

SunSystems PSA

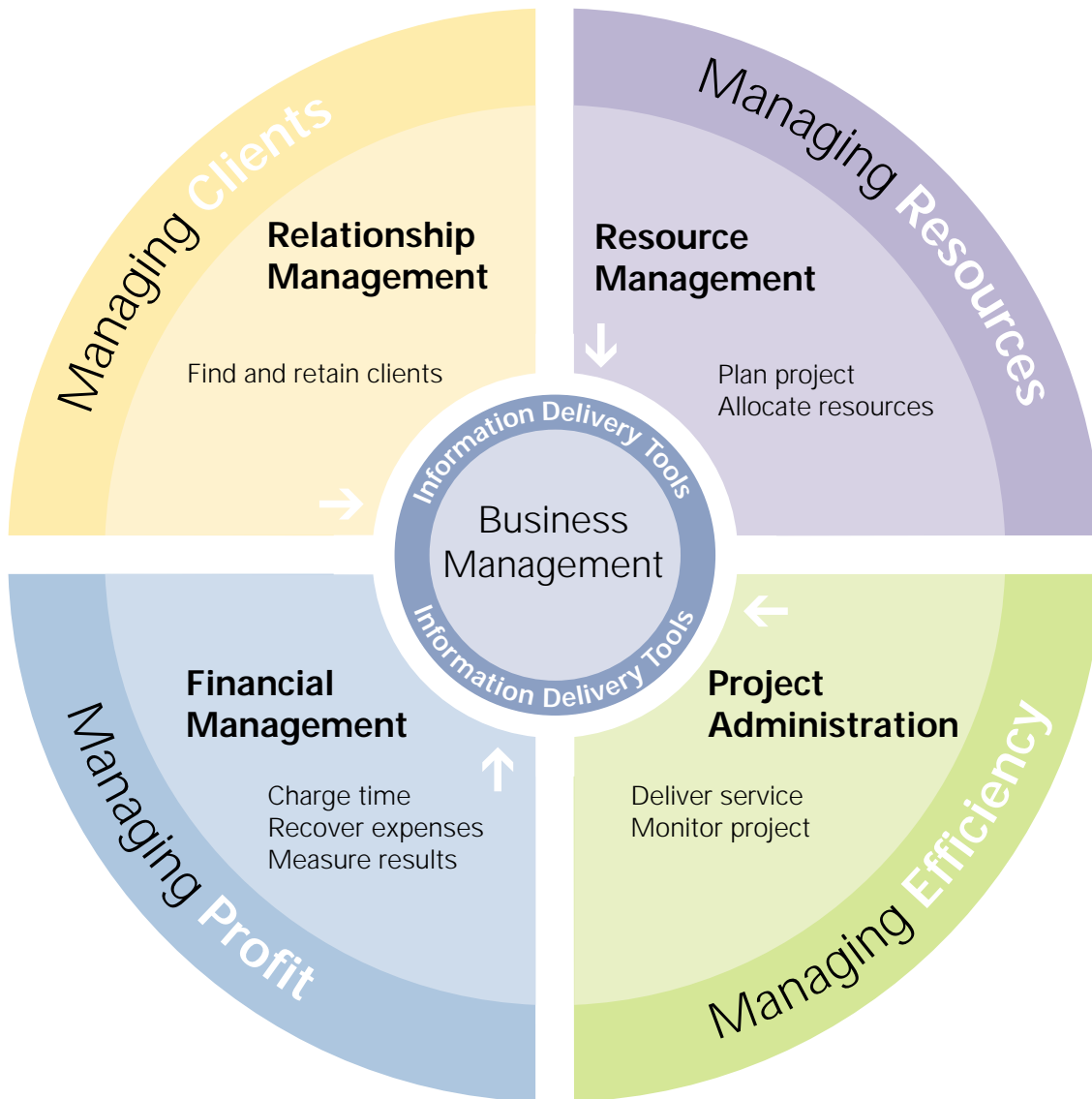
Powered by Sharp**OWL**

Product Overview





The Total PSA solution



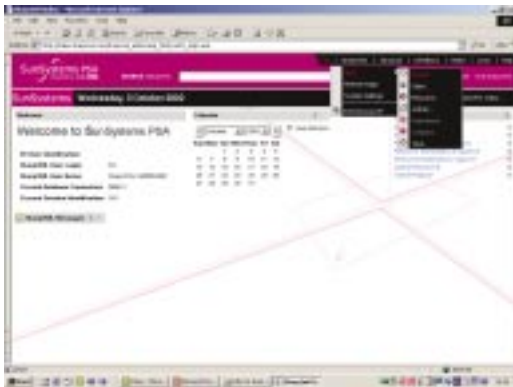
A suite of PSA applications suitable for organizations supplying services on an internal or external basis



SunSystems PSA

Meeting the needs of professional services organizations

SunSystems PSA (Professional Services Automation) is a suite of integrated application modules. It is aimed at organizations that offer the services of skilled staff on a project basis, either to external clients or in an in-house capacity such as an IT or facilities department. It enables effective planning of projects and resources, plus efficient time and expenses management and billing, which will drive revenue recovery and improve utilization, bringing tangible improvements to your profits, client relationships and staff retention figures. SunSystems PSA is powered by SharpOWL™, a leading PSA vendor, and has been tailored to integrate seamlessly with the rest of the SunSystems back office portfolio.



