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## Overview

### PrjIx Summary

PrjIx is an Enterprise based project tracking software. PrjIx can be as easy as a simple project tracking tool for bids, or it can be used to track everything on a project from inception to closeout. It has pre-built modules for the following tasks associated with a project:

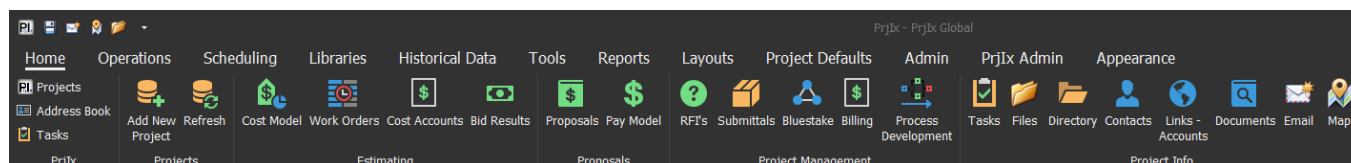
- Estimating Module
  - Building Cost Model Estimates for Projects and Change Orders
  - Building Project Budgets
  - Tracking Bid Results
- Proposals Module
  - Pricing of Proposals
  - Tracks Proposals sent to clients.
  - Maintains a Comprehensive Library of Scope Definitions used to Standardize Conditions, Exclusions, and any other Clarifications to Project Proposals.
- Project Management
  - Change Order Tracking
  - RFI Tracking
  - Submittal Tracking
  - Bluestake (Call Before You Dig) Ticket Tracking
  - Project Billing
  - Process Development
- Common Functionality across modules
  - Task Management
  - Standard Folder Structures
  - Contact Database
  - Links and Accounts Database
  - Map Links

### PrjIx Graphical User Interface (GUI) Fundamentals

PrjIx utilizes Data Grids for most of its Create, Read, Update and Delete (CRUD) functionality. These grids are based on the most advanced grids, designed by [DevExpress](#). The following are some of the common terms used throughout this manual and screenshots as to what they look like in the application.

#### Ribbon Control

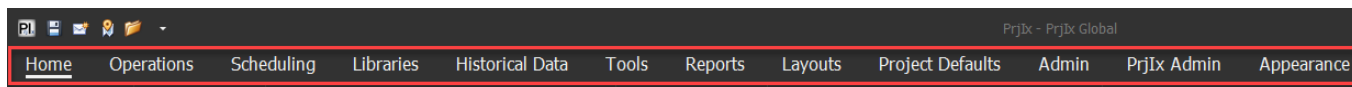
The Ribbon Control is based off the popular Microsoft Office Ribbon. The default Ribbon tab is the Home Tab. The Home Tab changes as tabs change, all default buttons for each tab will be displayed on the Home Tab.



## PrjIx User Manual – General Functionality

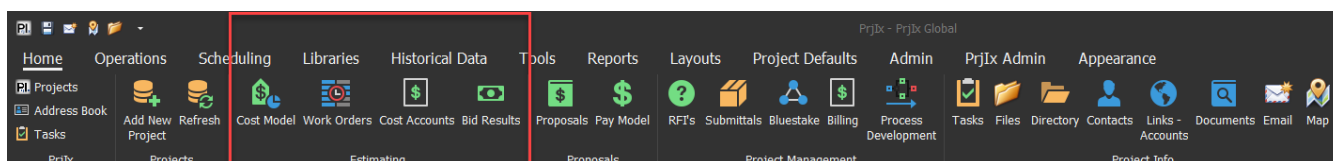
### Ribbon Tabs

Ribbon tabs show different functionality for the current form.



### Ribbon Groups

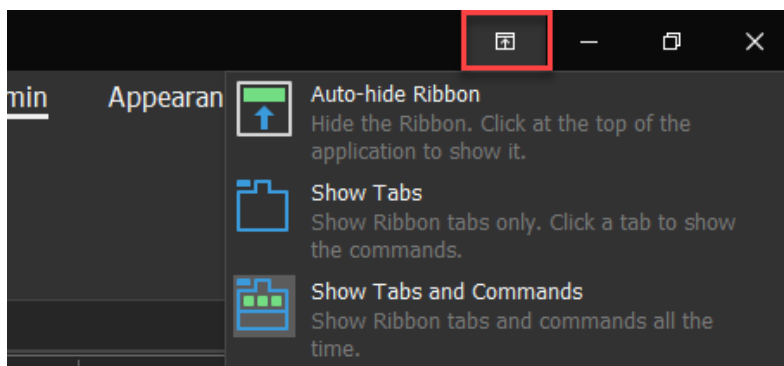
Ribbon Groups organize the buttons based on module and similar functionality.



