ID	Project Description	Engagement	Department	Responsible	Assigned	Budget Generation Base	sed on Tasks? Bu	Budgeted Amount	Budgeted Hours	Budgeted Amount Factor Bu	udgeted Hours Factor Completion Event	Target Date Method Use	Fiscal Year? Mu	st be Weekday? Ge	nerate Assigned from Project Gene	rate Custom Values from Project Ge	nerate Descriptions from Project Generate Engageme	t from Project Generate Groupings from	m Project Generate Tasks fror	om Project Generate Links from	n Project Generate Notes from	n Project Staff Assignment Me	lethod Generation Method	Generation Month Generation D	ay Target Start Date Method Targ	et Start Month Target Start Day	Target Complete Month Ta	arget Complete Day S	Solution	Solution Target	Tracking Description Project Priority
706	Estate Tax Return	Business Tax Services	Tax Department	Client's Partner	Engagement's Manager	Budgeted Yes	s 0.0	.00	0.00	1.00 1.		After received date No	Ye	No	Yes	Yes	s No	No	Yes	Yes	No	Assigned Staff	When I manually create it	3 15	After received date 0	0	0 14	ł . ,	Other	-	Not Started Normal
709	Gift Tax Return	Business Tax Services	Tax Department	Client's Partner	Engagement's Manager	Budgeted Yes	s 0.0	.00	0.00	1.00 1.	00	After received date No	Ye	No	Yes	No	No	No	Yes	Yes	No	Assigned Staff	When I manually create it	3 15	After received date 0	0	0 14	i O	Other		Not Started Normal
941	941 Employer's Quarter Fed TR	Payroll Services	Accounting Department	Client's Partner	Engagement's Manager	Budgeted Yes	s 0.0	.00	0.00	1.00 1.	00	After received date No	Ye	No	Yes	Yes	s Yes	No	Yes	Yes	Yes	Assigned Staff	Specified days before next date	1 0	After received date 0	0	0 5	C	Other		Not Started Normal
990	Not For Profit Tax Return	Business Tax Services	Tax Department	Client's Partner	Engagement's Manager	Budgeted Yes	s 0.0	.00	0.00	1.00 1.	00	After received date Yes	Ye	No	Yes	Yes	s No	No	Yes	Yes	No	Assigned Staff	Specified days before next date	3 15	After received date 0	0	0 14	t C	Other		Not Started Normal
1040	Individual Income Tax Return	Individual Tax Services	Tax Department	Client's Partner	Engagement's Manager	Budgeted Yes	s 0.0	.00	0.00	1.00 1.	00	After received date No	Ye	No	No	No	No	No	Yes	Yes	No	Assigned Staff	Specified days before next date	3 15	After received date 0	0	0 14	t C	Other		Not Started Normal
1040ES	1040 Estimated Tax Payments	Individual Tax Services	Tax Department	Client's Partner	Engagement's Manager	Budgeted Yes	s 0.0	.00	0.00	1.00 1.	00	After received date Yes	Ye	No	Yes	No	No	No	Yes	Yes	Yes	Assigned Staff	Specified days before next date	1 0	After received date 0	0	0 5	C	Other		Not Started Normal
1040EXT	1040 Extension	Individual Tax Services	Tax Department	Client's Partner	Engagement's Manager	Template Yes	s 0.0	.00	0.00	1.00 1.	00	After received date No	Ye	No No	No	No	No	No	No	No	No	Assigned Staff	When I manually create it	2 15	After received date 0	0	0 4	C	Other		Not Started Normal
1040NOTICE	Individual Tax Notice	Individual Tax Services	Tax Department	Client's Partner	Engagement's Manager	Template Yes	s 0.0	.00	0.00	1.00 1.	00	After received date No	Ye	No	No	No	No	No	No	No	No	Assigned Staff	When I manually create it	2 15	After received date 0	0	0 10	) C	Other		Not Started Normal
