



Intro to TIME/ACTIVITY Reporting on BIGTIME.

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BigTime is from Edison's Attic
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There are different options for setting up BigTime so that it can be customized for your needs. CCADV does functional accounting which captures the main areas of our work.

These function areas are called "Classes". As you can see, CCADV not only has Classes, but also several sub-classifications under some of our Classes. The highlighted areas are for bookkeeping purposes and when tracking time and activities, staff does not bill to those classes (although Lee, our business manager, might). If you would like more information on those particular classes, we can arrange to have Lee put together some information on that for you.

10 TRAINING

10 TRAINING:11 Annual Conf
10 TRAINING:12 Statewide
10 TRAINING:13 Regional
10 TRAINING:19 Other Training

20 Tech Assist

30 ED, AW & AD

30 ED, AW & AD:31 Awareness
30 ED, AW & AD:32 Lobbying
30 ED, AW & AD:33 Pub Policy
30 ED, AW & AD:34 DU Research
30 ED, AW & AD:34 DU Research:343 DU Interview Reimb
30 ED, AW & AD:35 Comm Rela
30 ED, AW & AD:39 Other Ed A & A

70 Membership

80 Admin

90 Fund

90 Fund:92 Temp Restrict

Net Assets

Net Assets:Perm Restricted

Net Assets:Temp Restricted

Net Assets:Unrestricted

Our **Labor Codes** capture the actual activities that we engaged in during the time period and is entered WITH the specific class that reflects that area of work under which the activity was performed. Below is a sample of the labor codes that we use. Time and activity is tracked by the **labor code** (captures the activity – what we actually were doing), the **class** (which is most reflective of the area of work, the time spent and a very brief note that goes with each entry). This is all entered under the grant which is funding that work for each individual. Every time you make an entry, it pre-populates the next week’s entries.


- Communicate
- Document Development
- Event/Meeting/Training**
 - Attend
 - Evaluate
 - Facilitate
 - Logistics
 - Preparation
 - Present
- Financial Mgmt
- HR
- Internal**
 - PTO Vacation/sick Non-billable, vacation time
 - Holiday Non-billable, holiday time
- LOBBYING**
 - Direct contact
 - Grants
 - Mailings
 - Media
 - Other
 - Publications
 - Rallies
- Program Development**
 - Grant Mgmt
 - Program - run in program administratio: timesheets, expenses reports, staff meet, etc.
 - Training
- Request Response
- Research
- Site Visit
- Travel

For example – this is one of the grants that funds me that I would pull up at the beginning of the week being recorded. You can see that most of the activities that I do are already up and ready for me to make an entry. If not, I can add or remove additional lines at any time if my work week is more varied.

Department of Justice: Coalition VAWA 9/15 - 8/16					
+		+	Internal: Holiday	+	20 Tech Assist
+		+	Internal: PTO Vacation/sick	+	20 Tech Assist
+		+	Program Development: Progr	+	20 Tech Assist
+		+	Communicate	+	20 Tech Assist
+		+	Document Development	+	20 Tech Assist
+		+	Event/Meeting/Training: Atter	+	10 TRAINING:19 Other Tr
+		+	Event/Meeting/Training: Atter	+	20 Tech Assist
+		+	Event/Meeting/Training: Facili	+	20 Tech Assist
+		+	Event/Meeting/Training: Prep	+	10 TRAINING:19 Other Tr
+		+	Event/Meeting/Training: Logi	+	10 TRAINING:19 Other Tr
+		+	Event/Meeting/Training: Logi	+	20 Tech Assist
+		+	Request Response	+	20 Tech Assist
+		+	Research	+	20 Tech Assist
+		+	Travel	+	10 TRAINING:11 Annual C
+		+	Travel	+	20 Tech Assist
Department of Justice: OVW Rural 10/15 - 9/16					

This is a screen shot of my home screen. You can see by the tabs that BigTime has the capacity to perform multiple functions that have many useful applications. At the DOT – Part I, I showed you a quick grant report that I ran for my quarterly report and what one of my time sheets looks like.

The Daily Routine




This set of tools will let you keep track of time you spend on the Grant/Client/Projects you are assigned to. It will also let you see status at a glance, and it will help you keep track of Tasks and assignments.

- Time entry
- Expense entry
- Your Grant/Client/Project list

HOW TO:

- Edit my personal information?
- Submit my timesheet?

Managing Clients and Staff




Whether you're managing the entire firm or just one group/division, you can use the management tools to stay on top of project status, team utilization, billings vs. your budgets and all your management metrics.

- Add/Edit staff information
- Add/Edit Grant/Client/Projects
- Print Reports (utilization, capacity, etc)

HOW TO:

- Review draft invoices?

Sales Pipeline Management




Use the sales tool to manage your existing pipeline of business. You can also use your pipeline 'rules' to determine how much business to expect in the weeks and months to come.

- Add new prospects
- Adjust budgets
- Review sales pipeline
- Convert 'prospects' to Grant/Client/Projects

HOW TO:

Grant/Client/Project Management




Project managers can use the project tools to enter and adjust client budgets, Tasks, milestones, goals and risks.

- Project Plans
- Task Lists
- Microsoft Project2000 integration

HOW TO:

- Adjust my Grant/Client/Project budget?
- Get my Grant/Client/Project information?

The Library



Your company's digital brain trust contains documents, sample forms and templates for everything from typical project plans to form sheets and proposals. The library is your source for the best advice your company has to offer.

HOW TO:

This is very basic information and I am sorry, but I am unable to pull up the menu under a tab and take a screen shot, but there are multiple options.

If you are interested in a live meeting (via computer) where I can share my screen with you to go over some of the basics and functions of BigTime, please let me know.

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