A
Traffic Manager's
Guide to
Clients & Profits

Why Bother?

Does this sound familiar?

The Monday morning production meeting starts late because the weekly traffic report isn't ready.

The traffic coordinator got stuck putting out fires on Friday, so couldn't bring the FileMaker or Excel jobs database up to date for Monday. The traffic report—rushed out to a waiting production department—is missing last week's new jobs, even though the AE's are supposed to add them. (How can they? No one has time to show them how.) It also shows open jobs that are really closed ("was I supposed to update that?"), as well as due dates that have long been rescheduled.

Still, the work gets done because it has to. How? The tried-and-true ways: running around, screaming at people, and post-it notes.

"We don't need a new system, do we?"

If a client asked you right now which jobs were over budget, how long would it take for you to have an answer? Or a printer calling about an overdue invoice, wondering when if it was paid? What if a copywriter wants to know how many hours are left on a job? If you can't find these answers within minutes—without leaving your desk—then congratulations, you've got a great system. If not, there's a much smarter way.

"Why Clients & Profits?"

You might think Clients & Profits is just an accounting system—something for the Suits. The fact is, Clients & Profits handled production for over three years before it could ever print a financial statement. From its start in 1986, Clients & Profits focused on the creative side of the ad business: Tracking job tickets, estimates, traffic, and costs. It was never designed as a back-office accounting system. It was made with the idea that anyone who needed to know something about a job can see it from their own computer, without chasing down someone in Accounting—or rummaging through chaotic job jackets.

"Our work changes too fast. The computer won't keep up."

The production manager in Clients & Profits isn't really new. The fundamental feature of Clients & Profits—the electronic job jacket—has tracked tens of thousands of jobs over the last 10 years. It's been proven effective, easy to use, and in over 1,000 shops—from small design firms to fast-growing ad agencies. The production manager has been constantly refined and improved based on feedback from users, making the software faster and more useful. Yet, it is still exceptionally easy to use. The point is, agencies depend on Clients & Profits to track jobs every day. And it works.

"But it doesn't do everything I need."

We're not saying that Clients & Profits will be a 100% perfect fit in your shop. But there's a compelling reason to give it a try—it'll show you what's going on, any time. There's lots of ways to use Clients & Profits to manage production and traffic. You don't have to do everything at first, either. But take a look at what the software gives you: Detailed job schedules, daily job hot sheets, client job status reports, weekly traffic reports, and more. Think about what you really need to know each day to get the work done. Then find the traffic reports that best work for you. Once you know what you're looking for, you'll discover which parts of Clients & Profits to use now.

This guide will help.

This guide will give you ideas about how to use Clients & Profits for tracking jobs, including the most useful production reports: The daily job status report, the weekly traffic report, and the job schedule. Clients & Profits can make your life easier, giving you more control over the work you do. It's worked for lots of people at lots of agencies. That's a compelling reason to make it work for you.

So who uses it?

PRODUCTION MANAGER:

"I want to make sure the job is done correctly, on time, and within budget."

TRAFFIC COORDINATOR:

"I want to have an easy way to schedule and reschedule jobs so that the shop runs smoothly— and nobody misses a deadline."
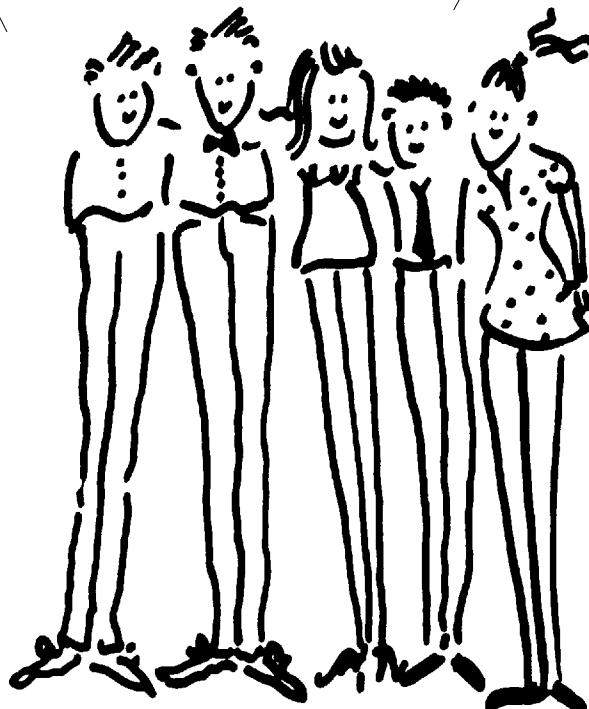
ART DIRECTOR:

"I need to be certain that the tasks my department is responsible for are taken care of. I need to see the work load for my team every day."

ACCOUNT MANAGER:

"I want to know when a job's tasks are completed—and if everything is under control. Also, I need to know how much has been spent, and if we're over budget."

CREATIVES:

"I want to know one thing: what do I need to do today?"

So how does it all work?

The Job Ticket is the foundation for everything that happens in Clients & Profits. The job ticket is an electronic job jacket. It remembers everything about a job: estimates, schedules, specifications, production status, and traffic milestones.

