

A horizontal bar with three segments: blue, orange, and green.

## AXIO ProServ: Optimized Operations for the Global Project Management-based Enterprise

AXIO for Professional Services from Velosio is an end-to-end business software solution for project based businesses managing global resources with multi-entity, multi-currency, multi-taxation and multi-language requirements.

Our solution spans all the important processes in your firm – resource management, project management, marketing, human capital management, and financial management – to give you unparalleled insight and control of all of your critical business functions.

AXIO is built for Microsoft Dynamics 365 for Operations, optimized for cloud, on premise, or hybrid deployment, Dynamics 365 provides proven global scalability and enterprise-class extensibility. AXIO is compliant with all GAAP, IFRS, Sarbanes-Oxley, and DCAA requirements.

## Solution Differentiators

- **A Truly Global Solution:** Universal integration of resources pools, skill-sets, projects, and finances across any number of countries, companies, or other entities.
- **Scalable and Agile:** The solution can scale to a virtually unlimited number of users. The flexible and extensible systems architecture provides an agile business platform enabling rapid response to market or organizational changes.
- **Rapid Deployment and Adoption:** Because it is based on Dynamics 365 for Operations, and works like and with familiar Microsoft software, AXIO is easier to learn to implement, manage, and use than alternative solutions driving more efficient and faster deployment and time-to-value than any other enterprise-class ERP.

## Velosio Offers:

### ■ **Technical and Business Subject Matter Experts:**

A full complement of experienced professionals that have intimate knowledge of the needs of IT Consulting, Management Consulting and Architecture and Engineering firms. These industry experts use a wide-array of best practices and tools to ensure tangible results from your systems implementation.

### ■ **Comprehensive Services:** A full suite of information technology and business consulting services from migration and implementation to business process re-engineering.

### ■ **RightSource:** Velosio offers a “RightSourcing” model which combines the best of our onshore and offshore resources to provide you with the flexibility to utilize an optimized mix of the right skills at the right cost - with no compromise on the speed and quality of project deliverables.

### ■ **RightPath:** A proven, collaborative methodology to reduce risk coupled with turnkey templates and workflows based on industry best-practices that facilitate a faster, more successful implementation.

### ■ **Microsoft Lifecycle Services:** A cloud-based, preconfigured collaborative workspace that we leverage to optimize AXIO implementations. LCS integrates cloud infrastructure, business analysis, configuration and customization and automates interactions and changes between these elements. Lifecycle Services helps us improve the predictability and quality of your implementation by simplifying and standardizing the implementation process to realize business value faster.

## AXIO for Professional Services Capabilities

### Global

- Multi-entity support for projects and resources
- Multi-language, multi-country support
- Proven global enterprise scalability
- Maximum extensibility - Layered architectural development language enables virtually any level of customization or integration

### Sales and Opportunity Management

- Lead and Opportunity Management
- Account management

### Project and Resource Management

- Flexible Project hierarchies
- User defined billing structure
- Manage resource forecasts and utilization by role or resource
- Project budgeting and management down to the activity level
- Track project progress and costs
- Capture time and expense
  - Receipt management
  - Corporate credit card management
  - Travel requisition
  - Cash Advances
- Dimension defaults on time sheets

- Cross entity resource utilization and project execution
- Robust Project Management functionality with optional integration to Microsoft Project
- Project alerts and notifications
- Integrated Document Management

## Project Accounting and Billing

- Manage revenue recognition and cash flow
  - Flexible revenue recognition supports multiple revenue streams, including subscription, pay-as-you-go, on-demand, as well as time and materials.
- Project Costing
- Inventory management
- Overhead allocation management
- Enhanced Web Portal for Project Managers

- Global project accounting capability
  - Multi-currency at project level

## Financials

- Multi-Company, Multi-Currency Management
- Accounts Payable
- Accounts Receivable
- General Ledger
- Fixed Asset Management
- Bank
- Manage collections
- Compliance and Regulatory Support

## Human Capital Management

- Payroll
- Benefits Administration
- Employee Self-Service Portal

Dynamics 365 Operations Project management and accounting > Project resources > Resource availability

Soft book Hard book Clear selections Refresh resource grid View settings Filter settings OPTIONS

### Resource availability

Name: Availability start date/time: 1/8/2017 12:00 AM Availability end date/time: 2/25/2017 11:59 PM

