14-12-2018

Unit4
PSA Suite

Service update 2 & 3

Index

INTRODUCTION

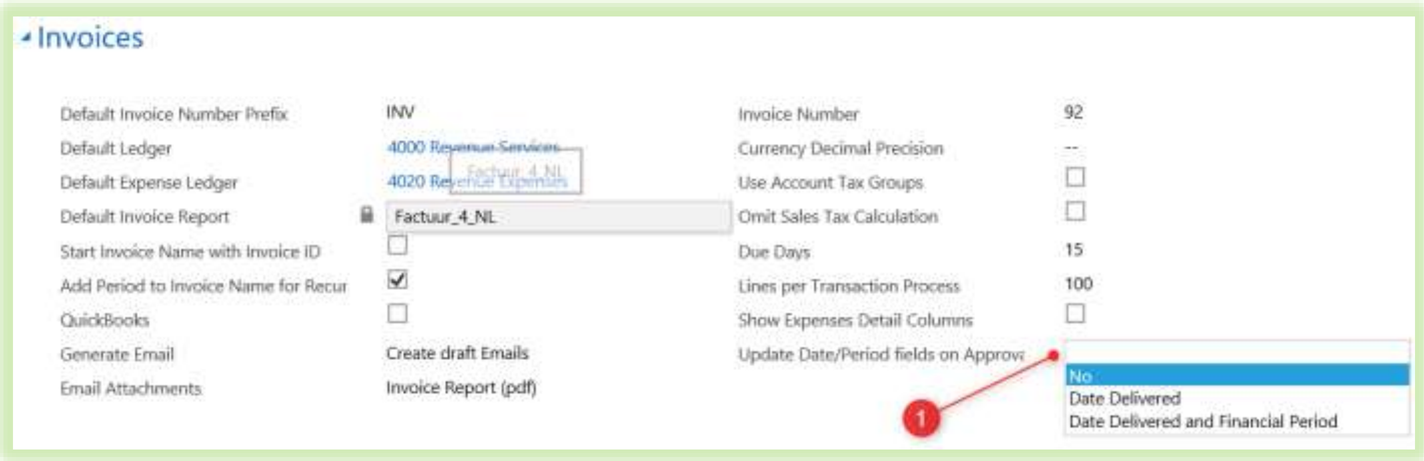
The Unit4 PSA Suite is designed to make our customers more productive and Drive Operational Excellence. To help our customers to achieve those goals we will focus in 2018 on the following themes:

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

This document will describe the new features for versions scheduled to be released in 2018 after Vega Edition. This Sprint is defined in 2 Service Updates; 1 and 2. This document outlines Service Update 2. For more details on the expected release dates, see below:

PSA SETTINGS

Invoices

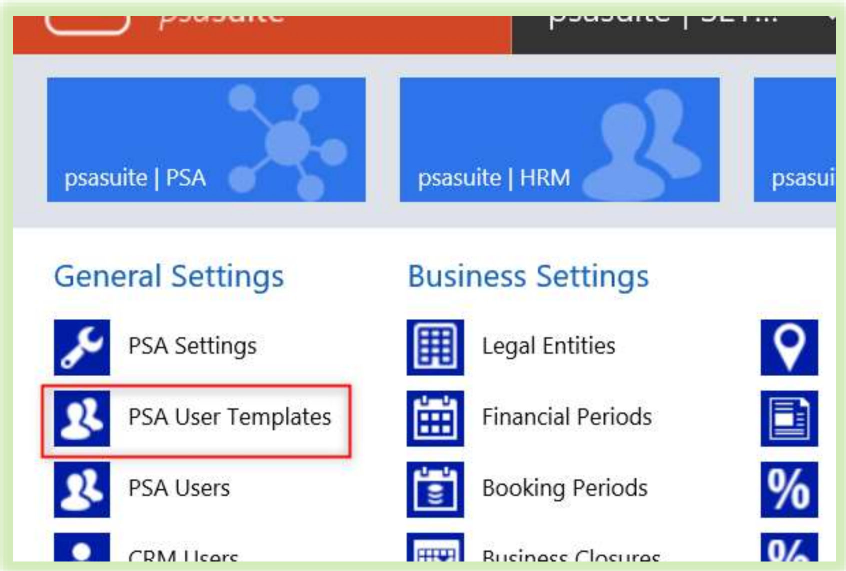


The Update Date / Period fields on approval (1) setting allows you to automatically adjust the date of the invoice when approving the invoice.

There are 3 possibilities:

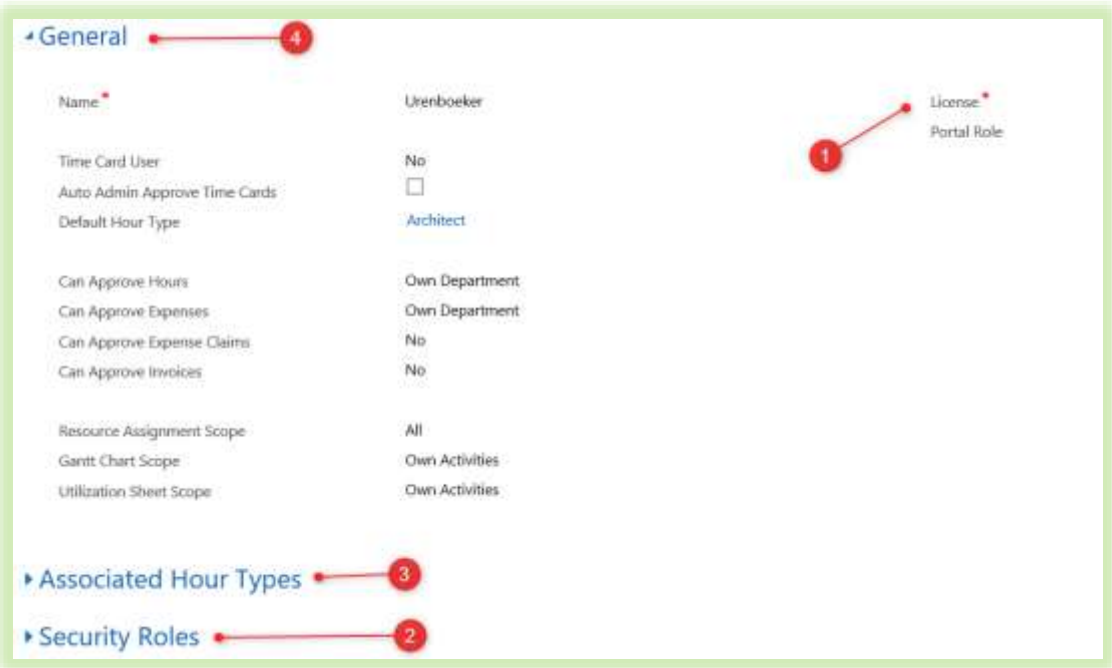
1. Not - The date / period remains unchanged when approving the invoice.
2. Date approved - The date of the invoice is adjusted to the date of approval of the invoice.
3. Date approved and financial period - The date of the invoice is adjusted to the date of approval of the invoice and it is also adjusted to the corresponding period.