"PSA is a new family of applications designed for services organizations that gives professionals the ability to become more efficient and profitable, while increasing their levels of customer satisfaction."

David Hofferberth,
Senior Analyst, Aberdeen Group

Designed by professionals for professionals

SunSystems PSA can be smoothly dovetailed with your existing business processes. It is available as a range of specific modules that combine to provide a complete solution across the entire business lifecycle of an internal or external services organization.

The integrated nature of SunSystems PSA supports and enhances the flow of relevant real-time information throughout your business. It collects raw data accurately and efficiently turning it into meaningful business knowledge, enhancing control and communication throughout.

The SunSystems philosophy of quality and value-added service ensures a seamless link with your systems to mould the right PSA solution for your business. SunSystems PSA instills and maintains good business practice enterprise-wide and has been designed by experts with personal experience of managing services-led businesses.



Unlocking your potential

SunSystems PSA unlocks the potential of your business, maximizing your profit and efficiency through better knowledge, planning and strategic decision making. As a leading Professional Services Automation software solution, SunSystems PSA is suitable for any business or internal department that employs highly skilled and high value professionals.

Sharpen your business edge by delivering the right information to the right people at the right time.

Challenges facing businesses today:

- Expensive staff costs – hiring, training and keeping
- Complexity of change management
- Increasing client demands and globalization
- Information isolation – lack of shared knowledge
- High levels of written-off or incorrectly billed time
- Lack of visibility throughout the organization
- Lack of confidence to make strategic business decisions

SunSystems PSA enables you to:

- Identify, win and retain profitable clients
- Pinpoint, recruit and retain the best people
- Recognize, process and distribute valuable information
- Identify, manage and grow your areas of profit



"...PSA solutions should be, for the most part, a 'no brainer' investment for services organizations looking for the cost containment and increased revenues that result in increased profitability."

Aberdeen Group

November 2001



Clarity and control

As a manager of a skilled resources department or business you need a clear and complete view of your business information. SunSystems PSA provides an integrated PSA solution across the full range of business functions.



"We now have an excellent overview of all project activity. Users can easily submit data to the system, monitor performance levels and accurately allocate budgets and resources across specific projects, which will add considerably to the bottom line."

*Peter Shere,
Finance Director, Drivers Jonas Ltd*

Project Name	Status	Start Date	End Date
Project A	Active	01/01/2010	31/12/2010
Project B	Completed	01/01/2009	31/12/2009
Project C	On Hold	01/01/2011	31/12/2011
Project D	Active	01/01/2010	31/12/2010
Project E	Active	01/01/2010	31/12/2010

Business Management

SunSystems PSA enables you to make important strategic business decisions rapidly and with confidence. Its unique reporting and publishing tools retrieve only the relevant information from your key business areas, delivering this to business heads in near real-time, while allowing drill-down to any granular level.

Customer Relationship Management

SunSystems PSA integrates to leading CRM packages to allow you to:

- Improve contact and communication with customers and prospects
- Evaluate and manage all opportunities more effectively
- Streamline and rationalize your bid process
- Better co-ordinate your sales and marketing opportunities
- Share vital customer information throughout your organization

Resource Management

- Quickly define your projects by task and activities
- Easily schedule your available resources, matching skills with availability
- Accurately set budgets, define costs and billing rates
- Rapidly communicate your plans and resource schedules to all relevant parties

Project Administration

- Capture time information quickly and accurately
- Process and approve expenses rapidly
- Feed back and publish timely work-in-progress reports
- Alert client of key milestone achievements/delays
- Approve/deny/comment on information captured

Financial Management

- Manage complex billing scenarios
- Easily recharge to other cost centers
- Increase visibility of costs, income and margin
- Establish automatic feed into ledgers and accounting systems



Global Solutions, Local Support

Get in touch... today

With 18,000 customers in over 190 countries, SunSystems is a truly global solution for all your distributed financial and business software requirements. Systems Union, author of SunSystems, has an international development center, where over 200 people ensure that this unique application remains the industry benchmark for flexibility and value. The company has a further 500 employees working around the world to support customers, and relationships with 200 Value Added

Resellers who offer local installation, training and support in every country in the commercial world.

For more information on SunSystems, service offerings, Systems Union or our partners, please visit our web site at www.sunsystems.com or contact your nearest SunSystems office.