### Ribbon View Settings

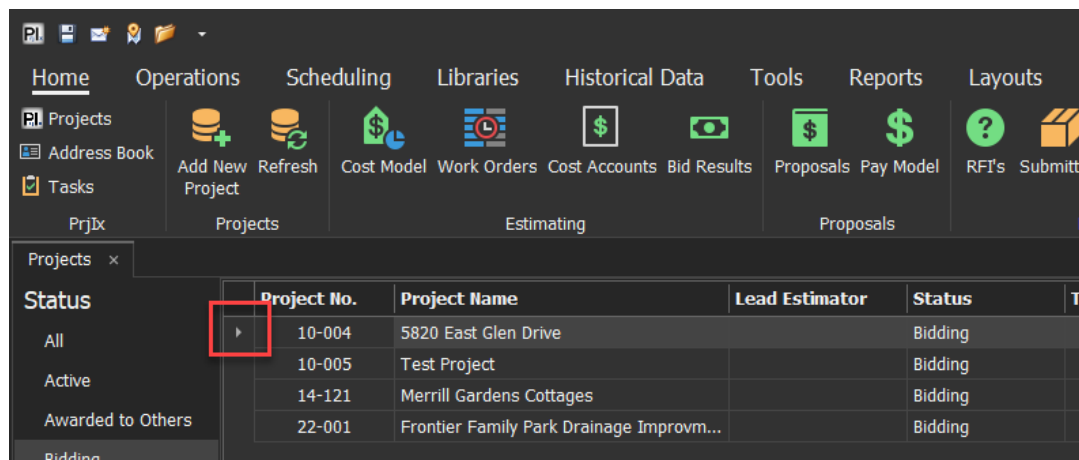
The Ribbon can be always on (Show Tabs and Commands), Auto-Hide for a full screen view or Show Tabs for a Tabs only view.

To change Ribbon settings, click on the Ribbon Setting button on the upper right of the screen.



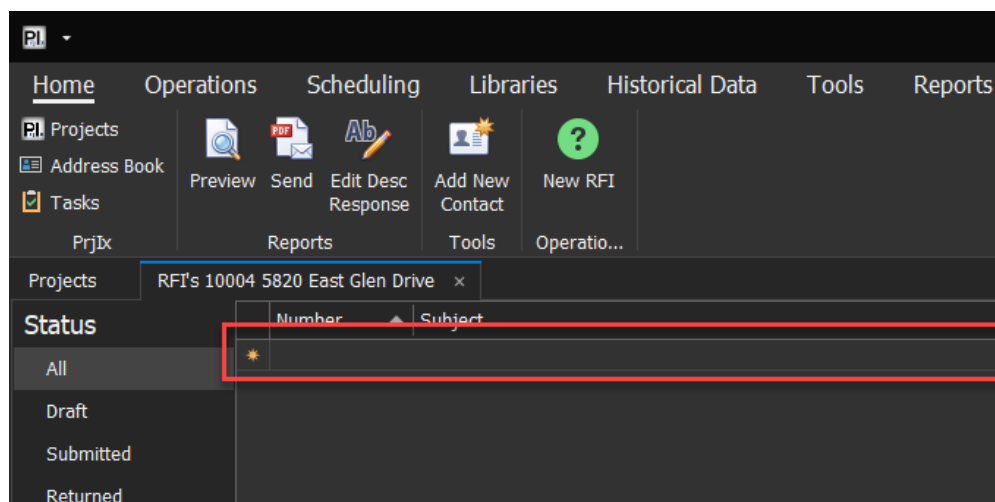
### Row Selector

The Row Selector is used to identify what row you are currently on and when there are child grids, it can be double clicked to open the child grids up for that specific row.



