

Key Reports for the Agency Principal

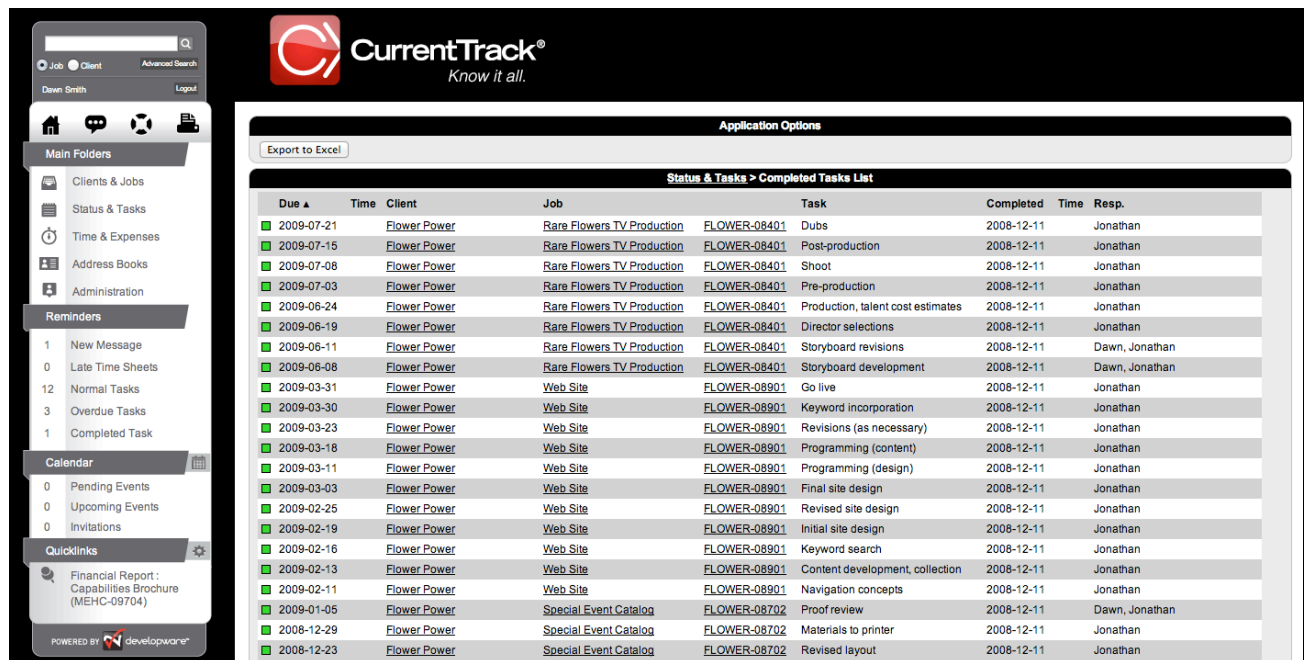
Completed Tasks List

(Status & Tasks – I Want To: View Completed Tasks List)

“Available only to users with Special Access, the Completed Tasks List is a compilation of both Active and Sleeping jobs, and their Completed Tasks.”

Answers such questions as:

- “How often is Dawn late when completing her Tasks? Early?”
- “What have we completed for the Client this month?”
- “What have we completed, as a team, this week?”



The screenshot displays the CurrentTrack software interface. On the left is a sidebar with navigation options: Main Folders (Clients & Jobs, Status & Tasks, Time & Expenses, Address Books, Administration), Reminders (New Message, Late Time Sheets, Normal Tasks, Overdue Tasks, Completed Task), Calendar (Pending Events, Upcoming Events, Invitations), and Quicklinks (Financial Report: Capabilities Brochure (MEHC-09704)). The main area shows the 'Status & Tasks > Completed Tasks List' report. It includes an 'Export to Excel' button and a table with columns: Due, Time, Client, Job, Task, Completed, Time, and Resp. The table lists various tasks for 'Flower Power' and 'Rare Flowers TV Production' completed between 2008 and 2009.

