

1. First Customer Contact: Sign-in

Company
Logo

First Customer Contact: Initial Login

One user at the company receives this information from Perceptive upon activation of an account

Audit
Prodigy Icon

Company:	
User Name:	
Password:	

Contact Perceptive Software for Initial User Name / Password

Accept

Perceptive Control Solutions LLC

2. First Customer Contact: Administrator Set-up

Company
Logo

First Customer Contact: Administrators Set-up

Audit
Prodigy Icon

Administrator Name:

Administrator Email:

Click to Set-up another Administrator

Administrator Name:

Administrator Email:

Click to Set-up another Administrator

Triggers email to Administrators if Email account is valid.

Need additional screen for invalid Admin Email.

Appears only if "Click to Set-up another Administrator" is clicked.

Total up to 5 Administrators

Accept

3. Administrator: Sign-in



Administrator: Login

Administrator/s reach this screen by clicking on the email link received after Screen #2



User Name:	
User Email	XXXXXX@XXXX
Password:	

Accept

4. Administrator: Settings Module View



Administrator: Settings Module View



Business Set-up

Resource Set-up

Project Set-up

Color Coding Set-up

Administrator: Business Set-up

Perceptive Control Solutions LLC

6. Administrator: Resource Set-up

Company Logo

Administrator: Resource Set-up

Audit Prodigy Icon

Resource Details

Resource Name	XXXX	Title	XXXX	Email	XXXX	Location	XXXX	Region	XXXX	Primary Supervisor	XXXX
---------------	------	-------	------	-------	------	----------	------	--------	------	--------------------	------

Common Holidays

Calendar

Phone #

From Screen 9 (User Self-Setup)

Consultant ?

Default - No

Deactivate

If yes, Name the Consulting Firm

Access Privileges

Check-boxes signifying enablement of access privilege

	Plan	Operations	Analytics	Billing	Reports 1	Reports 2	Reports 3
Add	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Delete	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Edit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
View Only	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Resource Name, Title, Email, Location, Business Unit, Primary Supervisor and Consulting Firm's Name should be memorized after each resource set-up so they appear when typing in the first one or two characters for subsequent resource set-up

Clicking "Accept" triggers email to each resource with a link to next screen (User Self-setup)

Accept

Clicking "Accept" triggers an identical blank screen until the last resource is set-up

Perceptive Control Solutions LLC

7. Administrator: Projects Setup

Company Logo

Only Administrators can set-up Projects, unless they give a Resource the authority

Fiscal Year

Project Name	XXXXX
Sub-Project Name	XXXXX
Project Number	XXXXX
Project Type	XXXXX
Risk Rating (High/Medium/Low)	XXXXX
Business Unit	XXXXX
Sub-Business Unit	XXXXX
Business Objective	XXXXX
Business Location (Country)	XXXXX
Business Sub-Location (City)	XXXXX
Project Manager - Can be more than one	XXXXX
Scheduled Quarter	Q1/Q2/Q3/Q4 - DD Menu

* Project Type: Same as Specialities as defined in Screen #9 – can choose more than one. Prompt every field if left blank to confirm blank

Administrator: Project Set-up

Total Project Hours = Sum of all Phases hours

Audit Prodigy Icon

Billable: Options - Yes and No. Default = No

Total Project Hours	XXXX	Billable ?
Phases		
Travel	XXX	No
Planning	XXX	✓
Field-work	XXX	✓
Documentation	XXX	✓
Draft Report Writing	XXX	No
Report Review	XXX	No
Final Report Issue	XXX	

