Draft

Unit4
PSA Suite

Orion release
(Service update 1, 2
(PSA version
4.3.0.380)

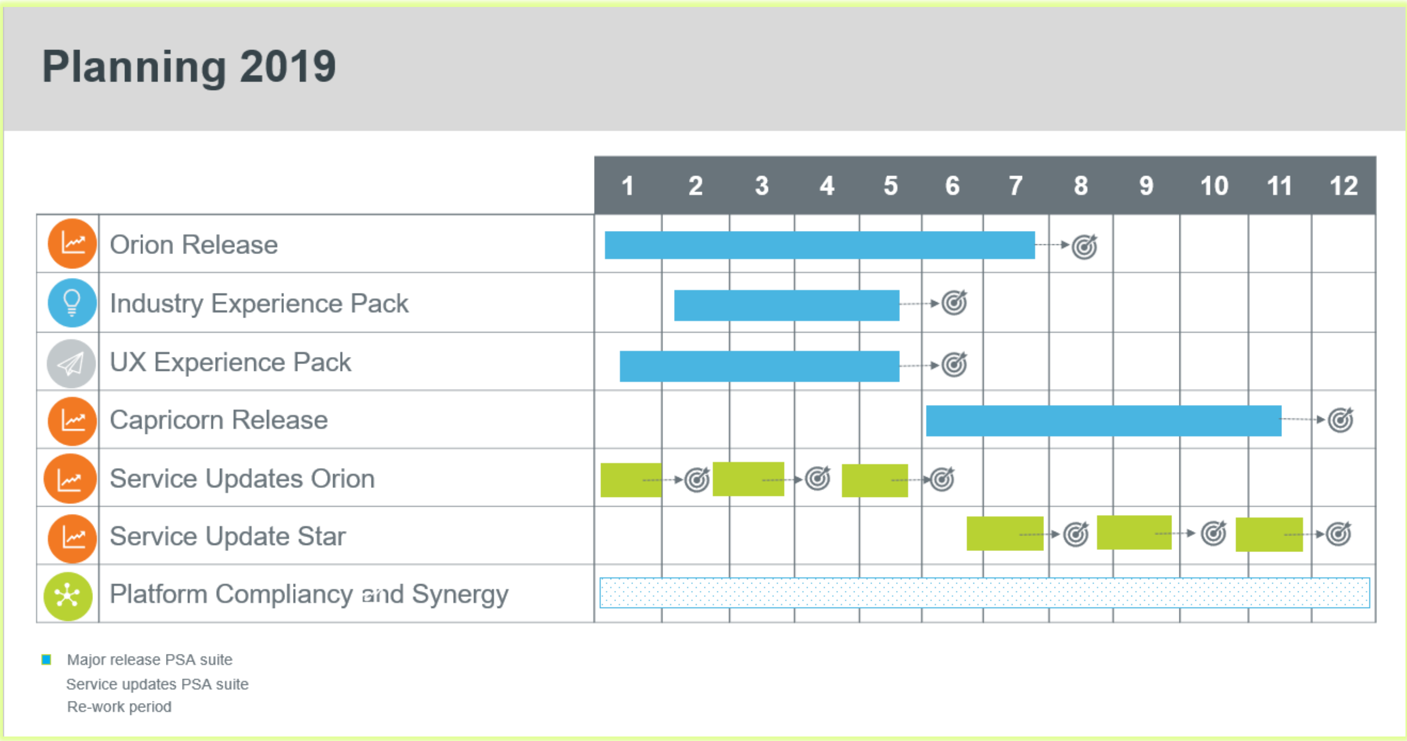
Index

INTRODUCTION

The Unit4 PSA Suite is designed to make our customers more productive and Drive Operational Excellence. To help our customers to achieve those goals we will focus in 2019 on the following themes:

- User Experience
- Increase Productivity
- Industry Specific
- Platform Synergy

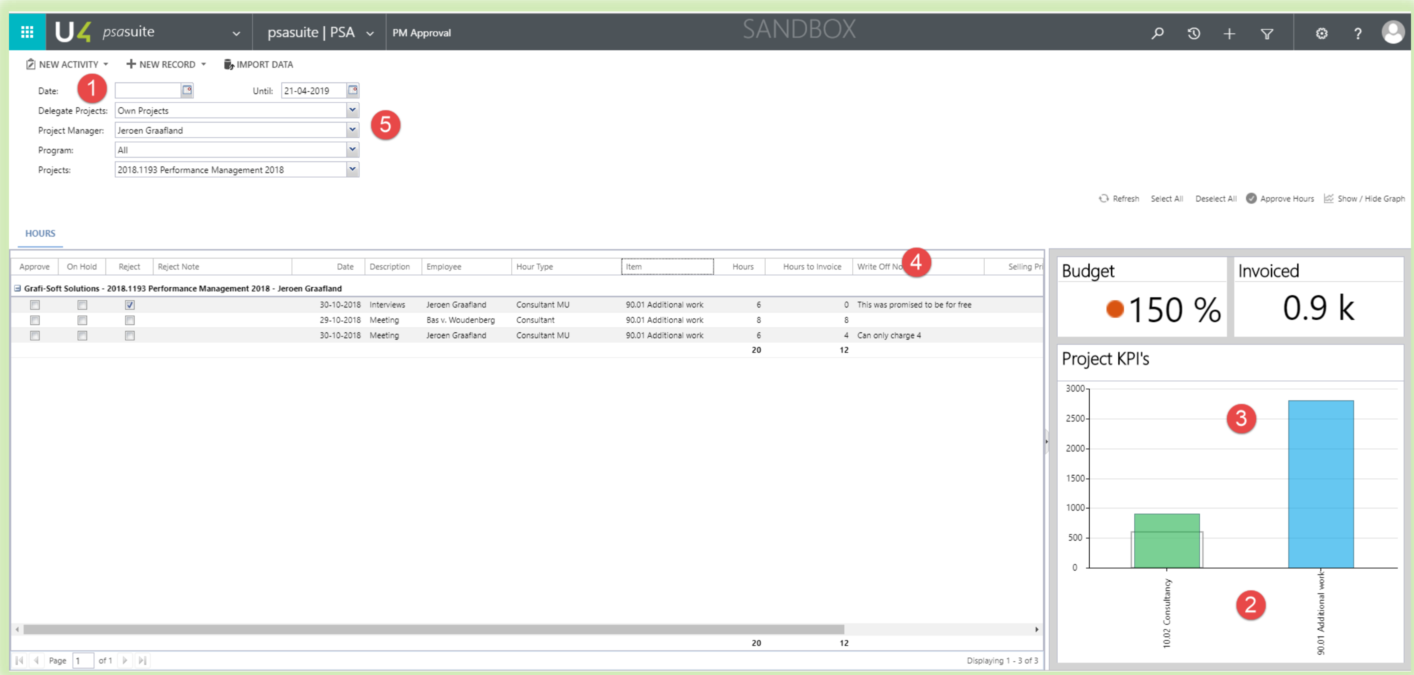
This document will describe the new features for versions scheduled to be released in 2019 after Bellatrix, bundled in the Orion release. This Sprint is defined in 4 Service Updates; Service update 4 will be mainly around translations to Dutch and possible bugfixes. This document outlines Service Update 1 and 2. Service update 3 is later scheduled

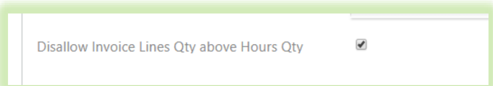


APPROVAL IMPROVEMENTS

PM approval

1. Date 'From' in PM approval is not automatically filled in with first day last week, this allows it the PM directly get an overview of all the 'to be approved hours', especially important since we have added the 'reallocation' functionality.
2. Graph in PM approval is automatically appearing after opening the approval screen. This gives the PM a direct visual overview of budget vs actual on project and item level.
3. Graph in PM approval is not showing the items anymore which are not active
4. Reason write-off can be added to the line when changing the 'hours to invoice'. This is a PSA setting and can be found in PSA settings, invoice section 'Show invoice Write off note colomn'.
   'Hours to invoice' setting added to the PSA user setting in which you can determine if the user is allowed to increase the 'hours to invoice' to a higher number than hours booked by the person.
5. Delegate function on a project level. From now on you can also add a delegate on a project, which allows you to work with different delegates per project instead 1 delegate for all your projects (delegate on PSA users) The dropdown in 'Delegate projects' will either show you only the delegates which have set this on a project level "projects where I am a delegate" or users where I am a delegate.





