

Project Management

Visibility

360 degree view of project status and budget

Control

Project cost and information about deliverables at your fingertips

Graphical

Projects and resource utilisation displayed graphically

Mobility

Time and materials can be entered from a mobile device

On time

Functionality and reports available help delivering projects on time

On budget

Cost tracking and business alerts help delivering projects on budget



The World's Best Integrated Business Platform

Have the visibility and control you need to deliver projects successfully

Save time and money! Professional services, construction and creative companies will benefit from the many functions found within Enterprise software. Project management, costing and job bag capabilities are seamlessly integrated with all areas of the accounting system.

Quotations

Raise Quotations for Projects by quickly entering relevant codes, and even using drag and drop of relevant items. Mix and match time, materials, expenses and stocked items. Enter free text descriptions, or drop in blocks of text from elsewhere. Forms can be set up with header lines and subtotals, to create excellent-looking and easy to read documents. Use Enterprise's pipeline management features to report on conversion rates, value of potential orders per month and average sales lead times. New job numbers can be created from quotation details automatically, at any point in the sales process - whether or not the sale has been closed.

"We can be more proactive since we can identify if there is a problem with a project much earlier on in the process."
Kieran McGinley, Maiow

Project Overview and Phases

The Project record controls much of the information for invoicing, reporting and for accounting. There is huge flexibility over the level of detail to present on invoices - with different settings for each project. For example, choose to present the time worked on the project as anything from a single row consolidating all days, to separate rows for each day by each person, with the date shown. Classify projects by business type, urgency or any other criteria, and provide analysis codes that feed right through to the accounts.

"We've totally transformed our weekly project tracking and management reporting",
Matti Zadok, Experian Integrated Marketing

Integrated Marketing.

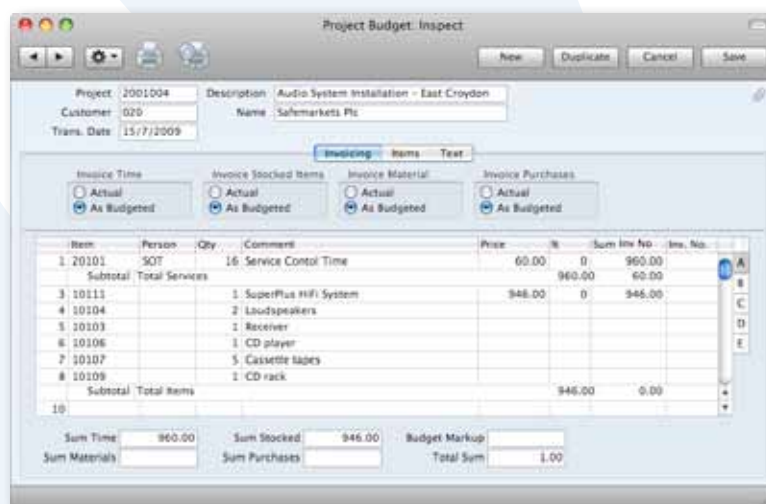
Create Project Phases, with the dates the phases are running from. All transactions will get labelled with their phase, enabling reporting on profitability, timing and project status per phase. Sign off completed phases, and you can trigger invoicing just for transactions belonging to those phases. Assign percentages to the phases, and get reporting on the percentage of the Project that is now complete.

Budgets

Budgets can be raised automatically from Quotations, or entered manually. These can be allocated to individuals, so reporting can pick up overruns at the person level as well as by type of work.

Rules set on Projects and Project Budgets give huge flexibility on methods of invoicing, including:

- fixed price: per project, per item or per item type
- time and materials (per diem): with rates picked up from price lists that can be set per client or group of clients
- milestones: this might be as simple as a single deposit, that gets automatically allocated against future invoices raised, or as complex as a series of milestones with amounts and expected invoicing dates
- retentions: set these as absolute amounts or percentages, and HansaWorld reverses it automatically when the final stages have been signed off.