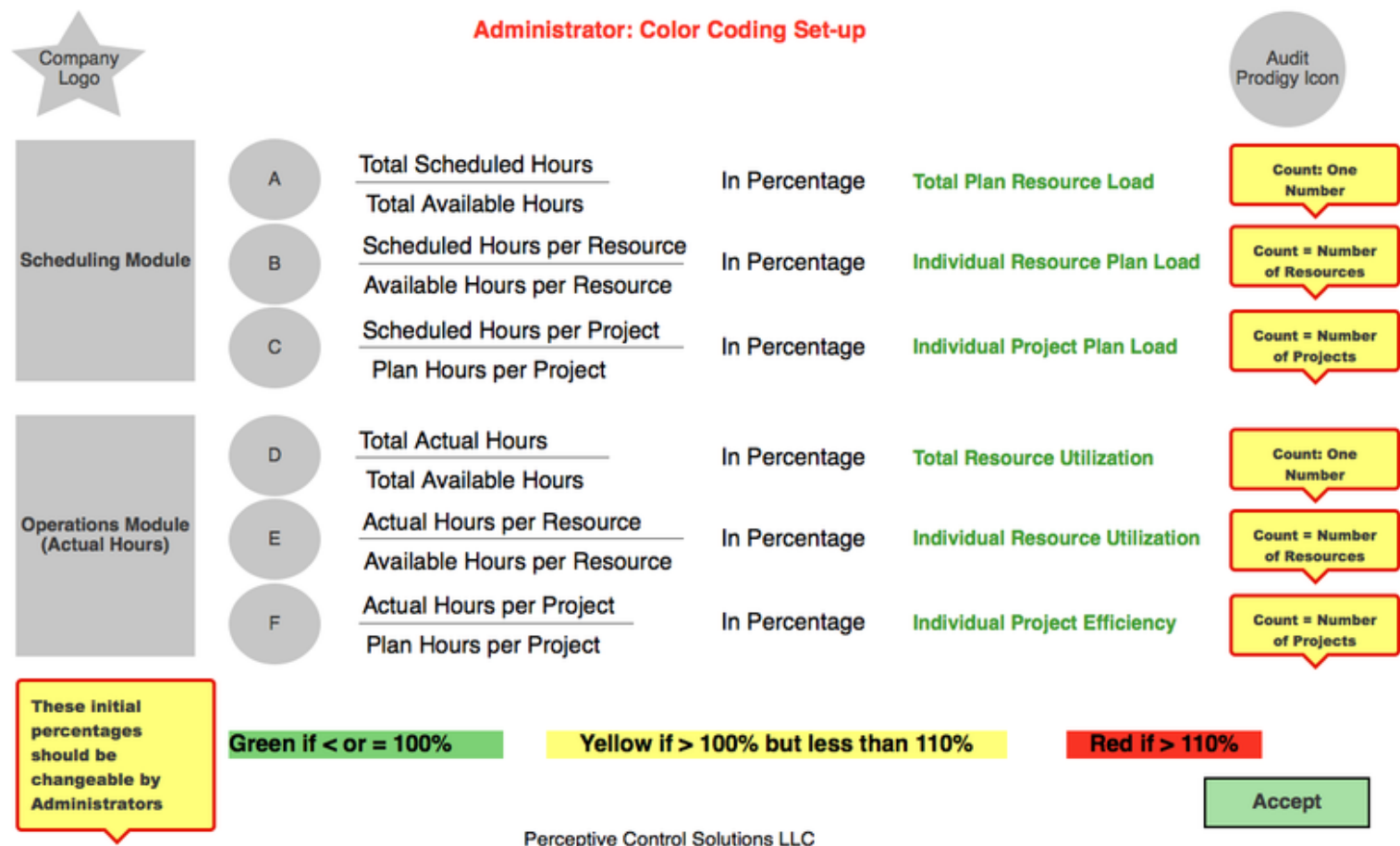
Above Phases should be editable and more phases added if necessary. Unused phases should disappear.

Every Phase should have hours - even "0"

Accept

Perceptive Control Solutions LLC

8. Administrator: Color Coding Set-up



9. All Users: Self-Setup

Company
Logo

All Users: Self-Setup

Audit
Prodigy Icon

Name: Filled-in (Screen#6)

Title: Filled-in (Screen #6)

Avatar: Pre-defined DD Menu

Import Image

Vacation:

Calendar

Unique
Holidays

Calendar

Unplanned
Days Off:

Calendar

Location: Filled-in (Screen #6)

Password (8 Characters)

Mobile Phone #

User Name

Specialties

IT

Compliance

Financial

SOX

AML

Operational

Print Report (All Data
fields except Password)

Initial set-up and subsequent changes made by User in this screen to Name, Title, Location, Specialties, Vacation, Unplanned Days and Holidays triggers emails to the Administrator. Once the Administrator executes the change/s in Resource Set-up Screen (#6), the Resource is notified by email and this screen is automatically updated.