System Requirements

SunSystems PSA uses Microsoft SQL Server 7 and 2000 for the database. Microsoft Windows 98, ME, NT and 2000 clients are supported.

Note: This statement is to be used as a guide and does not indicate levels of performance. An experienced technical consultant should in all cases be used to confirm suitability of configurations for your organization.

Disclaimer

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SunSystems PSA

Project Repository



Overview

Project Repository is the core module within the SunSystems PSA solution. It is the central data source where projects are defined and key information relating to project set-up, client rates and project specific activities and tasks are stored. This information can then be used to support time and expenses capture, resource management, billing and reporting.

Key features at a glance:

- Core mandatory SunSystems PSA module
- Resources can be categorized for ease of searching and allocation
- Clear project definition
- Powerful inbuilt enquiry and report-writing tool
- Alerts for key events within the project lifecycle
- Capability to archive and historically file projects
- Ability to access SunSystems PSA remotely over the web

Identifying your project resources

The Project Repository module allows managers to gain an overview of their available skills base and identify individual resources by department, category, rate, hours worked or competency.

The selection of resource for a particular project can be made by skill as well as individual names, allowing searches using up to ten separate analysis codes on every resource. For ease of selection, each resource can be categorized within the Project Repository module and can contain an individual or group cost as well as currency and charge out rates.

Establishing your project details

Within SunSystems PSA, projects are clearly defined using a hierarchical structure to facilitate planning and authorization control.

This definition includes the allocation of specific tasks or activities to a project as well as key dates and project notes. User defined status codes are allocated to the project and are accessible to the members of the project team.

Budgets and billing profiles can be established within the Project Repository and work can be categorized as productive or non-productive with each project able to adopt its own currency rules.

Reporting on SunSystems PSA

To keep project managers ahead of the game, SunSystems PSA has a powerful inbuilt enquiry and report-writing tool. The powerful Universal Search Facility (USF) and configurable reporting tools further ensure projects are under control at all times.

The event logger can be set up to monitor any key performance indicator associated with a project. Percentage work completed, for example, could be assigned to trigger an alert to the relevant managers, and could also prompt automatic invoice generation. Negative events, such as missing timesheets, can also be signaled to managers and rectified to avoid future problems.

SunSystems PSA will even monitor your resources' work rates, and alert management if staff are working over the EU directive for maximum working hours.



SunSystems PSA

Project Repository

Keeping the data clean

SunSystems PSA maximizes your processing power by keeping your data up to date and clean. Its tailored functionality boosts performance by only retaining relevant information whilst enhancing access to valuable historical data for reporting needs.

Furthermore, once projects, tasks or activities have become inactive, they can be flagged so as not to appear as drop down options.

Accessing the data

Role profiles control the level to which a member of staff can view or amend the data held within the repository. The standard roles within SunSystems PSA are Administrator, User and Client.

Additionally, as today's professionals are often located away from their office networks, SunSystems PSA can be accessed remotely. The web based maintenance facilities can be accessed securely via any compliant internet explorer site.* As well as updating and amending, new projects or clients can be set up remotely with the project structure identifying all relevant parties to be alerted via email.

* Web project maintenance has been designed for IE5.5 to maximize the use of navigational features. The minimum version for project maintenance over the web is IE5.

→ SunSystems PSA Resource Manager

→ Overview

The Resource Manager addresses the business issues facing project-based organizations when planning and managing the activities of large or complex resource pools. It uses, and builds on, the basic resource information created and stored in the main Project Repository.

It is a tool that aids effective scheduling, resulting in optimal utilization of resources by enabling project managers and resource managers to share knowledge, thus being in a better position to collaborate. This functionality is of particular relevance to those organizations with multiple resource pools under separate management and in separate locations.

It provides a view of the consolidated Microsoft® Outlook calendars of multiple resources in those locations. This enables recognition of existing workloads and 'free time' for allocation to project tasks.

Key features at a glance:

- Designed to use the core resource information already residing in the Project Repository
- Complete view of resource availability based on entries in MS Outlook calendars, on one or more Microsoft Exchange Servers
- Ability to schedule resources based on Skill, Location and Aspiration
- Weighting of scheduling criteria is possible, e.g. skill may be weighted more heavily than location
- Enhanced skills analysis capability
- Ability to link to HTML documents such as CVs, work packages, contracts, etc.
- Acknowledges that resources belong to different line managers
- Provides a web-based interface for managing requests
- Includes reminders to ensure that resources are booked within a specified time span

Enhanced efficiency

Many project management software tools rely on project diaries that are not synchronized with Microsoft® Outlook Calendars. Project diaries contain project related assignments whereas Outlook Calendars will contain more general information regarding holidays, training assignments and the like.