Everything you do for a client will be opened as a job ticket. Job tickets should be opened before the work has begun so that estimates,

1. OPEN THE JOB TICKET

costs, and time can be tracked accurately. Job tickets are used throughout the system to manage production, traffic, estimates, costs, and billings.

Estimates, costs, hours, and billing amounts are tracked on job tasks. Job tasks are the actual things you're doing to get the job done: artwork, copywriting, typesetting, printing, etc. A job can have one or more job tasks (there's no limit) of your choosing. A Task Table lets you set up a list of standard tasks and their production settings, such as group, lead time, and sort order.

Clients & Profits substantially automates job tracking. Jobs are numbered automatically as they are opened, eliminating the job book

you're probably using now.   You can make up job spec sheets that contain basic information about a type of job, such as the tasks that belong to a job type. These spec sheets can be applied to new jobs, instead of keying in information manually. Production status, due dates, and traffic details can be updated throughout Clients & Profits, making it easy to keep your work current—from any PC or Mac in the shop. Any job can be cloned, making an exact duplicate for a new job.

Clients & Profits can handle hundreds of jobs at the same time. Thousands of jobs can be part of your database at any time, making it

2. DO THE ESTIMATE

quick and easy to review your job history.   Clients & Profits even keeps a daily diary of changes to job tickets. Tasks do the real work of job tracking, since they track every dollar of estimates, cost, time, and billing from start to finish. On the production side, job tasks represent the individual steps you'll perform to complete the job. For scheduling, you'll give each task a due date, start date, and the name (or initials) of the resource who'll complete the task. Tasks are separate, but related, to jobs. The job itself doesn't actually track estimates, costs,

hours, and billings. Instead, it leaves it to the task to manage these things. That's why a job without a task can't track anything. You'll never add a job cost or billing without entering both the job number and the task code. A job must have at least one task, but can have hundreds—it's your choice. Tasks are usually added at the time the job
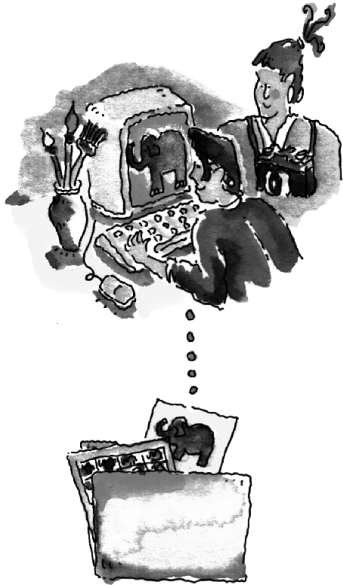
3. START THE WORK

is opened. Many tasks can be added to jobs quickly if you apply a spec sheet to a new job ticket. You can set up the spec sheet's template to include all of the tasks for a certain type of job, such as brochure, to save time.

The tasks you'll add to jobs are part of a Task Table. The Task Table contains a master list of every task you've ever used (and probably ever will use). Each task includes basic information like a name, standard markup, group and sort, and a default general ledger account for cost and income. When a task is added to a job, its basic (or "default") information is copied from the Task Table to the job ticket. This saves time, since you don't have to re-key the details for a task such as ART on each job ticket. Remember that the same task can't be used twice on the same job.

Production scheduling and job trafficking are seamlessly integrated with estimating and job tracking to eliminate time consuming double-

entry of work. This means you can use Clients & Profits for printing job logs, job status reports, traffic checklists, and daily work to do worksheets. It may be the only production tracking system you'll need. Clients & Profits provides several different ways to manage production. Production management revolves around four elements: job tickets, production and billing status codes, traffic milestones, and task due dates.

4. TRACK EVERYTHING

Jobs have a production and billing status that categorizes the work based on its progress, such as *Awaiting Approval*, *Estimating Pending*, *In Production*, and *Closed - Ready for Billing*. A production manager can track each job by its most important events—called milestones—such as meetings, approvals, presentations, etc. to keep the big picture in sight. Or, each production task on a job can be scheduled independently with a start date, due date, lead time, and a resource (the staffer or vendor who is responsible for it) to make daily traffic checklists.

You may decide to use one or all of the features based on how much work you do, the number of people involved in tracking production, and how much detail about your job you desire. Production reports can be printed daily, weekly, or at any time showing jobs, status codes, milestones, and task due dates to keep you on time of the shop's work.

The Big Picture

Two things make traffic work in Clients & Profits: Status codes and job tasks.

Status codes are categories that describe what's happening to a job right now. They're completely customizable, so you create a set of job statuses that work especially for your shop. You can have just a few essential statuses (e.g., new job, in production, ready to bill, closed) or dozens of status codes that track production in excruciating detail.

The Status Table, which contains your production status codes, is flexible. You can add, change, and delete status codes any time for any reason.