1040TAXPLAN	Individual Tax Planning	Individual Tax Services	Tax Department	Client's Partner	Engagement's Manager	Actual Yes	s 0.0	.00	0.00	1.00 1.	00	After received date No	Ye	No	Yes	No	No	No	Yes	Yes	Yes	Assigned Staff	Specified days before next date	5 0	After received date 0	0	0 30	) 0	Other		Not Started Normal
1040X	Amended Individual Income TR	Individual Tax Services	Tax Department	Client's Partner	Engagement's Manager	Budgeted Yes	s 0.0	.00	0.00	1.00 1.	00	After received date No	Ye	s No	No	No	No	No	Yes	Yes	No	Assigned Staff	When I manually create it	3 15	After received date 0	0	0 14	1 O	Other		Not Started Normal
1041	Estate and Trust Tax Return	Business Tax Services	Tax Department	Client's Partner	Engagement's Manager	Budgeted Yes	s 0.0	.00	0.00	1.00 1.	00	After received date Yes	Ye	No	Yes	Yes	s No	No	Yes	Yes	No	Assigned Staff	Specified days before next date	3 15	After received date 0	0	0 14	1 C	Other		Not Started Normal
1065	Partnership Tax Return	Business Tax Services	Tax Department	Client's Partner	Engagement's Manager	Budgeted Yes	s 0.0	.00	0.00	1.00 1.	00	After received date Yes	Ye	No	Yes	Yes	s No	No	Yes	Yes	No	Assigned Staff	Specified days before next date	3 15	After received date 0	0	0 14	i C	Other		Not Started Normal
1099	1099	Payroll Services	Accounting Department	Client's Partner	Engagement's Manager	Budgeted Yes	s 0.0	.00	0.00	1.00 1.	00	After received date No	Ye	No No	Yes	Yes	s Yes	No	Yes	Yes	Yes	Assigned Staff	Specified days before next date	1 0	After received date 0	0	0 5	C	Other		Not Started Normal
1120	Corporate Tax Return	Business Tax Services	Tax Department	Client's Partner	Engagement's Manager	Budgeted Yes	s 0.0	.00	0.00	1.00 1.	00	After received date Yes	Ye	No No	Yes	Yes	s No	No	Yes	Yes	No	Assigned Staff	Specified days before next date	2 15	After received date 0	0	0 14	i C	Other		Not Started Normal
1120S	S Corporate Tax Return	Business Tax Services	Tax Department	Client's Partner	Engagement's Manager	Budgeted Yes	s 0.0	0.00	0.00	1.00 1.	00	After received date Yes	Ye	No No	Yes	Yes	s No	No	Yes	Yes	No	Assigned Staff	Specified days before next date	2 15	After received date 0	0	0 14	i C	Other		Not Started Normal
1120W	1120 Estimated Tax Payments	Business Tax Services	Tax Department	Client's Partner	Engagement's Manager	Budgeted Yes	s 0.0	0.00	0.00	1.00 1.	00	After received date Yes	Ye	No No	Yes	Yes	s No	No	Yes	Yes	Yes	Assigned Staff	Specified days before next date	1 0	After received date 0	0	0 5	C	Other		Not Started Normal
	Accounting System Config	Consulting Services	Accounting Department	Client's Partner	Engagement's Manager	Template Yes	s 0.0	0.00	0.00	1.00 1.	00	After received date No	Ye	No No	No	No	No	No	No	No	No	Assigned Staff	When I manually create it	2 15	After received date 0	0	0 30	) 0	Other		Not Started Normal
	Annual Sales & Use Tax	Payroll Services	Accounting Department	Client's Partner	Engagement's Manager	Budgeted Yes	s 0.0	0.00	0.00	1.00 1.	00	After received date No	Ye	No No	Yes	No	No	No	Yes	Yes	Yes	Assigned Staff	Specified days before next date	1 0	After received date 0	0	0 5	C	Other		Not Started Normal