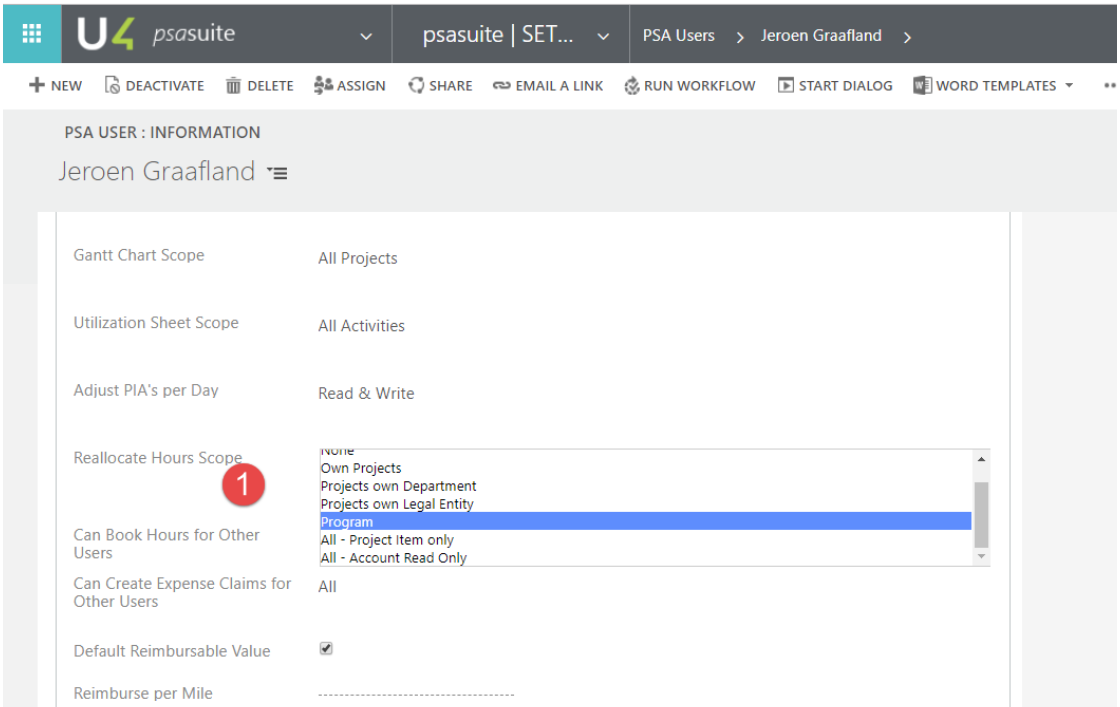
(PSA user setting disallow hours to invoice above hours booked)

Reallocation

In the Bellatrix release the reallocation function was added to PSA suite, which allows the project manager to reallocate hours in the PM approval to another project. The scope what was allowed was based on the scope setting on the PSA user. In this version we have added the scope 'program' which allows the project manager only to reallocate the hours to another project from the same program.

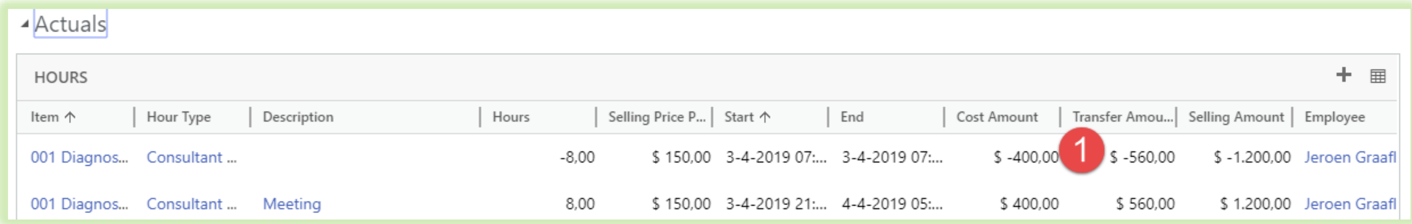
Reallocation scope settings on the PSA User:

- None : you are not allowed to reallocate at all
- Own projects: you are only allowed to reallocate to one of your own projects
- Projects own department: you are only allowed to reallocate to projects from own department
- Projects own legal entity: you are only allowed to reallocate to projects from own LE
- Program: only allowed to reallocate to projects from same program
- All - project item only: only allowed to reallocate project items
- All – account read only: only allowed to reallocate to projects from the same account.