A job always has a status code. When a job is opened it is automatically given a user-defined "new" status. When a job is closed, its status changes automatically to "closed." If costs are added to a closed job, it is automatically reopened with a user-defined "reopened" status. In the meantime, the job's status changes as the work progresses naturally.
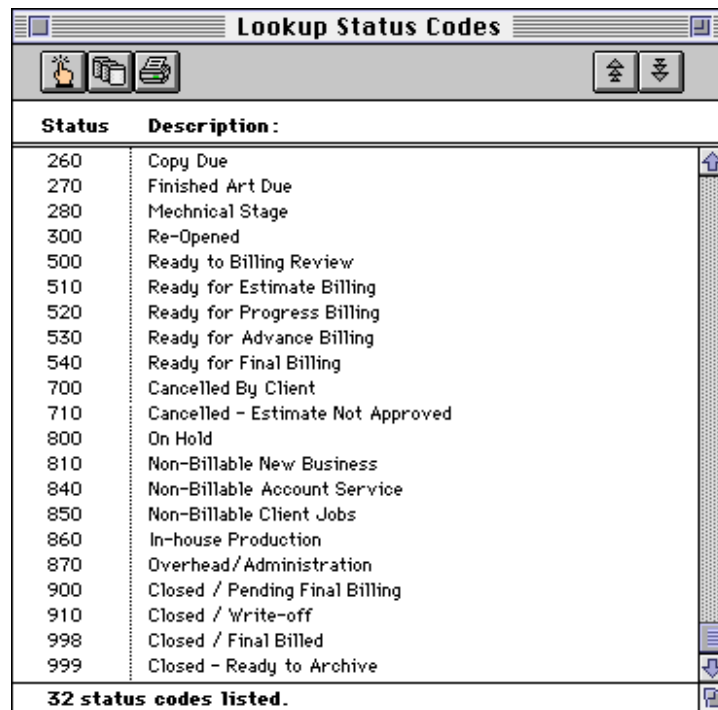
Status codes are indispensable because they help focus people on only the job's they wish to see. That's because every production and traffic report selects jobs by status code. So instead of seeing every open job on a Job Log, you use a status code to show only *reopened* jobs (i.e., status 300). Printing production reports by status code gives you a powerful filter to screen out unwanted jobs—making it much easier to see what's really important to you.

Status codes are smarter than they seem. Each status code has a programmable alert that warns users when they're using a job that's not approved, on hold, already billed, or closed. The warning, which says what you want it to say, appears automatically whenever someone tries to work on a job that has a status alert. It's an effective way to keep closed jobs closed, or to prevent work from beginning on jobs that aren't ok'd by the client. That's why it's very important to update a job's production status as soon as you know it has changed.

The Status Codes Lookup window

Status	Description:
260	Copy Due
270	Finished Art Due
280	Mechnical Stage
300	Re-Opened
500	Ready to Billing Review
510	Ready for Estimate Billing
520	Ready for Progress Billing
530	Ready for Advance Billing
540	Ready for Final Billing
700	Cancelled By Client
710	Cancelled – Estimate Not Approved
800	On Hold
810	Non-Billable New Business
840	Non-Billable Account Service
850	Non-Billable Client Jobs
860	In-house Production
870	Overhead/Administration
900	Closed / Pending Final Billing
910	Closed / Write-off
998	Closed / Final Billed
999	Closed – Ready to Archive

32 status codes listed.

Why bother with status codes at all? Without them, you couldn't look at a job and instantly and intuitively know that it is in production, not approved, on hold, or closed and ready for billing. Since there's only one Status Table for both production and billing, it's something that everyone agrees to—and will intuitively understand. When they see a job with status 500, for example, they'll instinctively know that it's *ready for billing review*.

Since everyone will start depending on Clients & Profits for up-to-date traffic information, it'll make people crazy if their reports show out-of-date job information. Fortunately, Clients & Profits makes it quick and easy to update a job's status. It's something anyone can do from their own computer, even while they're on the phone. The best way to get into the habit of updating job statuses is to leave Clients & Profits running all day.

Tasks do the real work of job tracking, since they track every dollar of estimates, cost, time, and billing from start to finish. They really have two distinct roles: one for accounting and another for production. On the finance side, job tasks are used throughout the system to track what's been estimated, spent, billed, and earned. Tasks are the line items clients see on estimates. They are the detail that appear on clients invoices. Profitability reports compare each task's costs and billings to analyze a job's profit.

On the production side, job tasks represent the individual steps you'll perform to complete the job. For scheduling, you'll give each task a due date, start date, and the name (or initials) of the resource who'll complete the task.

A job must have at least one task, but can have hundreds—it's your choice. Anyone can add tasks to a job ticket (that is, if they have the access privileges). A task can be added to a job anytime and from many places in Clients & Profits. Tasks are usually added at the time the job is opened. Many tasks can be added to jobs quickly if you apply a spec sheet to a new job ticket. You can set up the spec sheet's template to include all of the tasks for a certain type of job, such as brochure, to save time.

Each task on the Task Table includes basic information about the task like its description, standard markup rate, group and sort functions for organizing the tasks, and default general ledger accounts for cost and income. When a task is added to a job, its details are copied from Task Table to the job ticket. These details can be customized to the job's specific needs. The Task Table saves time, since you don't have to re-key all the details every time a task is added to a job.

Once added, job tasks can be instantly used for estimating, scheduling, costing, timekeeping, and billing. Tasks can also be added later while you're adding purchase orders or time sheets. To see a list of tasks anytime, use the Task Table lookup list.

The Task Table

The task code uniquely identifies the task on costs and billings, like ART or COPY. The task name briefly describes the task's purpose or function, such as *Artwork* or *Copywriting*, and is copied from the Task Table. Clients see task names, but not task codes, on estimates and invoices. The task's description appears on printed estimates, invoices, and on many job reports.

