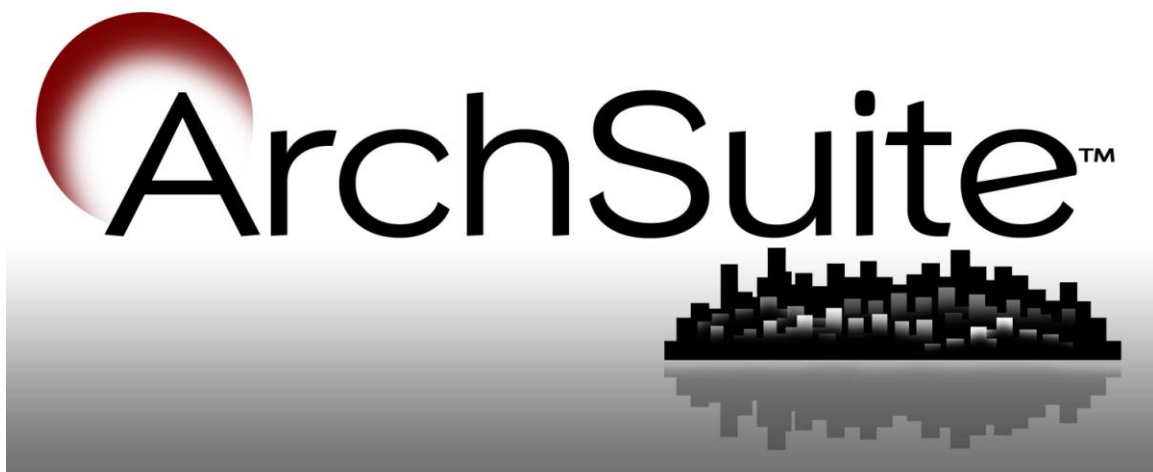


Introducing...



**The complete software solution for  
architectural and engineering  
professional service firms**

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## Product Overview

ArchSuite is an integrated set of management tools designed specifically for architectural or engineering professional service firms. The system, however, can also be easily adapted for any type of professional service firm.

**What ArchSuite Does.** ArchSuite integrates and automates every aspect of the operations of the professional service firm, with the exception of payroll and accounting. These functions, however, are integrated within ArchSuite as follows:

- **Payroll.** ArchSuite's timesheet module captures employee activities and tasks in a detailed and organized way. At the conclusion of each pay cycle, ArchSuite aggregates each employee's hours by type, and displays the detail for the purposes of submitting the information to a payroll specialist for further processing.
- **Accounting.** A powerful feature of ArchSuite is the automation of work orders, based on the type of project (firm fixed-price or hourly), the number of billing increments, and the percentage to be billed for each increment. Each work order represents the incremental billing amount for a portion of a project's life cycle. Although ArchSuite work orders could be utilized as invoices in and of themselves, the intent of the work orders is to be the source document for the generation of invoices in an accounting system. The most widely used accounting system is QuickBooks®, by Intuit, Inc. Intuit provides an approved software development kit (SDK) for use by application developers, and ArchSuite utilizes this SDK to seamlessly integrate with QuickBooks. ArchSuite users who wish to integrate with QuickBooks will enjoy full control over the automatic generation of invoices within QuickBooks and a work order/invoice transaction log that easily displays the connection of the ArchSuite work orders with the QuickBooks invoice. A bonus feature of the QuickBooks integration module is real-time display of outstanding balances in invoices and the ability to quickly prepare a report summarizing all invoice and work order activity, by client, Project, and/or time frame.