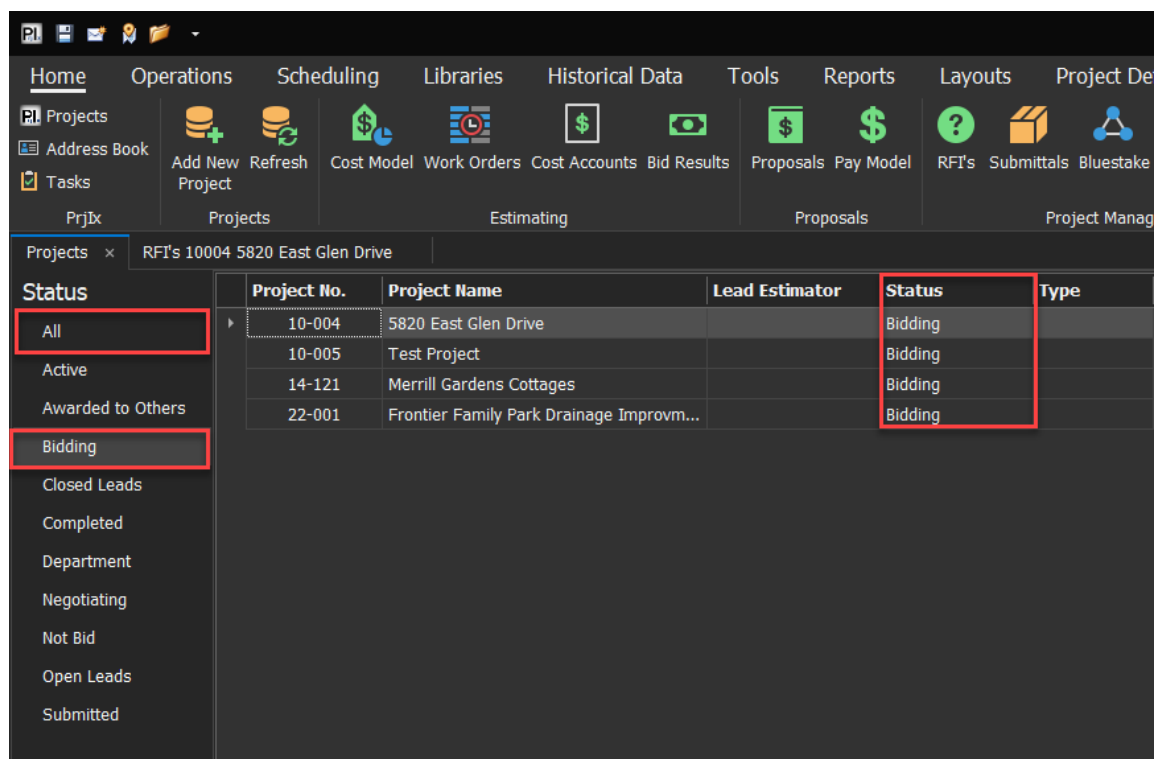
## Add New Row

The Add New Row is where most of Prjlx Create operations take place. If data is added to the grid via the Add New Row, it will always be located at the top of the grid. It is identified with an asterisk in the [Row Selector](#). When adding new rows, you must complete the process by tabbing through all the fields or navigating off the row using arrow keys or mouse clicks.



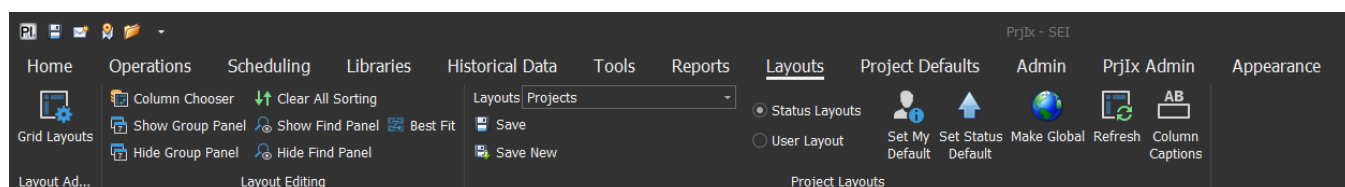
## Status Filters

Status Filters are used with many records in Prjlx, they are predefined filters based on the status of the record. Most of the Status Filter text can be customized to accommodate existing status workflows for your organization. All of the Status Filters have an “All” Select at the top, so you can quickly search all data if you don’t remember what status the record you are looking for is in. Status Filters are directly related to the Status Column and as soon as you update the record’s status column and refresh, they will disappear. By Clicking the Status you are currently on, it will automatically refresh that Filter, no need to click on different status and back again.



## Layouts

Layouts are used to save customizations to column arrangements, grouping, sorting and filters. Layouts can be very powerful and also used for Ad-Hoc Reporting, when used in conjunction with Print Grid feature. Not all grids have customizable layouts, but most with more fields than the average screen real estate allows, will have a Layouts Tab where you can Save, Select, Edit Layouts.