	Annual Compilation	Compilation Services	Attestation Department	Client's Partner	Engagement's Manager	Budgeted Yes	s 0.0	0.00	0.00	1.00 1.	00	After received date Yes	Ye	No No	Yes	Yes	s Yes	No	Yes	Yes	Yes	Assigned Staff	Specified days before next date	1 0	After received date 0	0	0 10	) 0	Other		Not Started Normal
APRWRITEUP	April Writeup	Accounting Services	Accounting Department	Client's Partner	Engagement's Manager	Budgeted Yes	s 0.0	0.00	0.00	1.00 1.	00	After received date No	Ye	No No	Yes	No	No	No	Yes	Yes	Yes	Assigned Staff	Specified days before next date	1 0	After received date 0	0	0 10	) 0	Other		Not Started Normal
AUDIT	Audit	Audit Services	Attestation Department	Client's Partner	Engagement's Manager	Budgeted Yes	s 0.0	0.00	0.00	1.00 1.	00	Before due date Yes	Ye	NO NO	Yes	Yes	s Yes	No	Yes	Yes	No	Assigned Staff	Specified days before next date	6 15	Before due date 6	0	1 0	0	Other		Not Started Normal
AUDI12	Audit2	Audit Services	Attestation Department	Client's Partner	Engagement's Manager	Actual Yes	s 0.0	0.00	0.00	1.00 1.	00	Before due date Yes	Ye	NO NO	Yes	Yes	s Yes	No	Yes	Yes	No	Assigned Staff	Specified days before next date	6 15	Before due date 6	0	1 0	) O	Other		Not Started Normal
	August Writeup	Accounting Services	Accounting Department	Client's Partner	Engagement's Manager	Budgeted Yes	s 0.0	0.00	0.00	1.00 1.	00	After received date No	Ye	NO NO	Yes	NO	No	NO	Yes	Yes	Yes	Assigned Staff	Specified days before next date		After received date 0	0	0 10		Other		Not Started Normal
BIWEEKPAYRL		Payroll Services	Accounting Department	Client's Partner	Engagement's Manager	Actual Yes	s 0.0	0.00	0.00	1.00 1.	00	After received date No	Ye	NO NO	Yes	Yes	S Yes	Yes	Yes	Yes	NO	Assigned Staff	Specified days before next date		After received date 0	0		. 0	Other		Not Started Normal
	Business Amended Tax Return	Business Tax Services	Tax Department	Client's Partner	Engagement's Manager	Budgeted Yes	s 0.0	0.00	0.00	1.00 1.	00	After received date No	Ye	NO NO	Yes	Yes	S INO	NO No	Yes	Yes	NO	Assigned Staff	When I manually create it	2 15	After received date 0	0	0 14	+ 0	Other		Not Started Normal
	Business Tax Extension	Business Tax Services	Tax Department	Client's Partner	Engagement's Manager	Template Yes	S 0.0	0.00	0.00	1.00 1.	00	After received date No	re	NO NO	NO NO	INO	No	NO	NO	NO	NO	Assigned Staff	When I manually create it	2 15	After received date 0	0	0 4		Other		Not Started Normal
	Business Tax Notice	Business Tax Services	Tax Department	Client's Partner	Engagement's Manager	Template Yes		0.00	0.00	1.00 1.	00	After received date No	ie Vo			NO	NO No	NO	NO	NO	NO	Assigned Staff	When I manually create it	2 15	After received date 0	0	0 10		Other		Not Started Normal
	Business Tax Planning	Business Tax Services	Tax Department	Client's Partner	Engagement's Manager Engagement's Manager	Actual Yes	s 0.0	0.00	0.00	1.00 1.	00	After received date Yes	Te Ve	NO NO	ne nes	Te: No	No No	No	Tes	Tes	No	Assigned Staff	Specified days before next date	2 15	After received date 0	0	0 30		Other		Not Started Normal