Accept

Perceptive Control Solutions LLC

Powered by **proto.io**

10. All Users: Sign-in



All Users: Sign-in

Mobile Enabled

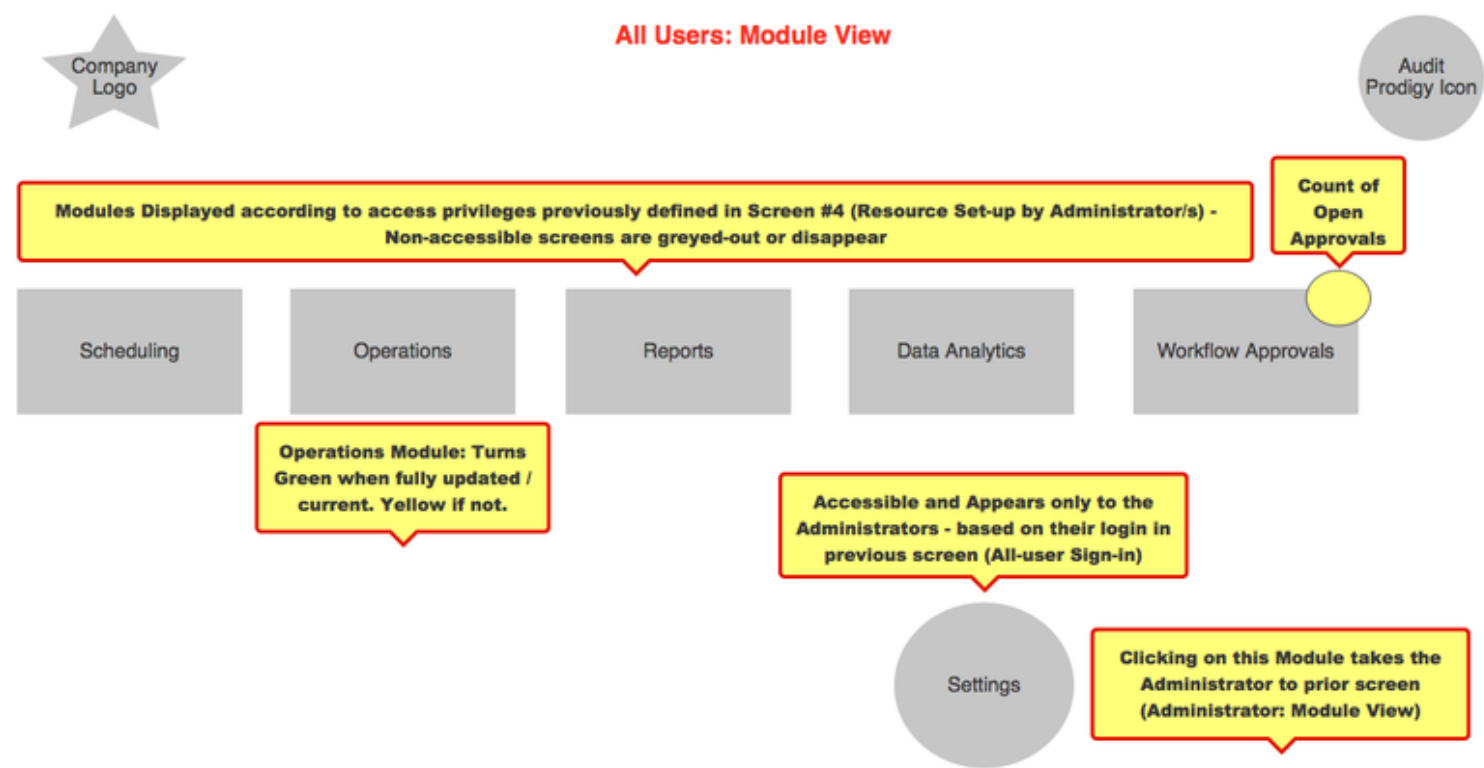


User Name:	XXXXXXXX
