

Dashboard Displays Provide Managers with Succinct Overviews of Work in Progress

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By Richard Buse

Tenrox of Pasadena, Calif., provides project workforce management and timesheet applications. Founded in 1995, the company's clients span 50 countries and a diverse range of industries, including various governmental units.

What enables Tenrox to serve such a broad clientele is its emphasis on providing applications that integrate with a client's existing IT components and work processes. Tenrox maintains partnerships with IBM, Microsoft (MS), SAP and other technology providers to alleviate software integration issues, and develops applications in modular format, allowing clients to choose out-of-the-box or custom modules designed for particular industries or specific companies. The company provides Small Business, Standard and Enterprise editions of the product.

Features

Tenrox offers its applications as fully-hosted services, as well as in versions that reside on MS Windows servers. A variety of interfaces allow for easy data transfers between large accounting and financial applications. Sales management data integrates with *Salesforce.com*. Other interfaces transfer data to small business applications, such as QuickBooks.

User-defined visual displays illustrate the sequences and relationships associated with work flows and work processes. Dashboards provide managers with real-time summaries of crucial data. Tables display work in progress, start and end dates for engagements or other tasks, budgeted hours, actual hours, expenses, and other data based on date ranges. Color-coded icons indicate changes in scope, or projects presenting issues needing to be resolved. Managers establish milestones for billing, based on dollar amounts, date ranges, work completed or other criteria.

Each dashboard measurement allows for drill-down examination, enabling managers to review how much of an individual's time is devoted to a particular client or assignment, and how those figures compare to projections.

Those examinations incorporate management-defined skill set ratings for each individual. For an accounting firm, those ratings might encompass skills and experience in estate plan-



ning, pass-through entities, C Corporation tax requirements, individual tax returns, nonprofit organization financial audits or other areas requiring an accountant's expertise. In addition to displaying those ratings, Tenrox also lists an individual's percentage of available time, allowing managers to more easily assemble work groups for new engagements.

Staff members or partners record work performed on behalf of clients in the Timesheet module. Hours enter by day and client, along with time charges. Related documents attach to daily client time entries, while an expense report tab opens a table for recording various expenses.

A variety of invoice templates accept billing information based on client, date range for work performed and work descriptions. Invoicing process steps include internal data approval, posting, final approval and maintenance of invoice data.


Tenrox gives users more than 300 report options, including assessments based on time and charges, effort, billed effort, total time, budget vs. actual time, and reports highlighting particular employee productivity and billing information. Data exports in HTML, and MS Excel and Word formats.

The Help menu takes users to a detailed, online index of assist topics. Tenrox provides two levels of support, Standard and Premium, with options to add Dedicated Support and Software Assurance. Plan offerings range from phone support during regular business hours for the Standard plan, to 24/7 support for the Business Critical plan. All plans include upgrades.

Summary

Examining Tenrox' modules reveals why it enjoys an expansive client base. The company's emphasis on adapting its modules to integrate with clients' current processes and IT systems alleviates implementation concerns, while accelerating return on investment.

Dashboard displays provide managers with succinct overviews of work in progress. Drill-down options open more detailed information. Familiar navigational characteristics make it easy for individuals to record daily time, billing and expense totals, while hundreds of reporting selections allow companies to generate assessments most relevant to their concerns.

Tenrox is an attractive option for any organization. Its capabilities for recording billing and expense data in multiple currencies make it particularly attractive for companies whose business includes international clients. 

Tenrox

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866-483-6769