projects360

Microsoft Dynamics 365 and **projects360** for the **professional services industry**

Professional services organizations operate in a highly competitive and fast-paced environment. They need to ensure proper management of financial resources, optimize intellectual capital and resource management practices, and have the flexibility to meet unique client needs to ensure their firm's success.

Microsoft Dynamics 365
for the service industry

The Microsoft Dynamics 365 solution for the professional services industry is designed to help your firm integrate key financial, project, resource, and client management processes. This ensures streamlined processes, improved visibility across the firm, and maximized project delivery success - all helping to set your firm apart from your competition.

Available for deployment in the Microsoft Azure cloud or in your firm's data center, Microsoft Dynamics 365 tightly integrates with the

Microsoft technologies your firm already uses – Microsoft Office, Microsoft SharePoint, and Power-BI. While leveraging the investments you have already made with Microsoft, this integration maximizes employee productivity levels, removes complexity from your IT environment, and minimizes your IT Total Cost of Ownership (TCO).

Microsoft Dynamics 365 — sa.global Service Industries Features			
Advanced Project Quoting	Role-Based Resourcing	Advanced Pricing Scenarios	Enhanced Workflow Process
Subcontractor Management	Advanced Billing	Project Manager Reports	Advanced Business Intelligence

Microsoft Dynamics 365 — Core Project Lifecycle Features			
Project Accounting	Work Breakdown Structures	Project Budgeting	Resource Scheduling
Time Entry & Approvals	Expense Entry & Approvals	Billing	Revenue Recognition

Microsoft Dynamics 365 — Best-in-class Cross Industry Features			
Financials	Business Development (CRM)	Inventory & Equipment	Procurement
Global Financial Management	HR & Payroll	Internal Controls	BI & Reporting

projects360 for the service industry

projects360 offers a series of extensions to Microsoft Dynamics 365 to enhance the standard functionality and provide best-in-class enterprise resource planning (ERP) capabilities for project-driven organizations. The solution helps professional services organizations streamline key project management and accounting processes, accelerate cash flow through improved time and billing processes, maximize utilization levels through powerful resource management and scheduling tools, and improve project profitability through improved visibility and control of project costs.

In addition to gaining valuable out-of-the-box functionality specifically developed for professional services firms, projects360 for the service industry can help your firm minimize the costs and timeframe to implement Microsoft Dynamics 365, thereby accelerating the time-to-value and maximizing the return on ERP investment.

Key features of projects360 for the service industry include:

- Role-based resourcing paradigm to forecast and schedule resources
- Enhanced dimension handling to configure rules on how revenue flows to different practices, lines of business, and other organizational dimensions
- Additional services pricing scenarios including multiplier-based pricing
- Qualification management to track a library of detailed information about your projects
- Additional tools for tracking and pursuing missing timesheets
- PTO handling for requesting and approving paid time off

- Improved tools for interacting with subcontractors
- Advanced invoice presentation to configure variable invoice formats via parameter-driven client invoice templates
- Automated generation of invoice backup documentation, such as timesheet and expense reports, expense receipts, and pass-through invoices
- Configurable setup of complex utilization rules and calculations
- Simplified setup of key workflows such as time and expense approvals

projects360 express deployment model

For professional services organizations that aim to standardize industry best practices and minimize the costs and timeframes for implementing Microsoft Dynamics 365 for Finance and Operations, sa.global offers the projects+ express deployment model. This is a streamlined implementation program that leverages the Microsoft Dynamics Lifecycle Services (LCS) platform along with sa.global-developed tools and templates such as:

- Implementation methodology and project management templates (schedule template, SharePoint project site template, specification templates, etc.), all available on the LCS site
- Standardized SharePoint tools for tracking project status and progress
- Automated environment provisioning on the Microsoft Azure platform including configurations from LCS
- Industry-specific business process structure and Visio process flow overviews deployed on LCS
- Industry-specific default data and workflows along with the ability to customize data using Excel templates on LCS
- Customized industry-specific data import templates (using Microsoft Dynamics 365 DIXF) to simplify the data migration process

sa.global's projects360 express deployment process can help your organization accomplish the following objectives when implementing Microsoft Dynamics 365:

- Reduce risk, drive efficiencies throughout your business, and accelerate the return on investment (ROI) for your Microsoft Dynamics 365 ERP initiative
- Minimize up-front IT requirements by quickly provisioning your Microsoft Dynamics 365 instance in the cloud on the Microsoft Azure platform
- Shorten the timeframe from project start-up to getting your key users 'hands-on' in Microsoft Dynamics 365 for Finance and Operations by leveraging default industry specific data sets
- Simplify the setup of customer-specific configurations using simple Excel worksheets
- Ensure operational efficiencies by adopting industry best practices and pre-configured workflows for key project-related processes
- Enable knowledge sharing and collaboration via online access to implementation methodology details and your organization's business process library

projects360 BI
self-service business intelligence and reporting

projects360 BI is an industry-specific, self-service business intelligence and reporting platform that provides out-of-the-box metrics, views, and reports designed specifically to help professional services organizations make informed decisions across your business.

projects360 BI leverages Microsoft Power BI, a best-in-class data visualization, exploration, and reporting tool. These data

visualizations can be directly embedded throughout the Microsoft Dynamics 365 user interface or can be accessed within the Power BI interface itself. With Power-BI and Microsoft Dynamics 365, you can easily create dashboards, utilize natural language queries and Cortana-directed voice queries, and access your data on-the-go with full mobile BI capabilities.

While there are many generic BI and reporting tools available for Microsoft Dynamics 365, projects360 BI was designed with the following attributes in mind:

- Integrated: projects360 BI is core to Microsoft Dynamics 365 and is not retrofitted to work with Microsoft Dynamics 365

- Industry-specific: projects360 BI provides standard measures and dimensions designed specifically to meet the unique needs of project-based service organizations

- Out-of-the-box: projects360 BI delivers many core service industries performance metrics, driving down costs and minimizing your time to value

- Transformed: projects360 BI data has been transformed and is ready for consumption by mainstream end users, delivering immediate results for your employees

- Self-service: projects360 BI is easy to use, giving your employees the ability to interact with this data in a self-service model

- Near real-time data: Leveraging Microsoft's in-memory BI technologies, projects360 BI is architected to provide access to your latest transactional information without lengthy delays

- Fast: projects360 BI is designed for high performance and uses Microsoft's in-memory technology to maximize speed and usability

- Cost-effective: projects360 BI is cost-effective and can be dropped into most Microsoft Dynamics 365 environments for a fraction of the cost of most other Microsoft Dynamics 365 BI and reporting solutions

Sample Calculated Measures

Project Financials

- Budgets and Actuals for Labor, Expenses, Revenue, Cost, Gross Margin, Hours, WIP, and more
- Committed Cost Amount and Quantity
- Customer PO Amount, Remaining. Invoiced
- Project Invoice Amounts, Tax, Cost, On Account
- AR Aging Amount, Aging periods

Utilization

- Target Hours, Target %, Utilized Hours, Utilized %
- Billable, Non-billable, Internal, Total, Non-utilized, PTO

Project Performance

- Gross profit, Earned Value, Variances

Sample Dimensions

- Activity (WBS)
- Company (legal entity)
- Customer
- Customer PO
- Dates
- Financial Dimensions (BU, Practice, Service Line, etc.)
- Main Account
- Posting Type
- Project
- Project Category
- Project Funding Source
- Project Roles:
  - Project Manager
  - Project Controller
  - Sales Manager
  - Worker Responsible
- Transaction Group
- Worker

As projects360 BI is tightly integrated with Microsoft Dynamics 365, many of the metrics can be configured directly in Microsoft Dynamics 365 to maximize flexibility and simplify the setup and ongoing management of your BI solution. This includes the setup of utilization and target utilization rules and calculations as well as unique financial posting scenarios that control how your financial data is represented in your reports and analytics views.

Let's **talk**

info@saglobal.com

www.saglobal.com

Americas: +1 302 858 0087

EMEA: +44 (0)2921 055902

APAC: +65 62084857