PSA User Templates



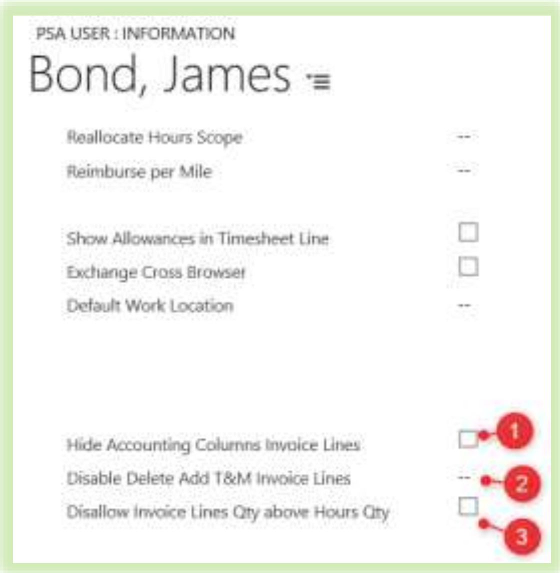
Multiple PSA User Templates can be created in PSA Settings. The following items can be included in a template:

1. The PSA license type
2. The standard roles for CRM / PSA
3. The standard related hour types
4. General settings (Hours per week / day, Legal unit, Gantt chart scope etc.)



If a template has been created, a PSA User Template can be selected when creating a new employee, the settings from the template will now be added to the newly created employee.

Added Invoice Settings (html screen)

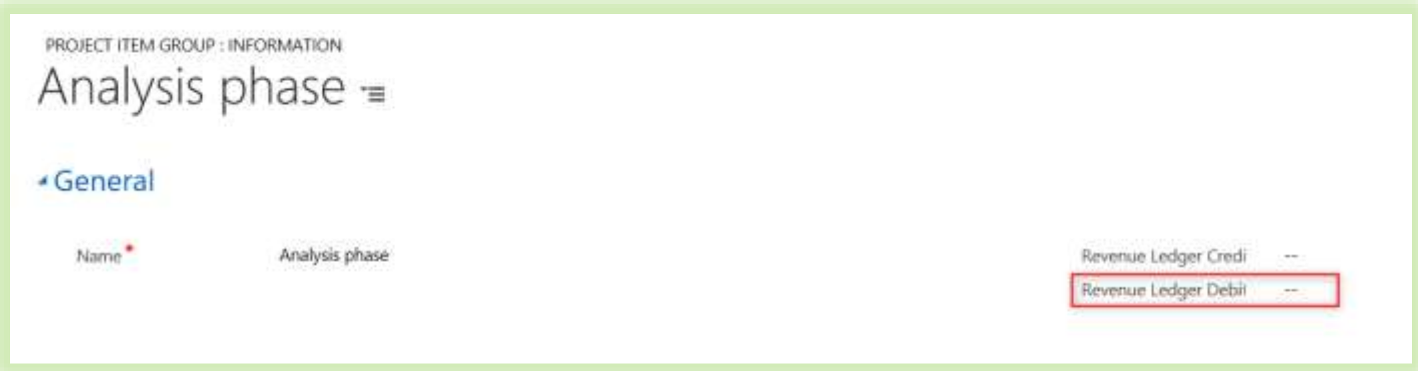


In the PSA Settings > PSA Users you can set up per user which rights this person has when creating an invoice with T&M items.
The 3 additional settings are:

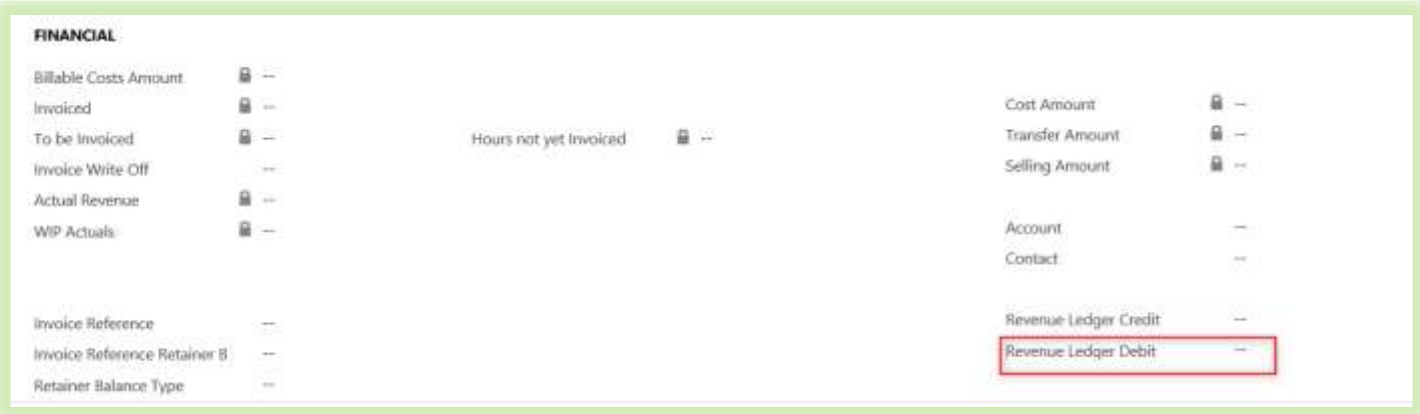
1. Adjust sales ledger at invoice line level (yes / no)
2. Disable Add / delete invoice lines.
3. Do not allow raising invoiced hours in relation to booked hours.

Fill in revenue ledger debit on project item

In the settings it is possible to select a ledger on the Project Group where the debit revenue for underlying project items is booked.



Also it is possible to set this up on a project.



The hierarchy for this is as follows:

Project item

↓

Project item groups (settings)

↓

PSA Financial Settings (Legal entity)

↓

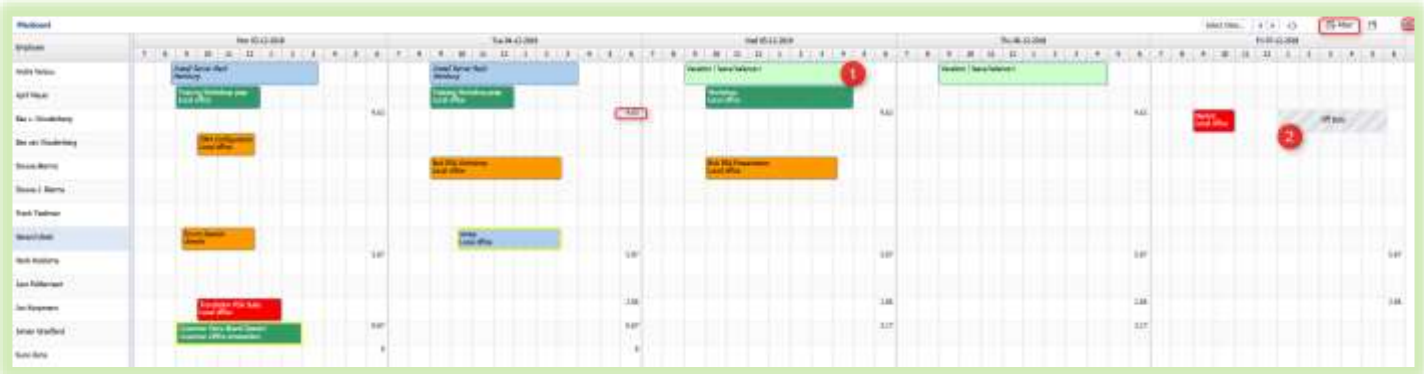
PSA Financial Settings (General)