Resource availability

☐ Available ☒ Partially available ☒ Reserved ☒ Overbooked ☒ Unavailable Soft booked / requested

RESOURCES	1/8/2017-1/14/2017	1/15/2017-1/21/2017	1/22/2017-1/28/2017	1/29/2017-2/4/2017	2/5/2017-2/11/2017	2/12/2017-2/18/2017	2/19/2017-2/25/2017
Adam Carter 003402 - USSS	Reserved 0.00	Reserved 0.00	Reserved 0.00	Reserved 0.00	Reserved 0.00	Reserved 0.00	Available 40.00
Adriana Giorgi 003405 - USSS	Overbooked -30.00	Available 40.00	Overbooked -30.00	Overbooked -30.00	Overbooked -30.00	Available 40.00	Available 40.00
Alice Ciccu 00349 - USSS	Available 40.00	Available 40.00	Available 40.00	Available 40.00	Available 40.00	Partially available 15.00	Available 40.00
Alistair Speirs 003301 - GBSI	Available 40.00	Reserved 0.00	Reserved 0.00	Reserved 0.00	Available 40.00	Available 40.00	Available 40.00

### Reservation details

Cancel reservations Confirm hours

Resource name	Engagement ID and name	Engagement type	Task name	Start time	End time	Reservation type	Reserved hours
Adam Carter	00000116 Eastside ERP Impleme...	Project		1/8/2017 12:00 AM	2/25/2017 11:59 PM	Hard Booking	240.00

## Reporting and Analytics

- Pre-Packaged Analytics
- Ad-hoc Reporting Tool for simplified report creation
  - End-user can create complex reports without understanding the database schema
- Enhanced BI Platform
  - Data Modeling
  - Data Quality Management
    - » Data Profiling
    - » Data Cleansing
    - » Data Validation
  - » Mobile Business Intelligence
- Dashboards
  - CFO Dashboard
  - Project Manager Dashboard
    - » Drill Down to Project Detail
- Alerts and Report Scheduling

- Automated Report Distribution

## Flexible Deployment

- Public Cloud deployment
- Private Cloud deployment
- Hybrid deployment

## Mobility

- Mobile access to the most crucial areas of business functionality
- Native Apps for IOS, Windows, and Android

## Enterprise Implementation Engine (Lifecycle Services)

- A cloud-based, preconfigured collaborative workspace that we leverage to optimize Microsoft Dynamics 365 for Operations implementations. Lifecycle Services helps organizations improve the predictability and quality of their



implementations by simplifying and standardizing the implementation process to realize business value faster.

- Uses pre-configured workflows and templates based on best practices and integrated with an Azure-based cloud infrastructure for development and testing.
- LCS integrates cloud infrastructure, business analysis, configuration and customization, and automates interactions and changes between these elements.

## Government Contracting Module (Optional)

- Provides proper segregation of direct costs from indirect costs
- Identifies and accumulates direct costs by contract
- Provides a logical and consistent method for allocation of indirect costs to intermediate and final cost objectives
- Allows accumulation of costs under general ledger and project ledger control
- Identifies employees' labor by intermediate or final cost objectives
- Interim determination of costs charged to a contract
- Exclude non-allowable costs per contract
- Limitation of cost, limitation of funds, allowable cost and payment
- Workflow for approval and internal controls

## Dynamics 365 for Sales (Optional)

- Enhanced Sales, Pursuit and Opportunity Management
- Enhanced Account Management
- Multi-Channel Marketing Automation
- Customer Service and Support
- Relationship Intelligence
- Robust Sales and Marketing Analytics

## The Journey Matters

ERP software serves as the focal point for managing all important aspects of a business and your chosen partner should have ideas and solutions to help you leverage ERP for your business. Velosio delivers the experience, tools and resources to ensure your project goes as planned, on-time and on-budget.

