

# t and Schedule Management

, 2026

How our time gets utilized in relation to project budget and schedule. The below content will walk you through the Grace project team from start to finish!

et

## Content Guidelines:

Deal with scope and fee with \$\$ amount

lines

Accepted, meet with our "Contract Manager" to get "Owner / Architect" and "Architect / Consultant" copies

lines

### t ("Budget Updated" tab)

Budgeting spreadsheet (see above), work with the "Project Accountant" to complete

ie (cell A2) This will carry over to each tab.

ted (cell J3)

al) (cell J5)

ie total Grace fee available (cell J6)

.l B8), discuss with Principal in Charge

ry phase (cells C12-C18 and D12-D18) These dates can be estimated and will carry over to each tab

ase (cells F12-F18)

ce locations) (cells A22-A24). These will carry over to each tab.

alls E32-E34)

is will calculate for you

C	D	E	F	G	H	I	
<b>PROJECT NAME</b>						Updated:	
				\$ 1,000,000.00	6.00%		
					30%		
					70%		
<b>PROJECT SUMMARY (NOTE:FEES AND COST SHOWN DO NOT INCLUDE ENGINEERING)</b>							
phase start	phase finish	# of days		COST	FEE	PROFIT	
Friday, November 1, 2024	Tuesday, November 5, 2024	4	5%	\$ -	\$ 2,100.00	\$ 2,100.00	
Tuesday, November 5, 2024	Saturday, November 30, 2024	25	15%	\$ -	\$ 6,300.00	\$ 6,300.00	
Sunday, December 1, 2024	Tuesday, December 31, 2024	30	25%	\$ -	\$ 10,500.00	\$ 10,500.00	
Wednesday, January 1, 2025	Friday, January 31, 2025	30	20%	\$ -	\$ 8,400.00	\$ 8,400.00	
Saturday, February 1, 2025	Friday, February 28, 2025	27	15%	\$ -	\$ 6,300.00	\$ 6,300.00	
Saturday, March 1, 2025	Monday, March 31, 2025	30	10%	\$ -	\$ 4,200.00	\$ 4,200.00	
Tuesday, April 1, 2025	Wednesday, April 30, 2025	29	10%	\$ -	\$ 4,200.00	\$ 4,200.00	
<b>Total</b>			<b>100%</b>	<b>\$ -</b>	<b>\$ 42,000.00</b>	<b>\$ 42,000.00</b>	
Department				Fee	Cost	Profit	Fee %
				#DIV/0!	\$ -	#DIV/0!	#DIV/0!
				#DIV/0!	\$ -	#DIV/0!	#DIV/0!
				#DIV/0!	\$ -	#DIV/0!	#DIV/0!
				#DIV/0!	\$ -	#DIV/0!	#DIV/0!
				#DIV/0!	\$ -	#DIV/0!	#DIV/0!
<b>Total</b>				#DIV/0!	\$ -	#DIV/0!	#DIV/0!
Project Team							
				NAME			
				NAMES			
				NAMES			
Approval							
				NAME			
				NAME			
				NAME			
				NAME			

t ("Phase Tabs" tab)

that could be a part of the contract and the phases being used will need to be completed

CD	BN	CA	Warranty
----	----	----	----------

ch office with role categories, to make the form easier to use and read you can **HIDE the rows** of the

omatically display dates input on the Budget Updated page.

he project, put their name adjacent to their role in (column A) on the PG tab and they will automatica  
 certain role you can add a row. Even if you're not using the Programming phase, input the team mem

and hours, once you put an hour(s) in (column D) then the fee starts to fill in automatically.

r hour(s) distribution will show Fee Less Profit (column H) in green shaded cell

role is located adjacent to each role (column E). Assigned staff roles can be found in Ajera in the Staff  
 roles are not exactly the same as job titles so please reference Ajera or accounting for specifics.

h staff role (column D) towards the Fee Less Profit amount. Total dollars allotted show (columns G) u  
 ount. This will show you the hours each staff member has to work for each phase.

2 hours a week each staff should be scheduled for shows (column B) next to each role/staff

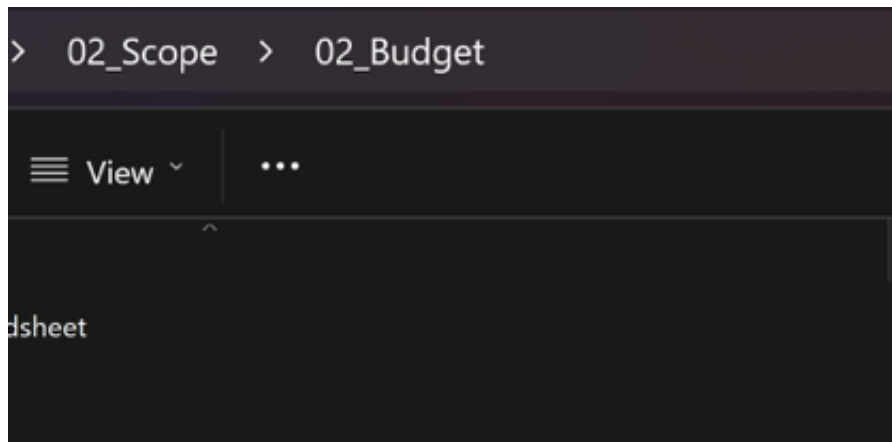
1 phase the project will have.