The screenshot shows a software window titled "Project Budget: Inspect". It contains a form with fields for Project (2001004), Description (Audio System Installation - East Croydon), Customer (020), Name (Safemarkets Plc), and Trans. Date (15/7/2009). Below the form are four sections for "Invoicing" with radio buttons for "Actual" and "As Budgeted": Invoice Time (As Budgeted), Invoice Stocked Items (As Budgeted), Invoice Material (As Budgeted), and Invoice Purchases (As Budgeted). The main part of the window is a table with columns: Item, Person, Qty, Comment, Price, %, Sum Inv No., and Inv. No. The table lists several items including "Service Control Time", "SuperPlus HiFi System", "Loudspeakers", "Receiver", "CD player", "Cassette tapes", and "CD rack". At the bottom, there are summary fields: Sum Time (960.00), Sum Stocked (946.00), Sum Materials, Sum Purchases, Budget Markup, and Total Sum (1.00).

Item	Person	Qty	Comment	Price	%	Sum Inv No.	Inv. No.
1	20101	SOT	16 Service Control Time	60.00	0	960.00	
Subtotal Total Services						960.00	60.00
3	10113		1 SuperPlus HiFi System	946.00	0	946.00	
4	10104		2 Loudspeakers				
5	10103		1 Receiver				
6	10106		1 CD player				
7	10107		5 Cassette tapes				
8	10109		1 CD rack				
Subtotal Total Items						946.00	0.00
10							

Each budget line can be marked with a type, that indicates whether future invoices will be based on actual costs or a fixed amount, or even not recharged to the customer at all. You can also set blocks to prevent invoicing of specific items before given dates.

Scheduling

Assign one or more managers, and all team members, by entering their person codes on the Project record. Use Enterprise's Resource Planning module to schedule each piece of work on the Project. You can filter the schedule to show just work being performed on a specific project, or all time entries, for each project team. You do not need to replicate scheduled tasks on timesheets: if you are using the schedule, ticking work as done makes the necessary job costing entries. Resource Planning supports drag and drop reallocation between different team members.

Time Billing and Costing

Set up as many employees as you want, each with their hourly rates and cost per hour for gross profit calculations. Employees can belong to groups, all with the same rates, for ease of entry and reporting. Job groups can themselves be associated with price lists, so different customers are recharged at different rates for the same person's time. In addition, you can set up specific discounts or unit prices for individual customers and items (time or costs).

Time sheet entries allow you to enter any quantity of items (usually hours of an employee's time) against an employee and project. In addition, items can be non-stocked cost items, such as consumables, recharges and the like. To make things even easier, job groups can be restricted to a defined list of items that can be entered on time sheets.

To speed up data entry, clicking Enter or Tab from a blank line copies data from the line above to the line below, which can then be edited. Posted entries can be amended easily by marking them, "red-lining" deletions, and adding amended lines.

Time entries can even be given codes that relate to when on the day or in the week the work was performed. For example set overtime rates for weekdays after 5pm, double rates for weekends, and triple rates for state holidays.

"We have been impressed by the simplicity of costing time and expenses against jobs, holding this data for multiple years, and then invoicing it whenever required,"

Paul Harris, ICEE

Standard reporting includes:

- Employee statistics, covering time worked, on what, by project, with productivity details
- Consultants bonus calculations
- Gross profit by project and by employee, if requested showing time, purchases, material and order items separately
- Project invoicing, giving amounts invoiced and yet to be invoiced
- Budget against actual income and costs, in value and quantity terms, at several levels of detail
- Project profit/loss

