

Celoxis Evaluation Checklist

Advanced Scheduling

- Manual Scheduling
- Multiple Resources with Individual Allocations
- Allocations in Percentage & Hours
- Assign Resources from Different Time Zones
- Auto Scheduling based on Resource Hours, Vacations & Time zones
- Fixed Effort, Fixed Duration & Fixed Units Scheduling
- Interactive Gantt Chart
- Cross-project Dependencies
- Project & Task Baseline
- Critical Path

Financial Management

- Activity & User-based Billing Models
- Fixed Price & Hourly Project Engagements
- Project & Task level Budgets
- Fixed Labor & Material Cost
- Project Specific Rates
- Financial Health Indicators
- Planned v/s Actual Tracking
- Job role-based costing and billing
- Cost Projection
- Revenue Forecasting
- Cash Flows & Margin Tracking
- Invoicing

Reporting and Analysis

- Multiple Data Visualizations (Donut, Bar, Stacked & Grouped Bar, Comparison Bars, Scatter, Tabular, Line, Card View, Gantt)
- Drill-down Reporting
- Multi-level Grouping & Sorting
- Reporting on Custom Fields (including formula fields)
- Time-phased Data Reporting
- Dynamic Filtering
- Scheduled Report Delivery

Time and Expense Management

- Weekly Timesheet
- Timers
- Fill Time via Email
- Fill Time for Another User (Proxy)
- Non-project Time
- Automatic Timesheet Reminders
- Incomplete Timesheet Reporting
- Activity & Expense Codes
- Reimbursable Expenses
- Configurable multilevel time approval workflows
- One-click Approvals
- Auto Approvals

Collaboration

- Project Discussions
- Conversations on Tasks & other Work Items
- Activity Stream
- Document Management
- File Sharing
- @mentions
- In-app Notification Center
- Free Client Collaboration

Security

- Role-based Security
- Project-level Security settings
- Workspaces to isolate Projects

Customisations

- Custom fields, including roll-up & formula fields
- Individual Dashboard & Report Customizations
- Account Branding
- User Preferences
- User Avatar

Project Tracking

- Visual Health Indicators
- Schedule Projections
- Planned v/s Actual Tracking
- Earned Value Analysis (EVA)
- Status Updates by Email
- Management Dashboards
- Email Notifications
- Intelligent Alerts & Notifications
- Calendar View
- Change Request Management

Resource Management

- Resource Profiling & Skillsets
- Project & Personal Calendars
- Exception Management (meetings, vacations...)
- Job Roles
- Reporting Manager
- External Users (vendors/contractors)
- Part-time Resources
- Virtual Users
- Interactive Cross-project Workload Chart
- Capacity Planning
- Planned v/s Actual Effort & Utilization Tracking
- Resource Efficiency
- Who's Doing What

Project Portfolio Management

- Project Requests
- Project Prioritization
- Demand Management
- Custom Fields to capture Business KPI
- Project Portfolio Analysis

Risk Management

- Create, Assign & Track Organizational or Project Risks
- Qualify Risks by Impact, Probability of Occurrence & Risk Rating
- Add your Risk Parameters
- Risk Assessment
- Risk Register

Custom Apps (Workflows)

- Microsoft Project
- Excel/CSV
- Salesforce.com
- QuickBooks Online
- Google Drive
- iCal
- LDAP (Active Directory)
- Full Email Integration (Outlook, Gmail, etc.)
- Single Sign-On (SSO)
- Flexible, web-based API

Deployment Options

- SaaS (Cloud-based)
- On-Premise

Other Features

- Search
- Multi-lingual Application (Localization)
- Mobile Access