ow on the Budget Update tab

	D	E	F	G	H	I
<b>STAFF NAME</b>						
<b>Programming</b>						
<b>COST</b>			Department %	PHASE FEE	FEE LESS PROFIT	START DATE
						<b>11/1/2024</b>
	<b>Hours</b>	<b>Cost</b>	<b>#DIV/0!</b>	<b>#DIV/0!</b>	<b>#DIV/0!</b>	
		\$ 315.00		\$ -		
		\$ 310.00		\$ -		
		\$ 250.00		\$ -		
		\$ 175.00		\$ -		
		\$ 170.00		\$ -		
		\$ 150.00		\$ -		
		\$ 155.00		\$ -		
onal (Architecture)		\$ 140.00		\$ -		
chitecture)		\$ 115.00		\$ -		

ure)		\$ 65.00		\$ -		
Project Manager		\$ 155.00		\$ -		
		\$ 145.00		\$ -		
		\$ 125.00		\$ -		
		\$ 110.00		\$ -		
eriors)		\$ 100.00		\$ -		
		\$ 50.00		\$ -		
ition		\$ 130.00		\$ -		
		\$ 150.00		\$ -		
		\$ 155.00		\$ -		
		\$ 175.00		\$ -		
		\$ 80.00		\$ -		
				\$ -		

s under 02\_Budget folder under Project Management. (see below)



ing Spreadsheet is complete the information can be input into Ajera

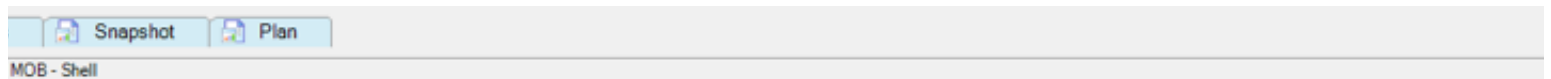
d work with the Project Accountant to be input

will be entered (labor) for each phase

udget Spreadsheet will be input

Project Budget Spreadsheet will be input

for each phase current here. If dates need to change, work with the "Project Accountant" to change ar  
chedule will be created and maintained



Resource	Meterance/Commitment#	Status	% Dist	Construction Cost	% of CC	Hours / Units	Cost Rate	Cost	Billing Rate	Contract	% Complete	% Complete Date	Est Start Date
		Active				<input type="checkbox"/>				175,750.00			05/04/20
		Closed											
		Active	20.00							35,150.00			05/04/20
		Active	50.00			175.00				28,850.00			
James E. Spencer						25.00			190.00	4,750.00			
Jeffrey D. Billman						20.00			150.00	3,000.00			
Benjamin S. Marsh						50.00			120.00	6,000.00			
Adam J. Gutierrez						80.00			79.00	6,320.00			
		Active	37.00							6,300.00			
								6,300.00		6,300.00			
		Work Hold	25.00							43,937.50			06/01/20
		Work Hold	50.00			225.00				36,062.50			
James E. Spencer						25.00			190.00	4,750.00			
Jeffrey D. Billman						20.00			150.00	3,000.00			
Benjamin S. Marsh						90.00			120.00	10,800.00			
Adam J. Gutierrez						90.00			79.00	7,110.00			
		Work Hold	37.00							7,875.00			
								7,875.00		7,875.00			
		Work Hold	35.00							61,512.50			07/01/20
		Work Hold	50.00			320.00				50,487.50			
James E. Spencer						40.00			190.00	7,600.00			
Jeffrey D. Billman						40.00			150.00	6,000.00			
Benjamin S. Marsh						120.00			120.00	14,400.00			
Adam J. Gutierrez						120.00			79.00	9,480.00			
		Work Hold	37.00							11,025.00			
								11,025.00		11,025.00			

schedule dates have been input, this project shows up in the Schedule Manager for each staff and the dates change, adjust staff schedules

update and distribute equally across the weeks in each phase for each person when the project budget scheduled hours must be manually adjusted in the Schedule Manager in the event of schedule changes and update this information.

Working multiple projects and their weekly hours need to be balanced to 40 hours per week. It is not advised as they are likely to be working on multiple projects. We encourage you to check the workload of each staff member to make sure staff isn't overscheduled.