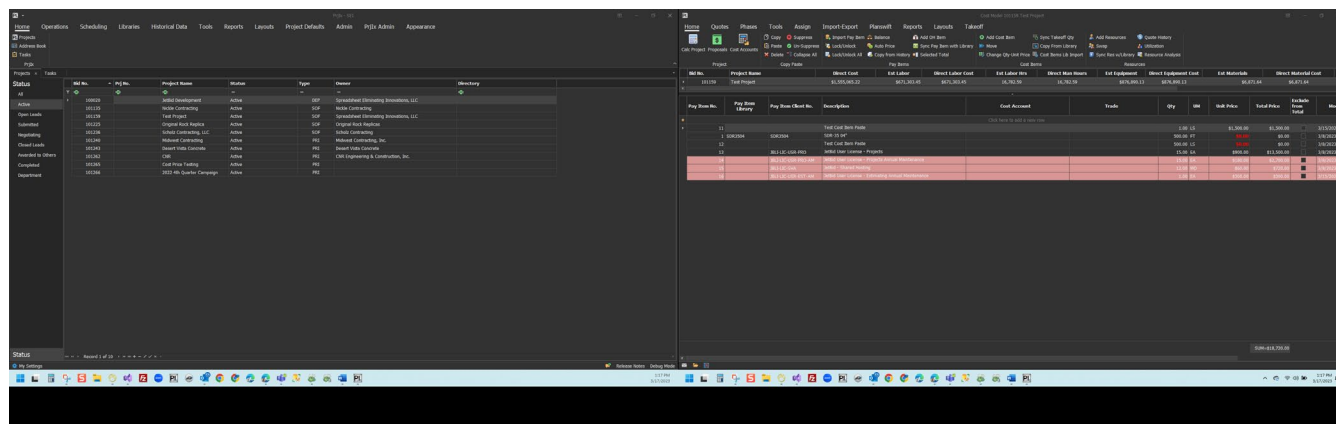
## Find Panel and Auto Filter Row

The find panel and auto filter row are lighting fast ways to search for data on most of the grid forms in PrjIx. The Layout tab has buttons to turn them on if they or not showing or you can right click on a header to access the menu to turn them on also.

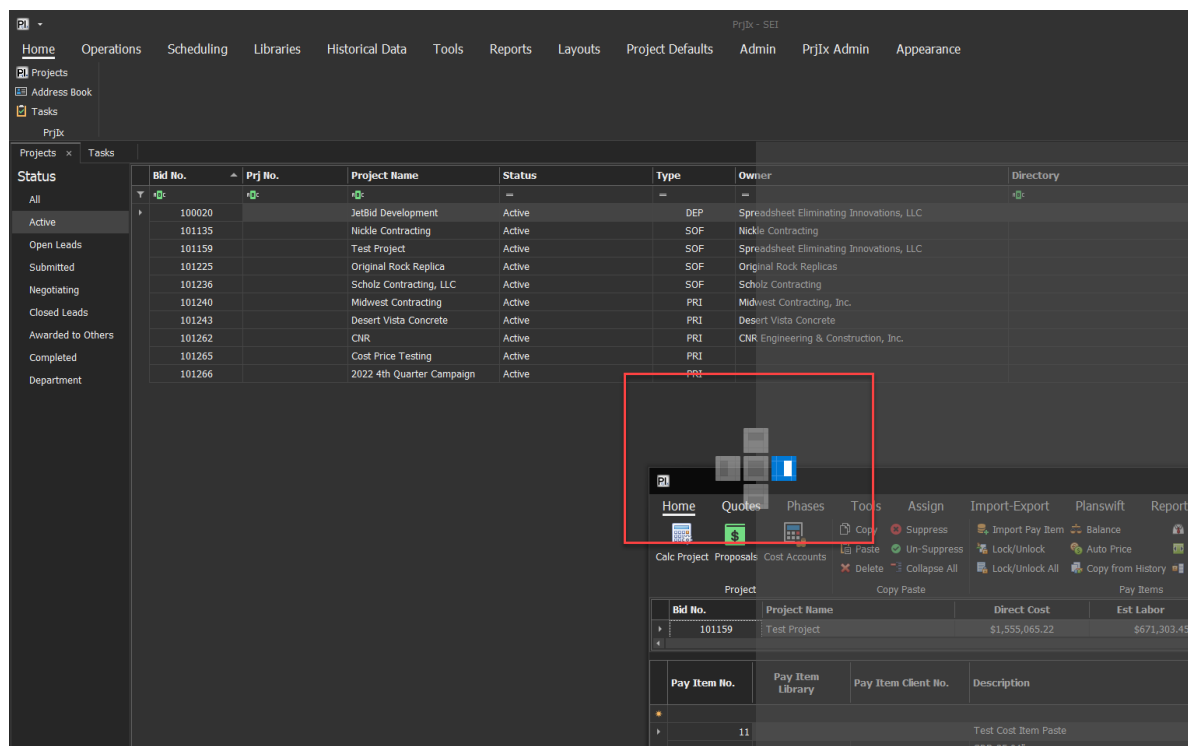
## Prjlx User Manual – General Functionality