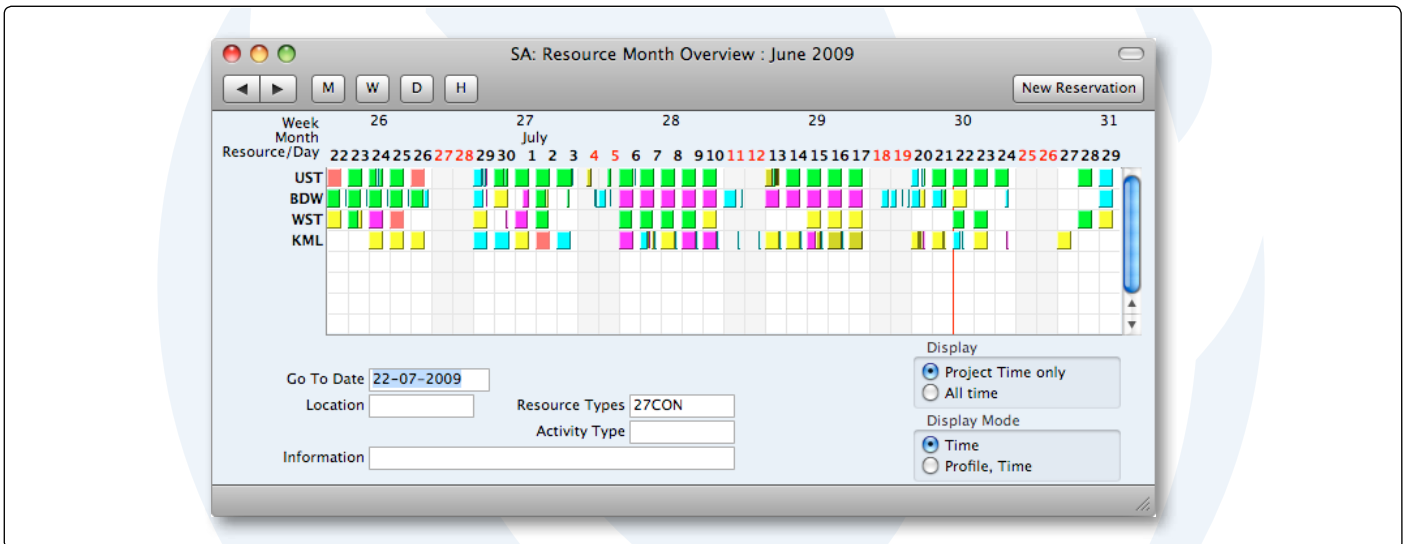
Expenses

Enterprise provides simple expense sheets to allow your employees to enter their expenses. The expenses input screen is headed by the employee and only books expenses against a specific employee. Coding is simplified, so the employee only needs to enter intuitive codes describing the type of receipt (e.g. "CAB" for a taxi fare), and Enterprise takes care of the accounting entries and the tax treatment.

"For staff reimbursements, we now use the integrated Expenses module and have been able to eliminate the old manual spreadsheets which were previously very labour intensive."

Michael Gigliotti, Time Out Sydney

Enterprise also provides the facility to have someone sign off an expense sheet. Expenses sheets can be in any currency, with a current rate being picked up automatically, by default.



Enterprise provides reports to show what is owed to each employee. Payments can be made to each employee, as advances or repayments. These show the company's and the employee's bank accounts and lists to be sent to your bank. Additional bank fees can be added to these payments.

Mileage claims are also available for employees to enter information about travel time and distance which can also be allocated to a project.

Purchase Orders and Invoices

Each row of a Purchase Order or Purchase Invoice can be allocated to a project simply by putting the project code on it. The Project Purchase Orders Report shows, for each project, values or quantities of items allocated to the project on Purchase Orders, Purchase Invoices, and recharges on Sales Invoices - so you can quickly pick up missing accruals or recharges.

Stock Transactions

Depending on your type of business, you may choose to allocate stock entries against a project when purchasing, direct from stock, or by delivering to any project location.

Invoicing

Enterprise handles any schedule of invoicing, based on budgets, costs or any number of pre-set amounts at any date.

Enterprise allows you to set up a default presentation for an invoice, which can be varied for any project. This determines the level of detail independently for entries from time sheets (time and consumables), and for purchases. Detail varies from every transaction to one line per project, but alternatively allows listing

by item or by item group. Prior to invoicing, you may change the quantity or price of any time based item. Each Item can be associated with markups, so they can be re-charged from the job at the marked up price. Alternatively, you may change the mark-up percentage for any item prior to invoicing. Invoices can be raised for a client across jobs automatically.