Password:	*****

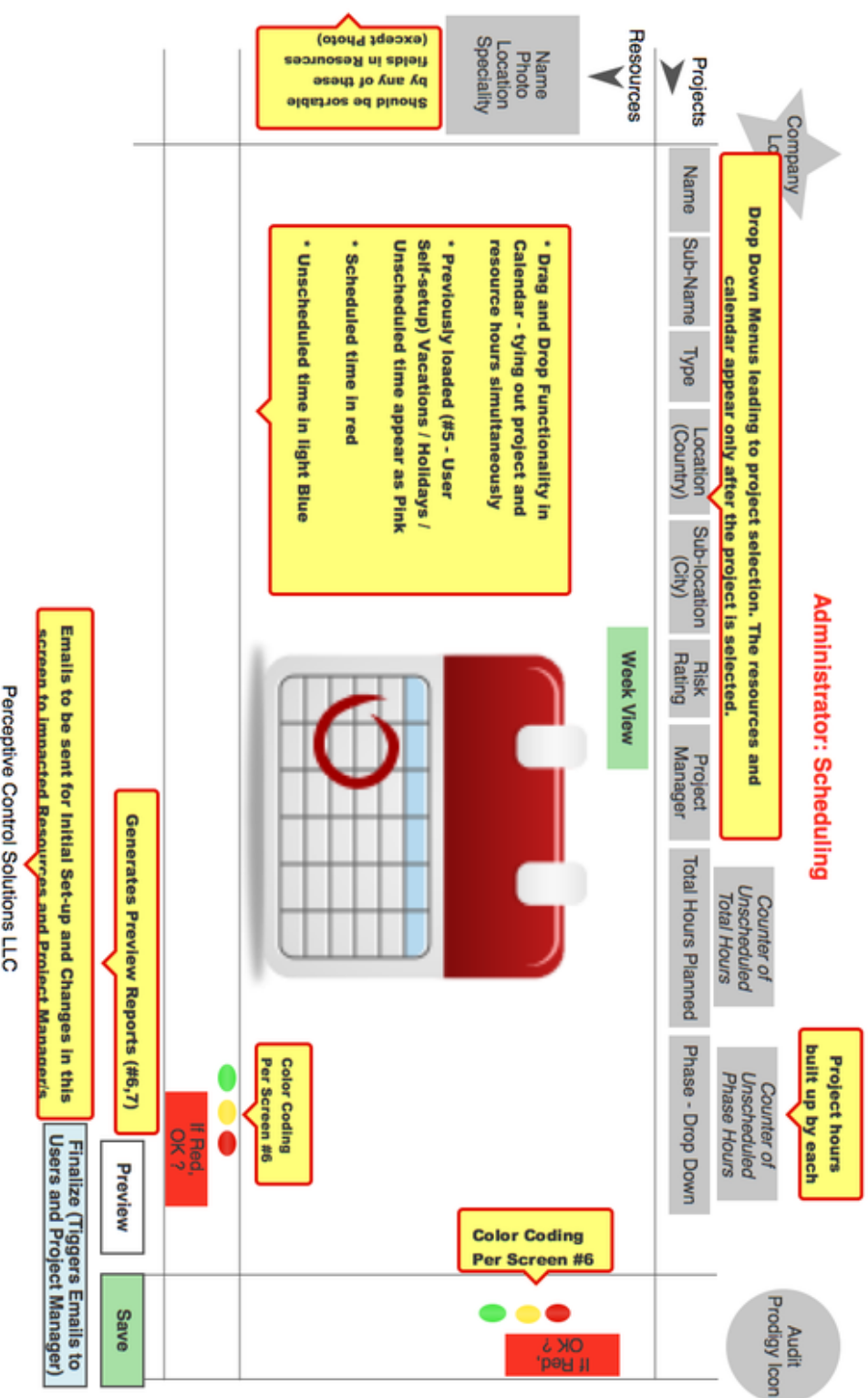
Enter

Need additional screen/s for invalid User Name or PW.
If forgotten, need workflow to Administrator for reset.