Due	Time	Client	Job	Task	Completed	Time	Resp.
2009-07-21		Flower Power	Rare Flowers TV Production	FLOWER-08401	Dubs	2008-12-11	Jonathan
2009-07-15		Flower Power	Rare Flowers TV Production	FLOWER-08401	Post-production	2008-12-11	Jonathan
2009-07-08		Flower Power	Rare Flowers TV Production	FLOWER-08401	Shoot	2008-12-11	Jonathan
2009-07-03		Flower Power	Rare Flowers TV Production	FLOWER-08401	Pre-production	2008-12-11	Jonathan
2009-06-24		Flower Power	Rare Flowers TV Production	FLOWER-08401	Production, talent cost estimates	2008-12-11	Jonathan
2009-06-19		Flower Power	Rare Flowers TV Production	FLOWER-08401	Director selections	2008-12-11	Jonathan
2009-06-11		Flower Power	Rare Flowers TV Production	FLOWER-08401	Storyboard revisions	2008-12-11	Dawn, Jonathan
2009-06-08		Flower Power	Rare Flowers TV Production	FLOWER-08401	Storyboard development	2008-12-11	Dawn, Jonathan
2009-03-31		Flower Power	Web Site	FLOWER-08901	Go live	2008-12-11	Jonathan
2009-03-30		Flower Power	Web Site	FLOWER-08901	Keyword Incorporation	2008-12-11	Jonathan
2009-03-23		Flower Power	Web Site	FLOWER-08901	Revisions (as necessary)	2008-12-11	Jonathan
2009-03-18		Flower Power	Web Site	FLOWER-08901	Programming (content)	2008-12-11	Jonathan
2009-03-11		Flower Power	Web Site	FLOWER-08901	Programming (design)	2008-12-11	Jonathan
2009-03-03		Flower Power	Web Site	FLOWER-08901	Final site design	2008-12-11	Jonathan
2009-02-25		Flower Power	Web Site	FLOWER-08901	Revised site design	2008-12-11	Jonathan
2009-02-19		Flower Power	Web Site	FLOWER-08901	Initial site design	2008-12-11	Jonathan
2009-02-16		Flower Power	Web Site	FLOWER-08901	Keyword search	2008-12-11	Jonathan
2009-02-13		Flower Power	Web Site	FLOWER-08901	Content development, collection	2008-12-11	Jonathan
2009-02-11		Flower Power	Web Site	FLOWER-08901	Navigation concepts	2008-12-11	Jonathan
2009-01-05		Flower Power	Special Event Catalog	FLOWER-08702	Proof review	2008-12-11	Dawn, Jonathan
2008-12-29		Flower Power	Special Event Catalog	FLOWER-08702	Materials to printer	2008-12-11	Jonathan
2008-12-23		Flower Power	Special Event Catalog	FLOWER-08702	Revised layout	2008-12-11	Jonathan

Master Task List

(Status & Tasks – I Want To: View Master Task List)

“Available only to users with Special Access, this is a list of all Working Tasks, sorted by employee. It can be used to gauge employee workload while assigning new Tasks and serve as a daily status sheet.”

Answers such questions as:

- “Is Anthony overloaded with work this week?”
- “What’s going on in the Art Department?”
- “Dawn will be out on Friday. What do I need to move?”

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Dawn Smith Logout

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Financial Report: Capabilities Brochure (MEHC-09704)

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Application Options

Export to Excel

Status & Tasks > Master Task List for 2008-12-13 to 2013-01-12

Benjamin Orton

P	Due	Time	Client	Job Title	Number	Task	Allotted	Resp.
	2012-11-15		Mission East Health Care	Q1 Media Placement	MEHC-12101-4	Media buy		Bruce Littleton, Benjamin
	2012-11-15		Global Warming Prevention	Spring ('13) Media Plan	71-12101-2	Media buy		Bruce Littleton, Benjamin
	2012-11-29		Roosevelt High School	2013 TV Media Placement	RHS-12102-4	Media buy		Bruce Littleton, Benjamin
	2012-12-06		Bakers' Restaurant	2014 Managers' Conference	BAKERS-12801	Production Estimate		Dawn, Benjamin
	2012-12-17		Roosevelt High School	2013 Radio Media Placement	RHS-12101-5	Media buy		Bruce Littleton, Benjamin
	2013-01-03		Bakers' Restaurant	E-Newsletter Production	BAKERS-12901	Compile recipient list		Dawn, Benjamin