As a consequence of using the Resource Manager, project and resource managers will have a complete view of resource availability and, as a result, the utilization of resources is efficient.



Calendar information is presented graphically and each block of time, unless marked "private", may be drilled into for detailed assignment information. Calendar bookings are color coded to differentiate provisional and firm bookings, chargeable and non-chargeable values, as well as their accepted or tentative status.



SunSystems PSA

Resource Manager

Skills data

An organization can use new skills criteria in the selection of resources for deployment, ranging from obvious technical suitability to include things such as language skills with assigned degrees of fluency.

Skills may be designated as 'base' skills and a multi-level tree can store a series of related skills (e.g. Languages -> French -> written or spoken) before a competence rating is required.

Skills and levels of competency are user-defined and date sensitive so that they may be tracked and reviewed regularly. The system Event Logger can be pointed at the Skills Database to track changes.

In addition to supporting notes, each skill can record levels of aspiration – that indicate enthusiasm and willingness to learn – which may be required when a shortage of actual skills exists, or to recognize the employee's desire to develop new skills. Furthermore, in support of common practices, experience data can be recorded against each skill and linked to clients and projects in order to extract management and bid data.

Managing the individual

The Resource Manager enables more data to be recorded against individual resources allowing for quick, easy assignment to projects for which they are well suited.

Additional deployment data includes:

- Passport and visa information, complete with expiry dates
- Travel preferences and restrictions, which can be modified
- Temporary constraints to accommodate life events, e.g. marriages, pregnancy, illness, sabbaticals

Taking these things into account when scheduling resources can prevent employee "burn out" and reduce an organization's rate of attrition. It also ensures that the most appropriate resource is assigned quickly to projects, increasing both customer and employee satisfaction.

Controlled business processes

When searching for resources to be allocated to projects, requesting managers can restrict their searches to only those areas within their agreed pools. For example, they may select by availability, company, department, profit center, client, project, resource, skills, location, region, willingness to travel, resource analysis codes and security group.

When the search results are returned, a link against each resource shows the calculated suitability percent and allows the user to 'drill' to see how the calculation was arrived at, including the influence of weighting. At the end of a successful search configuration, the settings may be saved for re-use.

Booking requests can then be made and are circulated to resource owning managers, or directly to resources authorized to "self approve" their bookings. "Proxy" users can be defined to cover for resource managers when they are not available.

All requests are set to expire at a user specified date and can be managed through a message board, ensuring that no bookings are forgotten or go unfulfilled.



SunSystems PSA

Microsoft® Project Interface



Overview

Project Interface is a module which integrates SunSystems PSA with Microsoft® Project. Microsoft® Project is the most widely used project management tool in the world and therefore this integration enables projects to be managed more easily using familiar software.

Key features at a glance:

- Integration of SunSystems PSA and Microsoft® Project
- Use of a familiar tool thereby reducing training costs
- Allows the import of key data from other SunSystems PSA modules
- Project plans can be exported to the relevant projects held in your SunSystems PSA database
- Financial data can be merged with project plans to give valuable forecasting and costing information

Complete project management

A project manager needs to keep track of all the complex issues surrounding a project. Microsoft® Project enables an overview of the complete project to establish performance against target and foresee any problems arising in critical paths. This facilitates client updates and the resolution of situations before they become an issue.

By utilizing the existing common areas of data overlap, the Project Interface greatly enhances your team's ability to manage, and reduces the administrative burdens of re-keying or manual chasing. And because you're enhancing existing tools, little extra training is required, meaning work schedules won't be disrupted.

Ease of integration and data availability

Via the SunSystems PSA Project Interface, MS Project can utilize the vast pool of resource and client data stored in the Project Repository module. Data on skills, resource numbers, territories, costs & charge rates, client projects, tasks and activities etc can be requested and imported onto a plan. Set hours and non-working days can also be considered via import of calendar information, for assigning individuals accordingly.

The Project Interface further supports your project administration functions via an additional toolbar within MS Project to communicate with SunSystems PSA. Because SunSystems PSA holds relevant cost and charge data assigned to resources and clients, a cost budget for any project can be created from scratch within MS project, and will even enable insertion of tasks and activities from the relevant databases onto the Gantt chart.

Any budget previously created against a SunSystems PSA project can also be brought in, and used as a template (access rights permitting) when creating a new project. You can also bring in the budget to revise figures to export back into SunSystems PSA.

Because budgets can be auto saved into Project and set as baselines, timelines can be imported to allow comparisons with actual time spent on projects. Constant monitoring of plans against real cost and time data can again keep management informed of any gains or slippage against budgets or timescales.

Using SunSystems PSA, MS Project Interface will give far better visibility of the on-going projects within your organization, enabling more informed decision making with regards to utilization of resources and future business plans. Forecasting will be less problematic as reporting on all ongoing projects, their stages, and staff utilization becomes visible.