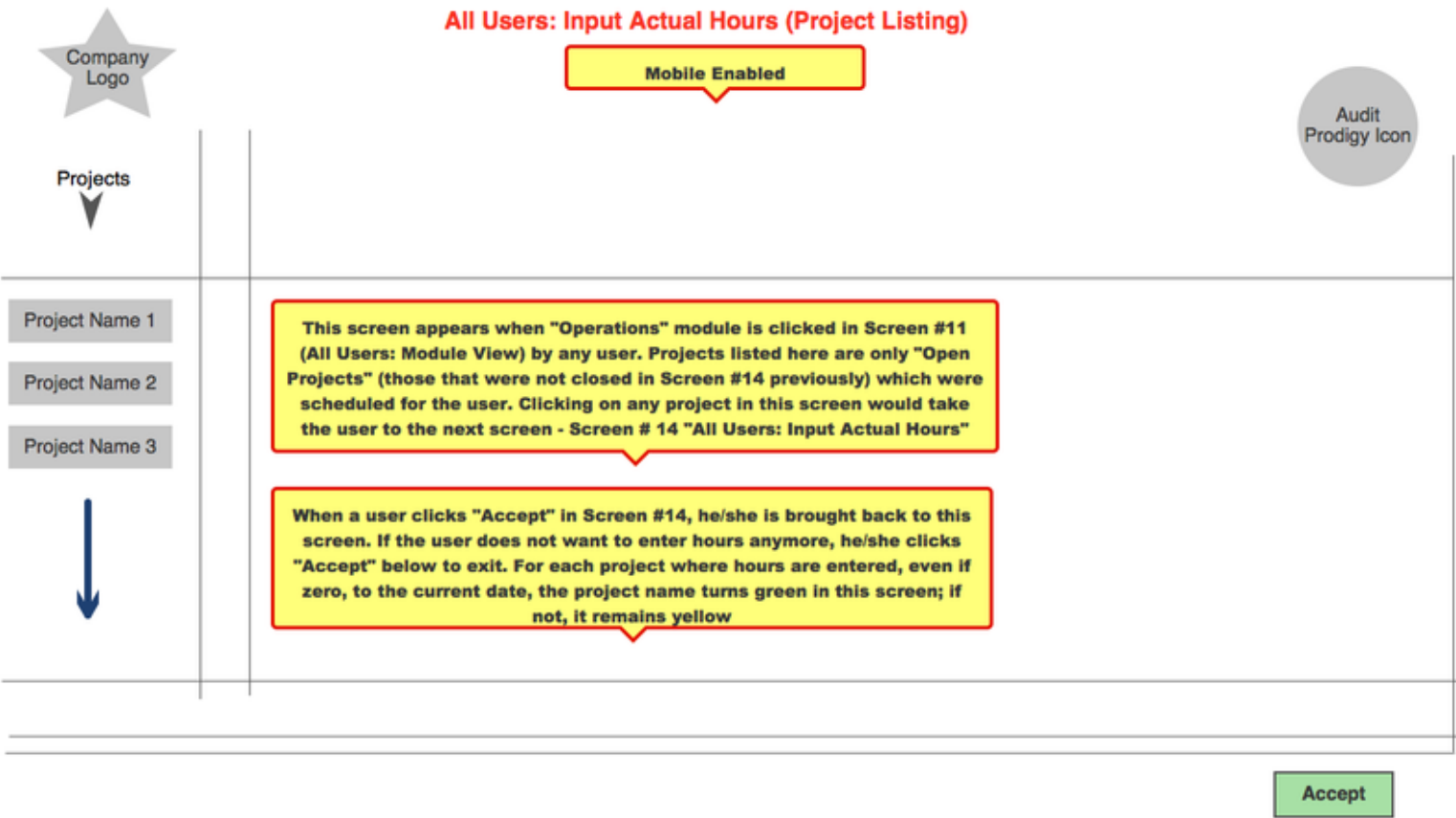
11. All Users: Module View



12. Administrator: Scheduling



13. All Users: Input Actual Hours (Project Listing)



14. All Users: Input Actual Hours

Company Logo

Projects

Project Name

Sub-Project Name

Travel

Planning

Field Work

Documentation

Draft Report

Report Review

Final Report

Project Total

All Projects Total

Check Mark If Phase Complete

Only allow two prior weeks + current week view. Only Administrator can input up to a month from current date

Only display Scheduled, Open Projects pertaining to the User - One Project at a time

Only Project Manager can Check this box and Only after boxes below are checked by assigned resources. Only Administrators can reopen a Closed Project.