Dawn Smith

P	Due	Time	Client	Job Title	Number	Task	Allotted	Resp.
	2012-12-04		Roosevelt High School	Web Site Re-Design	RHS-12901	Timeline established	.25	Dawn
	2012-12-06		Bakers' Restaurant	2014 Managers' Conference	BAKERS-12801	Production Estimate		Dawn, Benjamin
	2012-12-11		New Business	RFP: Heart Institute Web Site	00-12901	Timeline established	.25	Dawn
	2012-12-18		[YOUR AGENCY]	Letterhead Re-Design	AGENCY-12701	Prepare, review Estimate		Dawn
	2012-12-19		[YOUR AGENCY]	PR/Marketing Efforts	AGENCY-12801	Press release (draft 1)		Dawn
	2012-12-24		Bakers' Restaurant	Q2 Television Production	BAKERS-12401	Storyboard development		Dawn, Jonathan
	2012-12-27		Bakers' Restaurant	Branding Guidelines Booklet	BAKERS-12701	Prepare, present Estimate		Dawn
	2012-12-27		Roosevelt High School	1/4-Page Ad (Open House)	RHS-12201	Ad specs from publication		Dawn
	2012-12-31		Global Warming Prevention	2014 Campaign Brochure	71-12701	Prepare, present Estimate		Dawn
	2012-12-31		Bakers' Restaurant	Social Network Campaign	BAKERS-12902	Marketing plan outline		Dawn, Julianne
	2013-01-01		Mission East Health Care	Benefits Brochure	MEHC-12701	Production estimate		Dawn
	2013-01-01		Global Warming Prevention	Outdoor Board Production (Hwy. 55)	71-12601	Production Estimate		Dawn

Working Tasks List

(Status & Tasks – I Want To: View Working Tasks List)

“Available only to users with Special Access, the Working Tasks List is a compilation of all Active jobs and their Working Tasks.”

Answers such questions as:

- “What’s due for my Client this week?”
- “What’s moving through the agency right now?”
- “What’s currently Overdue?”

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Dawn Smith Logout

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Status & Tasks > Working Tasks List