PSA PLANNING

Planboard (new)

Is a full new development available within this release. Planboard is designed for day to day planning to easily create events and will allow you to plan resources based on a timeframe within a day. You can create an event for a resource by selecting a time frame in a day with your mouse pointer. With the Planboard you will be able to:

- Create an event by selecting a time frame in the plan board based on a start and end time
- Create an event with a minimum duration of 15min
- Events can be planned with repetitiveness (daily, weekly, monthly)
- The time scale of a day is standard and can be adjust from the filter settings
- Determine your own event codes and provide them with your own color indication
- not available time (off duty) can be set up per resource and is visible in planboard
- PTO and business closure is visible in Planboard
- Create a 'General' event, not related to a project
- Event is related to a PIA and/or project item
- Hour booking is related to an event. event to PIA and/or project item
- Events can be retrieved as a blue print in timesheet Calender and timesheet Line
- Hover over job will show tool tip with summary of detail of job

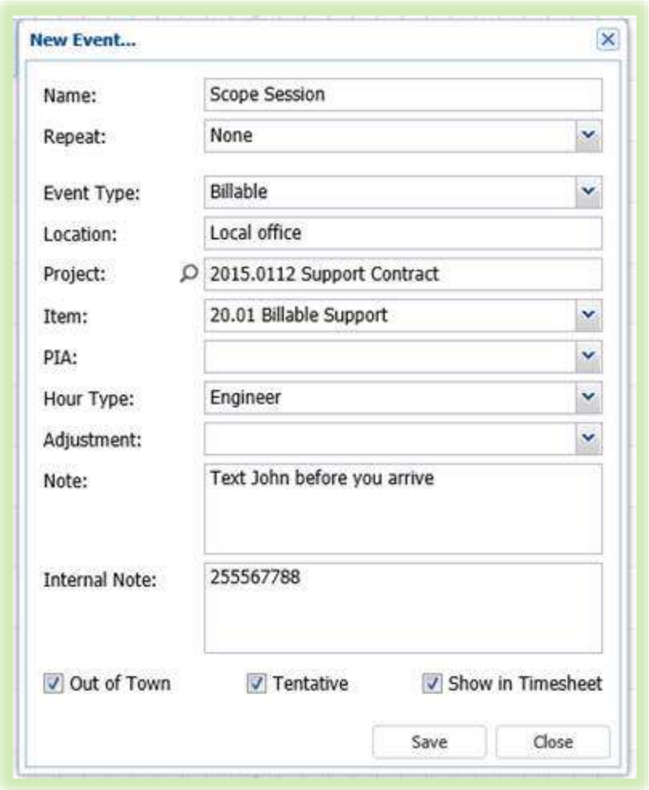


- Copy a job: Click + Shift and drag

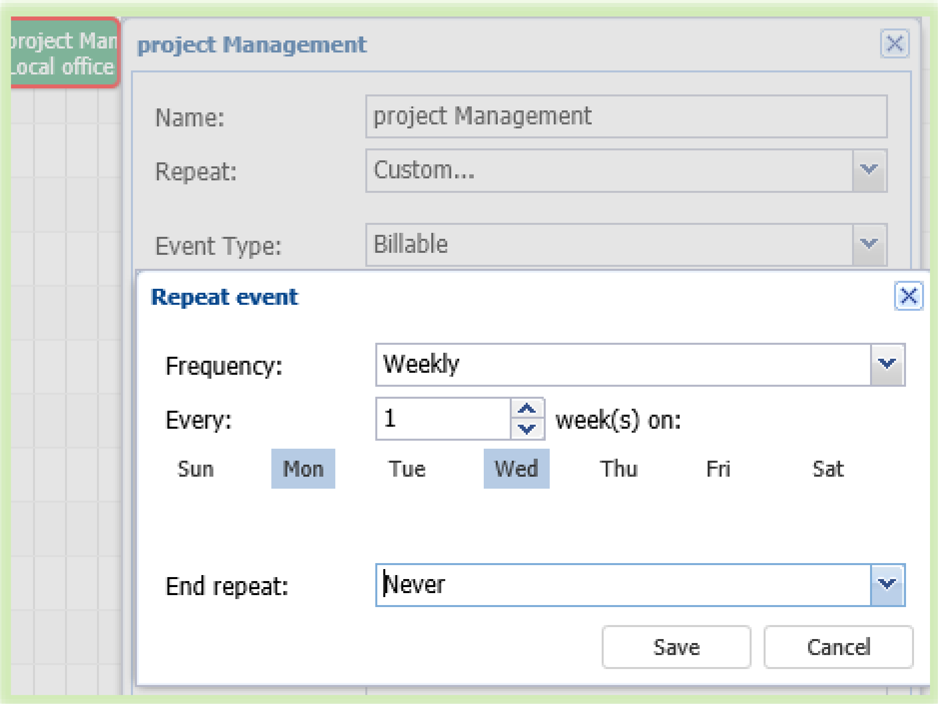
1. PTO integration (HRM)
2. Not available/off duty integration (HRM)
3. PIA day utilization visibility
4. Filter option
5. Settings for color code set up of events
6. Show Tentative events with yellow outline

After creating events click on the Save icon top right to save your last enhancements to planboard.

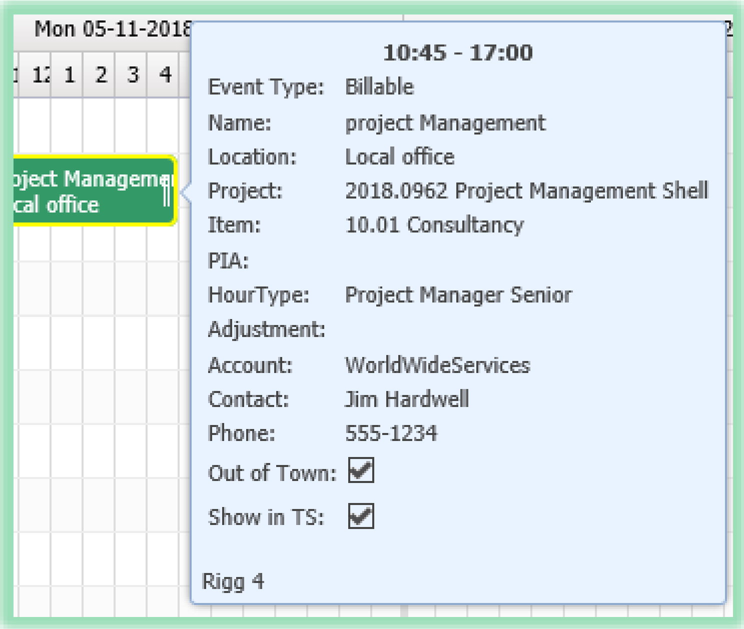
An event can be a 'General' event. A general event does not have a relationship with a project.
The job details will contain:



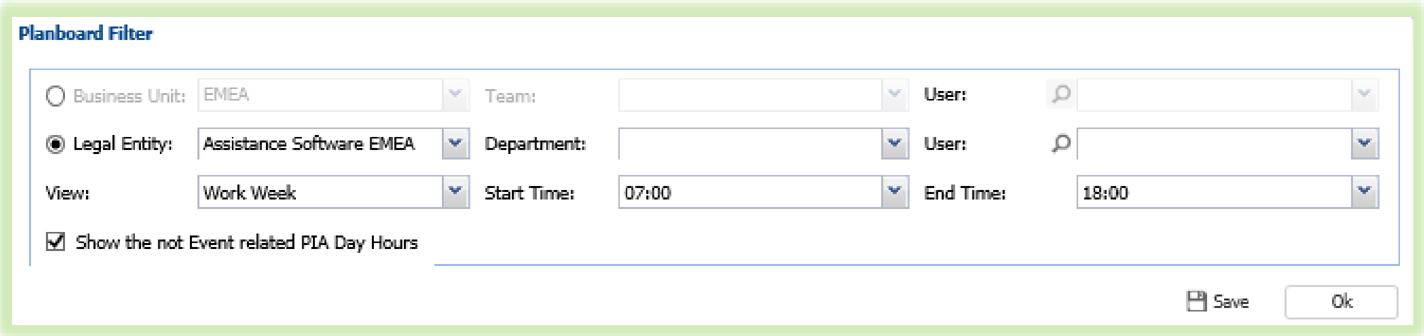
Events can be schedule using repetitiveness on a daily, weekly or monthly basis



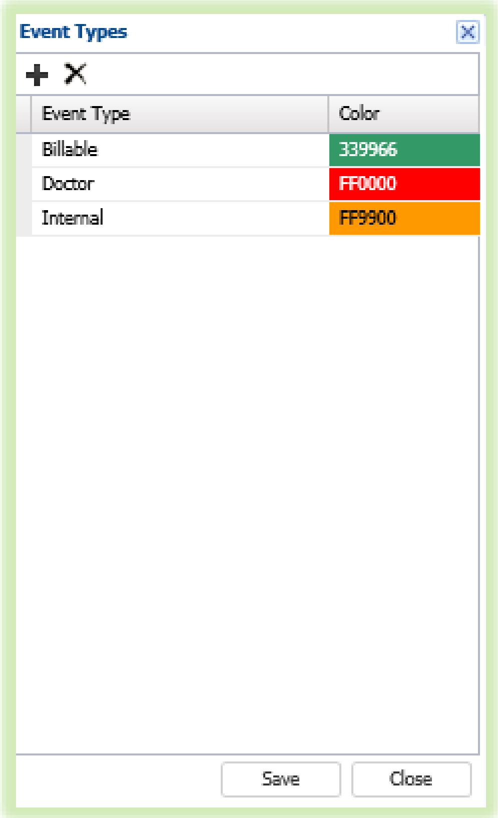
When hovering over an event a pop will display all details concerning the event



The filter option allows you to create your own filter and store that filter. Filter has the option to include the PIA day utilization. The PIA days are not displayed as the total amount can consist of multiple PIA days and PIA days do not have a start and end time indication. The number has an informative karakter to understand a resource is booked on other engagements.



Settings can be applied for setting up your own event color code indication



Planboard makes use of the approved PTO request that will appear accordingly in the planboard. The PTO hour entries are indicated in the 'light green' color just as in Utilizationsheet.

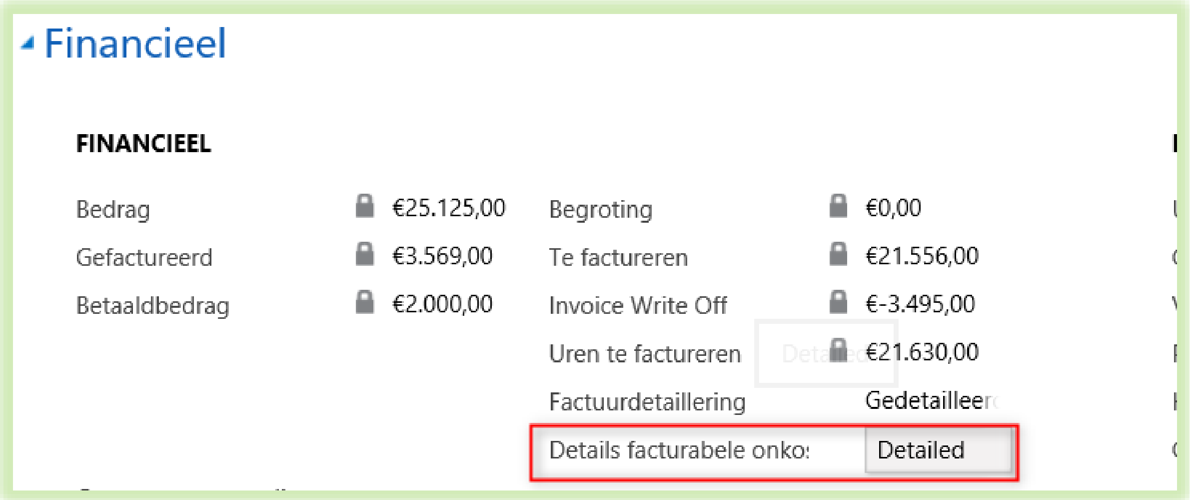
HRM

Contract entity is extended with start and end time indication per day. This is used for the planboard to indicate that an employee is not available (off duty). Populating the from / to hours will show that a resource is NOT available and therefore OFF Duty shown in dashed light grey.

PROJECT

Details billable costs

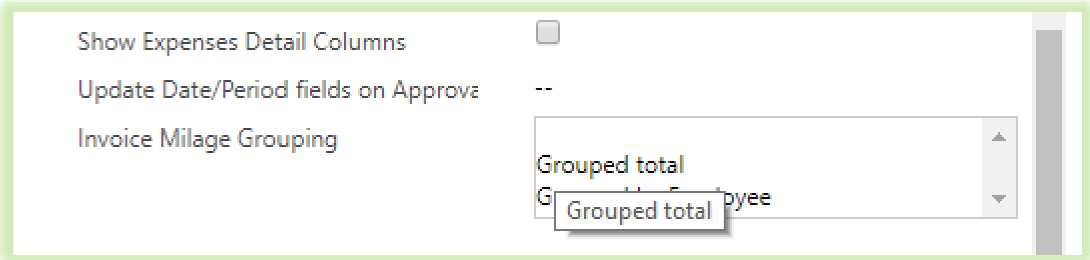
At project level, there is an setting which can be used to indicate whether expenses should be shown in detail on the invoice.