For better job tracking, tasks have an "always unbillable" option. This option prevents costs from being charged to unbillable job tasks. (If someone tries to add billable costs to an "always unbillable" task, they'll be stopped.)

Other options help personalize the Task Table for your shop. For example, each task can have a custom icon in the Task Table to visually illustrate its function. Task icons appear on work-to-do reports. Job tasks can be arranged into user-defined groups by entering an optional group number. And, each task can be set as an estimating/billing task, scheduling task, both, or neither. Scheduling tasks appear only on the job schedule, and can't be estimated or billed. Finished tasks don't appear on production reports. Job tasks can be easily marked as "finished" from the Time Card's pop-up Schedule window.

The Daily Status Report

The only way to keep up with the progress of a job is to track its production status from day to day. Clients & Profits makes it easy by giving production staffers many quick and easy ways to update jobs.

The key here is the Daily Job Status Report. This report lists open jobs by client, emphasizing due dates, the current production status, and status/traffic notes. Since the Daily Job Status Report doesn't show costs or billings, it can be freely distributed throughout the shop.

To keep the status report fresh, you'll need a daily ritual of updating status codes. Changing one job's status is easy: simply find the job ticket, click on the Traffic button, and make the change. But there's a better way to update dozens (or even hundreds) of open jobs at once: The Job Status window.

Can't remember a status code? Don't worry—the Status lookup list is available anywhere you're working in Clients & Profits. Simply choose Status Codes from the Lookup menu and you'll see a list of production status codes. Double-clicking on a status code copies it to the Job Status window, replacing a job's current status. You can even add new status codes on the fly.

The Daily Job Status Report is just one of dozens of production and traffic reports printed from Clients & Profits. Since all production reports show essentially the same information, there are all equally accurate and timely. Some reports (just as job logs) show more information than the Daily Status report, while others (like job summaries) compare estimates, costs, and billings to date.

	Job Status		
AE/Team:	ALL		

•Number:	Name/Title:		Production Status:
BAC-144	Awards Dinner Program – CEO's Society	10	New Job
BAC-146	The Chief – Awards Issue	10	New Job
BAC-147	Relative Portfolio - 1995	10	New Job
BAC-148	CEO's Society Circle Certificate Revisions	10	New Job
BAC-157	Ransom Awards & Rec. Insert/Flyer	10	New Job
BAC-158	Imprint Page for Award Winners Brochure	14	In Production
BAC-163	Re-run "Best Feet Forward" logo	14	In Production
BAC-164	Silkscreen velcro header	14	In Production
BAC-166	CEO"s Circle Conf. Invitation – Design Only	14	In Production
BAC-169	Invitation Package For CEO Circle Conference	14	In Production
BAC-170	Sanwa Banker Referral Network – Preliminary Design	17	Pending Client Approval
BAC-173	Directory Network – flyer design	17	Pending Client Approval
BAC-174	The Chief – Spring 1994	17	Pending Client Approval
BAC-175	Envelope for CEO Award – Hammerhill	17	Pending Client Approval
BAC-177	Award Dinner brochure cover art	17	Pending Client Approval
731 Job Tickets listed			Cancel Save

The Update Job Status window lists many jobs for quick and easy updating.

The Job Status window lists open jobs by client and a range of production status codes. These options let you select only jobs *in production*, for example, instead of seeing all jobs (which can be overwhelming). The window works like a spreadsheet: press Tab to move from job to job, changing the status as you go. Clicking save updates the job ticket window and production reports instantly. The Daily Job Status Report is printed from the Job Status window—just click on the Print button. The report shows the changes you've just made.

The Snapshot production reports are your the source of up-to-date information on open jobs, traffic, and task schedules. A complete picture of your work in production is available here: job status lists, traffic reports showing milestones, work-to-do schedules for tasks and resources, and a customizable schedule chart that shows unfinished tasks by department or team.

Daily Job Status Report
Jobs with production status 1 to 899.

Number:	Name/Title:	AE:	Due Date:	Status:
	American Bios/Integrated Systems (ABI)			
ABI-103	Power Pipes: Advertising & Color O	TAB		**In Production (200)**

| ABI-104 | Spring Flyers: Edge Runners Spring | TAB | 02/12/96 | **Pending Client Approval (199)   Need to re-do draft sketch** |
| ABI-105 | Edge Runners Spring Sell Sheet | TAB | 02/12/96 | **Pending Client Approval (199)   Layout App --rejected** |

1/24/96: Billing status changed to "Ready for Progress". / 1/14/96: Production status changed to "Pending Client Approval". /

ABI-106	Spring Flyer: Chalk Spring Sell Sh	TAB		**In Production (200)**
ABI-107	Edge Runners: Green Tape Dagger	TAB	02/12/96	**Pending Client Approval (199) In Production**
ABI-109	Power Pipes: Power Advertising & C	TAB		**In Production (200)**