**ArchSuite Capabilities.** ArchSuite automates every aspect of the daily, monthly, and yearly operations of the professional service firm. ArchSuite uses a modular user interface, providing users with an intuitive screen for each management task associated with operations. These modules include:

- **Timesheet.** Direct hours are recorded with reference to clients and projects selected from list boxes. Procedures prevent mis-posting hours to inactive projects. Direct and overhead hours require the selection of an activity and task to easily describe what was accomplished, and this information is displayed in other modules. Vacation and leave hours are automatically checked against the individual's leave accruals to ensure that leave hours are properly posted. As hours are entered into the system, a set of management oversight checks in the project manager employee hours module are invoked as supervisors approve or disapprove the hours prior to payroll preparation. After payrolls are generated and saved in the payroll module, hours are locked from further change. These procedures ensure accuracy and accountability for every hour posted to the system. The payroll module calculates overtime according to the firm's overtime policy and summarizes the detail for submission to the payroll specialist. ArchSuite utilizes a 14-day pay cycle and accommodates individuals in salary-exempt, salary non-exempt, full-time hourly, part-time hourly, and outside temp pay categories.
- **Clients.** Clients are the heart of a professional service firm. The client module provides for management of essential client information. If QuickBooks integration is utilized, procedures exist to tightly map ArchSuite clients with their respective QuickBooks customers, and to ensure this mapping remains current.

- **Employees/Human Resources.** ArchSuite users will find that employee management can be fully and completely implemented within the system. Every aspect of employee management can be found in the system, including:
  - Necessary personal information.
  - Assignments to supervisors, departments, locations, employee titles, billing rates and pay classifications.
  - Salary/hourly pay information and history. All pay information is encrypted and tightly access controlled to ensure security.
  - Benefits elections, such as health insurance, disability insurance, and 401(k) elections.
  - Hire and termination history.
  - Ability to maintain encrypted notes for use by human resources personnel.
  - Additional human resources tools to streamline your day to day operations:
    - Leave accounting. Based on your firm's leave policies, ArchSuite provides employees and supervisors with easy to use tools to instantly view employee's leave account, request and approve leave using a graphical interface that clearly shows possible overlaps between employees, and easily roll leave balances over from year to year, based on your company's policies. A supporting feature is the "who's on leave" module, which provides a quick look at who has requested leave for a period and who's on leave today.
    - Event calendar. Users can schedule events of any type and place the event in other employees leave calendars based on their relationship to the user scheduling the event. Conference room bookings are also fully integrated into the calendar module.
- **Contracts and Projects.** The professional service firm's life blood is its contracts and the projects performed in satisfaction of these contracts. ArchSuite fully automates the creation of projects and contract documents, according to the following model:
  - A client may have zero, one or many *contract vehicles*. The contract vehicle describes the project classification and type, billing type, number of billing increments and profile (percent billed for each increment), location, and other factors.
  - A contract vehicle may have zero, one, or many *projects*. The project inherits the characteristics of the contract vehicle and is the entity that drives ArchSuite. The project will include descriptive information and a pricing structure that is dynamic and fully tailorable for any specific purpose.
  - A project may have zero, one, or many *amendments*. An amendment is a project revision. Amendments may be written to any project, whether or not it is currently active. Amendments inherit the characteristics of the project and contract vehicle, with the exception that the amendment's billing type and billing profile may be different than the project's.
  - Pricing. Pricing is easily accomplished by choosing a price line item from a list that is completely tailorable for the firm's business model. Each price line item is associated with the project type, hourly rates set by the firm, or reimbursable items. A project is quickly and easily priced by selecting any combination of individual price items. All price items are fully reusable and can be "mixed and matched" to accurately and completely price each project.
  - Contract documents. Contract documents are automatically generated using Microsoft Word® templates, that import all necessary descriptive and pricing detail. The automated contract will "wrap around" the specific legal boilerplate used by each firm using ArchSuite. Contract documents are automatically saved to a file location on the firm's local area network. With ArchSuite, the generation of fully completed contract documents for a project is as easy as the click of a mouse and a signature.

- **Project Life-Cycle.** The ArchSuite scheduling module provides for detailed management of the project life-cycle, from creation to completion. ArchSuite applies a fifteen-milestone model to the project lifecycle:
  1. Creation date.
  2. Sent to client.
  3. Ratified contract received back from client.
  4. Project start.
  - 5 – 14. User-definable interim milestones which describe each step the project moves through according to the user's business model.
  15. Project completion.