Input Actual Hours in Calendar.
Automatically display Blank cell. One click lets any input of < 24 hours

Week View

Mobile Enabled

ETC: Only display on desktop. Auto calculated (Total Scheduled-Actual Hours) unless overridden. No auto calculation subsequently

Audit Prodigy Icon

Total Actual Hours	Estimated To Complete Hours (ETC)	Total Scheduled Hours	Free Text Box (120 characters)
XXX	XXX	XXX	Comment
XXX	XXX	XXX	Comment
XXX	XXX	XXX	Comment
XXX	XXX	XXX	Comment
XXX	XXX	XXX	Comment
XXX	XXX	XXX	Comment
XXX	XXX	XXX	Comment
XXX	XXX	XXX	Comment
XXX	XXX	XXX	Comment
XXX	XXX	XXX	Comment
XXX	XXX	XXX	Comment

Color Coding Per Screen #8 per All Project Total

If Red, OK ?

If Red, OK ?

If Red, OK ?

"Finalize" Triggers Workflow to Project Manager for Approval

Preview

Save

Finalize (Tiggers Emails to Users and Project Manager)

Perceptive Control Solutions LLC

Powered by **proto.io**

15. Report 1: Plan Report for Audit Committee (For Plan Year)

Company Logo

Access to this report is restricted per permissions granted

Report 1: Plan Report for Audit Committee (For Plan Year)

Audit Prodigy Icon

Sorted High to Low

Plan Year: XXXX

Risk Rating	Project Name	Q1	Q2	Q3	Q4	Plan Year
		Plan Hours	Plan Hours	Plan Hours	Plan Hours	Total Hours
High	Sub-Project Name					
Medium	Sub-Project Name					
Low	Sub-Project Name					
Total Plan Hours						
Total Available Hours						
Total Consultant Hours						

Free Form Text Box

Print / Export

16. Report 2: Plan Report for Audit Committee (Prior+Plan+Future Years)

Company Logo

Access to this report is restricted per permissions granted

Report 2: Plan Report for Audit Committee
(Prior Year + Plan Year + Future Years)

Audit Prodigy Icon

Plan Year: XXXX

Sorted High to Low

Risk Ranking	Project Name	Q1	Q2	Q3	Q4	Plan Year	Prior Year	Next Year 1	Next Year 2
		Plan Hours	Plan Hours	Plan Hours	Plan Hours	Total Hours	Total Hours	Total Hours	Total Hours
High	Sub-Project Name								
Medium	Sub-Project Name								
Low	Sub-Project Name								

Total Plan Hours

Total Available Hours


Total Consultant Hours

Free Form Text Box

Print / Export

Perceptive Control Solutions LLC

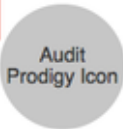
17. Report 3: Project Status







Report 3: Project Status


Access to this report is restricted per permissions granted

This report first appears as a screen allowing input Only into "Comments" section below. If no comments, "Comments" title is not displayed




Project Name	Risk Rating	Plan Hours	Q1	Q2	Q3	Q4	Comments
XXXX	High	9999					Free Text (120 Characters)
YYYY	High	8888					Free Text (120 Characters)
ZZZZ	Low	7777					Free Text (120 Characters)
AAAA	Medium	6666					Free Text (120 Characters)


Legend:




Completed Projects (From Screen #14 - Check Marked by Project Manager))



In-Progress (Actual Time recorded but not check-marked Complete in Screen #14)



Project scheduled in the quarter in Screen #7 - Project Set-up but no time recorded in Screen #14



Project planned in a quarter in Screen #7 but Scheduled in a different quarter in Screen #14 (Administrator: Scheduling). Display this bubble in the scheduled quarter

Print / Export

18. Report 4: Actual to Plan by Project and Resource

Company
Logo

Report 4: Actual to Plan by Project and Resource

Audit
Prodigy Icon

Access to this report is
restricted per
permissions granted

Data source: Screen #14:
All Users: Input Actual
Mouse

Sort Complete
Projects as First

	Plan	Actual	Variance	Variance %	Complete ?
Project Name					<input checked="" type="checkbox"/> <input type="checkbox"/> No
Resource 1 Name					
Resource 2 Name					
Resource 3 Name					
Resource 4 Name					
Project Total					

Print / Export

19. Report 5: Resource Utilization

Company
Logo

Report 5: Resource Utilization

Three levels of accessibility based on authorization level - Total Function / Project Manager / Team Member.