ABI-110	Power Pipes: Fall Promo	TAB		**In Production (200)**
ABI-111	Power Pipes: Tri-folder	TAB		**In Production (200)**
ABI-112	Color Comp For Reg Card	TAB		**In Production (200)**
ABI-113	Sidewalk Chalk: Color Comp. for Sl	TAB		**In Production (200)**
ABI-114	Power Pipes: Color Comp For Power	TAB		**In Production (200)**
ABI-115	Color Change - Comp	TAB		**In Production (200)**
ABI-116	Edge Runners: Auto Runners Cards	TAB	02/12/96	**Photo/Art Phase (210) In Production Art (Fast)**

01/18/96: Billing status changed to "Ready for Progress". / 01/11/96: Production status changed to "Art Phase". / 01/09/95: Production status changed to "Art Phase". / 01/08/96: Production status changed to "Ready for Progress". / 01/06/95: Production status changed to "Pending Client Approval". /

| ABI-117 | Edge Runners: Feature Insert (6) | TAB | 03/01/96 | **Re-Opened (300)** |

12/09/95: Production status changed to "Approved, In Production". /

| ABI-118 | Power Pipes: Portable Demo Kit | TAB | | **In Production (200)   Need to re-do draft sketch** |

11/04/95: Production status changed to "Pending Client Approval". /

| ABI-119 | Power Pipes: 9" Display | TAB | | **In Production (200)** |
| ABI-120 | Edge Runners: Deluxe Line Posters | FRD | 01/14/96 | **Pending Client Approval (199)   On Hold in Creative** |

2/04/96: Billing status changed to "Re-opened For Revisions". / 1/14/96: Production status changed to "Pending Client Approval". / 01/18/96: Production status changed to "Awaiting Ok". / 01/31/96: Production status changed to "Write-off". / 01/05/96: Production status changed to "Re-opened For Revisions". /

| ABI-121 | Power Pipes: Southwest Dealer kit | MM | | **In Production (200)** |
| ABI-122 | Power Pipes: Mountain States Deale | TAB | | **In Production (200)** |

ABI-123	Power Pipes: Western Dealer kit	TAB		**In Production (200)**
ABI-124	Power Pipes: Canadian Dealer kit	TAB		**In Production (200)**
ABI-125	Power Pipes: Eastern Dealer kit	TAB		**In Production (200)**
ABI-126	Power Pipes: Midwest Dealer kit	TAB		**In Production (200)**

The Weekly Traffic Report

There are three parts to job traffic in Clients & Profits: status codes, traffic notes, and milestones. Status codes classify jobs, such as *new*, *in production*, *awaiting approval*, and *ready to bill*. Traffic notes describe anything about a job's progress, such as the results of client meetings. But milestones give you real information.

Milestones represent key events or phases, such as the dates of creative meetings, client approvals, press checks, etc. Each job type can contain up to twelve different milestones (but not all milestones need to be used). They vary by job type, so each type of job (brochure, ads, radio spots, etc.) has its own customized set of milestones. Traffic milestones are optional, but can be very useful when used together with status codes to better track the shop's production.

Traffic milestones are part of the spec sheet. If a job doesn't have a spec sheet, it doesn't track traffic milestones. Also, the spec sheet must have milestone headings; if not, this job can't track milestones. Jobs with the same job type share the same milestone headings. You can enter the milestone dates, time, and names (whatever will fit in each field), but you can't change the milestone headings. The headings themselves can only be changed in the spec sheet; changing the headings, however, affect all jobs using that spec sheet.
traffic milestones.

Supra Kit & Associates
Traffic Report
Job Tickets with production status 1 - 999

Interactive (CD-ROMs/kiosks)	AE/Team:	Est	Conc	Comps	CRE rv	Demo
ABI-118 *Open Doc: Portable Demo Kit* *American Bios/Integrated Systems* *11/04/95: Production status changed to "Pending Client Approval". /*	TAB	11/6	11/7	11/9	11/10	ok CR
ABI-2292 *Power Pipes Launcher* *American Bios/Integrated Systems* *11/19/96: Production status changed to "In Production". /*	TAB	8-30 a	9-14	9-18	9-23	ok/CD
ABI-2301 *FAQs* *American Bios/Integrated Systems* *08/12/95: Production status changed to "Copy Development".*	TAB	8-10	8-10	8-11	8-12	ok CD
ADL-102 *Revisions to "Barrow Approach"* *Applied Dynamics* *11/22/95: Production status changed to "Closed, Ready For Billing".*	FRD	10-9	10-10	10-19	10-20	
ADL-2316 *"Narrow Approach" Web Page* *Applied Dynamics* *08/31/96: Production status changed to "Re-Opened". /*	FRD	n/a	Steve	Amy	Mary	--
ATT-111 *AudieTest CD-ROM product survey* *Audience Technologies Inc.* *12/19/95: Production status changed to "Pending Client Approval".*	TAB	--	--	Steve	ADA	ok CD
ATT-154 *"Renew" Demo CD-ROM* *Audience Technologies Inc.* *11/10/95: Production status changed to "Concept/ Development". /*	TAB	10-10	10-15	10-28	10-28	ok CD

Update Traffic

Job: FOO-356   "See us free" Direct Mail Promotio

Production Status: 17   Pending Client Approval
Billing Status: 50   Ready for billing
Status Note: ready for client review
Next Steps/Comments: Due date: 02/20/96

2/01: Notes from initial concept meeting – client like comps so far, especially the enhancements to the logo. AW want to work on the illustration another 2 hours to refine the background.