SunSystems PSA Billing Manager



Overview

SunSystems PSA Billing Manager is a module within the Professional Services Automation Suite that allows total control over the entire billing process. It is essential for those companies who charge out for their employees' time, or simply wish to account for internal services.

It can be tailored to reflect the way you work, handling all types of billing in any combination, enabling adjustments to be made at any stage, and charged as you prefer or as agreed with individual clients. Recovery of expenses or disbursements can all be automatically processed using agreed uplifts, and clients can even be billed electronically, using the e-Billing™ feature standard with this module.

Refined over a number of years and utilizing feedback from professional services billing teams, SunSystems PSA will handle all your company's specific invoicing requirements. It will also cater for internal project teams or services departments, where cross-charging and accountability are key.

Key features at a glance:

- Complete control of your billing to maximize billing opportunities and reduce administrative burdens
- e-Billing as standard to reduce approval and payment times
- Analysis of the billing data and provision of all your strategic reporting information needs; profits, utilization figures, billing history, recovery rates etc.
- Flexible charge rate definition (resource, activity, date, stepped, project and client)
- Allows the creation of a constant stream of billing rather than the monthly bottleneck
- Handles all types of professional billing (fixed, milestone, T&E, advanced, multi-client and repeat)
- Customizable invoice formats

SunSystems PSA e-Billing™ – The future of invoicing here today

In the billing cycle the less paper and manual processes you have, the quicker you can gain approval and receive payment. The option to use e-Billing™ comes as standard with Billing

Manager, conforming to the new electronic BASDA standards. Allowing customer ownership of parts of the project process via secure portals is truly the next generation of e-business.

Utilizing a sophisticated web publishing tool, e-Billing™ presents your clients with an invoice, in a familiar style*, for work completed which can be approved online. The invoice is actually a dynamic web page providing a number of layers of information and the recipient may drill down to examine the detail beneath. Once satisfied, the bill can be approved and generated. The invoice can be emailed directly to the client's financial system and a hard copy dispatched to satisfy current audit requirements.

e-Billing™ is safe and secure, ensuring that only data you wish clients to see is made available. Page level security profiles can also be created, thus approval periods and speed of payments will increase.

SunSystems PSA also integrates seamlessly into the other SunSystems products, feeding your accounts systems with relevant data for updating the debtor account within the sales ledger and the appropriate nominal accounts.

**e-Billing™ is standard as part of your Billing Manager solution. You will however, need to run a reports server to run the report database. Bespoke invoice styles can be designed by your support provider.*

Maximizing billing opportunities

With SunSystems PSA Billing Manager you can increase the revenue realized from your project work. Employees are less likely to write-off time as non-chargeable administration when they are capturing the information with the Time & Expenses Manager. The approvals system also helps by alerting senior managers to repeated written-off hours so action can be taken to improve the recovery figures. Reporting can highlight areas of profit, loss or weakness, and again steps can be taken to improve utilization and recovery in those areas.

Managing cash flow

Billing Manager allows modification of the invoicing process by the individuals who are closest to the projects. Following the generation of a draft bill, project managers can manually adjust the hours and rates on a bill, depending on what they have agreed with the client.



SunSystems PSA

Billing Manager

This flexibility means that the numbers can be approved by the clients and then expectations matched by the back office team in charge of processing and distributing the final bill. Furthermore, managers can defer items, spread values, or search for extra items which may have recently been updated following the generation of the draft. Mandatory audit trails for modifications ensure there is a history of when and why each amount was not billed, and reporting outputs allow for detailed analysis of adjustment activity.

By invoicing on the day the project is finished or a milestone completed – as opposed to the end of the month – there is less likelihood of a dispute, since the project is fresh in the client's mind. Also, the sooner you invoice, the sooner you are likely to receive payment.

Should the client not approve the bill for payment, SunSystems PSA will immediately notify the project managers involved and the issue can be resolved as soon as possible. This dramatically reduces delayed or disputed bills, improving cash flow into your business.

Graphical representations such as bar charts or graphs can also be included should you wish.

Although using SunSystems PSA should negate the need for sending out a credit to a client, human errors or miscommunications may lead to the occasional refund. Not only can you do this easily, and reconcile back to your accounts, you can also create partial credit notes where only a proportion of the bill is to be returned.

Types of billing

When setting up projects in your Project Repository, SunSystems PSA allows for extreme flexibility in how you can charge for work. Each project can have its own criteria for billing or agreed rates can be set for each client. Rates can be defined against each expense or disbursement type, individual resource, resource type or activity type.

For resources, hours charged can be hourly, daily or stepped dependent on time worked. For expenses or disbursements, the charge rate could be fixed, a fixed uplift, or even a percentage uplift from cost. All can be easily adjusted and amended across projects if client rates should change.