Reallocation & Invoicing

In this version we have added the function than when hours are reallocated the original booking by the time sheet user will not be changed; reallocation will reverse the original booking with –(minus) the same quantity and will add a new hour booking for the new project/item etc. This allows the user full control on auditing (what has been changed after the time sheet user posted his/her timecard) but also allows the system when a original booking is automatically reversed by the reallocation function, that the plus (+) and minus(-) hour bookings are automatically are reconciled and therefore not be transferred to an invoice. The original and reverse hour booking made by the reallocation function will be automatically PM and Admin approved when this is used according to PSA settings



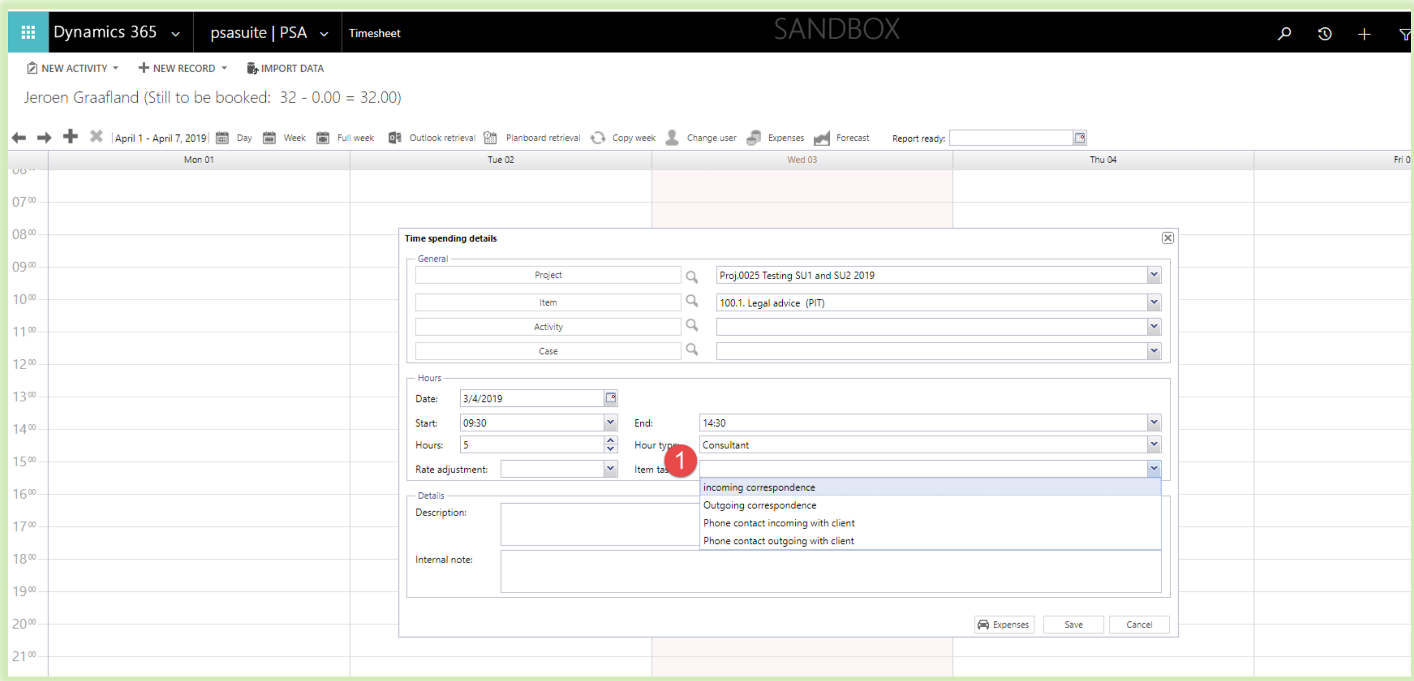
Actuals

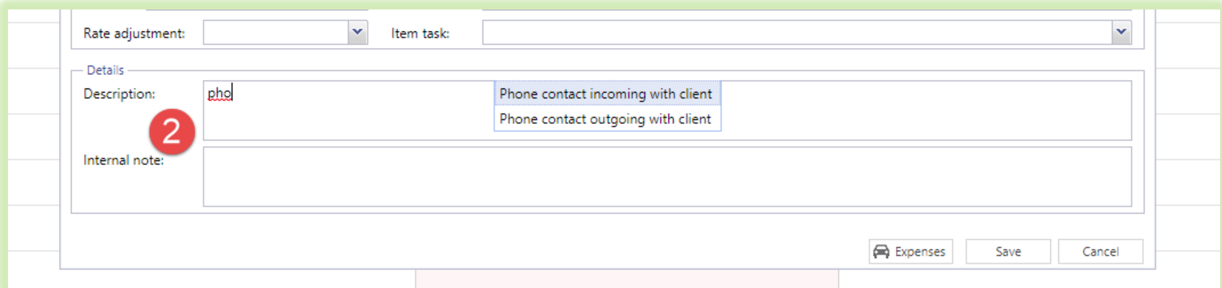
HOURS

Item	Hour Type	Description	Hours	Selling Price P...	Start	End	Cost Amount	Transfer Amou...	Selling Amount	Employee
001 Diagnos...	Consultant ...		-8,00	$ 150,00	3-4-2019 07:...	3-4-2019 07:...	$ -400,00	$ -560,00	$ -1.200,00	Jeroen Graafl
001 Diagnos...	Consultant ...	Meeting	8,00	$ 150,00	3-4-2019 21:...	4-4-2019 05:...	$ 400,00	$ 560,00	$ 1.200,00	Jeroen Graafl

Project Item Task (Description)