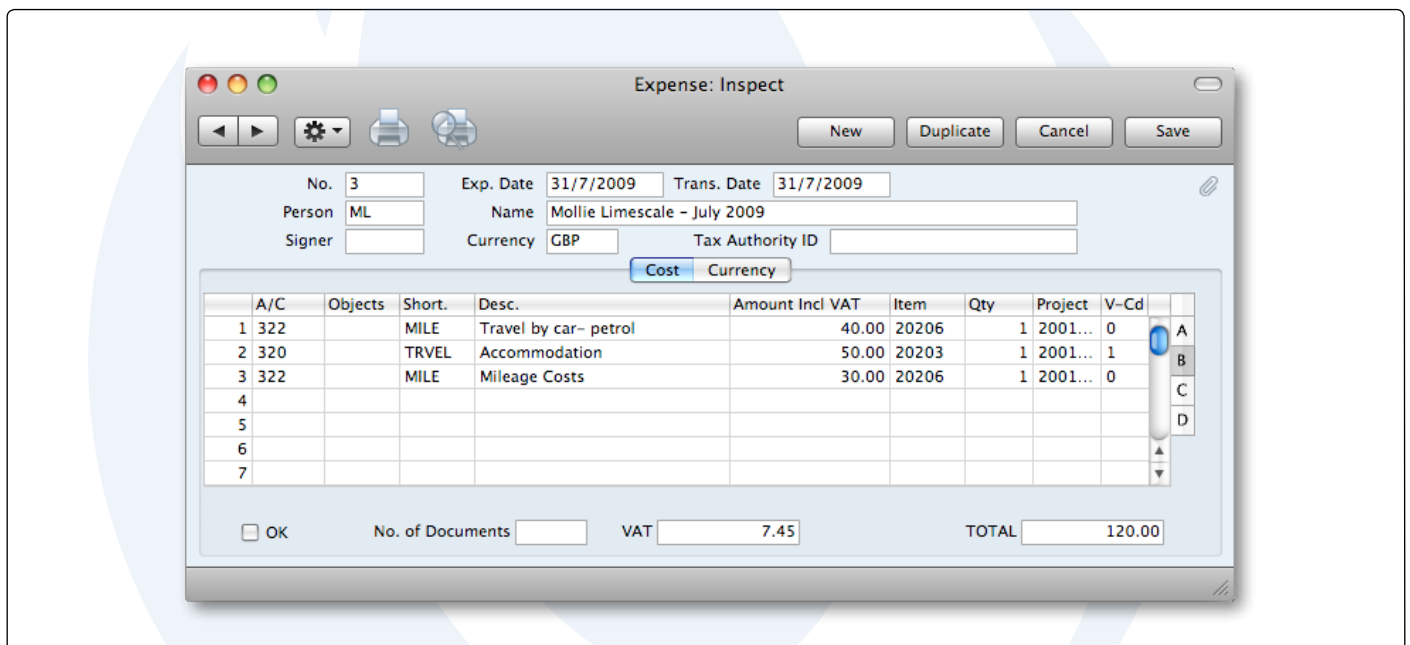
“Previously we have been relying on people remembering to record all information relating to a project and transferring it into the accounts system.”
Jacqui Howell, Air Studios

Enterprise provides an on-screen report for all items on a project yet to be invoiced. Like many key reports in Enterprise, the report has full drill-down, both for transactions and budget details. You can double-click down to the detailed transaction, and edit quantity, price, discount or mark-up figures to make final adjustments prior to invoicing. Billable entries can be marked as “invoice after date” and any number of interim down-payment or deposit invoices can be raised and set off against the final invoice.

Multi-currency and Accounting

Projects can be given a currency, and all invoicing will be in that currency. Costs incurred in that currency will be billed without translation, whereas costs in any other currency will be translated automatically to the billing currency. Price lists can be assigned per currency for any item.

Enterprise supports real-time accounting of work-in-progress from all costing entries.



Links to Payroll

Enterprise can easily export time sheet information for import into an external payroll package. The payroll summaries can also be exported from payroll packages for import into the Enterprise Nominal Ledger. See your Certified HansaWorld Business Partner for advice about imports and exports with different payroll packages.