- **Fixed billing** – For fixed price projects, a price is agreed for the work, and a schedule can be created determining dates and amounts for bills, which is then created as suggested drafts.
- **Milestone billing** – This allows invoices to be generated as certain achievement targets are met. Percentage project completed or hours worked against budgets, for example, will trigger production of bills as they are met.
- **Time & Expenses billing** – This is a common form of billing where actual hours spent on projects and any expenses or disbursements are collated and charged out according to agreed charge rates or uplifts agreed with your individual clients, or by individual projects.
- **Repeat billing** – Companies who have agreements with clients for monthly standard service charges, maintenance fees, or recurring costs such as license fees, can create a billing schedule to deal with such disbursements automatically.
- **Advance billing** – Billing Manager copes with different types of advanced billing requirements. For example, should a client pay an agreed amount in advance for project work, SunSystems PSA will match any time, expense or disbursement against this figure and alert the project manager of the status.
- **Multi-client billing** – Some companies may be working on projects for more than one client, or a client may have requested that bills be separated so that they can remunerate from a third party sponsor. SunSystems PSA allows for this with a client ownership feature, meaning bills can be split between all relevant parties by a percentage or a factorial basis.

Flexible presentation

Billing Manager templates are completely flexible, allowing you to adjust underlying settings (bill type, currency etc.), the text on your bills, and the groupings of billing information.

Notes made against individual projects can also be included on the invoices should the charge need explanation.

Logos, terms and conditions, contract notes, client references, terminology etc. can all be included on your invoice layout to conform to your clients' wishes.



SunSystems PSA

Intra-Company Charging



Overview

SunSystems PSA Intra-Company Charging is a key add-on to your PSA financial management suite, allowing you complete recognition of your internal people costs.

It can operate across project teams, worldwide offices or even between group companies where non-taxable added agreements are in place.

The functionality allows a resource to be matched to a specific profit center, allowing shared resources across teams to have unique costs and charge rates attached. Accounting properly for services teams, and cross charging if necessary, will help your organization to work as a truly global team.

Key features at a glance:

- Enables the charging of internal people costs
- Allows accurate analysis of costs and revenues across profit centers
- Revenue from resources loaned across global projects can be easily realized
- Resource allocations can be justified and accounted for
- Reduction in the administrative burden to your back office
- Internal collection cycles minimized
- Internal disputes prevented and employee satisfaction increased

Recognizing your organization's profit structure

The SunSystems PSA Intra-Company Charging module is based on profit center logic. Each office, department, or region may have its own financial database within which it sets its own unique rules on charge rates, profit margins etc. However, each resource within the enterprise is ultimately linked to one of those profit centers, where their salary is accounted for, whether they be chargeable or not.

If shared resources are accounted for in different profit centers, SunSystems PSA will cope with the charge allocations automatically. In this way the center that bills the final client doesn't unfairly recognize all the revenue.

Intra-Company Charging allows you to set up profit centers either individually or by group, and to set them against resources, departments or companies. SunSystems PSA recognizes the difference between 'Intra-Company' clients and final clients, and will automatically request a flag if any resource is allocated without being linked to an existing profit center.

Harmonizing intra-company disputes

A key cause of frustration among professional services teams who work across profit centers is the back office hassle of ensuring the right office is paid correctly for the services employed. There is often an endless paper chase of invoices, with arguments over how much should be paid for the work done.

The key reason why Intra-Company Charging is successful is that it forces your organization to set up agreed internal rates, over and above your external ones. In many cases these may already exist, but by automating them centrally your back office can be relieved of the administrative burden, and instantly pick up any changes or updates to agreed internal rates.

SunSystems PSA sets rules centrally. When they are agreed or modified, they are automatically used to calculate the cross-charge appropriate for that resource's time.

→ SunSystems PSA

Intra-Company Charging

Expenses and disbursements

The same principles can apply for expenses and disbursements incurred by resources working as part of another project team. The reimbursement from the client is allocated against the set pre-arranged commission and uplift fees dependent on the original profit center of the resource.

Without the ability to cross-charge against internal profit centers, figures for profit and recovery can be dramatically affected (see the fictional example below). The office that controls and invoices for the project work receives full payment as pure profit, with no employee costs incurred. Office A, which is providing the resource and paying employee costs, incurs a loss.

With Intra-Company Charging in place, the offices have an agreed rate between them which covers the cost of the individual and ensures a share of the profit goes to Office A. SunSystems PSA's repository engine automatically adjusts the calculations on the project and will either raise an intra-company bill or initiate a journal transfer.

Without Intra-Company Charging

	Office A	Office B	Client
Cost	250	0	850
Revenue	0	850	-
Profit	-250	850	-

With Intra-Company Charging

	Office A	Office B	Client
Cost	250	500	850
Revenue	500	850	-
Profit	250	350	-

→ SunSystems PSA

Time & Expenses Manager

→ Overview

Without an effective mechanism for capturing and processing the project data that is generated around your organization or department, the accuracy of the information upon which your other processes are based is compromised. Key to this is choosing a system that gives you the information you require for processing, reporting, scheduling and decision making across your enterprise. This information must also be easy for users to complete without disrupting their normal work routines.