Selectable Period

For the Weeks From XXXX to YYYY

Audit
Prodigy Icon

	Week 1					Week 2	Period Totals		
	A. Available Hours	B. Scheduled Hours	C. Actual Hours	D. Variance Unscheduled Hours (A-B)	E. Variance Un-Worked Hours (B-C)		Totals for A, B, C, D, E	% Variance Unscheduled Hours Total D/Total A	% Variance Un-Worked Hours. Total E/Total B)
Resource 1 Name									
Resource 2 Name									
Resource 3 Name									
Resource 4 Name									
Resource Total									

Print / Export

20. Report 6: Scheduled Hours Preview (By Project)

Company
Logo

Report 8: Scheduled Hours Preview (By Project)

Preview Report #1 from
Screen #12
(Scheduling)

Audit
Prodigy Icon

Access to this report is
restricted per
permissions granted

FISCAL YEAR

Quarter 1/2/3/4

			Week 2/1/16-2/8/16	Week 2/9/16-2 /16/16	Week 2/17/16-2 /24/16	Week 2/25/16-3/4/16	
Project Name	Resource Title	Resource Name					
XXXX	Manager	Jack	20	22	20	19	
	Senior Staff	John	8	8	8	10	
	Junior Staff	Jill	14	15	16	10	
Project Name	Resource Title	Resource Name					
YYYY	Director	Cindy	↓	↓	↓	↓	
	Senior Staff	John					
	Junior Staff	Pam					

Print / Export

21. Report 7: Scheduled Hours Preview (By Resource)

Company
Logo

Report 9: Scheduled Hours Preview (By Resource)

Access to this report is restricted per permissions granted

FISCAL YEAR
Quarter 1/2/3/4

Preview Report #2 from Screen #12 (Scheduling)

Audit Prodigy Icon

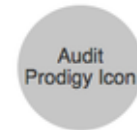
			Week 2/1/16-2/8/16	Week 2/9/16-2/16/16	Week 2/17/16-2/24/16	Week 2/25/16-3/4/16	
Resource Name	Resource Title	Project Name					
Jack	Manager	XXXX	20	18	20	15	
		YYYY	8	12	9	15	
		ZZZZ	14	15	14	20	
		Week Total					
Resource Name	Resource Title	Project Name					
Melissa	Director	XXXX	↓	↓	↓	↓	
		BBBBB					
		AAAAA					

Print / Export

X. General Notes



General Notes



1. Two different background colors/themes for Administrators and Resources
2. User Name and Password standards to be established and should be flexible if a customer has different requirements. Include "Forgot Password" function.
- 2A. Workflows, as defined in the screens needs to documented / built
3. Functional availability to be determined for Basic / Corporate / Enterprise level subscription plans
 - A. Screen #14 (Operations):
 - Basic - No Text Field, No R/Y/G Buttons, No ETC
 - Corporate: Yes, Text Field, No ETC, R/Y/G - Judgemental
 - Enterprise: Yes, Text Field, Yes ETC, R/Y/G - Calculated (Actual + ETC - Scheduled)
4. Billing Screens / Icon / Alerts / Past-due Notice Emails to be built. Methodology and amounts TBD.
5. Screen #12. (Scheduling): Allow sorting of Project fields for Corporate and Enterprise - No to Basic
6. Free Usage: a. What info do we collect ? b. Access - Direct / Email ?
7. Export Data - Need Raw (Excel/CSV), Crystal Reports, Quick Books
8. Do we want to create a Report Writer ? How difficult to build ?
9. Import Data - APIs ? Set-up by Apoorva - Revenue Opportunity.
10. Custom Reports - Revenue Opportunity
11. Single-Sign On -- with GMail on Mobile ?

Perceptive Control Solutions LLC