With this version we introduce a new entity; the project item task & description functionality. This is a related entity to the project item and allows the organisation to use an extra dimension underneath the project item which can be used for either more precise invoicing or pre-defined descriptions for fast time entry which is often used for the legal professional. (a lot of small entries throughout the day) This function is different from the current project item activity (PIA) functionality which has a lot more features and functions but for only adding an extra dimension this is often not all needed. For using it as a fast way of selecting pre-defined descriptions the time sheet has some extra capabilities. Either you select the pre-defined description from the drop-down box, or you start typing in the description box and the function will auto-fill the description.

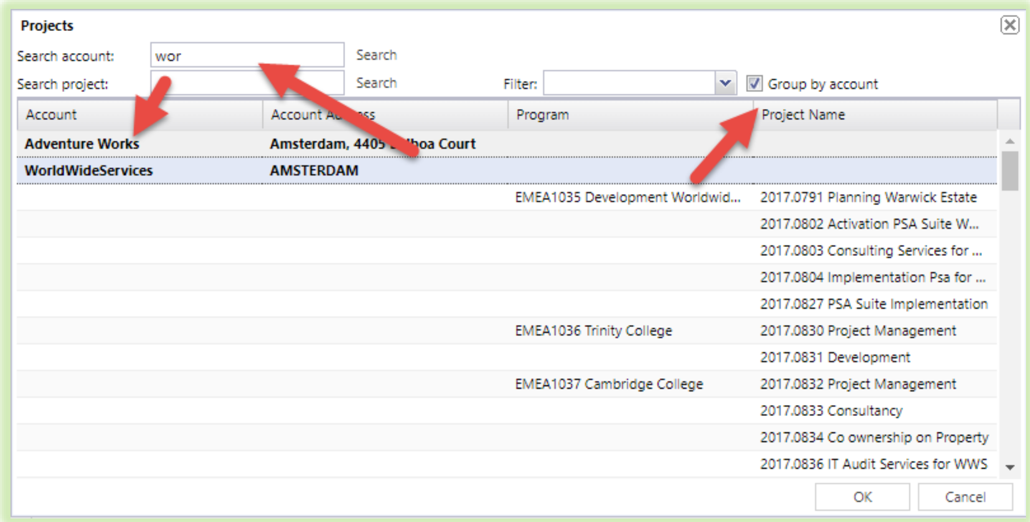




This extra feature is controlled by the PSA settings (show project item task in the hours section). In the next release (SU3) this function

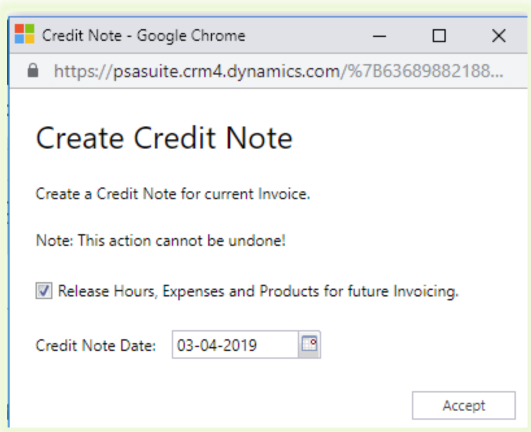
Advanced Search functionality Timesheet Calendar (Time sheet line will follow in next release)

Searching projects in timesheet calendar can now also been extended with searching via clients. The current search project feature allowed already full text searching project (title) or client name. Now we have added the ‘Group by account’ feature which allows the user first search on account and shows also some basic address info in case there are a lot of accounts with a similar name. Double clicking on the account name will collapse or expand the project list belonging to the client.