Employees												
Employee Type	Hours Budget	Hours Actual	Hours Remaining	Scheduled Hours	Available Hours	2020 5/17 - 5/23	2020 5/24 - 5/30	← Actual 5/31 - 6/6	Schedule → 5/31 - 6/6	2020 6/7 - 6/13	2020 6/14 - 6/20	
Licensed Arc...				<b>989.00</b>		<b>40.00</b>	<b>40.00</b>	<b>22.50</b>	<b>40.00</b>	<b>40.00</b>	<b>40.00</b>	
Licensed Arc...		31.00	-31.00	39.00	-70.00		9.00					
Licensed Arc...		47.50	-47.50		-47.50	0.50		0.50				
Licensed Arc...	114.00	22.00	92.00	13.00	79.00	9.00		4.00	4.00	9.00		
Licensed Arc...	144.00	78.25	65.75	23.00	42.75				5.00	3.00		
Licensed Arc...	300.00	200.00	100.00	135.00	-35.00	15.00	20.50	14.50	18.00	15.00		
Licensed Arc...	420.00		420.00	405.00	15.00							

ation / CA - DAL Arch...	Licensed Arc...	80.00	24.50	55.50	54.50	1.00	6.00	0.50	0.50	2.00	1.00
n Administration / CA...	Licensed Arc...	120.00	29.50	90.50	79.50	11.00	1.00	1.50	2.00	2.00	2.00
onstruction Administ...	Licensed Arc...	140.00	5.50	134.50	90.00	44.50	3.50	0.50		3.00	3.00
Improvements / Cons...	Licensed Arc...		10.50	-10.50		-10.50	0.50		0.50		
	Licensed Arc...	50.00	15.50	34.50		34.50	3.50	8.00			
is	Licensed Arc...	90.00		90.00	43.00	47.00				6.00	7.00
Jallas	Licensed Arc...	120.00		120.00	107.00	13.00					
t / BD - Dallas	Licensed Arc...		33.00	-33.00		-33.00	0.50		0.50		
D - Dallas	Licensed Arc...		1.50	-1.50		-1.50	0.50				

Hours are in Ajera and scheduled you can keep track of hours, by staff, in the “Hours Actual”, “Scheduled

table, or over, show in the “Available Hours” column

the “Projects” tab

Employees										
	Hours Budget	Hours Actual	Hours Remaining	Scheduled Hours	Available Hours	Spent Labor	Scheduled Dollars	2020 5/24 - 5/30	2020 5/31 - 6/6	
	<b>1,474.00</b>	<b>729.25</b>	<b>744.75</b>	<b>446.00</b>	<b>298.75</b>	<b>76,280.50</b>	<b>48,190.00</b>	<b>42.50</b>	<b>77.00</b>	
ire		21.50	-21.50		-21.50					
	218.00	185.00	33.00		33.00	22,206.50				
	30.00	28.50	1.50		1.50	5,415.00				
effrey D. Billman	18.00	39.00	-21.00		-21.00	5,850.00				
	100.00	79.00	21.00		21.00	7,900.00				
	70.00	38.50	31.50		31.50	3,041.50				
	67.00	12.00	55.00		55.00	1,560.00				
n B. Lopez	40.00	12.00	28.00		28.00	1,560.00				
	27.00		27.00		27.00					
s	220.00	112.50	107.50		107.50	12,620.00				
	30.00	23.50	6.50		6.50	4,465.00				
effrey D. Billman	35.00	4.00	31.00		31.00	600.00				
	65.00	40.00	25.00		25.00	4,000.00				
	90.00	45.00	45.00		45.00	3,555.00				
	60.00	60.50	-0.50		-0.50	4,920.00				
	40.00	39.00	1.00		1.00	2,340.00				
M. Ward	20.00	21.50	-1.50		-1.50	2,580.00				
iqn	95.00	24.50	70.50		70.50	2,905.00				
n B. Lopez	55.00	20.50	34.50		34.50	2,665.00				
	40.00	4.00	36.00		36.00	240.00				
cture	344.00	194.50	149.50	113.00	36.50	21,881.50	13,070.00	35.00	44.00	
	29.00	15.00	14.00	10.00	4.00	2,850.00	1,900.00	3.00		
effrey D. Billman	75.00	52.50	22.50	30.00	-7.50	7,875.00	4,500.00	8.00		

	120.00	53.50	66.50	43.00	23.50	5,350.00	4,300.00	13.00	
	120.00	73.50	46.50	30.00	16.50	5,806.50	2,370.00	11.00	
Design	180.00	118.75	61.25	103.00	-41.75	10,187.50	8,700.00	7.50	2
n B. Lopez	80.00	43.75	36.25	36.00	0.25	5,687.50	4,680.00	6.50	
	30.00	12.00	18.00	21.00	-3.00	720.00	1,260.00		
	70.00	63.00	7.00	46.00	-39.00	3,780.00	2,760.00	1.00	
ecture	200.00		200.00	156.00	44.00		16,800.00		
or Design	90.00		90.00	74.00	16.00		9,620.00		
ditional Service #1 Covered P...									
		131.50	131.50	81.00	78.50	9,007.50	55,010.00	11.00	2

not use all of their hours in a phase then that is additional profit. If they go over in a phase, then work