Billing points are integrated into the scheduling module as follows:

- Billing can be 1, 2 or 4 billing increments, or any number of billing points, based on a percentage achieved. For 1 billing increment projects, the work order is generated at project completion. For 2 and 4 billing increment projects, a work order is generated on receipt of ratified contract, or project start. The final work order is generated at project completion. Interim work orders (for 4 billing increment projects) can be generated at any milestone between 5 and 14, according to the business model.
  - When a manager presses the button associated with a billing point, the work order is instantly generated and enters the queue for invoicing.
- **Dashboard.** The ArchSuite dashboard is the management heart of the system. In the dashboard, users view a number of graphical and tabular displays summarizing exactly how the firm's projects are moving through their life-cycle. A critical report, the Total Project Rollup report, provides detailed estimates of current and future billings for each active project in the system, sorted by project manager and client. A number of other graphs and displays summarize contract generations, milestone progress, aging projects, flagged projects, and other factors. A snapshot sub-module provides users with the ability to "take a snapshot" of the production of each project manager at any point in time, and to compare this snapshot with others to assess progress or identify problem areas.
  - **Transmittals.** Professional service firms provide deliverables to their clients. These may be drawings, blueprints, objects, computer disks, or other documents or items, and they have to be delivered to the client. The transmittals module assists in this by generating a printed transmittal using Microsoft Word®, and keeping the details of the delivering courier (if used), so when the invoices arrive from couriers, they can be easily associated with the project and client for billing or accounting purposes.
  - **Reimbursables.** Many internal costs such as printing and plotting, document generation, computer disks and other items should be passed on to the client for billing purposes. The reimbursables module provides an easy way to select from a list of reimbursable items, depending on the project type. Once selected and associated with a client and project, the reimbursables will generate a special reimbursable work order for invoicing purposes.
  - **Analysis.** ArchSuite provides powerful analytical tools to let you know how your firm is doing. These include:
    - **Executive toolkit.** This module, which is designed to be used by senior management of the firm, provides a flexible and detailed look at revenue, based on work orders generated within ArchSuite. Sales by project type, client, department, and location can be viewed based on any combination of these factors. A graphical display provides any type of chart the user prefers, and the charts can be saved or exported. Summary spreadsheets are built using Microsoft Excel® for further analysis, if desired. In addition the executive toolkit provides two more powerful features:

- **Forecasting.** ArchSuite uses a variation of Brown's Single Exponential Smoothing (SES) algorithm to forecast sales based on past performance. Users can also choose a simple best-fit forecast model. Forecasting can be as much art as science, but ArchSuite's forecasting models provide users with a consistent algorithmic model to try to predict future revenue.
- **Performance and productivity.** Based on the selection of factors (project type, client, department, location), performance of each business sector is provided in detail to help users prioritize sales, marketing, and internal workload distribution, in order to maximize profits. For the selected factors, productivity is displayed in three ways: sales per direct labor hour, average labor hour margin, and the ratio between these two factors.
- **Project cost.** While the executive toolkit provides a comprehensive look at revenue and performance, the Project cost module provides the *inside* look at costs and profitability of each project. After selecting a Project, the user can view the exact revenue, labor cost, miscellaneous cost and sub-contractor costs associated with execution of the Project. In addition, this module provides users with the ability to define and allocate sub-contractor's costs which are required to complete the Project (for example, outside PME engineering performed for an architectural firm). The focus of the Project cost module is your company's bottom line.
- **Queries.** The queries module provides a tabular and graphical summary of direct hours recorded against projects. Using drop-down list boxes, the user can select any combination of clients, projects, amendments, or employees to instantly see how time is being utilized and allocated.
- **Business rules and system management.** A comprehensive system maintenance module provides a flexible and powerful way to customize ArchSuite to reflect exactly how your firm does business. The system maintenance module provides control over:
  - **Definitions and display of selected items in various modules.**
  - **Price schedule.** The price schedule is built and maintained here. ArchSuite provides the ability to roll a price schedule over from year to year, automatically adjusting the prices according to your desired escalation rate.
  - **User management.** Each ArchSuite user is assigned to a user type which is defined by our. Certain users can be granted additional privileges to act as system administrators or super users, or to be able to view privileged pay information. User activity is also displayed, showing the logon and logoff times for each user, daily connection activity, and version installed on each user's machine.
  - **Tasks and activities.** ArchSuite comes pre-loaded with a number of activities and tasks aimed at the architectural firm, but how you want your users to record their time is totally up to you.
  - **Transaction log.** Sometimes you need to know exactly when someone executed a specific critical task within ArchSuite. The transaction log records over forty important activities, but which ones you wish to track is totally up to you. In addition, automated alerts can be created which alert any user you wish to the execution of a critical task. These alerts will pop up every fifteen minutes for those users you wish to see them.
  - **Project transfers.** Each Project is associated with a project manager, but from time to time you may wish to transfer responsibility for selected Projects from one project manager to another. Easily done here.
  - **Transaction controls.** Some highly critical functions can be tightly controlled based on the settings you choose for these tasks. You are provided with the ability to permit, warn, or prevent the execution of these highly critical functions. Users are provided feedback if the setting is at the warn level, and are advised that permission is denied, if set at the prevent level.
  - **Permissions/user types.** One of the most power features of ArchSuite is the ability to tailor overall permissions throughout the system. Here you can specify exactly what