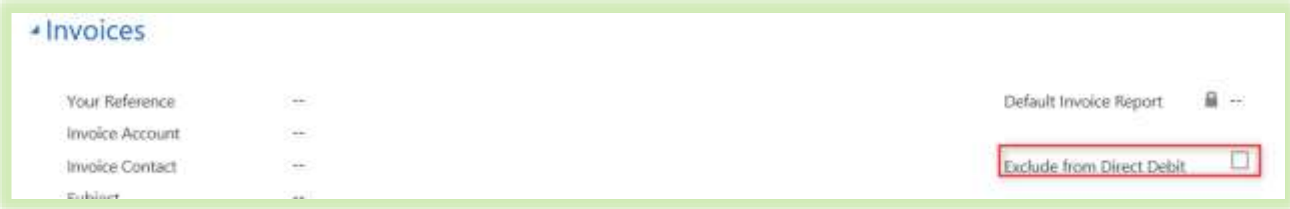
Miles are not displayed in detail unless this is indicated via the setting in the PSA Settings.

This 3 possibilities are:

- Select none (there are no miles displayed)
- Grouped total (total grouped one line)
- Grouped by Employee (miles grouped per employee)



Disable Mandate on Project



It is possible to indicate on a project that it should not be taken into account with mandate.

INVOICING

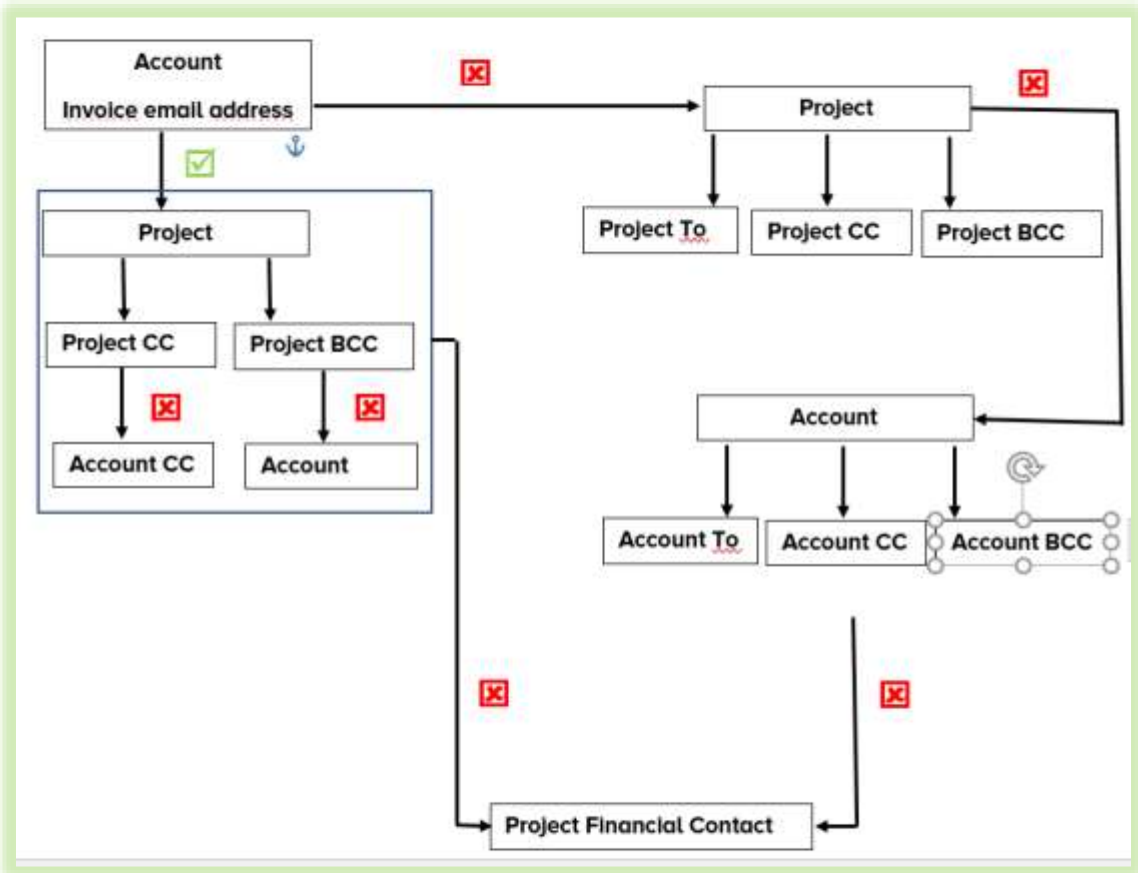
Email invoices

In this version new fields are included for invoicing by email.

At both account and project level, fields have been added in which persons can be selected to whom the invoice should be mailed.

In Invoice email address (4) a email address can be entered manually, this email address does not have to be known in the system.

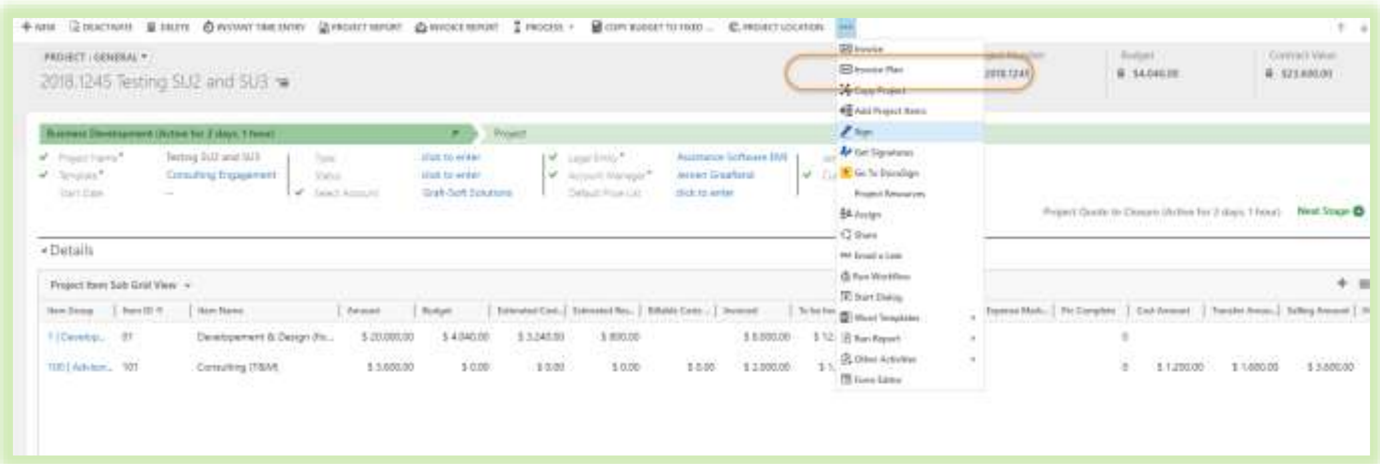
Schematically this looks like this:



Bill Planner (new)