P	Client	Job Title	Job Number	Task	Allotted	Resp.	Due	Time	Target Job Complete
	Global Warming Prevention	Spring ('13) Media Plan	71-12101-2	Media buy		Benjamin, Bruce Littleton	2012-11-15		2012-12-31
	Mission East Health Care	Q1 Media Placement	MEHC-12101-4	Media buy		Bruce Littleton, Benjamin	2012-11-15		2011-12-30
	Roosevelt High School	2013 TV Media Placement	RHS-12102-4	Media buy		Benjamin, Bruce Littleton	2012-11-29		2012-12-31
	[YOUR AGENCY]	Nov. In-House Charges	AGENCY-1210-02	Close job	.25	Pamela	2012-11-30		2012-11-30
	Roosevelt High School	Web Site Re-Design	RHS-12901	Timeline established	.25	Dawn	2012-12-04		2013-01-31
	Bakers' Restaurant	2014 Managers' Conference	BAKERS-12801	Production Estimate		Dawn, Benjamin	2012-12-06		2013-01-31
	Roosevelt High School	Web Site Re-Design	RHS-12901	New media budget	.25	Jonathan	2012-12-06		2013-01-31
	New Business	RFP: Heart Institute Web Site	00-12901	Timeline established	.25	Dawn	2012-12-11		2013-01-15
	New Business	RFP: Heart Institute Web Site	00-12901	New media budget	.25	Jonathan	2012-12-13		2013-01-15
	Roosevelt High School	2013 Radio Media Placement	RHS-12101-5	Media buy		Benjamin, Bruce Littleton	2012-12-17		2012-12-31
	[YOUR AGENCY]	Letterhead Re-Design	AGENCY-12701	Prepare, review Estimate		Dawn	2012-12-18		2013-01-31
	[YOUR AGENCY]	PR/Marketing Efforts	AGENCY-12801	Press release (draft 1)		Dawn	2012-12-19		2012-12-31
	Bakers' Restaurant	Q2 Television Production	BAKERS-12401	Storyboard development		Dawn, Jonathan	2012-12-24		2013-01-31
	Bakers' Restaurant	Branding Guidelines Booklet	BAKERS-12701	Prepare, present Estimate		Dawn	2012-12-27		2013-01-20
	Roosevelt High School	1/4-Page Ad (Open House)	RHS-12201	Ad specs from publication		Dawn	2012-12-27		2012-01-31
	Bakers' Restaurant	(30) BOGO Offer	BAKERS-12402	Production estimate		Suzanne	2012-12-28		2013-01-31
	Bakers' Restaurant	Social Network Campaign	BAKERS-12902	Marketing plan outline		Dawn, Julianne	2012-12-31		2013-01-30
	Global Warming Prevention	2014 Campaign Brochure	71-12701	Prepare, present Estimate		Dawn	2012-12-31		2013-03-31
	Global Warming Prevention	Outdoor Board Production (Hwy. 55)	71-12601	Production Estimate		Dawn	2013-01-01		2013-02-28
	Mission East Health Care	Benefits Brochure	MEHC-12701	Production estimate		Dawn	2013-01-01		2013-02-28
	New Business	RFP: Frazier Trophy Co.	00-12801	Marketing plan outline		Julianne, Dawn	2013-01-02		2013-01-31
	Bakers' Restaurant	Branding Guidelines Booklet	BAKERS-12701	Copy		Suzanne	2013-01-03		2013-01-20
	Bakers' Restaurant	E-Newsletter Production	BAKERS-12901	Compile recipient list		Dawn, Benjamin	2013-01-03		2013-01-28
	Global Warming Prevention	2014 Campaign Brochure	71-12701	Copy		Suzanne	2013-01-07		2013-03-31
	Mission East Health Care	Capabilities Brochure	MEHC-12702	Production estimate		Dawn	2013-01-07		2013-01-31

Financial Report Summary

(Administration – Agency Administration – Create Financial Report Summary)

“The Financial Report Summary can be used by Accounting, Account Executives, System Administrators, and principals alike to monitor the Budgets of their Clients' jobs – both Active and Sleeping – versus their incurred expenses (i.e. time, mileage, purchases), for a given year.”

Answers such questions as:

- “How many jobs are getting close to Budget? Over?”
- “For which Clients are we consistently over Budget? Under?”
- “What did we bill, last year, versus what we incurred?”

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Administration > Financial Report Summary 2002 for Active Jobs

