



# **SOLVER** for Professional Services Companies

| Get Complete Insight

Updated: Jan/2020

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## Introduction

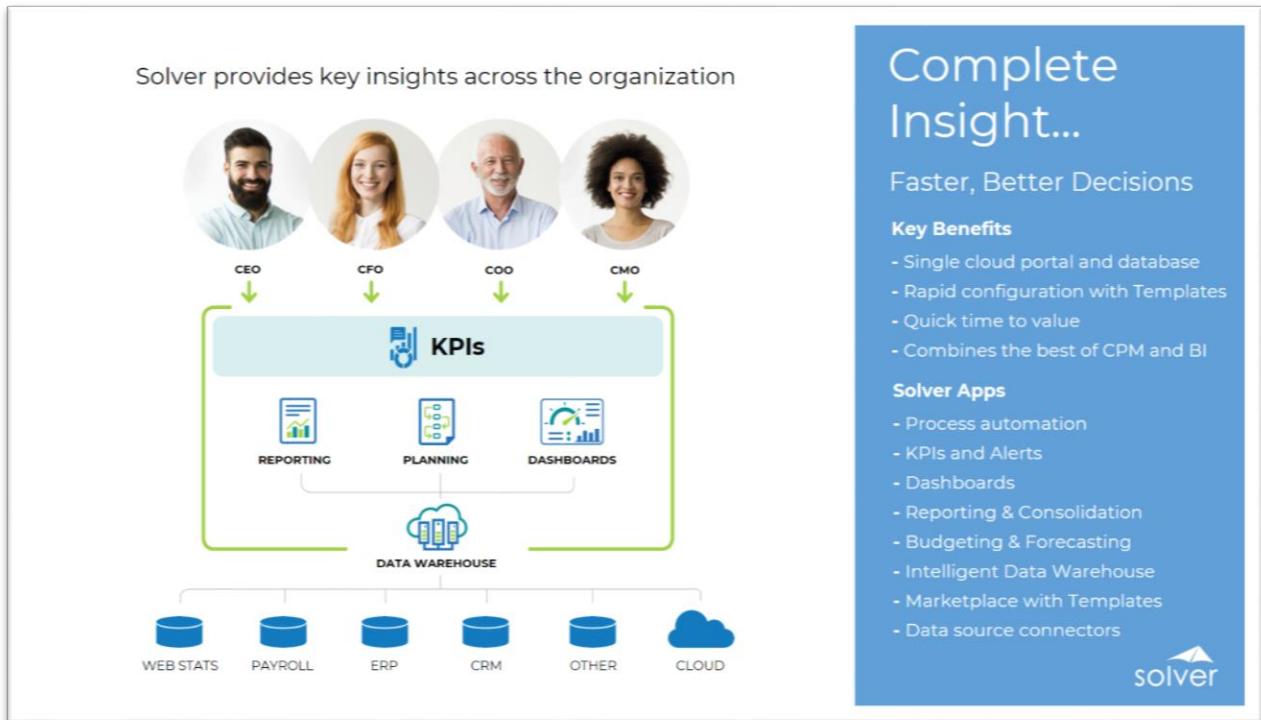
The purpose of this white paper is to provide an overview of Solver. With frequent, automated cloud updates, the solution is continuously being enhanced to drive faster, better decisions across its global customer base. For the latest information or to discuss your specific needs, please contact your local Solver partner, visit Solver's [web-site](#) or email us at [info@solverglobal.com](mailto:info@solverglobal.com).

## Product Summary

Solver provides a single, cloud-based solution that automates reporting and planning processes, and supports faster and better decisions based on key information from across the organization's data sources.