modules a user of a certain user type may gain access to. Further, you can control what the user does *within* the module by disabling buttons or selections, as desired. Management of this feature is highly secure, using encrypted settings to prevent abuse.

- Employee assignments. This is where you will assign each employee to a supervisor, department and location. Visual and written reports are available so you can see the “wiring diagram” at any time.
- Leave and hours. Here you can define your company’s leave and holiday policies in any way you choose. You specify the accrual rates for annual leave and sick leave, and if you wish, personal time. You specify which user types are eligible for leave. Timesheet enforcement can range from non whatsoever up to a tightly controlled environment where users of certain types must clock in and clock out and hours posted will be evaluated against your company’s policies.
- Project milestones/Project classes. The ArchSuite model provides a framework for fifteen milestones within a Project’s life cycle. Here is where you define what the types of projects are, the definition of each milestone and select those milestones you wish to trigger work orders and invoices as the Project advances towards successful completion.

In summary, the System maintenance module lets you define your company—your way.

#### Additional features.

- Database. ArchSuite utilizes the powerful Microsoft SQL Server™ database system. This ensures data integrity and reliability as well as a fast backbone for ArchSuite’s wide range of capabilities.
- Microsoft Office™ integration. Documents and reports are built in a variety of ways within ArchSuite, but some key functions are built using integration with Microsoft Word and Excel. This ensures that ArchSuite’s reports can be easily integrated with your other company documents.
- Crystal Reports™. Many reports are built using the attractive Crystal Reports XI report engine. This powerful report engine also provides the ability to save the reports in a variety of additional formats.
- Graphics Server©. In many modules, data is presented both tabularly and graphically. ArchSuite uses the Graphics Server graph engine to display the graphical look at your data. In many cases, you can also modify the appearance of the graph to suit your presentation needs, and export the graph to files or the clipboard for easy integration into your presentations or reports.
- QuickBooks™ integration. Using methods approved by QuickBooks, ArchSuite integrates tightly into your company’s accounting system to provide you with the ability to quickly build and review QuickBooks invoices based on ArchSuite’s criteria.
- Expansible. ArchSuite can support a firm of any size and number of locations.
- Dynamic. Over 98% of all constraints and business rules utilized in ArchSuite are easily available to you. You can make ArchSuite fit *your* business model, instead of the other way around.

ArchSuite can help you, the owner of a professional services firm, focus on quality and customer satisfaction, while ArchSuite does the rest. Seamlessly, easily and powerfully.

Enhance your operations and save overhead costs with ArchSuite, the complete software solution for architectural and engineering professional service firms.