

ProScope for NetSuite

# Complex Projects Made Simple



  
**ProScope**  
Complex projects made simple

**ORACLE  
NETSUITE**



ProScope is a native to NetSuite application that has been developed to seamlessly extend NetSuite's project management capability.

Built entirely on the NetSuite cloud platform, ProScope delivers advanced project controls for NetSuite users facing complex project management challenges.

Until now, there has been a distinct lack of solutions for project centric companies operating with the Oil and Gas, Facilities Management, Construction and Manufacturing industries. Achieving the desired functionality required has generally only been possible by undertaking major modifications to a business's existing ERP solution, or by shifting from application to application.

For businesses with highly complex project management needs, NetSuite and ProScope combined provide the solution. By harnessing NetSuite's native customisation, ProScope seamlessly extends and enriches NetSuite core competencies, equipping product driven asset companies with the flexibility, visibility and agility they require to run complex projects.

For every stage of the project lifecycle, ProScope offers unique functionality. It is designed to offer greater control and greater information – from the strategic portfolio level to the in-depth detail of every activity. Because it's native to NetSuite, there's no shifting from application to application to make the most of that functionality. ProScope operates within the same, familiar NetSuite environment users know and understand. ProScope's strength is the ability to seamlessly extend NetSuite's core offering to deliver a complete, unrivalled solution.

## From the start to finish of each and every project, users have more control, visibility and accountability.

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Templates and ready-made structures let users automatically create a project. A built-in costing estimator allows for the scoping of equipment, services and resources, in order to quickly and easily pull together detailed estimates and profit forecasts. What's more, once complete, quotes can be emailed to recipients at the touch of a button, creating a fully traceable CRM link within NetSuite.

Once a project is awarded, ProScope allocates and schedules the resources, coordinating with field service and asset management applications to request and order the appropriate services.

As the project progresses, ProScope enhances NetSuite's core cost and time reporting functionality, providing the tools to manage both resources and assets and to review profitability and performance.

## Greater Project Planning and Control

From the initial stages of planning and throughout the entire project lifecycle, ProScope provides tools that allow every detail of a project to be properly managed.

From project set up, it is possible to select from standardised project structures and pre-set project templates with sub projects already included and ready to be customised to individual requirements. With standard items for equipment and inventory costs together with add-ons and overheads such as project management fees, expenses and shipping, users can easily and quickly pull together all the necessary project costs. ProScope even makes it possible to manage procurement and inter-company transactions from right within the project.

As a project proceeds and undoubtedly changes, users can adapt their project plans in real time. ProScope provides an agile and responsive platform for reassigning teams, rescheduling activities or redirecting equipment.

From strategic level, down to individual resources, team members and physical inventory, ProScope empowers users to take control of every aspect of project performance

# Key Project Management Challenges for Project Centric Businesses

## Disparate systems

As a business grows, multiple systems are often added over time to drive and fulfil the needs of different departments, for example the finance team will choose a solution that works for them, the sales time potentially another and on it goes. Eventually, these systems become siloed and inefficient due to a distinct lack of a unified view of the business. It is at this point that many businesses look to a fully integrated ERP solution, such as NetSuite.

In the past, for project centric businesses, while an integrated ERP solutions might be strong on finance and distribution for example, they are usually exceptionally limited in terms of the specific 'best of breed' functionality required for estimating, project management and project reporting. As a result, many business simply can not avoid the need to choose a stand alone solutions in order to effectively manage their projects. This means that they still suffer from the lack of unified view of their projects, disjointed invoicing and billing and poor visibility to effectively allocate resource and inventory items required.



## Lack of visibility

Key stakeholders within an organisation, should be able to view a single version of the truth, curated and tailored specifically for them, giving actionable, real-time insights. Typically, with multiple systems implemented across a business this is not possible. Project and commercial managers have a different view of the project portfolio compared to the finance team, who have a different view to the sales team, compounded by the executive team needing full portfolio visibility to influence their strategic plans.