Key benefits that Solver provides include:

- A top-rated Corporate Performance Management (CPM) solution by G2 based on user satisfaction
- Global partner channel with industry expertise to help you whenever and wherever
- Cloud software, support, and upgrades packaged into a subscription price providing unmatched ROI over traditional CPM solutions
- Built for business users to manage the entire solution without the need for developers
- Executive and management data from across the organization that is easily accessible in ONE place with Solver's intelligent data warehouse
- Solver's multi-tenant cloud application provides quick initiation, SOC 2 compliance, automatic software upgrades, and scalability at one's convenience
- Solver provides the power and the familiarity of cloud-connected Excel to solve the most complex formula and layout requirements for reporting and planning template designers
- Easy-to-use, pre-built integration to Power BI, the world's #1 visualization solution
- Fast and cost effective integrations provided with Solver's wizard-driven CSV, SQL, and prebuilt ERP/CRM Connectors
- Unlimited access to reports and dashboards from secure web portal
- Hybrid cloud option provides customers with real-time cloud reporting capabilities for their on-premise ERP system



## Company Summary

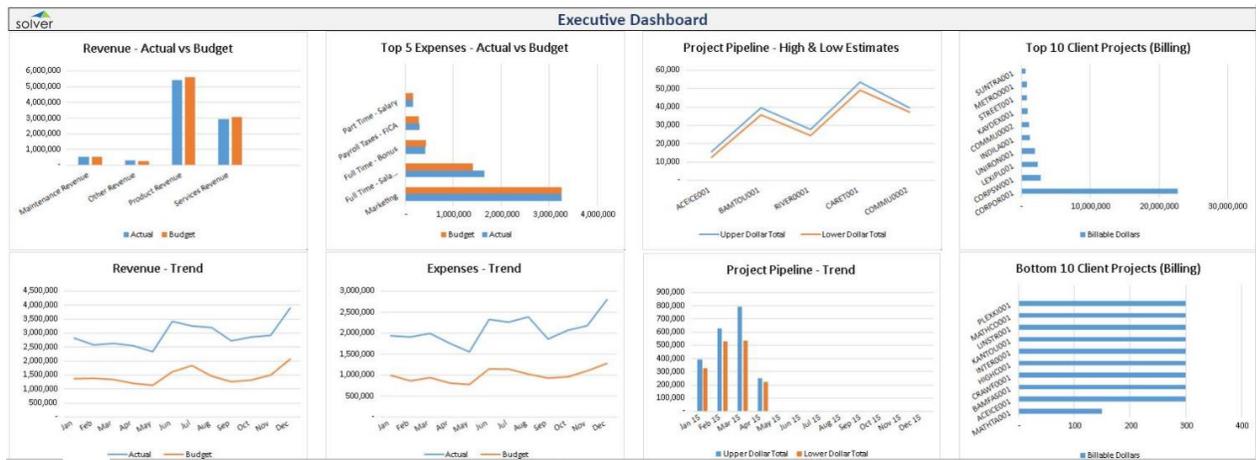
Solver, Inc. is redefining the category of cloud-based reporting and planning. The Solver solution is built to enable faster and better business decisions across the entire organization. Solver combines financial and other key data into a single tool, powered by the most flexible report and planning form designer on the market. Organizations use this solution to automate and streamline financial and operational reports, consolidations, and budgeting and forecasting processes. Solver empowers users with complete insight that drives intelligent decisions and competitive advantages. Headquartered in the United States, Solver, Inc. has more than a dozen offices and hundreds of partners globally that provide local and industry expertise. To learn more, visit [www.solverglobal.com](http://www.solverglobal.com).

## PS02 – Executive Dashboard

This is an example of a summary dashboard to make it easy for executives in professional services organizations to take the "pulse" on the business. It combines high level revenue and profit information with operational data such as project pipeline and top and bottom clients.

In this sample dashboard, the following information is included:

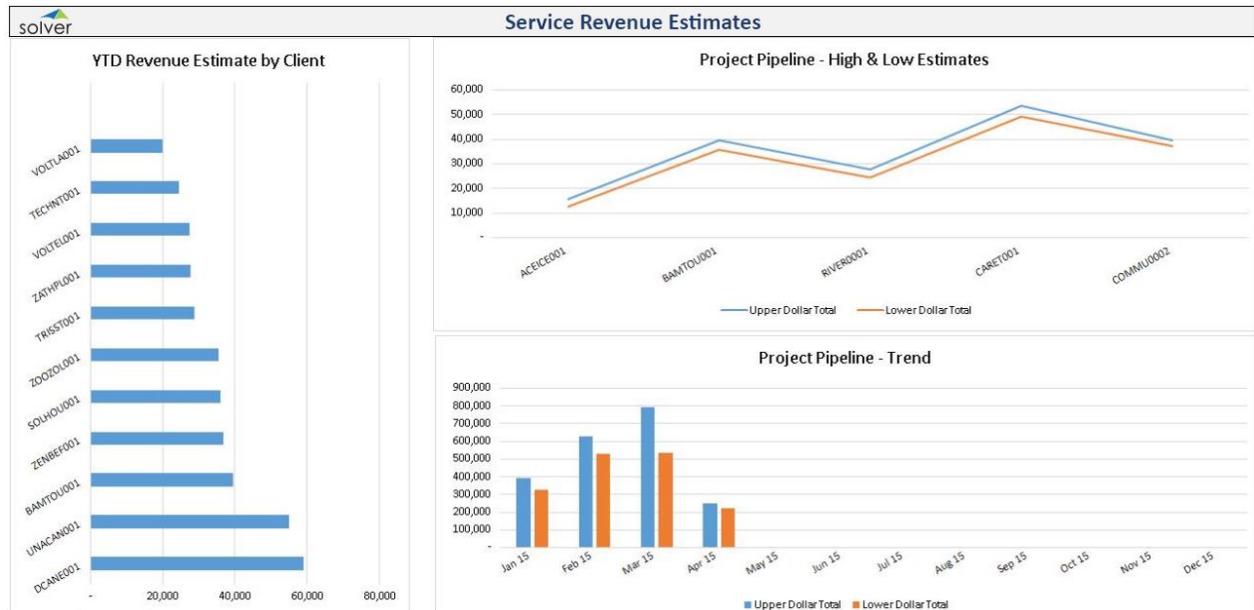
- Actual vs Budgeted Revenues - comparison
- Top 5 Expenses – Actual vs Budget
- Project Pipeline – High & Low Estimates
- Top 10 Client Projects (Billing)
- Revenue Trend
- Expenses Trend
- Project Pipeline – Trend
- Bottom 10C Client Projects (Billing)



## PS08 – Service Revenue Estimates

This dashboard example focuses on Service Revenues, both from a client perspective and from a trend standpoint. The following information is included:

- YTD Revenue Estimate by Client – ranked
- Project Pipeline – High & Low Estimates
- Project Pipeline - Trend



## PS09 – Project Revenues & Expenses

This dashboard example focuses on sales performance from a sales manager standpoint. The Sales Manager table in the top left corner can also be used as a filter and when a person is selected from the list, several of the other components in the dashboard will then automatically filter on that person.

The following information is included:

- Project Billing – click on Period to filter all other dashboard components to just that month
- Project Pipeline – High & Low Estimates
- Billable vs Non-Billable hours
- Reimbursable Expenses

