

# UMT Project Financial Server

## Top 10 Features





## Project Financial Intelligence for Microsoft Project Server 2010

**UMT Project Financial Server 2010 seamlessly extends Microsoft Project Server 2010 to provide comprehensive cost and benefit management capabilities across the entire project life cycle.**

Driven by challenging economic times and enhanced compliance requirements, financial management has become a priority for organizations investing in project and portfolio management (PPM) best practices and solutions. Project Financial Server 2010 is designed to support organizations with both simple and mature financial management requirements. Whether you want to capture high level cost estimates, facilitate organizational charge backs or track benefits realized, Project Financial Server 2010 is the right solution.

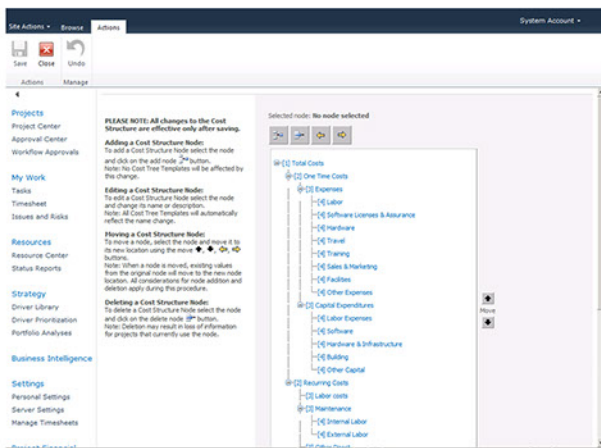


Project Financial Server 2010 provides the following benefits:

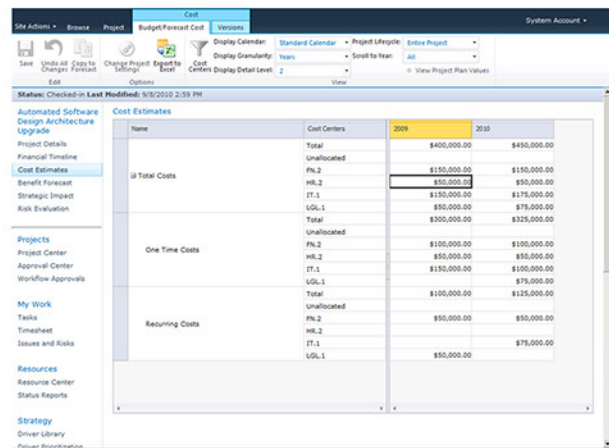
- **Seamless & Effective Governance** - Effectively standardize financial structures and integrate financial governance controls to drive accountability and compliance
- **Better Data, Smarter Decisions** - Quickly create accurate and reliable cost and benefit predictions to support and enhance portfolio selection decisions
- **Enhanced Visibility & Insights** - Effectively measure project and portfolio financial performance through powerful reports and dashboards
- **Easy-to-Use & Integrated** - Enhance user experience and get started quickly with familiar SharePoint Server 2010 interface

## UMT Project Financial Server - Top 10 Features

- 1 **Standardize Financial Structures** - Quickly standardize global cost and benefit structures across the organization to drive transparency and facilitate enterprise reporting
- 2 **Effectively Integrate Governance** - Seamlessly integrate financial governance controls within existing project workflows to enhance accountability and better meet regulatory standards



Global Cost Structure



The screenshot shows a 'Budget Cost Web Part' displaying a table of cost estimates. The table has columns for 'Name', 'Cost Centers', '2009', and '2010'. The data is categorized into 'Total', 'One Time Costs', and 'Recurring Costs'. The 'Total' section shows a total of \$400,000.00 for 2009 and \$450,000.00 for 2010. The 'One Time Costs' section shows a total of \$100,000.00 for 2009 and \$125,000.00 for 2010. The 'Recurring Costs' section shows a total of \$50,000.00 for 2009 and \$50,000.00 for 2010.