All too often, a lack of visibility can mean that a project is too advanced before issues are identified, leading to delays, increased costs and culminating bad feeling between the company and client which at worst, could derail an entire project.



### ANALYTICS DASHBOARD

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Evolution	Metric	Actual vs Target	Actual	Target
	Revenue		\$3.4M	82.0%
	Profit		\$1.2M	108.7%
	Avg. Order Size		\$850.3	71.0%
	On Time Delivery		98.0%	98.0%
	New Customers		15432	145.0%
	Cust. Satisfaction		98.3%	100.0%
	Market Share		45.9%	80.0%

Sales per countries





## Poor Reporting

Disjointed systems make visibility and reporting difficult. Instead of running on a single platform, departments maintain their own reporting solutions, whether that be Excel spreadsheet or a MS Project Plan that cannot be centrally captured within the overall project plan.

A lack of visibility means producing accurate, detailed reports takes longer. More time is spent running individual reports which often need to be exported and further enriched to allow for gaps. What's more, poor reporting significantly impacts the ability to make critical business decisions.

## Lack of control of resource

In order for a project to be run efficiently and effectively, sufficient resource is required. Knowing who you have available, what their individual skill set is, when they are available and for how long?

To ensure resource can be properly allocated to a project, having real time visibility of that resource is key. You need a complete view of your project portfolio, the ability to quickly assess resource requirements, assign tasks and identify issues in order to keep all projects moving. Lack of visibility of resource can result in project timescales and budgets not being met.



## Inability to allocate assets and equipment

Often in a project, while it is possible to add physical human resource from the project plan, it is not possible to add assets or any inventory items required. This is particularly important if your business operates within the manufacturing or construction industry.

Ensuring you have full visibility to see that the items you require are firstly, available and secondly, able to be ringfenced for your project becomes difficult, especially if the stock inventory you depend on is not integrated with your overall business system and therefore always up to date. Again, not having component parts of items required for a project can lead to significant delays and additional costs.

# OTHER CHALLENGES?

## The solution - NetSuite and ProScope.

A fully integrated advanced project management solution.



Implementing a fully integrated business system that encompasses the full lead to cash lifecycle, enriched with project, programme and portfolio management capabilities will deliver a real and measurable impact to your bottom line.

By combining the existing capabilities of NetSuite with the enhancement features of ProScope, Finance, Project Management and Inventory combine on a unified platform to allow seamless delivery of complex projects. Users are empowered to drive business efficiency and project profitability.

## NetSuite and ProScope allows you to plan, drive, and measure project success at every stage.

ProScope enhances the existing capabilities of the core NetSuite solution, providing seamless functionality for project planning, resource and asset management, billing and forecasting, without the need for reverting to external sources or additional applications. Together, NetSuite and ProScope offer greater visibility and deeper understanding at every level of a project, from key financials to resources and assets. Data flows constantly into highly visual, user friendly dashboards and reports are available in real time allowing senior business leaders to make informed business decisions using up to the minute information, facilitating more effective strategic planning.

ProScope also opens the door for wider cross platform collaboration. Users can easily import data from Microsoft applications such as Microsoft project and Excel, feeding in project plans and spreadsheets, as well as mapping project resources to NetSuite resources. What's more, ProScope works hand in hand with NetSuite's field service and asset management applications, easily sharing information around distributing resource, scheduling activity and allocating time. Users at every level, across every area of the business consistently see a single point of truth.



## Greater Visibility and Insight

ProScope's simple user-friendly interface makes it easy to monitor and measure the progress of each project, by offering a 'helicopter view' of an entire project portfolio.

Gantt charts offer a broad overview with the opportunity to drill down into individual subject project elements for even more specific detail.

All Gantt charts have drag and drop functionality, therefore resource managers can easily identify and resolve any issues, add additional tasks or task hierarchies, staying on top of the overall project performance, from pipeline to profitable delivery.