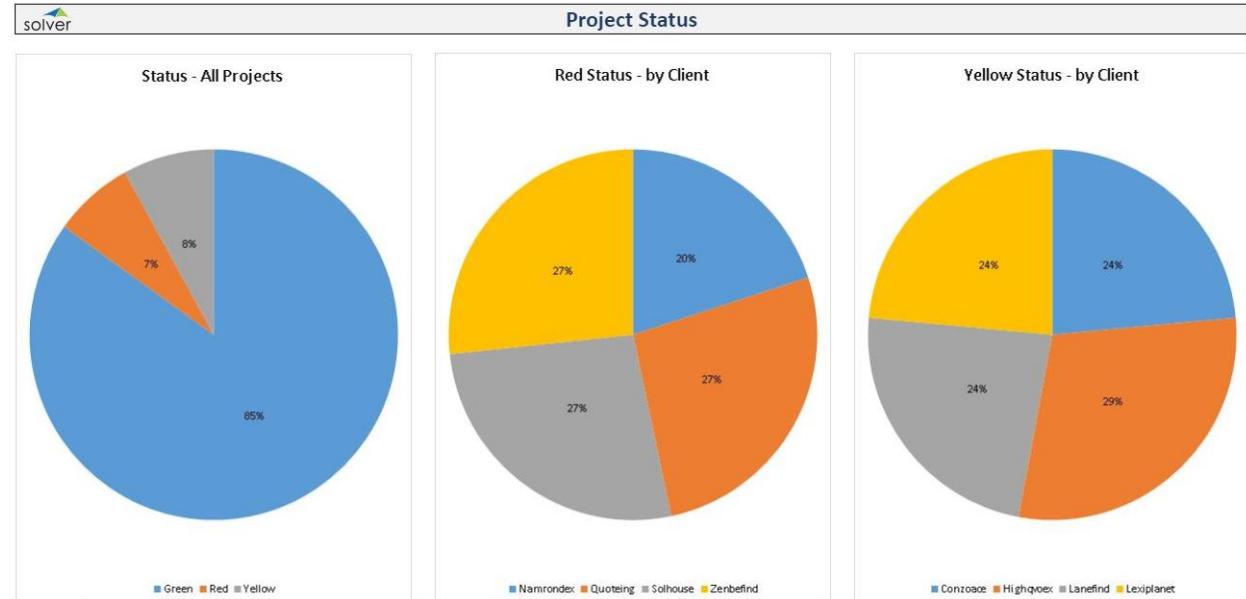


## PS10 – Project Status

This is an example of a Project Status-focused dashboard to help project managers analyze the "health" of current projects.

The following information is included:

- Overall Status across all Projects – drill to Project Manager (PM)
- Red Status Projects (projects at risk) by Client – drill to Project Manager
- Yellow Status Projects by Client – drill to Project Manager
- Project Detail table – with detailed metrics and comments by Project



## PS11 – Project Manager Dashboard

This dashboard example helps analyze the performance of Project Managers (PM). The filter in the top right corner allows the user to select the group managers to review by Job Title (such as 'Project Manager') to review. By clicking on a person in the top left chart, all the rest of the dashboard will display the metrics for that person. The following information is included:

- Project Billing – Trend
- Individual PM Utilization vs Average
- Billable vs Non Billable Hours
- Non-reimbursable Expenses vs Average
- Project Status
- Reimbursable Expenses

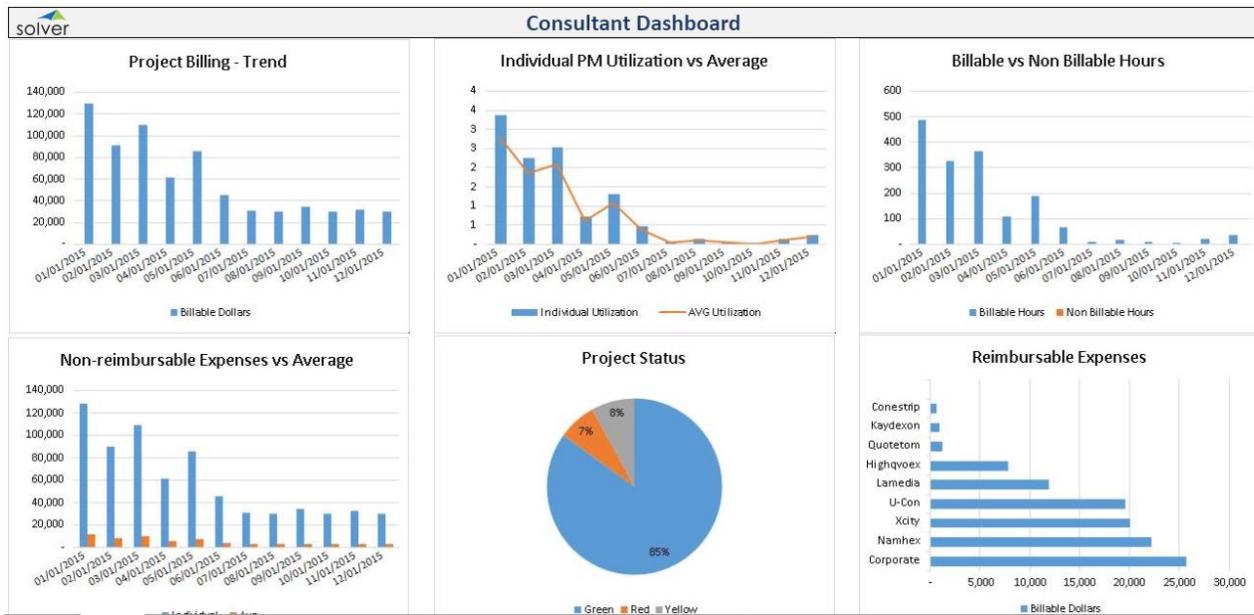


## PS12 – Consultant Dashboard

This dashboard example helps analyze the performance of individual Consultants/Professionals. The filter in the top right corner allows the user to select the consultant to review.