Job Title	Number	Opened	Budget	# Hours	\$ Hours	Expense Gross	Media Gross	Budget Remaining	Billed	Unbilled
Bakers' Restaurant										
Social Network Campaign	BAKERS-12902	2002-07-17	\$1875.50	12.50	\$1275.00	\$449.40	\$0.00	\$151.10	\$1024.81	\$699.59
Sub-Totals for Bakers' Restaurant:			\$1875.50	12.50	\$1275.00	\$449.40	\$0.00	\$151.10	\$1024.81	\$699.59
Global Warming Prevention										
Spring (*13) Media Plan	71-12101-2	2002-06-10	\$23000.00	21.00	\$637.50	\$12.44	\$18498.80	\$3851.26	\$345.98	\$18802.76NB
Full-Page Newspaper Ad	71-12201	2002-06-10	\$3800.00	25.00	\$2237.50	\$13.09	\$0.00	\$1549.41	\$53.17	\$2197.42
2014 Campaign Brochure	71-12701	2002-05-23	\$50000.00	24.25	\$2250.00	\$35.53	\$0.00	\$47714.47	\$201.98	\$2083.55
Tradeshow Display	71-12702	2002-06-07	\$2500.00	20.25	\$1837.50	\$364.26	\$0.00	\$298.24	\$645.37	\$1556.39
Sub-Totals for Global Warming Prevention:			\$79300.00	90.50	\$6962.50	\$425.32	\$18498.80	\$53413.38	\$1246.50	\$24640.12
Roosevelt High School										
2013 Radio Media Placement	RHS-12101-5	2002-05-09	\$12000.00	6.25	\$181.25	\$1.82	\$0.00	\$11816.93	\$87.21	\$95.86
2013 TV Media Placement	RHS-12102-4	2002-05-09	\$12000.00	9.75	\$556.25	\$9.81	\$0.00	\$11433.94	\$574.03	\$0.00
Sub-Totals for Roosevelt High School:			\$24000.00	16.00	\$737.50	\$11.63	\$0.00	\$23250.87	\$661.24	\$87.89
Totals:			\$105175.50	119.00	\$8975.00	\$886.35	\$18498.80	\$76815.35	\$2932.55	\$25427.60

Time Summary

(Administration – Agency Administration – Create Time Summary)

“Available only to users with Special Access, the Time Summary reflects all time recorded within an indicated date range, sortable by a number of criteria, including Client(s), Job and Media Type(s), and Work Code(s).”

Answers such questions as:

- “How many Hours did Dawn record last week?”
- “How many Hours have been recorded for my Client this month?”
- “How much vacation time has everyone used so far this year?”

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Dawn Smith Logout

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Financial Report: Capabilities Brochure (MEHC-09704)

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Export to Excel

Administration > Time Summary

Date From: 2008-11-13

Date To: 2012-12-13

Bakers' Restaurant

Dawn Smith

Administration (A)

BAKERS-12801 2014 Managers' Conference	2011-12-19	Proofreading	0.25	\$18.75
BAKERS-12801 2014 Managers' Conference	2012-03-01	Location scouting with client	3.50	\$262.50
BAKERS-12801 2014 Managers' Conference	2012-09-28	Proofreading	0.25	\$18.75
Administration (A) Sub-Total(s):			4.00	\$300.00

Account Service (AS)

BAKERS-12902 Social Network Campaign	2010-09-21	Determine next steps	1.00	\$125.00
BAKERS-12801 2014 Managers' Conference	2011-07-27	Client meeting	0.75	\$93.75
BAKERS-12701 Branding Guidelines Booklet	2011-07-27	Client meeting	0.75	\$93.75
BAKERS-12801 2014 Managers' Conference	2011-11-16	Input CCR, KO meeting	0.50	\$62.50
BAKERS-12901 E-Newsletter Production	2011-11-29	Client meeting	0.50	\$62.50
BAKERS-12801 2014 Managers' Conference	2012-01-11	Client meeting	1.00	\$125.00
Account Service (AS) Sub-Total(s):			4.50	\$562.50
Dawn Smith Sub-Total(s):			8.50	\$862.50
Bakers' Restaurant Sub-Total(s):			8.50	\$862.50

Global Warming Prevention

Dawn Smith

Administration (A)

71-12702 Tradeshow Display	2009-07-14	Presentation to client	0.75	\$56.25
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Gross Income Report

(Administration - Agency Administration - Create Gross Income Report)

"The Gross Income Report can be used by Accounting, Account Executives and principals alike to monitor Gross Income by date range and Client, as well as by Job and Media Type(s). CurrentTrack enables you to create the Report you need - based on previously filed Billing Entries - via a series of drop-down menus."

Answers such questions as:

- "What's my Margin for Newspaper Production?"
- "Am I making any money on this Client?"
- "What's my Margin across all Clients?"