### A Collaborative Proven Implementation Method

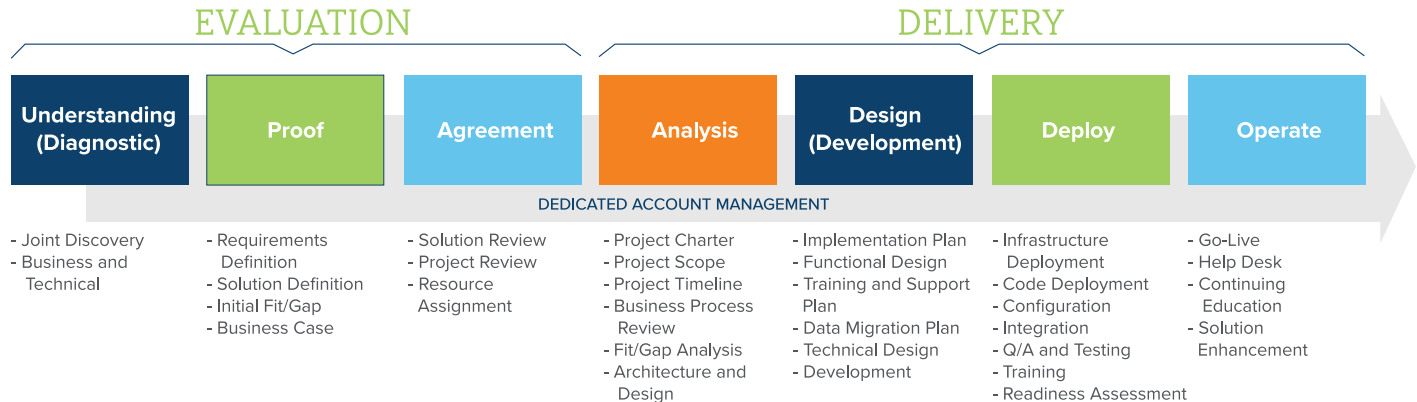
Our **RightPath** method reduces risk through the use of turnkey templates and workflows based on industry best-practices, facilitating a faster, more successful implementation.

This approach also provides cross-phase visibility of several management disciplines meant to assure the success of the project. These disciplines include:

- **Risk Management** - Manage risks to influence the probability of occurrence and their impact on the project objectives like cost, schedule, and quality.
- **Scope Management** - Plan and manage the project scope across the project lifecycle.
- **Issue Management** - Plan and manage issues that arise throughout the project.



# Velosio RightPath Methodology



- **Time and Cost Management** - Initiate, control and manage time and cost to ensure completion of the project on time and within budget.
- **Resource Management** - Organize and manage all involved in the project - human resources, equipment and material resources.
- **Communication Management** - Plan and manage communications throughout the project.
- **Quality Management** - Ensure a certain level of quality for the project deliverables and for project management.
- **Procurement Management** - Manage purchases and acquisitions of services and deliverables from outside the project team to fulfill the defined project requirements.

During an AXIO implementation, the Blueprint document serves as the focal point for the start of implementation. The Blueprint describes the features delivered by AXIO. While there are still configuration decisions and analysis to be done by the project team, when it comes to the business processes, the

Blueprint was developed by a full complement of experienced information technology and business consulting experts from migration to business process re-engineering focused on:

- Eliminating wasted productivity (ie; redundant data entry, looking for information, manual processes and report creation, slow transaction times, disparate islands of information)
- Aligning business goals and business processes
- Increasing automation, and
- Optimizing financial processes to accelerate cash flow.

## The Right Resources at the Right Time

The **RightSourcing** model which combines the best of onshore and offshore resources provides flexibility to utilize an optimized mix of the right skills at the right cost - with no compromise on speed and quality of project deliverables.

**Swiftness and Expertise:** Most of the time tasks are offshored to resources who specialize in their field, with specific product and technical expertise. Effectively, the tasks can be completed faster and with better quality output.

**Ability to Exploit the Time Zone Advantage:** When time is money, working with offshore resources allows you to reap the benefits of a 24-hour development cycle.

**Cost Savings:** Generally, offshoring certain services can be very cost effective. In some cases, cost can be a fraction of US costs with equal quality.

## A Successful Go-Live

The success of your entire ERP project may actually be determined on Go-Live day. A successful launch encourages staff, eases concerns and facilitates adoption. A rocky start can cause frustration that sets back adoption and fuels negativity for months, even if problems are fixed quickly. Velosio ensures a smooth Go-Live where you also save both time and money by:

Avoiding productivity loss due to employees working on go-live planning instead of their regular jobs.

- Avoiding expenses associated with billing and coding errors during go-live.
- Providing you with easy access to supplementary human resources such as elbow-to-elbow coaches and temporary employees that you would otherwise have to invest in or do without.
- Providing the experience to ensure a positive experience and avoid long-term adoption issues.



## Take the first step!

We can help assess where you are and where you need to be. Learn more at [velosio.com](http://velosio.com) or call us at 1.800.589.6614.