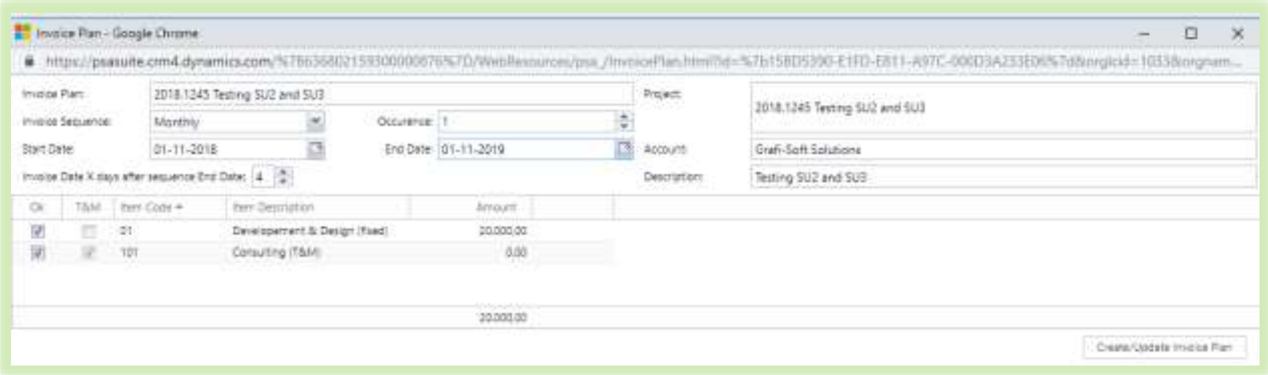
The billing planner is designed to facilitate easy creation of recurring billing schemes. This creation of billing scheme is based on the contract value (PSA item amount).

- The billing plan engine will provide the option to create, in a sequence, a billing plan based on a schedule
- Planned billing sequence can be created from all contract types.
- T&M bill plans will be planned with 0; when project unfolds in the period the amount will be populated accordingly
- Planned billing scheme will be available in the forecast
- Bill planner can be connected to a project template, when creating a project or program all bill plan items will be created
- The billing plan will be available in batch invoicing (bill plan engine)
- On item level you will have 2 extra options for balance invoicing; You can mark an item as Balance and if only invoiceable when balance invoice is > than retainer amount
- Invoice description details can be managed on project item level as well as on bill plan level

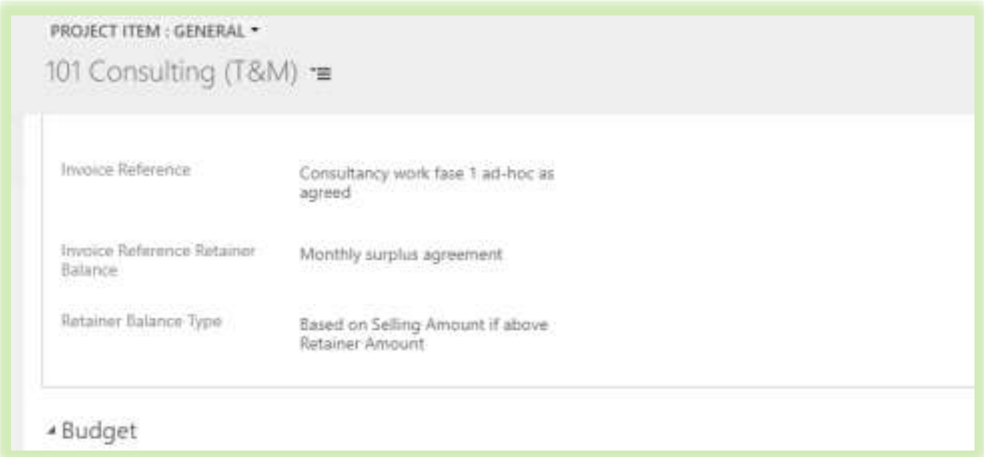


This will lead to the screen to generate bill plan (installment plan) with a flexible invoice schema where you have to ability to do this weekly or monthly with flexible occurrences, which gives the user the ability to do this every week, every 4 weeks, every month, every 4 months (quarter) etc.

Also a T&M item can be added to the schema which means that when creating the batch invoice both fixed and T&M will be added to one invoice automated.



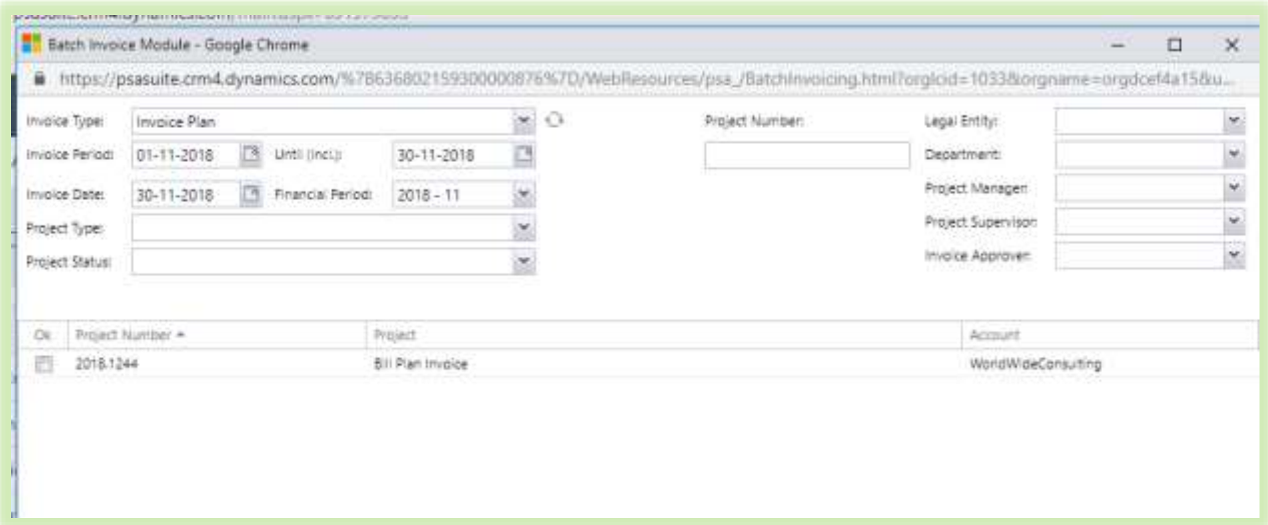
When using the retainer amount on a T&M item this retainer amount will be used for the bill planner. On this item can be configured what needs to be done if the actual T&M amount in a specific month overruns the monthly retainer. Either just leave the retainer as it is, or add the overrun to the invoice as an extra line. This extra line description can be set on an item level.



Bill Planner Invoice Engine (new)

The billing planner invoice engine is designed to facilitate easy creation of invoices from the bill plans. The engine will provide the option to create automated your invoices in the selected due date period.The bill plan invoice engine is a new solution and will not interfere with Batch invoicing.