SunSystems PSA Time & Expenses Manager has been developed over a number of years utilizing users' feedback as to how the system performs.

Key features at a glance:

- Allows the accurate and timely recording of time and charging of expenses
- Flexible deployment options which allow the collection and collation of workforce data from anywhere in the world
- Knowledge about projects can be captured and shared throughout your global workforce
- Allows the customization of design to suit the individual
- The approval process is automated leading to a reduction in the billing cycle
- Alert system for the tracking of key events or issues

Today's mobile workforce demands web-based solutions

Often workers and consultants are spread across many offices or customer sites, and across many different countries. Employees need access quickly, where and when it suits them; and they need to use the system pro-actively rather than passively, and without compromising on functionality.

SunSystems PSA's architecture is modeled on how a modern professional services organization or department runs, and aligns to a sensible e-business strategy. Whilst the heart of the solution is processed centrally due to the mass of functionality, the data gathering, distribution and maintenance is done using the thin client model. SunSystems PSA Time & Expenses Manager recognizes the consultant's needs, yet is light and scalable to thousands of resources.

Gone are the days when workers would only exchange information during convenient breaks in the day. Today's professionals are frequently offsite and rarely meet other colleagues from other teams. Yet there is a vast knowledge base of information collected on client site visits, and during the everyday process of business.

SunSystems PSA's capture system can help you to capitalize on some of that knowledge, utilizing the fields within its input screens. Tools such as Microsoft® Sharepoint™ Portal Server and Microsoft® SmartTags, can form part of a knowledge database that allows sharing of relevant information about clients, experience, and projects throughout your organization.

Flexible options that work with you

Access can be made via the World Wide Web using a secure browser portal, and information transferred online. The data is updated in real time so that, once approved, administrators or managers can use the information straight away.

SunSystems PSA can also be used offline, by downloading a small footprint client. The user can fill out either time and expense or notes information when convenient, and synchronize both ways with the central system when access to the web is possible. SunSystems PSA has also kept ahead of trends in business communications, and has adapted the timesheet for Microsoft® Windows CE for use with the Pocket PC and other PDA devices.

Built by professional services people who understand the frustrations of many of the conventional or 'in-house' solutions used today, SunSystems PSA timesheets present project titles and tasks in plain language, rather than using confusing codes or project numbers.

The Intelligent Timesheet™ system identifies individual profiles when users log in, and allows bespoke configurability by the employee within selectable parameters. The content of fields, prefilled data, color scheme and look and feel can all be adjusted to suit the individual without affecting the system's workflow. The interface is designed from the user's perspective, whilst ensuring all essential business data is collected and processed correctly.



SunSystems PSA

Time & Expenses Manager

The individual user profiles determine what projects, tasks and activities the user sees against which they can book time, displaying relevant projects only. The intuitive engine will also pre-display fields based on previous entries. Fields can be stipulated by administrators or project managers as mandatory.

Hours can be broken into chargeable, non-chargeable and administrative, and input in units to suit. Non-productive time is dramatically reduced as users become familiar with the SunSystems PSA system, and both accuracy and volume of data received noticeably improves.

Less paper, less manual processing, less delay...

Expenses can become a burdensome task. With SunSystems PSA, the parameters established in your repository will automatically locate a client and apportion agreed rates through the user interface, for all expense types and disbursements.

Once submitted, the expenses go straight to the relevant approval manager, who is alerted when logging in. Re-chargeable expenses and disbursements (which may have originated from a financial system) are dealt with automatically and passed through to client billing. It all adds up to quicker approval times and reduced billing cycles.

SunSystems PSA allows front office staff to be re-imbursed faster, reduces the workload for back office staff, and ensures clients are more willing to pay.

Expense forms and timesheet reports can also be drilled, analyzed and printed locally, to enhance administrative practices.

The system effectively acts as the user's accountant, automatically processing worldwide tax and other calculations – they simply input the minimum information and SunSystems PSA does the rest!

SunSystems PSA alerts and approvals – control where you need it

Using the hierarchical structure contained within your SunSystems PSA Project Repository, your administration system can police the workflow across your business.

Denied time, for example, can be escalated immediately to the attention of relevant parties. Utilizing email, key events can be tracked (including client approval) and highlighted to reduce disputes and billing cycles.

SunSystems PSA can notify managers or administrators of missing or overrun time on a project, and is even European Working Time Directive aware. Clear color coding allows users to see at a glance what time is missing, approved, pending or denied and take appropriate action.