DECWRITEUP	Consulting December Writeup	Consulting Services Accounting Services	Accounting Department	Client's Partner Client's Partner	Engagement's Manager	l'emplate Yes Budgeted Yes	ις Ο.Ο	0.00	0.00	1.00 1.	00	After received date No After received date No	Te Ve	NO NO		No	No	No	NU Ves	NO	Vec	Assigned Staff	When I manually create it Specified days before next date	1 0	After received date 0 After received date 0	0	0 10		Other		Not Started Normal
EBPAUDIT	Employee Benefit Plan Audit	Audit Services	Attestation Department	Client's Partner	Engagement's Manager	Budgeted Yes Budgeted Yes	.s 0.0	00	0.00	1.00 1.	00	Before due date Yes	Ye		Yes	Yee		No	Yes	Yes	No	Assigned Staff Assigned Staff	Specified days before next date	6 15	Before due date 6	0	1 0	, 0	Other		Not Started Normal
	February Writeup	Accounting Services	Accounting Department		Engagement's Manager	Budgeted Yes	s 0.0	00	0.00	1 00 1	00	After received date No	Ye	No No	Yes	No	No	No	Yes	Yes	Yes	Accianad Staff	Specified days before next date	1 0	After received date 0	0	0 10		Other		Not Started Normal
	Federal Tax Audit	Tax Audit Services	Tax Department	Client's Partner	Engagement's Manager	Template Yes	s 0.0	00	0.00	1 00 1	00	After received date No	Ye	No No	No	No	No	No	No	No	No	Assigned Staff	When I manually create it	2 15	After received date 0	0	0 20		Other		Not Started Normal
	January Writeup	Accounting Services	Accounting Department	Client's Partner	Engagement's Manager	Budgeted Yes	s 0.0	.00	0.00	1.00 1.	00	After received date No	Ye	No No	Yes	No	No	No	Yes	Yes	Yes	Assigned Staff	Specified days before next date	1 0	After received date 0	0	0 10	) (	Other		Not Started Normal
JULWRITEUP		Accounting Services	Accounting Department		Engagement's Manager	Budgeted Yes	s 0.0	.00	0.00	1.00 1.	00	After received date No	Ye	No	Yes	No	No	No	Yes	Yes	Yes	Assigned Staff	Specified days before next date	1 0	After received date 0	0	0 10	) 0	Other		Not Started Normal
JUNWRITEUP		Accounting Services	Accounting Department	Client's Partner	Engagement's Manager	Budgeted Yes	s 0.0	.00	0.00	1.00 1.	00	After received date No	Ye	No	Yes	No	No	No	Yes	Yes	Yes	Assigned Staff	Specified days before next date	1 0	After received date 0	0	0 10	) 0	Other		Not Started Normal
MARWRITEUP		Accounting Services	Accounting Department	Client's Partner	Engagement's Manager	Budgeted Yes	s 0.0	.00	0.00	1.00 1.	00	After received date No	Ye	No	Yes	No	No	No	Yes	Yes	Yes	Assigned Staff	Specified days before next date	1 0	After received date 0	0	0 10	) 0	Other		Not Started Normal
MAYWRITEUP		Accounting Services	Accounting Department	Client's Partner	Engagement's Manager	Budgeted Yes	s 0.0	.00	0.00	1.00 1.	00	After received date No	Ye	No	Yes	No	No	No	Yes	Yes	Yes	Assigned Staff	Specified days before next date	1 0	After received date 0	0	0 10	) C	Other		Not Started Normal
	Mergers & Acquisitions	Consulting Services		Client's Partner	Engagement's Manager	Template Yes	s 0.0	.00	0.00	1.00 1.	00	After received date No	Ye	No	No	No	No	No	No	No	No	Assigned Staff	When I manually create it	2 15	After received date 0	0	0 30	) 0	Other		Not Started Normal