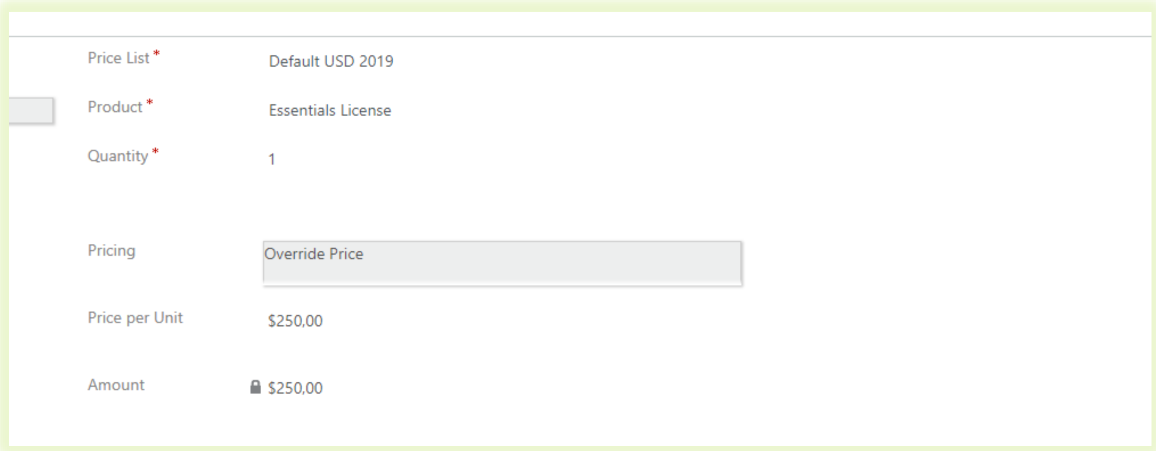
Create Credit Note as a Draft

In this release it is possible when using the credit note feature that the credit note is not automatically approved but created as a draft. This feature is controlled by the PSA Settings. Be careful when using the ‘release hours, expenses and products for future invoicing’ which is releasing all items as non-invoiced and item lines on the credit invoice are changed by the user. In this release they will get out of sync. This feature is mainly added for an extra approval on sending a credit note. Only after approving the credit note all the hours will be released (when release hours, expenses and products is clicked)!



Price override on a product

From this version on you have the ability to override the standard prices from a product (price-list). Click on pricing to switch from 'default' to 'override price'. Standard price will also be kept on the record to some later analysis where deviated from the standard.



Bug fixes/minor changes behavior:

Invoice date	Issue solved with date delivered and the new settings in PSA settings regarding 'update date/period on approval'. System is now correctly updating the date delivered/invoice date. (refer to setting 'Update date delivered to and Financial period' after approving invoice) release notes Bellatrix
Tax calculation on invoice	Since the latest release from Microsoft Dynamics 365 there could be a potential issue with (re)-calculation tax and approving an invoice. A plugin from PSA is solving this issue and

	re-calculates the tax again after approving the invoice and is checking the totals against the individual line tax items.
Invoice sending via email	Hierarchy issue in sending invoice via email is solved. When only the financial contact is filled with an email address, this is chosen as the preferred email recipient. When an email address on the account is set (email invoices to) this is taken as the default. If the 'email invoice to' on the project is set, this will overrule the account email settings. Future development is to have a program email address when using summary invoicing.
Online Invoice generator	Fixed the bug that Dynamics 365 online in combination with PSA was not able to sent out a email activity. Please note that when using this function the Azure section in the PSA settings must be filled in. On our PSA Sol portal the manual can be found how to do this.
Category field on expense	Changed the double name in display schema name for the field category on the expense entity. This was leading to an error when using import excel.
Time Card & contract entity	Bug resolved that time sheet line was not always looking at the new HR contract entity for the (bi)weekly hours when using 'Time Card full week mandatory'
Time Zone, PIA, GANTT, Utilisation	All relevant dates for the GANTT and Utilisation sheet will have from this version on a UTC noon time stamp for making for ensuring that in all time-zones start and end days will stay the same. We will provide a free conversion tool for converting all these relevant dates to UTC noon time stamp. Also the behavior on the GANTT in combination with a multiple resource is changed. From now on you can change the start/end date of the PIA also when hours are manually adjusted per resource.
Duration PIA changed	Since this SU2-2019 version duration of a project item activity behavior is aligned with general behavior of activities from MS Dynamics. Example. Activity start date :01 April 2019, end date: 03 April 2019: Duration now = 2 days (activity will end up to and not (!) including April 3rd.
Minor bugs	Minor bugs fixing