2/18: Final revisions approved by AE, waiting for client approval.

Milestones: Job Type: Production
CL/App _____   Art   1/15   CL/APP _____
AE/App 2/18   Layout 1/08
Proof   2/10   Lino   1/04
Edit   2/01   Photo 1/16

                    [Cancel] [Save]

The job's status note appears on the traffic reports, as well as many job lists. Use it to better describe a job's current status, especially what's happening to it next. The Update Traffic window is opened from the Time Card by entering a job, pressing tab, then clicking on the Traffic button.

Prgm	F/Art	QA	Beta	AD ok	GM	Install	Status Note:
ok AD	11/15	11/18	ASAP				Need to re-do draft sketch
ok/AD	10/1	ASAP	tbd	11/30?			Design rejected -- redo
ok ABD	8-18	8-22	8/24	8/30			See AE for new PMS colors
							Double-check orig art for fit
--	8-17	8-25	Thurs	8-27			Code still needs work
--	--	11-30	12-2				QA passed; ready for beta
ok AD	11-6	11-14	Tues	11-28			Waiting for scans from client

Job tasks and traffic milestones aren't the same thing. Both help you track production, but each has different abilities. Job tasks are better used when you want to track who's doing what throughout the week.

Traffic milestones let you see the big picture of your shop's production. Milestones help a traffic manager track jobs in production, while task schedules show each resource what work to do. You can use one or the other, or both, to manage jobs. Traffic milestones represent a job's most important events, such as approvals and meetings. Milestones tend to show the job's key points, not each individually step.

Traffic reports show open jobs and their milestones, selected by production status. Different options lets you print different versions of the basic traffic Snapshot report (shown at left). These options, such as listing jobs by client, can be printed as needed. But the basic traffic report is the best to see a concise snapshot of your jobs in production. have several options to If you use FileMaker, this report is probably very similar to the job report you're now using.
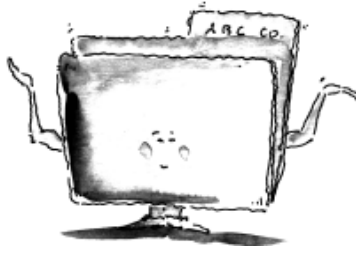
The Job Schedule

The ability to easily coordinate hundreds of jobs, tasks, and resources through a agency-wide job schedule is one of Clients & Profits's best features.   Job scheduling lets you plan, organize, and track your shop's unfinished work for any day of the week, for any week, and for any time period.

Schedules are based on a job's tasks. Every job task on a job ticket can have multiple due dates, start dates, and people, places, or things that are responsible for doing the work—plus complete specifications that describe the work to do.

The Job Schedule window shows both unfinished and finished job tasks. Tasks appear in the order by which they're completed (based on the Schedule Sort field in the Task Table). This feature lets you arrange tasks based on how you work (such as step 1, step 2, etc.). Only schedule tasks appear on the Job Schedule window; any estimate-only tasks are excluded.
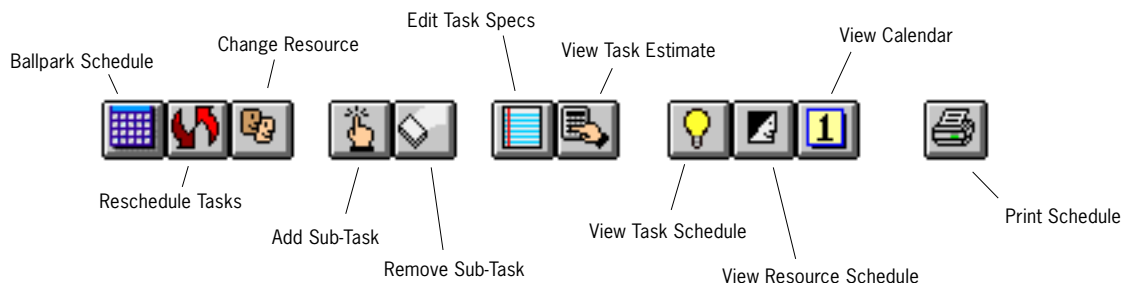
Each job task includes production details like due date, due time (morning or afternoon), the resource assigned to do the work, its estimated hours, a lead time in days, a start date, and a finished date. The job task's schedule information should be updated throughout the day as it changes. Schedules can be updated from the pop-up Time Card, making it easy for everyone to update the tasks that they work on.

Anyone who needs to know can see their work to do today, this week, next week—or for any period of time.

A job ticket can have any combination of job tasks. The tasks you choose are completely customizable to accommodate any kind of job.