- Automatic creation of all invoices from all contract types
- Billing plan is related to a project item
- T&M Billing plan will show all hours due in the selected period
- The invoice engine will handle multiple item types for creation on 1 single invoice
- For retainer bill creation options on project item level apply to mark as Balance and if only invoiceable when balance invoice is > than retainer amount
- Invoice description details can also be managed on project item level



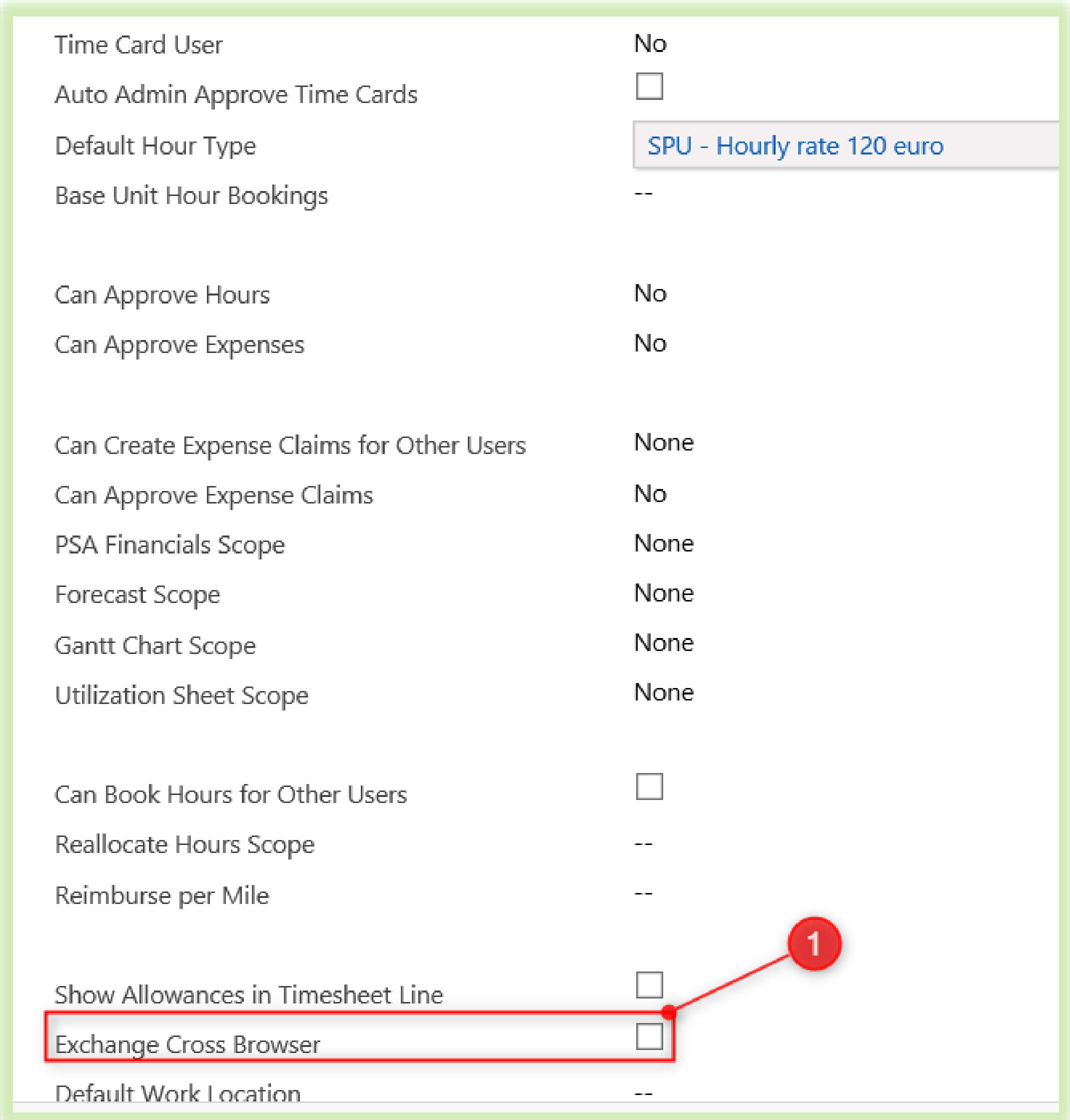
TIMESHEET

Retrieve Outlook Calender

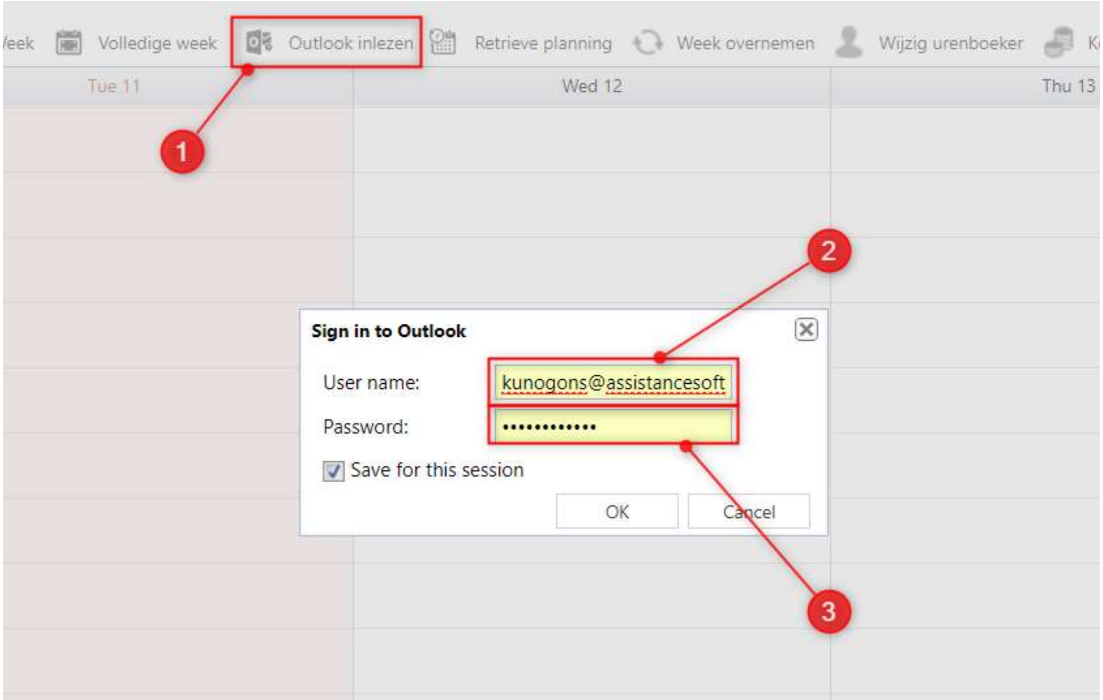
Vanaf PSA Suite Service Update 2 is het mogelijk de Outlook agenda in te lezen onafhankelijk van welke browser u gebruikt. Er dient hier voor aan een aantal voorwaarden te worden voldaan.

From PSA Suite Service Update 2 it is possible to retrieve the Outlook calendar regardless of which browser you are using. A number of conditions must be met here.