The following information is included:

- Project Billing – Trend
- Individual PM Utilization vs Average
- Billable vs Non Billable Hours
- Non-reimbursable Expenses vs Average
- Project Status
- Reimbursable Expenses



## PS20 – Client Estimate Form

This is an input form to enter project estimates for clients. It is an example of Solver’s web-based input form capability (also used for budgets and forecasts).

Note 1: The form would only be used by organizations that don’t have a good solution in place for project estimates.

Note 2: You can design virtually any input form you want in Solver, depending on your data collection needs.

In the portion of the form that is visible in the screenshot below, the yellow cells are for input:

Client Estimate Form				Lower			Upper			Lower \$
Scope Answer	Summary Comments	Detailed Comments	Calc	Override	Total	Calc	Override	Total	Lower \$	
<b>Summary</b>										
<b>Project Information</b>										
Notes for the Software Internal Report					0.0			0.0		
<b>Requirements/Analysis/Project Design</b>										
Kickoff, requirements review/gathering			0.0		0.0	0.0		0.0		
			0.0		0.0	0.0		0.0		
			0.0		0.0	0.0		0.0		
	15.00%		0.0		0.0	0.0		0.0		
<b>Total Requirements</b>					0.0			0.0		
<b>Installation</b>										
Installation of Software			0.0		0.0	0.0		0.0		
Is the Web Portal Part of Installation										
<b>Total Installation</b>					0.0			0.0		
<b>Training</b>										
Software - Training for Power Users			0.0		0.0	0.0		0.0		
			0.0		0.0	0.0		0.0		
<i>List the Modules Needed for Training</i>										

## PS22 – Consulting Forecast/Budget by Project

This is an example of a completely customizable, web-based Solver input form. In this example, the input form is used to enter (or it could be budgets) Forecasted hours by week by consultant by client.

Yellow cells shows where data entry is allowed.

solver Consulting Budget by Project				Actual																				
				Actual					Fest		Fest		Fest		Fest		Fest		Fest		Fest		Fest	
				1/1-1/7	1/8-1/14	1/15-1/21	1/22-1/28	1/29-2/4	2/5-2/11	2/12-2/18	2/19-2/25	2/26-3/1	3/2-3/8	3/9-3/15	3/16-3/22	3/23-3/29	3/30-4/5	4/6-4/12	4/13-4/19	4/20-4/26	4/27-5/3			
Customer	PM	Employee	Type	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18			
Accumsan Convalis Ante Incorporated (SOLHOU001)	Ted	Martin Laffey	Permanent									8.5												
Ac Libero Company (NEWFIN001)	Orlando	Casey Garcia	Permanent						4.0	2.5														
Adipiscing Elit Lic (ZENBEFO01)	Orlando	Luis Pierzynski	Permanent																					
Adipiscing Fringilla Inc. (CASTLO001)	Jorge	Kurt Stults	Permanent																					
A Feugiat Incorporated (ISIN0001)	Orlando	Carlos Jackson	Permanent										4.5	9.5	5.0	4.5			6.0	6.0	6.0			
Aliquam Gravida Mauris Industries (COMTE0001)	Ted	Luis Pierzynski	Permanent																					
Aliquam Gravida Mauris Industries (COMTE0001)	Ted	Kurt Stults	Permanent										8.0	8.0										
Aliquet Industries (COUNT001)	Jorge	Carlos Jackson	Permanent																					
Amet Consectetur Corporation (KCITY001)	Ted	Chris Martin	Permanent																					
Amet Lorem Sempor Limited (CORPAP001)	Orlando	Martin Laffey	Permanent																					
Arcu Incorporated (FOURTO001)	Orlando	Casey Garcia	Permanent																					
At Sem Molestie Pc (DAMZIM001)	Orlando	Justin Posada	Permanent							3.5	4.0													
At Sem Molestie Pc (DAMZIM001)	Orlando	Luis Pierzynski	Permanent																			24.5		
Blandit Nam Pc (STRIP001)	Ted	Chris Martin	Permanent					14.5																
Consequat Purus Maecenas Inc. (OCTAG0001)	Jorge	Chris Molina	Permanent						2.0	2.0														
Consequat Purus Maecenas Inc. (OCTAG0001)	Jorge	Carlos Jackson	Permanent										17.0											
Corporate (CORPOR001)	Orlando	Justin Posada	Permanent										4.5	4.5										
Corporate (CORPOR001)	Orlando	Chris Molina	Permanent										8.5											
Corporate (CORPOR001)	Orlando	Luis Pierzynski	Permanent						9.0	40.0	39.0													
Corporate (CORPOR001)	Orlando	Ricardo Molina	Permanent																		3.5	28.0		
Corporate (CORPOR001)	Orlando	Chris Martin	Permanent																					
Corporate (CORPOR001)	Orlando	Chris Martin	Permanent																					
Corporate (CORPOR001)	Orlando	Martin Baker	Permanent																					
Corporate (CORPOR001)	Orlando	Nick Punto	Permanent																					
Corporate (CORPOR001)	Orlando	Nick Punto	Permanent																					