	Monthly Compilation	Compilation Services	Attestation Department		Engagement's Manager	Budgeted Yes	s 0.0	.00	0.00	1.00 1.	00	After received date No	Ye	No	Yes	Yes	s Yes	No	Yes	Yes	Yes	Assigned Staff	Specified days before next date	1 0	After received date 0	0	0 10	) 0	Other		Not Started Normal
	Monthly Sales & Use Tax	Payroll Services	Accounting Department	Client's Partner	Engagement's Manager	Budgeted Yes	s 0.0	.00	0.00	1.00 1.	00	After received date No	Ye	No	Yes	No	No	No	Yes	Yes	Yes	Assigned Staff	Specified days before next date	1 0	After received date 0	0	0 5	C	Other		Not Started Normal
MONTHPAYROL		Payroll Services	Accounting Department	Client's Partner	Engagement's Manager	Budgeted Yes	s 0.0	.00	0.00	1.00 1.	00	After received date No	Ye	No	Yes	No	No	No	Yes	Yes	Yes	Assigned Staff	Specified days before next date	0 20	After received date 0	0	0 0	C	Other		Not Started Normal
	Not-For-Profit Audit	Audit Services	Attestation Department	Client's Partner	Engagement's Manager	Budgeted Yes	s 0.0	.00	0.00	1.00 1.	00	Before due date Yes	Ye	No	Yes	Yes	s Yes	No	Yes	Yes	No	Assigned Staff	Specified days before next date	6 15	Before due date 6	0	1 0	C	Other		Not Started Normal
	November Writeup	Accounting Services	Accounting Department	Client's Partner	Engagement's Manager	Budgeted Yes	s 0.0	.00	0.00	1.00 1.	00	After received date No	Ye	No	Yes	No	No	No	Yes	Yes	Yes	Assigned Staff	Specified days before next date	1 0	After received date 0	0	0 10	) C	Other		Not Started Normal
OCTWRITEUP	October Writeup	Accounting Services	Accounting Department	Client's Partner	Engagement's Manager	Budgeted Yes	s 0.0	.00	0.00	1.00 1.	00	After received date No	Ye	No	Yes	No	No	No	Yes	Yes	Yes	Assigned Staff	Specified days before next date	1 0	After received date 0	0	0 10	) C	Other		Not Started Normal
OTHERTAXAUD	OtherTax Audit	Tax Audit Services	Tax Department	Client's Partner	Engagement's Manager	Template Yes	s 0.0	.00	0.00	1.00 1.	00	After received date No	Ye	No	No	No	No	No	No	No	No	Assigned Staff	When I manually create it	2 15	After received date 0	0	0 20	) C	Other		Not Started Normal
	Payroll Tax Notice	Payroll Services	Accounting Department	Client's Partner	Engagement's Manager	Template Yes	s 0.0	.00	0.00	1.00 1.	00	After received date No	Ye	No	No	No	No	No	No	No	No	Assigned Staff	When I manually create it	2 15	After received date 0	0	0 10	) 0	Other		Not Started Normal
	Quarterly Compilation	Compilation Services	Attestation Department	Client's Partner	Engagement's Manager	Budgeted Yes	s 0.0	.00	0.00	1.00 1.	00	After received date No	Ye	No	Yes	Yes	s Yes	No	Yes	Yes	Yes	Assigned Staff	Specified days before next date	1 0	After received date 0	0	0 10	) 0	Other		Not Started Normal
QTRPAYROLL	Quarterly Payroll	Payroll Services	Accounting Department	Client's Partner	Engagement's Manager	Template Yes	s 0.0	.00	0.00	1.00 1.	00	After received date No	Ye	No	No	No	No	No	No	No	No	Assigned Staff	Specified days before next date	0 20	After received date 0	0	0 0	C	Other		Not Started Normal
	Quarterly Sales & Use Tax	Payroll Services	Accounting Department		Engagement's Manager	Budgeted Yes	s 0.0	.00	0.00	1.00 1.	00	After received date No	Ye	No	Yes	No	No	No	Yes	Yes	Yes	Assigned Staff	Specified days before next date	1 0	After received date 0	0	0 5	C	Other		Not Started Normal