Job Scheduling - Toolbar buttons

Job Schedule

Job: ABI-116   "Interface" Product Line Catalog
Client: ABI   American Bios, Inc.
Prod Status: Art Phase (5)

Step:	Start:	Due:			Task:		Resource:	Finished:
1	01/05/96	01/12/96	PM	Friday	DES	Design/Concept	--	05/01/96
		Rough thumbnail sketches						
2	01/17/96	01/22/96	PM	Monday	CCM	Comprehensive Layout	ad	05/01/96
		Tight B&W Comps						
3	02/14/96	02/14/96	AM	Wednesday	CMG	Computer-Aided Graphics	JAV	05/02/96
		This is for the type distortions.						
4	01/24/96	01/31/96	AM	Wednesday	PDD	Photography Direction	EZ	05/01/96
5	01/31/96	02/02/96	AM	Friday	CCD	Concept/Creative Directio	BF	05/02/96
6	01/12/96	01/24/96	AM	Wednesday	DIL	Illustration	EZ	05/01/96
		Small illustrations ie: Lightening Bolts						
8	02/12/96	02/13/96	AM	Tuesday	CTP	Typesetting	Central	--
9	02/02/96	02/08/96	AM	Thursday	CPR	Computer-Aided Production	JAV	--
10	01/26/96	02/01/96	AM	Thursday	PRF	Proofreading	SE	--
10	02/09/96	02/12/96	AM	Monday	COL	Color Marking	LH	--

Specifications:
Design and mechanical art for full-line product catalog.
Rough B&W thumbnails for initial client approval.
Tight B&W Comp for final client approval.
(no color comps.)
Client to supply all photography and copy.
NO Illustrations are included.
Client to supply all sizes of the card and blister.
Final art to client is conventional mechanical art.

Unscheduled Tasks appear first, and don't have dates.

Tell me what's going on?

Work-to-do reports can be printed every morning from the job's you've scheduled. A separate page is printed for each staff member, showing him or her the job tasks they've been scheduled for. They'll see the task's due date, time, client name, as well as the hours they have left to finish the work. Work-to-do reports are always up-to-the-minute accurate, since they show tasks and dates that were updated up the moment the report was printed.

The jobs you schedule create daily work-to-do reports. These useful reports, together with the Work to Do window, are a great way to track your work. The window provides a sophisticated dialog box to find unfinished job tasks by due date, start date, resource, client, AE/team—for any period of time.

Anyone can easily check out their work schedule by finding their unfinished tasks from the Work to Do window. Unfinished tasks can be found by any range of start dates or due dates. This lets you show staffers what's they are doing next week. In addition, tasks can be found by client or account team.

For each unfinished job task you'll see its due date, job number, job name/title, start date, and its estimated hours. Tasks are sorted by due date, but can be resorted by clicking on the window's column headings.

Double-clicking on a job task lets you see and change its schedule in detail, including specifications and task notes (which describe the task's current status). Changes to the job schedules are saved instantly—and are published automatically for everyone to see.

Supra Kit & Associates
Work To Do

Who:	Due Date:		Job/Task:	
CL	02/26/96	AM	ABI-140	Deluxe Crosstab package revisions
			CGL	Computer-Generated Linos/Film
			ABI	American Bios/Integrated Systems
CL	02/26/96	AM	ABI-146	Edge Runner: Telescoping Charts
			CREV	Comp. - Revisions
			ABI	American Bios/Integrated Systems
CL	02/26/96	PM	ITP-147	Roll-out Ad - 2-Page Spread
			0019	Illustration - hand lettering
			ITP	Cheyenne Productions
CL	02/27/96	AM	IVM-176	Video/Brochure destination package
			CRE	Creative
			IVM	Linux Plus
CL	02/27/96	PM	ITP-147	Roll-out Ad - 2-Page Spread
			0017	Comp. - Revisions
			ITP	Cheyenne Productions
CL	02/28/96	AM	ABI-151	Edge Runners insert packages
			0031	Computer Graphics
			ABI	American Bios/Integrated Systems
CL	02/28/96	AM	ABI-151	Edge Runners insert packages
			0032	Computer Type
			ABI	American Bios/Integrated Systems
CL	02/28/96	AM	ITP-147	Roll-out Ad - 2-Page Spread
			0023	Photoshoot - Digital
			ITP	Cheyenne Productions
CL	02/29/96	AM	REE-111	Full-Page Announcement Ad Template
			DES	Design/Concept
			REE	Reynolds Access
CL	03/01/96	PM	ABI-151	Edge Runners insert packages
			0034	Conventional Mechanical
			ABI	American Bios/Integrated Systems
CL	03/01/96	PM	ITP-147	Roll-out Ad - 2-Page Spread
			0024	Photo/Disc. to SKA
			ITP	Cheyenne Productions

HOURS LEFT is estimated hours less posted actual hours
*Hours in ( ) indicates you're over the estimate*

Resource:	Due date:		Job:	Task:	Description:	Est Hrs:	Start date:
AZ	09/13/95	--	CBT-132 CGL		2nd Unit Development Brochure (re-run w/revs.) *Color Marking*	2.00	09/08/95
AD	09/15/95	PM	4123 ILL		Marketing brochure *Illustration*	6.00	09/13/95
HT	09/15/95	AM	VDW-220 ART		VDW ad concept *Art Design*	5.00	09/12/95
AF	09/18/95	--	CBT-131 CPR		New Unit Dev. Map Brochure *Computer-Aided Production*	8.00	09/14/95
SM	09/22/95	PM	BAC-207 ILL		Costs for Commercial Division Portfolio *Illustration*	5.00	09/14/95
TW	09/25/95	AM	BAC-207 CRE		Costs for Commercial Division Portfolio *Creative*	6.00	09/21/95
LS	09/28/95	AM	IVM-176 CRE		Video/Brochure destination package *Creative*	9.00	09/25/95
AE	10/02/95	AM	4123 COPY		Marketing brochure *Copy laser*	4.00	09/29/95
EL	10/02/95	AM	BAC-207 PROD		Costs for Commercial Division Portfolio *production*	8.00	09/29/95
AW	10/02/95	AM	BAC-219		Company Holiday Cards - Design and Comp. only	3.00	10/02/95

Double-click on a job task to update it's complete scheduling information, including task status, production specifications, and task notes.

