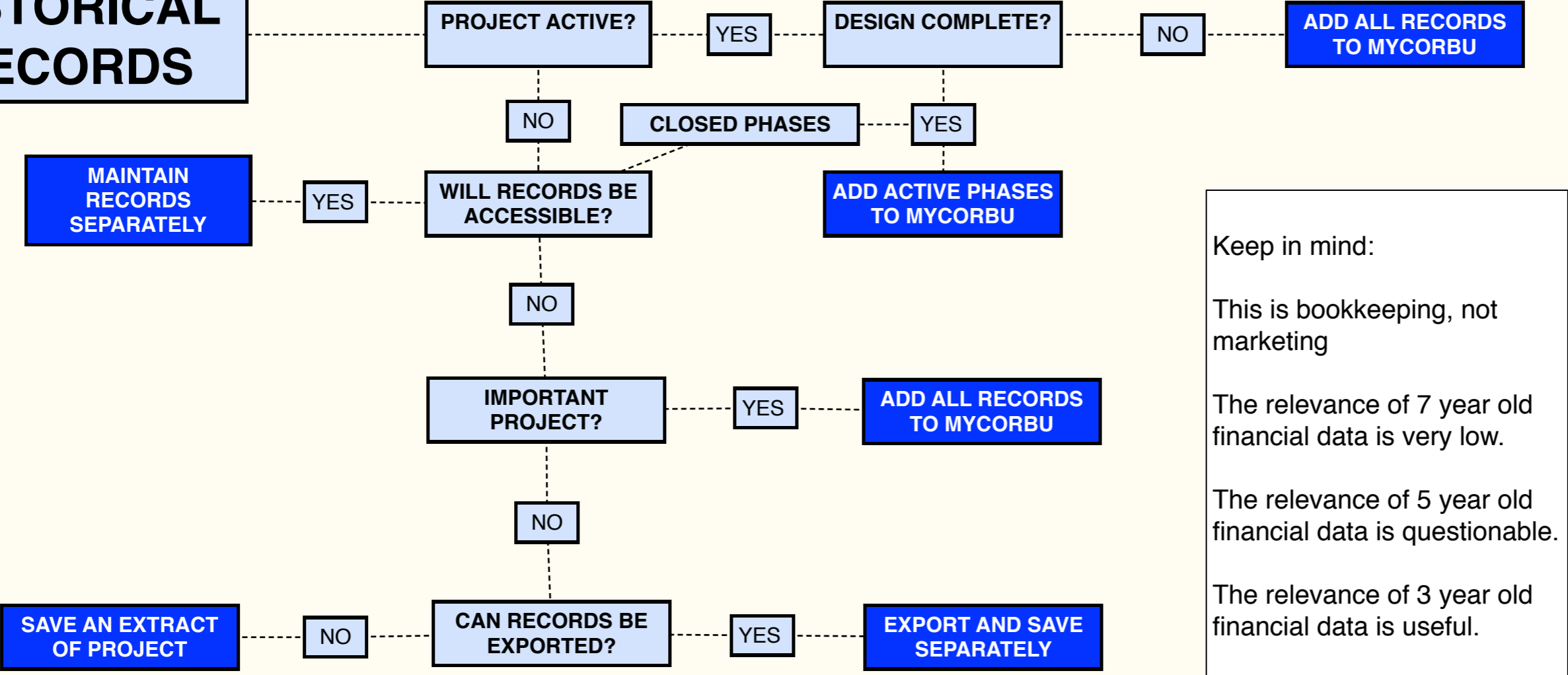


# HISTORICAL RECORDS



Keep in mind:

- This is bookkeeping, not marketing
- The relevance of 7 year old financial data is very low.
- The relevance of 5 year old financial data is questionable.
- The relevance of 3 year old financial data is useful.

- Suggested minimal historical records entries:
- Add the Project
  - Add the Project-Phases
  - Add the Contact Org for client, consultants, etc.
  - Set charge rates to 'era-appropriate' (perhaps 90% of billing rates in effect)
  - Make one time entry per person per Project-Phase on a relevant date per year
  - Ignore reimbursable expenses and mileage
  - Make one expense entry for each project-related expense category (e.g. consultants) per year
  - Make one income entry for project per year