

# Sage Accpac ERP™

## Quick Cost 5.5

---

### Needs Analysis Agenda

# Contents

---

---

<b>Chapter 1 Needs Analysis Agenda .....</b>	<b>3</b>
Accounting.....	3
Project/Job Types.....	3
Teams/Resources .....	3
Expenses.....	4
Project/Job Closure in Detail .....	4
Integration .....	4
Network and Infrastructure .....	4
Reporting.....	4

## **Enabling IP Quick Cost 5.5 Needs Analysis Agenda**

# Chapter 1

## Needs Analysis Agenda

---

---

This chapter details an agenda for an initial needs analysis session.

### Accounting

The first session will cover your requirements in terms of accounting:

Specifically we need to gain a clear understanding of the work-in-progress model and revenue and cost recognition approaches used in your organization.

In addition inter-company accounting policies will also be reviewed and documented.

### Project/Job Types

We will discuss the different types of engagements you have and the differences between each.

We will review the entire life cycle of each project /job type from quoting to closure.

We will review the type of project information that a system would need to store and where this information is sourced from.

### Teams/Resources

We need to understand how your organisation wants to manage operating a disbursed team in the new system.

How teams are structured will be discussed and how this impacts on inter-company accounting.

An understanding on how resources are employed (salaried, wages, contract) and how this will impact the implementation of the system.

## Expenses

We will discuss the type and nature of the expenses your staff can claim and if and how these expenses are reimbursed.

In addition we will review if and how creditor's expenses are charged to projects.

## Project/Job Closure in Detail

We will review in detail the process for closing a project/job including the steps for billing and any approval process that exists.

For non billable projects/jobs we will discuss the recognition approach used.

## Integration

During this part of the discussion we will discuss any requirements to integrate with any external systems and review the systems themselves.

## Network and Infrastructure

While not usually covered in a needs analysis session, this will be of interest.

We will discuss the existing infrastructure and decide if it is suitable for the deployment of a centralized time and billing solution.

## Reporting

A review of all your existing reports will be made. Gaps in existing reporting will need to be identified and all of the reports defined.