Interaction with the Enterprise by HansaWorld

This product sheet covers several modules that all interact. There are also other modules within Enterprise that offer benefits to companies using job costing modules:

- Engine: covers Nominal, Sales and Purchase Ledgers, Quotations, Sales and Purchase Orders, and Stock - for all the accounting, debtors, creditors, and stock entries
- Job Costing: covers Projects, Project Budgets, invoicing, settings and reporting
- Expenses: for the employee expense claims
- CRM: you can create Calendar entries that automatically post time to projects, create mailshots targeted to customers who have or have not bought a specific service, and run detailed reporting by activity
- Resource Planning: shows multiple calendars simultaneously
- Document management: any file can be attached to any record in Enterprise, such as PDFs samples of artwork to show to prospects, held against the original prospect
- Email: permits automatic emailing of Purchase Orders to



Modules

- Business Alerts
- Cash Book
- Cheques
- Conferences
- Consolidation
- Contracts
- Course Booking
- Credit Management
- CRM
- Customs
- EDI
- Email
- Expenses
- Fax
- Fixed Assets
- Group Calendar
- Hotel
- Internal Stock
- Jewellery
- Job Costing
- MRP
- Nominal Ledger
- Point of Sales
- POS Offline
- Pricing
- Production
- Purchase Ledger
- Purchase Orders
- Quotations
- Rental
- Report Generator
- Resort
- Resource Planning
- Restaurant
- Sales Ledger
- Sales Orders
- Service Orders
- Share Trading
- SmartView
(Business Intelligence)
- Stock
- Task Manager
- Telephone Log
- Warehouse Management
- Webshop and CMS

Technologies

- Business Communicator (Asterisk, Skype and TAPI)
- Forms Designer
- HAL Customisation language
- Intelligent Routing
- Interfacing Toolkit
- Massive Cacheing
- ODBC
- SmartApps Designer
- Wide-area Networking

Internet Services

- Address Lookup
- Credit Card Payment
- Credit History
- E-invoicing
- Electronic Bank Services
- Electronic VAT Return
- Exchange Rate Lookup
- Postcode Lookup

Company profile

HansaWorld is a major international software company specialising in business optimisation solutions. The group employs around 300 staff in a strong network of daughter companies and distribution partners worldwide. There are offices in 19 countries spanning all the major continents, allowing HansaWorld to offer international implementations with a single point of contact across many countries.

The group was founded in Sweden in 1988, by Managing Director Karl Bohlin, and is currently headquartered in Ireland. The products are available in 27 languages and work with almost all computers and operating systems. There have been more than 74,000 HansaWorld installations at a wide range of organisations, from small and medium-sized businesses to entrepreneurial divisions of larger companies.

HansaWorld is one of the leading drivers to bring a new perspective to corporate software business needs. Traditional software companies continue to push a silo approach involving developing an Enterprise Resource Planning application that is difficult to integrate with other components such as Customer Relationship Management, Email, Document Management, Workflow and vertical market solutions. HansaWorld has pioneered the approach of developing solutions that cover almost all the company's main business needs in a single, integrated solution, and by underpinning these with constant technological innovation. As a result, this Integrated Business Platform unifies processes across all departments, through advanced software-based best practices which thereby improve the flow and value of business transactions to deliver time and cost savings at every level without compromise.

HansaWorld provides local product management for each market where it actively sells Enterprise. This process covers not just translations (if required), but also localisation for statutory and commercial practices, and ongoing quality control.

Product Strategy

Enterprise's advanced and successful user interface was first developed for Apple Macintosh in 1988. In 1994, when the program was ported to Windows, it had already been proved by thousands of users. HansaWorld's experience with international sales and modern technology puts it in the perfect position to meet the challenges of the next decade.

HansaWorld provides a wide range of technologies for e-business including internal and external email, several webshop solutions and PDA support. In addition, HansaWorld can help to build a corporate portal. Enterprise is developed using C++ as its programming language, and proprietary technology for database design and for network communication. This allows HansaWorld to have the same products available for several different operating systems, each version optimised for maximum performance.

Currently Enterprise is available for Windows 2000-XP, including Windows CE, Mac OSX, Linux and AIX, Symbian S60 and iPhone.

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Certified HansaWorld Business Partner



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