## PS26 – Forecast Report by Project by PM

This report has three tabs, and once you have selected your project manager or managers, as well as the first week of forecast and the year, a report will generate that gives you:

- An overview of multi tabs will show at the bottom tabs of project managers selected
- Title of related clients and the date in the report
- Finalized projects and projects on hold
- You get detailed view of that week’s logged hours and a total in the far right column and at the bottom
- Below the report is a summary of all the above detailed information
- You will also get a grouping button that will show you the details of each consultant attached to that project and the hours logged with totals

Project Hours by Employee		All Projects - Permanent and On Hold										
Project		3/15-3/21	3/22-3/28	3/29-4/4	4/5-4/11	4/12-4/18	4/19-4/25	4/26-5/2	5/3-5/9	5/10-5/16	5/17-5/23	5/24-5/30
At Sem Molestie Pc		0.0	0.0	0.0	0.0	8.5	0.0	24.5	0.0	0.0	0.0	0.0
Blandit Nam Pc		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	Justin Posada	14.0			7.0	8.5		7.0				7.0
	Chris Molina											8.0
	Luis Pierzynski					3.5	28.0					36.5
	Flacido Molina											7.5
	Chris Martin											8.0
	Martin Baker											8.5
	Orlando Iannetta											9.0
	Nick Punto											7.0
	Roy Podsednik	31.5							36.5	35.5		8.0
	Carlos Jackson		21.5								7.5	
	Ted Willingham	29.0										8.5
	Clay Cust		23.0		16.5	17.0	17.0					7.0
	Joe Hafner										11.5	
	Micah Holland	32.5	22.5			8.5						8.0
	Martin Laffey	36.5	7.5							16.0		7.0
	Casey Garcia											8.5
	Jorge Narveson	36.5										8.5
	Kurt Stults								41.0			8.5
Corporate		180.0	74.5	0.0	23.5	37.5	45.0	7.0	77.5	35.5	35.0	155.5

## PS30 – Time and Expense

This report example provides a Time & Expense summary by client. If multiple clients are selected, the report will dynamically replicate and give one report per client (see tabs at bottom of screenshot).

The report is web-based, so clients and project managers alike can log in and run the report whenever they need it. Like all Solver reports, it can also be automatically distributed by email.

The report includes detail of services provided per consultant as well as project-related expenses per consultant.

Time & Expense Summary by Client							
LAMQU0001							
Date Range: '2021-01-25':2021-01-30'							
Type	Date	Description	Task	Hrs/Qty	Rate	Total	
<b>Curabitur Corporation</b>							
<i>Martin Baker</i>							
Curabitur Corporation	01/26/21	Finalize Model Requirements, Design and Document	Finalize Model Requirements, Design and Document	1.00	300.00	300.00	
<i>Total Consulting</i>				1.00	300.00	300.00	
<i>Total Expenses</i>						0.00	
<i>Total Martin Baker</i>						300.00	
<i>Carlos Jackson</i>							
Curabitur Corporation	01/26/21	Finalize Model Requirements, Design and Document	Finalize Model Requirements, Design and Document	1.50	300.00	450.00	
<i>Total Consulting</i>				1.50	300.00	450.00	
<i>Total Expenses</i>						0.00	
<i>Total Carlos Jackson</i>						450.00	
<i>Casey Garcia</i>							
Curabitur Corporation	01/28/21	Project management	Project Management	1.00	300.00	300.00	
Curabitur Corporation	01/29/21	Integrate SL GL Summary and Detail to the BI360 Data Warehouse	Software Data Warehouse - Data Source Integrations	1.00	300.00	300.00	
Curabitur Corporation	01/30/21	Integrate GP GL Summary and Detail to the BI360 Data Warehouse	Software Data Warehouse - Data Source Integrations	1.00	300.00	300.00	
<i>Total Consulting</i>				3.00	300.00	900.00	
<i>Total Expenses</i>						0.00	
<i>Total Casey Garcia</i>						900.00	

