



## Fully configured Professional Services automation solution

Hitachi Essentials for Professional Services provides a complete professional services automation solution to help you effectively manage the delivery of client projects, the resources which are required for those projects together with project billing and accounting. Our solution, built on Microsoft Dynamics 365 for Operations, enables resource managers to build the right team for every project, accurately bill clients and provides self-billing functionality for contractors.

Hitachi Essentials for Professional Services enables you to:

- Better understand project and practice profitability
- Manage projects with effective tools for control and decision-making provided at your fingertips
- Analyse project profitability by dimensions using the flexible dimension defaulting framework
- Collaborate successfully on projects using Microsoft collaboration tools such as Skype for Business and SharePoint
- Easily enter projects, forecasts, time and expenses using any device
- Ensure that time and expenses are entered and approved in a timely manner

## Project Manager and Practice Manager Workspace

The project manager and practice manager workspaces provide dashboards which provide complete visibility of project and practice performance. At a glance, the workspace provides:

- Project and practice profitability
- Power BI analytics and KPIs
- Customer aged debt analysis
- Missing timesheets analysis
- List of project resources
- Assigned tasks visibility
- Lists of projects at risk
- Project cost and effort tracking

## Project Contractors Self-Bill

In order to automate and control project contractor costs, self-billing functionality has been introduced. This important feature will automatically produce supplier invoices based on approved timesheet entry. This greatly streamlines, controls and automates the contractor payment process.

## Resource Booking

To ensure that diaries are kept up-to-date when resources are booked onto projects, calendar appointment updates and cancellations are sent from Microsoft Dynamics 365 for Operations to Outlook. Configuration controls allow this function to be activated at a project-specific level; templates allow the wording of emails to be tailored.

## Project Purchase VAT

For many organisations, the VAT relief on project-related purchases is determined by the nature of the project and the project client. Hitachi has developed a solution which defaults the purchase VAT treatment based on the default set at project level. This greatly reduces the administrative burden of manually changing the VAT treatment for purchased goods and services.

## Project Workflows

Microsoft Dynamics 365 for Operations provides standard workflows to control and automate business processes which can easily be configured using a graphical drag and drop designer. Conditions for branching the workflows have been extended by Hitachi for the purchase requisition and order workflows to include any project data field e.g. project group, project manager. This provides a much more flexible framework in which to control project expenditure.

## Flexible Invoice Proposals

When a project invoice proposal is generated, an authorised user can now change payment terms and other relevant fields which provides much greater flexibility in project billing.

## Analysis Dimension Control and Defaulting

Microsoft Dynamics 365 for Operations provides the ability to append dimensions to financial transactions for ease of reporting and analysis. Hitachi has introduced a new form for controlling whether dimension fields must be mandatory or left blank for master record configuration. When enforced, defaults should be entered against master records. In addition, for each type of transaction, the sequence of defaulting behaviour for dimensions can be pre-defined to enable accurate accounting and ease transaction posting.

## Simple Project Setup

To ease set up of projects, the standard Microsoft Dynamics 365 for Operations copy wizard has been modified to automate and default project attributes based on input into the project creation (copy) wizard. A configurable tool provides control over the type of new project, the number of sub-projects and what attributes are inherited via a modified copy project wizard. A new role has been added to govern who can create master template projects.

## Project Forecast Entry

The project forecast entry screens have been laid out to make them easier to use with the key fields prioritised and the comments field expanded.

## Identification of Projects At Risk

Where no purchase order has been received for the project, projects can be flagged as 'At risk'. Not only does this provide visibility of projects at risk, it can also be used to prevent customer invoices being issued until the purchase order has been received.

## Project Numbering by Project Group

To easily identify projects by project group, you can now assign different number sequences by assigned project group. This ensures that project managers can easily identify and report on the different types of project.



Designed for  
Success



Predictable Cost



Flexible Approach



Ongoing Support

## Why Hitachi Solutions?

We offer deep industry expertise combined with decades of experience providing high-value solutions that deliver rapid return on investment. Our approach is designed to give you a faster, lower-risk implementation and rapid adoption of Hitachi's proven best practices, processes and configuration.

- It starts with core technologies built on the Microsoft Dynamics 365 for Operations cloud platform
- We extend that with our own best practice pre-configuration and sector-specific functionality so you can get up and running quickly. New features are introduced every three months to ensure you benefit from enhanced functionality which helps you keep pace with the demands of your industry.
- Finally, we deliver a tailored solution with inbuilt best practice processes and configuration templates to provide the best fit for your business, so you can focus on your unique strengths, not on basic technology