	Quarterly Writeup	Accounting Services	Accounting Department	Client's Partner	Engagement's Manager	Budgeted Yes	s 0.0	.00	0.00	1.00 1.	00	After received date No	Ye	No	Yes	No	No	No	Yes	Yes	Yes	Assigned Staff	Specified days before next date	1 0	After received date 0	0	0 10	) 0	Other		Not Started Normal
REVIEW	Review	Review Services	Attestation Department	Client's Partner	Engagement's Manager	Budgeted Yes	s 0.0	.00	0.00	1.00 1.	00	Before due date Yes	Ye	No	Yes	Yes	s Yes	No	Yes	Yes	No	Assigned Staff	Specified days before next date	4 15	Before due date 4	0	0 5	C	Other		Not Started Normal
	September Writeup	Accounting Services	Accounting Department	Client's Partner	Engagement's Manager	Budgeted Yes	s 0.0	0.00	0.00	1.00 1.	00	After received date No	Ye	No	Yes	No	No	No	Yes	Yes	Yes	Assigned Staff	Specified days before next date	1 0	After received date 0	0	0 10	) 0	Other		Not Started Normal
STATETAXAUD	StateTax Audit	Tax Audit Services	Tax Department	Client's Partner	Engagement's Manager	Template Yes	s 0.0	0.00	0.00	1.00 1.	00	After received date No	Ye	No	No	No	No	No	No	No	No	Assigned Staff	When I manually create it	2 15	After received date 0	0	0 20	) C	Other		Not Started Normal

ID	Project Description	Engagement	Department	Responsible	Assigned	Budget Generation Ba	sed on Tasks?	Budgeted Amount	Budgeted Hours	Budgeted Amount Factor	Budgeted Hours Factor Completion Event	Target Date Method Use Fiscal Year	? Must be Weekd	ay? Generate Assigned from	Project Generate Custom Values from Project	ect Generate Descriptions from Pro	ect Generate Engagement from P	roject Generate Groupings from Pro	ject Generate Tasks from Project	t Generate Links from	n Project Generate Notes from Proje	ject Staff Assignment Method	Generation Method	Generation Month	Generation Day 1	Target Start Date Method Target Sta	art Month Target Start D	Day Target Complete	e Month Target Complete	Day Solution	Solution Target	Tracking Description	Project Priority
TAXCOMP	Tax Compilation	Business Tax Services		Client's Partner	Engagement's Manager	Actual Ye	es	0.00	0.00	1.00	1.00	After received date Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes	No	Assigned Staff	Specified days before next date	2	15 A	After received date 0	0	0	21	Other		Not Started	Normal
VALUATION	Business Valuation	Consulting Services		Client's Partner	Engagement's Manager	Template Ye	es	0.00	0.00	1.00	1.00	After received date No	Yes	No	No	No	No	No	No	No	No	Assigned Staff	When I manually create it	2	15 A	After received date 0	0	0	30	Other		Not Started	Normal
W2W3	W-2/W-3	Payroll Services	Accounting Department	Client's Partner	Engagement's Manager	Budgeted Ye	es	0.00	0.00	1.00	1.00	After received date No	Yes	No	Yes	Yes	Yes	No	Yes	Yes	Yes	Assigned Staff	Specified days before next date	1	0 A	After received date 0	0	0	5	Other		Not Started	Normal
WEEKPAYROLL	Weekly Payroll	Payroll Services	Accounting Department	Client's Partner	Engagement's Manager	Budgeted Ye	es	0.00	0.00	1.00	1.00	After received date No	Yes	No	Yes	No	No	No	Yes	Yes	Yes	Assigned Staff	Specified days before next date	0	6 A	After received date 0	0	0	0	Other		Not Started	Normal