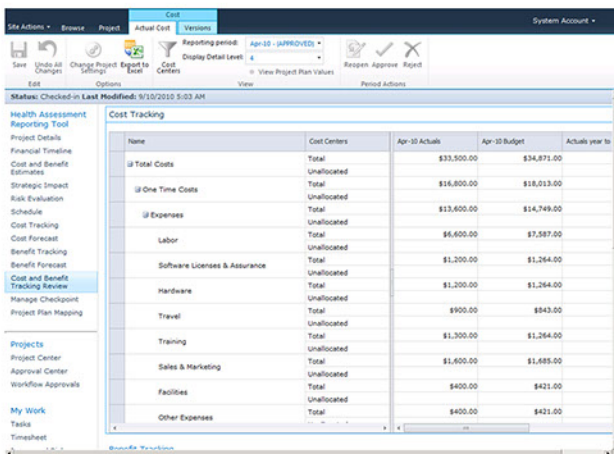
Name	Cost Centers	2009	2010
Total		\$400,000.00	\$450,000.00
Unallocated			
PH.2		\$150,000.00	\$150,000.00
HR.2		\$50,000.00	\$50,000.00
IT.1		\$150,000.00	\$175,000.00
LGL.1		\$50,000.00	\$75,000.00
Total		\$300,000.00	\$325,000.00
Unallocated			
PH.2		\$100,000.00	\$100,000.00
HR.2		\$50,000.00	\$50,000.00
IT.1		\$150,000.00	\$100,000.00
LGL.1		\$150,000.00	\$75,000.00
Total		\$100,000.00	\$125,000.00
Unallocated			
PH.2		\$50,000.00	\$50,000.00
HR.2		\$50,000.00	\$50,000.00
IT.1		\$50,000.00	\$75,000.00
LGL.1		\$50,000.00	\$75,000.00

Budget Cost Web Part

- 3 **Drive Accurate & Robust Financial Estimates** - Easily capture robust time phased cost and benefit estimates and derive metrics to enhance portfolio decision making
- 4 **Support Funding, Allocation & Chargebacks** - Simply breakdown financial data by Cost Centers to enhance organizational budgeting, allocation and charge backs
- 5 **Maintain Financial Versions** - Create versions / snapshots of financial data to quickly see how the estimates evolve and keep records for audit purposes

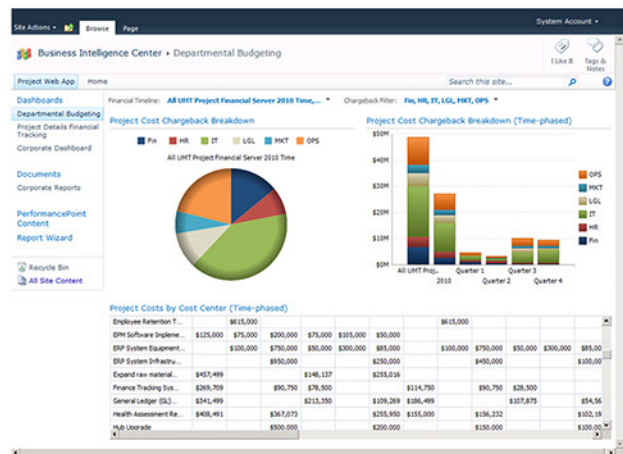
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- 6 **Top Down & Bottom Up Planning & Tracking** - Project Financial Server 2010 provides the flexibility to manually enter high level or detailed financial data in a top down "Cost Plan" or simply sync and aggregate resource assignment costs (i.e. human, cost and material) from the schedule
- 7 **Measure Financial Performance** - Complete financial status reports by period to effectively measure and track project cost performance, assess real-time variances and take action to mitigate cost overruns



Name	Cost Centers	Apr-10 Actuals	Apr-10 Budget	Actuals year to
Total Costs	Total	\$33,500.00	\$34,871.00	
	Unallocated			
One Time Costs	Total	\$16,800.00	\$18,013.00	
	Unallocated			
Expenses	Total	\$13,600.00	\$16,749.00	
	Unallocated			
Labor	Total	\$6,600.00	\$7,587.00	
	Unallocated			
Software Licenses & Assurance	Total	\$1,200.00	\$1,264.00	
	Unallocated			
Hardware	Total	\$1,200.00	\$1,264.00	
	Unallocated			
Travel	Total	\$900.00	\$843.00	
	Unallocated			
Training	Total	\$1,300.00	\$1,264.00	
	Unallocated			
Sales & Marketing	Total	\$1,600.00	\$1,685.00	
	Unallocated			
Facilities	Total	\$400.00	\$421.00	
	Unallocated			
Other Expenses	Total	\$400.00	\$421.00	
	Unallocated			

Cost Tracking Web Part



Financial Dashboard

- 8 **Financial Reports & Intelligence** - Utilize familiar Microsoft Business Intelligence capabilities to quickly build powerful reports and dashboards to provide Project Financial Intelligence. Project Financial Server 2010 includes a dedicated reporting cube that provides easy access to time phased cost and benefit data
- 9 **Track Benefits Realization** - Successfully track benefits and easily compare and contrast with the planned benefits documented in the initiative's business case
- 10 **Extend & Integrate** - The flexible web services based API, Project Financial Server Interface (PFSI), provides an open and extensible platform to effectively integrate with line of business systems and extend the solution