stretch the page to the right. When you select multiple items, they will now nicely wrap around the page.
2. New sort functionality has been implemented. More details will be given shortly.
3. Entering a new Internal Due Date can be quickly achieved by double clicking in the space provided instead of typing the entire date.
4. A date delivered will be automatically determined once a delivery receipt has been created.

## Sorting Order

**PTS** PROJECT TRACKING SYSTEM v6.3

Home Jobs **Firms/Clients** Vendors Cases Maintenance Reports Tasks Time Cards Log Out


Litigation Solution, Inc. : Jonnathan Resendiz : Dallas

### Sort Progress Report Completion Points

<b>Firm:</b>	<a href="#">Griffith &amp; Nixon</a>
<b>Job No:</b>	<a href="#">30975</a>
<b>Item Name:</b>	boxes
<b># Items:</b>	2

Use your mouse to drag and drop the selected items into the appropriate sort order.

Document Imaging Services : Copy
Document Imaging Services : QC Copy



This new sorting functionality will let you drag and drop items to whatever order you prefer. Once you hit update you will be able to see it in the progress report.

## VII. Commissionable Items

The screenshot shows the 'Edit Job Item' form in the PTS Project Tracking System. The form includes the following fields and options:

- Item Category: Tech Time (dropdown menu)
- Item Name: EDD Tech Time (text input)
- Description: [Detailed description must be provided by project coordinator] (text input)
- Base Price: 150 (text input)
- Cost to Produce: 75 (text input)
- Require Time Stamp:
- Bonus Percent: 10 (text input) \*No decimals / percent signs. Conversion to percent performed by PTS.
- Hourly Rate:  \*Should revenue for this item be calculated automatically based on your company's billing increment?
- Tech Time:  \*Is this a tech time item that should be included in the tech time tracking report?
- Pay Commission:  \*Should commission be calculated for this item?** (This row is highlighted with a red border in the image)
- Inactive:

Buttons: Update, Delete

Finally, items can now be categorized as commissionable or non-commissionable. This new functionality will prevent items that are not marked as commissionable to affect gross margin bottom line and hence falsely boosting the commission for a sales rep.

At the time of the update, all items will be marked as commissionable; hence, the user will not see a difference when it comes to all previous data entered into PTS. After the update, users will be able to update items that are not considered commissionable. This change will take effect company wide and not per location.