- Unit4 PSA Suite Web API version 1.0.0.7 must be installed in Dynamics.
- Check Exchange Cross Browser (1), this is not checked by default.



After this setting has been saved, the Outlook Agenda can be retrieved in the Timesheet.



Navigate to PSA Suite > Timesheet.

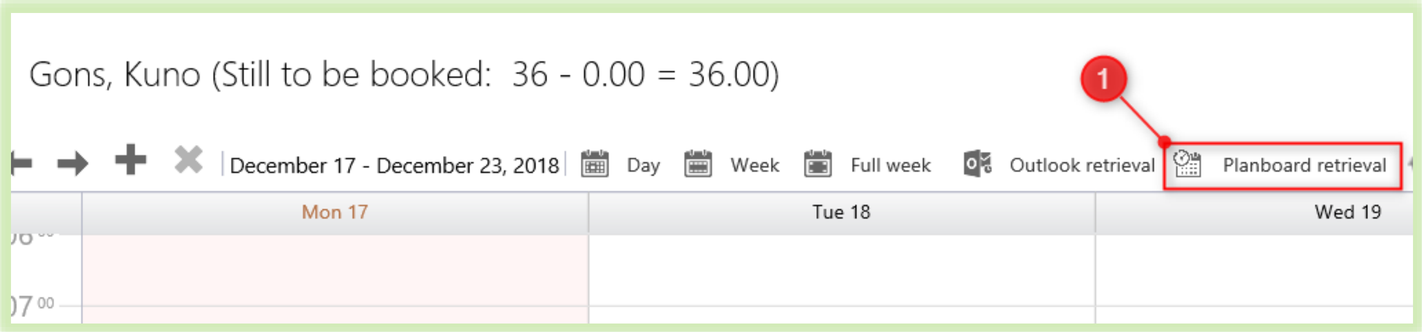
Click the Retrieve in Outlook button (1).

Then enter the own login name used for Outlook in User name (2).

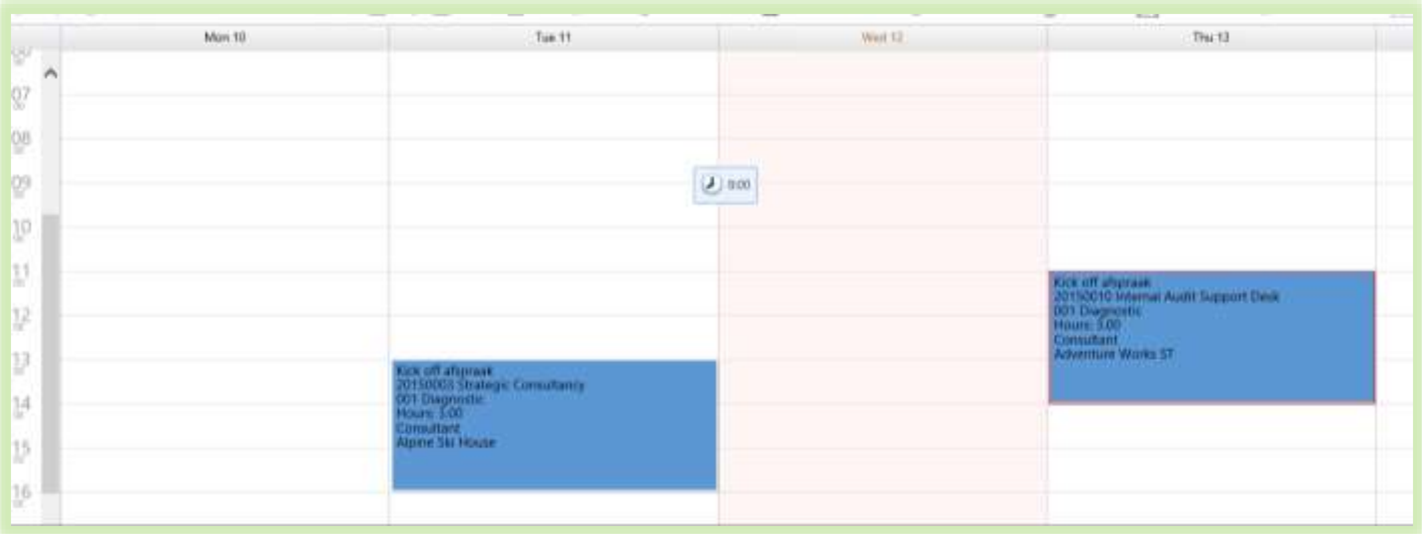
The Password (3) is the same as the password that logs into Outlook.

Retrieve Planboard in Outlook

It is possible to retrieve items from the planboard in Outlook.

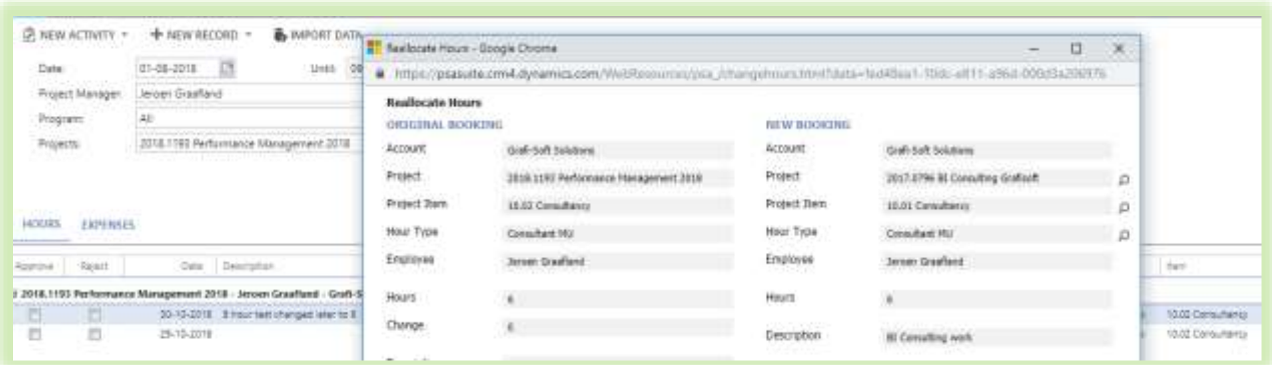


Open PSA Suite > Timesheet and click on the Planboard retrieval button (1), now the data is imported from the planboard and shown in the Timesheet.



Enhancement to the hours re-allocate functionality

When re-allocating hours from one project to another, from now on always a correction booking is made with a plus and minus. This is done for tracabilty / auditing purposes. Orginal hour booking from time-sheet user will not be changed.
When the user already posted a timecard, this validation will be done and the changed hour booking can directly be approved without adding this to the timecard. Total hours posted in a week will never be changed!



AML/CFT

Cloning AML/CFT

The possibility exists to clone an already completed AML or CFT. Here, an exact copy is made of the already existing one, in which the already entered data are taken along. Approval of the AML or CFT must be repeated.

Open an existing AML or CFT via Settings > AML of Customer Acceptance and click on the copy Survey button (1).