Input is instant, providing visibility in real time, by project, client or team. SunSystems PSA also validates in real time, isolating mistaken or incorrect information, giving managers confidence in their status data.

All your information safe and secure

A company's information is confidential. Background such as charge rates / project details etc must remain secure within an organization.

SunSystems PSA's security is given the highest priority, ensuring access only to approved users, and complying with industry guidelines. The level of access and functionality can be fully controlled at individual or group level, maintaining intra-company security and complete client confidentiality.

Deployment that won't interrupt your business

SunSystems PSA Time & Expenses Manager overlays your Project Repository, where most of your complex processing will be carried out. Most active resources are only inputting and receiving data relevant to their own projects and therefore require less client software.

In fact, with the total online deployment option, you simply need to allocate security profiles and users can begin using the system immediately, with minimal training. This is especially useful for large-scale rollouts, where global deployment is simply a case of reproducing a proven formula.

→ SunSystems PSA Multi-Currency Manager

→ Overview

If your business is spread across different sites, in many countries, and operates in several currencies, then keeping track of costs is often complicated but vital. Multi-Currency Manager will automate all your currency conversions quickly and accurately.

Key features at a glance:

- Currency for client, project, resource
- Invoicing in preferred currency on a project by project basis
- Handling of global billing and employee re-imburement scenarios
- Satisfy overseas requirements for multi-currency automatically through pre-set rules
- Import worldwide currency rates on a daily, weekly, or monthly basis
- Fully euro-compliant
- Triangulation and euro rate locking
- Date sensitive
- BASDA Standard
- Work-in-progress evaluation
- Links to other SunSystems products
- Flexible currency reporting

True euro-compliance

The European market is unique, in global terms, in its present use of a common currency alongside local currencies. The euro is accepted as currency against a fixed rate set by the European Central Bank. If any part of your organization trades within the European Union, it is essential that your software can cope with the euro triangulation.

SunSystems PSA is fully euro-compliant, with 3-way currency triangulation and rounding. Multi-Currency Manager also enables reporting using alternate currencies to an organization's base-currency via pivotal rates.

International working means international billing

If you use the Billing Manager, Multi-Currency Manager will allow you to invoice your clients in their preferred tender, converting data from cost currencies according to your agreed conversion criteria. In fact, currencies can be set at a combination of client, project, and resource levels.

The Multi-Currency Manager supplements the Billing Manager rules, so that the correct amounts are automatically calculated and billed to clients, wherever in the world you or your customers operate.



SunSystems PSA

Vision for SunSystems PSA



Overview

Vision for SunSystems PSA is a Microsoft Excel based reporting tool, enabling quick access to key management information held in SunSystems PSA.

Project related data - such as utilization rates, cost per resource and activity, project profitability and time and expenses incurred - can be analyzed and easily summarized in management reports. You can display this information in as much detail as necessary and it can be formatted and manipulated using Excel tools.

Key features at a glance:

- Information displayed in a familiar format
- Integrates seamlessly with SunSystems PSA
- Charts and pivot tables can be utilized
- Standard MS Excel formatting functions available including 'Traffic Lighting'
- Automatic report scheduling – to the web or via email

Integration with SunSystems PSA

You can extract information held in the PSA Project Repository directly into one or more worksheets. A dynamic link is maintained into the PSA files and MS Excel formulae are created for each entry in Vision for SunSystems PSA. This means that each entry is updated when you recalculate – this can be set to run automatically or upon prompt. A design wizard walks you through the step-by-step process in plain language in order to create the formulae for each entry.

Formatting information

Information can be formatted in Vision for SunSystems PSA using the Report Designer, providing the most appropriate layout and improving ease-of-use. This includes the location of entries, subtotaling information, creating page breaks and titles, inserting filtered columns and section headers, etc.

The familiar formatting functions available in MS Excel, such as number of decimal places, colors, font types and sizes, can all be utilized to enhance the display of information. In addition, the graphing tools can be applied to produce easy-to-read, eye-catching views of the information.

Using Format Tables, cells can be highlighted or 'Traffic Lighted' based on user-defined criteria. For example, if a project's revenue falls below a certain level, then that cell could be flagged to appear in red.

Vision Alert

This tool monitors and analyzes the information in SunSystems PSA and creates automatic, conditional responses based on this information.

Frequently performed activities can be set to run at predetermined dates and times – for example a management report highlighting overall project revenues per team could be set to run automatically every Monday morning.

You can also program the activities to respond to certain triggers called Alerts. For example, you can create an Alert that responds when a project's costs exceed budget.

When the set criteria are met, whether they are time specific or based upon alternative conditions, Vision Alert triggers a report. These reports can be used to populate a website or emailed to specific people.

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Systems Union House
1 Lakeside Road
Aerospace Centre
Farnborough
Hampshire GU14 6XP
United Kingdom

For regional offices, visit our web site:
www.sunsystems.com

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