## PS32 – Weekly Billing Summary

This Solver report example is really three reports in one (see tabs at bottom of screenshots). The purpose is to provide managers and consultants with a complete overview of activities performed in the past week, including:

- Hours, billable amount and % utilization by consultant – for the week, the month, year-to-date and prior year
- Billing by consultant - Monthly trend showing each month up to the current period that the report was run for
- Utilization overview

### Summary by Consultant and Client

Note that Variances are based on the end of the month  
2021-04-05:2021-04-11

Consultant	Goal	Week			Year to Date			
		Hours	\$	40 Hours Utilization	Hours	\$	170 Hours Utilization	Variance
<b>TOTAL BY CONSULTANT</b>								
Andre Baker					60	17,850	9%	17,850
B.J. Furcal					18	5,400	3%	5,400
Brett Young					38	11,400	6%	11,400
Brian Morton					230	69,000	34%	69,000
Carlos Jackson					2,829	848,550	416%	41,472
Carlos Johnson					1,388	416,250	204%	(2,850)
Casey Garcia					5,781	1,734,300	850%	41,854
Charlie Myers					646	193,800	95%	(112,200)
Chris Martin					6,797	2,039,100	1000%	188,185
Chris Molina					6,234	1,870,200	917%	402,031
Christian Marshall					221	66,150	32%	34,899
Clay Cust					7,211	2,163,300	1060%	381,231
Clint Doumit					391	117,150	57%	(15,218)
Craig Liriano					146	43,650	21%	26,250
David Gonzalez					670	201,000	99%	163,499
Eric Suzuki					393	117,900	58%	(11,452)
Ian Napoli					6,632	1,989,600	975%	207,107
Isaac Montero					2,675	802,500	393%	65,012
Jeremy Zito					352	105,600	52%	105,600
Joba Brantley					605	181,350	89%	181,350
Joe Hafner					104	31,050	15%	(202,859)
Johnny Sweeney					107	32,100	16%	(7,903)
Jorge Narveson					71	21,150	10%	(91,352)
Jorge Rowand					47	14,100	7%	(218,858)