### Tabs and Docking

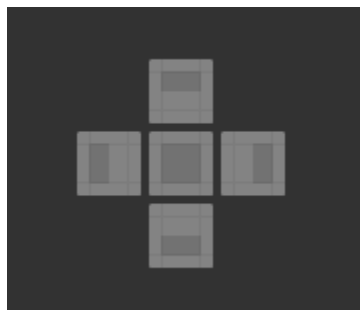
Prjlx uses tabs to organize its forms. Each time you open a new form for a project or system form, it looks to make sure it is not already open before opening it, if it finds it will make it the active form. Forms can be removed from the Main screen and placed on a separate monitor for review purposes. Tabs can then be re-docked back to Main Screen.



Tabs can also be organized within the Main Screen for review purposes. By dragging the tab into the Main Screen you will see the following Dock Control, depending on where you place it on the Dock Control will determine where it goes on the Main Form.



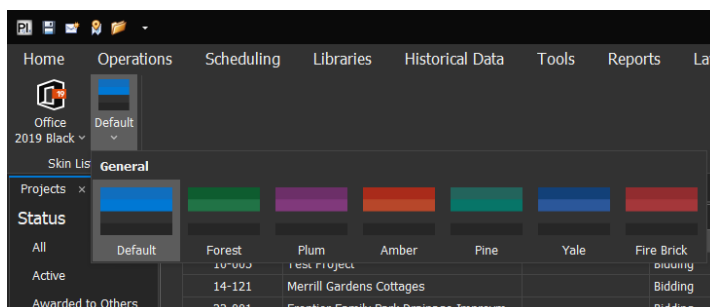
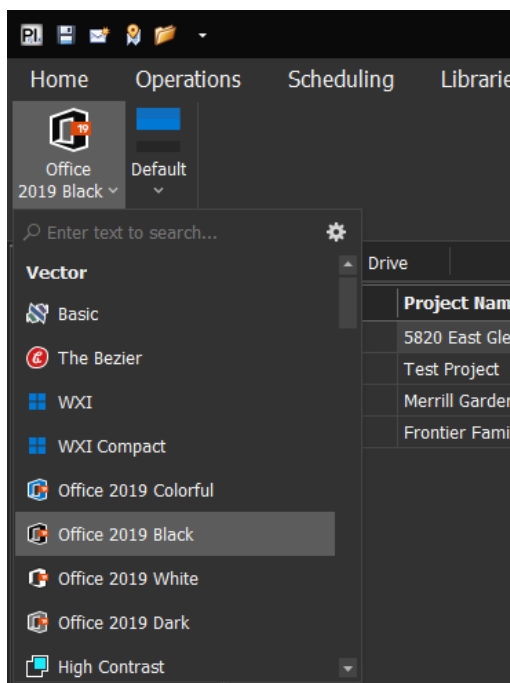
### Dock Controller



The Middle Square will place it back to Default Tab Location. The Right Square will Split Default Dock area and place it right of the Default Tab Location. The Left Square will Split Default Dock area and place it left of the Default Tab Location. The top and bottom squares will place it over or under the Default Tab Location.

### Appearance

Prjlx’s appearance can be customized using Themes. Several themes are preloaded and some can also have several color themes associated with it. To change your theme, click on the Appearance Ribbon Tab.







### System Libraries

Prjlx Cost Modeling leverages libraries to reduce data entry and keep your cost models consistent in terms of structure and costing. There are several libraries, they are listed below:

#### Pay Item Library

A library of standard Pay Items used to prepare proposals to clients.

#### Estimating Libraries

A project or a collection of projects used to define the breakdown of Pay Items for specific parameters: clients, quantities, regions, etc.

#### Cost Item Library

A collection of standard Tasks used to create a work breakdown structure for a Pay Item.

#### Cost Account Library

A collection of Accounts used to assign Pay Items, Cost Items and Resources to for creating project budgets and charging resources to projects.