	Est Hrs:	Hrs Left:	Time:	Start Date:
	2.00	2.00	___.__	02/26/96
	3.50	1.50	___.__	02/26/96
	6.00	1.50	___.__	02/26/96
			___.__	02/23/96
	2.25	1.50	___.__	02/27/96
	5.00	4.00	___.__	02/27/96
			___.__	02/27/96
	4.00	2.50	___.__	02/28/96
	4.00	2.00	___.__	02/26/96
			___.__	03/01/96
			___.__	03/01/96

Schedules list unfinished job tasks by resource, due date, start date, client, job, or task. These work-to-do reports can be printed daily to show everyone what they're to do each day. Or, weekly schedules can be printed in advance for production meetings to help manage the week's work load.

The Work-to-Do report shows tasks by person. But what about the work scheduled for an entire department? Meet the Schedule Chart. The Schedule Chart, which is printed from Snapshots, is a combination traffic/schedule report. It combines selected unfinished tasks by job number is an easy-to-read traffic spreadsheet-like format. It charts any group of like tasks by due date. You can pick-and-choose the unfinished tasks you want to see, sorted So instead of seeing all unfinished tasks for a week, you can print just ART, COPY, and DES (i.e., design) instead. This ability lets you easily chart work-to-do for different work groups, such as creative teams.
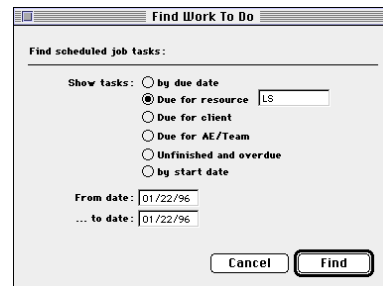
A different set of unfinished job tasks can be listed by clicking the Find button in the toolbar, then entering your selections.
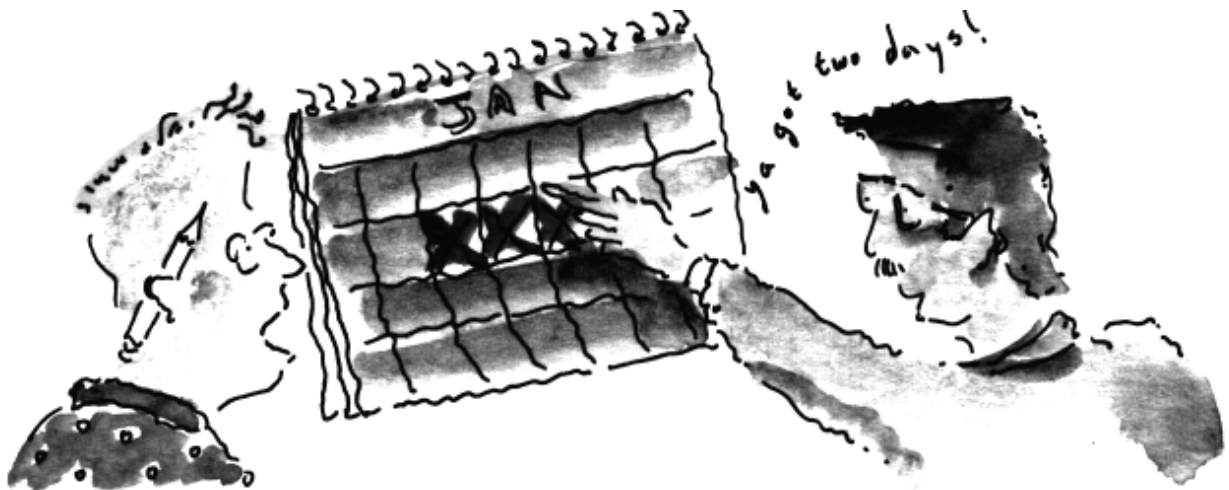
Essential Traffic Reports

Report Name:	Purpose:
Hot Sheet	Snapshot report lists open jobs by number with due date, production status, and status note
Schedule Chart	Snapshot report charts selected tasks by due date in a traffic report-like worksheet
Job List by Client	Lists open jobs by client
Job List by Job Number	Lists open jobs sequentially by job number
Job List by Job Type	Lists jobs grouped by job type
Job List by AE/Team	A job list for each AE or team, showing each team's jobs separately
Job List Wall Chart	Lists open jobs by client in large type; designed for posting on a production department wall
Job Log	Shows open jobs sorted by job number, job type, start date, due date, or project
Job Log + task schedules	Lists open jobs plus their unfinished job tasks
Project Job List	Lists open jobs by project, including start date and due date
Client Job Status List	A status report showing open jobs by client; including optional traffic status notes

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www.clientsandprofits.com