Key info right down to granular level of the lower tier project activities, giving exceptional reporting capability and actionable insights. A simple colour coding system highlights milestones and activities, showing where resources are committed and most importantly if they are over allocated.

A highly visual dashboard allowing you to track labour and expense budgets, assign teams and view colour coded spreadsheets to track resources and monitor financials. From invoices to be sent to what's due to be paid. ProScope provides invaluable insight that turns accounting into a valuable strategic resource, helping to shape decision making and inform planning.



## Enhanced Project Planning and Mobilisation:

- ✓ Build detailed quotations and email at the touch of a button.
- ✓ Detailed job costing build-ups.
- ✓ Separate cost breakdown structures. Activity-based budgeting.
- ✓ Advanced project procurement and requisitions, direct from the project.
- ✓ Automated document generation on project creation.
- ✓ Visual Scheduler for entire project portfolio.

## Enhanced Project Execution / Governance and Control:

### **View individual/team/company utilisation straight in your dashboard:**

- ✓ Merge historic and actual utilisation into a single view.
- ✓ Set and track individual team members utilisation targets.
- ✓ Create visual, at a glance, timesheets.
- ✓ View activity trends for continuous improvement in project performance.
- ✓ Export to Excel at the touch of button for reporting.

- ✓ Real-time interactive Gantt Chart.
- ✓ Import to and from Microsoft Project, Teams and SharePoint.
- ✓ Visual timesheet compliance views.
- ✓ Dashboard reporting of utilisation.
- ✓ Dashboard reporting of sales, WIP and invoicing across budget lines.
- ✓ Project and team resourcing in Excel exportable formats to share with clients.
- ✓ Auto allocations of teams to projects dealing with HR leaver and starters.
- ✓ Manage project inventory.

## Effectively track on-site/off-site and non-travel days for team members:

- ✓ View colour coded project and team resource allocations.
- ✓ Plan daily across team and projects, directly allocating tasks.
- ✓ Establish teams separate from HR structure and billing class constraints.
- ✓ Export pixel perfect sheets to Excel to share with clients.
- ✓ Instant pop-ups indicate project task information and notes, providing managers with the detail to make resourcing decisions easily.
- ✓ Edit and manipulate resource allocations straight from the spreadsheets.

## Enhanced Project Accounting and Reporting:

- ✓ Manages project retentions / add-ons / variations.
- ✓ Manages applications for payments.
- ✓ Allows project based overheads, including % of total contract value, fixed fee and labour overheads.
- ✓ Data is viewed directly on project header and instantly visible to project managers.
- ✓ Allows target margins to be set per project/project type.
- ✓ A rule based engine flags any profitability warning.
- ✓ Cost roll-ups from child projects to master projects.
- ✓ Automatic status and stages based on project activity.
- ✓ Extended set of dashboard and reporting from commercial, programme and project managers offering.
- ✓ CIS Automation – verified by HMRC for verifications and submissions.



## Additional Features:

- ✓ Charge based billing prepared at weekly time sheet level.
- ✓ Enhanced time sheet entry to include off-call and on-call entitlements.
- ✓ Project schedules and calendars.
- ✓ Cost value reconciliation reporting.
- ✓ Multiple project baselines.
- ✓ JIRA/Microsoft Teams/Slack/Azure DevOps integration.



# About Cooper Software

ProScope has been developed by Cooper Software, a leading NetSuite partner with a 15-year track record of supporting clients in the ERP space. ProScope is the culmination of that experience: an industry cloud solution that meets the needs and standards of a range of project-driven sectors, offering truly breakthrough performance.

ProScope offers the depth and range of functionality that nothing else does. And because it's native to NetSuite, there's no shifting from app to app to make the most of that functionality. This operates within the same, familiar environment users will know and understand – seamlessly extending its core offering.

For more information visit [www.proscope.co.uk](http://www.proscope.co.uk)