Job Client Advanced Search

Dawn Smith Logout

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Financial Report: Capabilities Brochure (MEHC-09704)

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Application Options

Export to Excel

Administration > Gross Income Report 2002-01-01 to 2012-12-13

Bakers' Restaurant

Job Title	Job Number	Budget	# Hours	\$ Hours	Net Expense	Gross Expense	Net Total	Gross Total	Billed	Gross Income	Margin
Festival Ad Production	BAKERS-08201	\$1200.00	14.50	\$1325.00	\$105.95	\$198.13	\$1430.95	\$1523.13	\$153.80	\$47.85	31.1%
In-Store Materials	BAKERS-08703	\$18000.00	10.75	\$1087.50	\$43.02	\$78.94	\$1130.52	\$1166.44	\$725.83	\$682.81	94.1%
Menu Reprints	BAKERS-08704	\$6700.00	12.75	\$1006.25	\$26.54	\$48.75	\$1032.79	\$1055.00	\$43.95	\$17.41	39.6%
2014 Managers' Conference	BAKERS-12801	\$8500.00	15.50	\$1368.75	\$29.60	\$55.35	\$1398.35	\$1424.10	\$563.00	\$533.40	94.7%
E-Newsletter Production	BAKERS-12901	\$2300.00	12.25	\$1056.25	\$309.37	\$578.52	\$1365.62	\$1634.77	\$423.12	\$113.75	26.9%
Social Network Campaign	BAKERS-12902	\$1875.50	12.50	\$1275.00	\$245.96	\$449.40	\$1520.96	\$1724.40	\$1024.81	\$778.85	76.0%
Sub-Totals for Bakers' Restaurant:		\$38575.50	78.25	\$7118.75	\$760.44	\$1409.09	\$7879.19	\$8527.84	\$2934.51	\$2174.07	74.1%

Flower Power

Job Title	Job Number	Budget	# Hours	\$ Hours	Net Expense	Gross Expense	Net Total	Gross Total	Billed	Gross Income	Margin
2009 Product Catalog	FLOWER-08701	\$5000.00	8.75	\$993.75	\$140.96	\$209.35	\$1134.71	\$1203.10	\$1324.98	\$1184.02	89.4%
Sub-Totals for Flower Power:		\$5000.00	8.75	\$993.75	\$140.96	\$209.35	\$1134.71	\$1203.10	\$1324.98	\$1184.02	89.4%

Global Warming Prevention

Job Title	Job Number	Budget	# Hours	\$ Hours	Net Expense	Gross Expense	Net Total	Gross Total	Billed	Gross Income	Margin
Mississippi State Fair Racer Production	71-01802	\$33000.00	98.00	\$9062.50	\$19087.55	\$34882.01	\$28150.05	\$43944.51	\$13098.64	(\$5988.91)	(45.7)%
Mississippi State Fair Booth Production	71-02701	\$4000.00	9.75	\$981.25	\$288.38	\$528.00	\$1269.63	\$1509.25	\$543.75	\$255.37	47.0%
Spring ('13) Media Plan	71-12101-2	\$23000.00	21.00	\$637.50	\$15741.85	\$18511.24	\$16379.35	\$19148.74	\$345.98	(\$15395.87)	(4449.9)% NB
Full-Page Newspaper Ad	71-12201	\$3800.00	25.00	\$2237.50	\$7.00	\$13.09	\$2244.50	\$2250.59	\$53.17	\$46.17	86.8%
2014 Campaign Brochure	71-12701	\$50000.00	24.25	\$2250.00	\$19.00	\$35.53	\$2269.00	\$2285.53	\$201.98	\$182.98	90.6%
Tradeshow Display	71-12702	\$2500.00	20.25	\$1837.50	\$196.16	\$364.26	\$2033.66	\$2201.76	\$845.37	\$449.21	69.6%
Sub-Totals for Global Warming Prevention:		\$116300.00	198.25	\$17006.25	\$35339.94	\$54334.13	\$52346.19	\$71340.38	\$14888.89	(\$20451.05)	(137.4)%

Mission East Health Care