### Monthly Consulting Trend

Consultant	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May
Justin Posada																	
Eric Suzuki			\$900	\$2,100	\$900	\$2,250	\$3,600	\$600	\$450	\$1,500	\$1,500	\$2,550	\$300	\$2,850	\$4,200	\$1,500	\$1,800
Chris Molina												\$15,900	\$61,200	\$43,500	\$20,250	\$31,050	\$51,100
Isaac Montero																	
Luis Pierzynski																	
Placido Molina	\$20,100	\$36,300	\$27,450	\$26,100	\$36,300	\$39,150	\$19,050	\$58,650	\$39,750	\$2,550	-\$5,400	\$3,900	\$11,550	\$28,200	\$16,200	\$450	\$24,600
Ian Napoli																	
Chris Martin	\$4,500	\$4,950	\$26,700	\$9,000	\$12,300	\$15,900	\$27,000	\$33,600	\$12,900	\$2,550	\$14,100	\$12,000	\$33,450	\$34,950	\$43,050	\$29,100	\$21,100
Martin Baker																	\$10,900
Clint Doumit											\$2,250	\$300	\$1,350	\$300	\$1,500	\$2,100	\$2,400
Orlando Iannetta																	
Carlos Johnson	\$1,350	\$17,550	\$34,800	\$19,800	\$16,350	\$19,500	\$35,400	\$14,100	\$22,500	\$19,050	\$1,500		\$37,950	\$13,950	\$17,850	\$4,050	\$18,400
Shin-Soo Eckstein													\$2,550				
Andre Baker											\$15,300	\$2,550					
Michael Carroll																	
Nick Punto	\$22,950	\$19,200	\$24,150	\$36,450	\$31,800	\$35,700	\$41,850	\$28,650	\$22,200	\$13,350	\$27,600	\$21,450	\$46,950	\$32,700	\$42,450	\$29,850	\$44,800
Shane Tolbert	\$36,900	\$26,700	\$14,100	\$45,750	\$37,500	\$55,650	\$39,150	\$22,500	\$23,850	\$60,450	\$21,750	\$15,150	\$23,550	\$16,200	\$16,650	\$8,400	\$24,100
B.J. Furcal																	
Rajai Guzman			\$750														
Nelson Hardy	\$17,250	\$30,600	\$54,000	\$50,700	\$41,850	\$47,100	\$29,850	\$39,000	\$36,750	\$45,150	\$450						
Roy Podsednik	\$4,800		\$10,800	\$8,100		\$3,900		\$7,650	\$19,350	\$12,000	\$4,950	\$1,350	\$14,100	\$23,700	\$36,450	\$31,350	\$35,800
Carlos Jackson																	
Brett Young																	
Ted Willingham																	
Clay Cust	\$17,850	\$13,950	\$18,750	\$34,650	\$49,050	\$51,150	\$58,200	\$50,250	\$38,100	\$37,050	\$25,050	\$17,250	\$27,150	\$36,000	\$43,350	\$16,950	\$38,100
Kevin Stubbs	\$2,400	\$18,150	\$750	\$5,850	\$8,100	\$3,150	\$4,800	\$9,300	\$8,250	\$1,200	\$600						\$4,800
Jorge Rowand																	
Joe Hafner																	
Johnny Sweeney																	
Neftali Crisp																	
Joba Brantley		\$12,600	\$10,050	\$22,650	\$18,000	\$40,050		\$1,200				\$600			\$1,050	\$3,150	
Charlie Myers													\$9,150	\$14,700	\$10,350	\$52,800	\$49,500

## PS34 – Weekly Project Status Report

This report example shows a weekly status per client, including commentary from the project manager and red and yellow alert colors for projects that may need attention.

Project Status by Week									
3/7/2015 0:00:00									
End User	Project Status	Consulting	Light	PMO Assigned	Consultant(s)	Priority	Start Date	Last Update	
Adipiscing Elit Lic	New project getting started, but the handoff from sales to consulting is not something the client was happy with.	0	Red	Orlando					
Adipiscing Fringilla Inc.	Estimate provided for an additional 20 hrs. of work (integration and 2 templates) which has been approved. Needs to be scheduled.	0	Green	Jorge	Shane	Medium			
Aliquam Gravida Mauris Industries	Integration of GL summary and Detail is mostly finished. Consultant plans to wrap up this project by 03/20. Training scheduled with Consultant for 03/24 - 03/27.	1,200	Green	Ted	Kurt/Luis	Medium	2/22/2015 0:00:00	03/12/15	
Arcu Incorporated	Integration requested has been completed	600	Green	Orlando	Carlos, Nick	Medium			
Blandit Nam Pc	Onsite in April is scheduled.	0	Green	Ted	Chris M.	Medium			
Consequat Purus Maecenas Inc.	Client has completed work. They are testing. Consultant was onsite for training last week which went well. No open items.	0	Green	Jorge	Chris, Martin				
Curabitur Corporation	Training completed. Consultant is working with client to insure no changes are still needed. First draft of SSIS to be complete Mar 16th. Consultant assigned to remaining tasks.	8,400	Green	Jorge	Casey/Carlos	Medium		03/12/15	
Curae, Donec Tincidunt Institute	Macro completed. A day in April is needed for on-site training.	0	Green	Ted					
Dapibus Quam Quis Associates	Client was not happy with start of project. Working with them to schedule resources.	600	Red	Jorge	Martin L., Kurt	Medium			
Diam Industries	Work will begin Mar 16th.	600	Green	Jorge	Casey, Chris,			2/15/2015	