#### Pay-Cost Item Trade Library

A collection of Trades used to organize Pay Items, Cost Items, create RFQ's and search historical data.

### Resources

#### Resource Library

A collection of Resources (Labor, Equipment, Materials, Subcontractors, Other Costs) used to assign to Cost Items to create a cost estimate.

#### Resource Trade Library

A collection of Trades used to organize Resources, create RFQ's and search historical data.

### Other Libraries

#### Scope Group Library

A collection of items to groups scope items for display on proposals.

#### Scope Library

A collection of items used to define scopes for project.

#### Condition and Exclusion Library

A collection of items used to define Conditions and Exclusions from Legacy application, being phased out in Version 8, will be deprecated by version 9.

## Prjlx User Manual – General Functionality

### Phase Library

A collection of standard phases of work, used to create subtotals on proposal and other reports.

### UM Library

A collection of units of measure used in your system.

### Prjlx Global Libraries (Subscription Based)

#### Prjlx Pay Item Library

A global collection of Pay Items you can import to your Pay Item Library if Global Data is subscribed to.

#### Default Cost Model Libraries

Projects focused on certain trades that can be imported to use for cost models.

#### Cost Account Library

A collection of cost accounts used to build budgets for projects and/or charge resources to during the execution of the project.

#### Prjlx Pay-Cost Item Trades Library

A global collection of Resource Trades you can import to your Pay Item Library if Global Data is subscribed to.

#### Prjlx Resource Library

A global collection of Pay Items you can import to your Pay Item Library if Global Data is subscribed to.

#### Prjlx Resource Trades Library

A global collection of Resource Trades you can import to your Pay Item Library if Global Data is subscribed to.

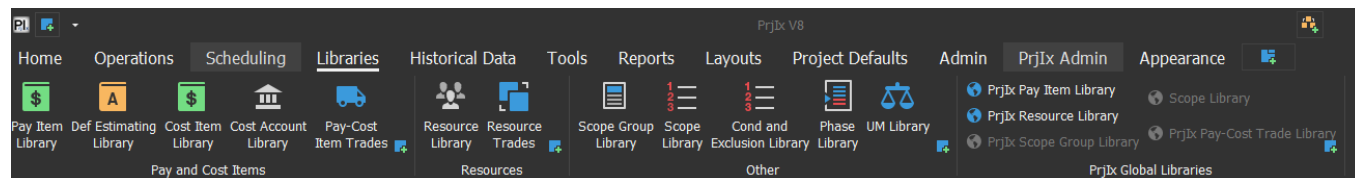
#### Prjlx Scope Group Library

A global collection of Scope Group you can import to your Pay Item Library if Global Data is subscribed to.

#### Prjlx Scopes Library

A global collection of Scope Group you can import to your Pay Item Library if Global Data is subscribed to.

### Libraries Toolbar



## Key Points

### Resources

When adding resources it is best to try and align them with how you buy those resources. For Example, if you buy concrete by the CY, but when you order it with color and it is billed separate by the pound, setup up resource for Concrete Coloring by the pound. This eliminates manual calculations when entering quotes using the RFQ Module.

### Descriptions

When defining descriptions, a left to right, generic to detail philosophy is beneficial for sorting and grouping functionality in Prjlx.

### Examples:

Best for Sorting	Not good for Sorting
Mega-lug, DIP, 12 Inch	12 Inch Mega-lug DIP
Concrete, 4000 psi	4000 psi Concrete
Excavator, Track, 36 Ton (CAT 330 or Equiv)	36 Ton Excavator
Labor, Operator, Skilled, Heavy Equip	Heavy Equip Operator
Dig, Lay Backfill, Sewer > 10 ft deep	Sewer > 10 Feet, Dig, Lay and Backfill

### Cost Items

When designing cost items, think universal, don't get too detailed! Also take into consideration how you plan on tracking historical costs with Cost Accounts. Depending on how you break up the Tasks, you may have a more universal Install task/item and more specific materials task/item.

For Example, you may break up Curb and Gutter into Hand Forming and Machine Forming. There are usually several type of curbs, that require different amounts of materials, but are close enough in production to group together for historical purposes.

### Example

Forming, Curb, Curb and Gutter, Roll Curb: Which include labor, equipment and materials associated with forming hand formed curbs of any type. Unit of Measure would be Lineal Feet (LF)

Pouring, Curb, Curb and Gutter, Roll Curb: Which includes labor, equipment and materials associated with pouring concrete. Unit of Measure would be Cubic Yard (CY)