

12 Effective PSA Dashboards for Your Business



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01

Introduction

Certinia (FinancialForce) PSA is a robust solution that empowers service businesses to streamline their professional services operations. With robust project management tools, it centralizes project data and automates workflows, ensuring seamless collaboration among teams and faster project delivery. In this ebook, we'll explore the power of Certinia PSA reports and dashboards and how it efficiently manages projects, track financials, enhance team collaboration, and deliver exceptional customer experiences!

02

Top 4 Benefits of PSA Dashboards for Organizations

Creating a PSA dashboard that readily presents all your data visualizations in one location is one of the simplest methods to make data easy to grasp for both technical and non-technical users. But how does it help your organization? Let us look into it.

Enables you to monitor team performance

You don't have to wait months to uncover performance concerns in your team or workforce. Employees will enhance their performance automatically if they are aware that a dashboard can monitor their performance in real time—even if it is merely to "stay off the radar." PSA dashboards allow you and your team to monitor progress, achieve targets, and enhance individual performance rates.

Saves time and resources

Without PSA dashboards, organizations spend numerous hours going into systems to run and create individual reports, or they rely on IT professionals to run and format these reports for them. Dashboard reporting saves time and money by providing the most updated results for each report.

Better strategic planning with key metrics

The key benefit of a PSA dashboard is that it provides a full overview of data from many sources. Dashboards are excellent for monitoring, measuring, and evaluating important data. It also allows you to create better strategies through metric analysis. Dashboards may be used to track elements like:

- Customer metrics
- Financial details
- Sales information
- Web analytics
- Human resources data
- Logistics data
- Marketing performance

Enhances decision-making

Businesses may make choices and act more quickly with instant access to at-a-glance information. There is no need to seek data from developers, wait for it, receive the report, and then attempt to act. Instead, PSA dashboard reports are immediate and simple for users to share, allowing for the open exchange of information between important parties.



03

Navigating Certinia (FinancialForce) PSA Dashboards

In this section, we will navigate through the PSA Cloud Analytics Dashboards that cater to different business needs. Let's explore their capabilities and key metrics that help you make data-driven decisions.

PSA Cloud Analytics Dashboards

#1: PSA Backlog Dashboard

The screenshot displays the Certinia PSA Backlog Dashboard. At the top, the Certinia logo is on the left, and navigation icons (grid, help, settings, notifications, user profile) are on the right. Below the logo, the page title 'PSA Backlog' is shown with a close button. A secondary header indicates 'Data updated: Jul 26, 2023 at 1:18 AM' and includes 'Edit' and 'Save' buttons. The main content area is titled 'Backlog' and includes a sub-header 'Use the global filters to select the date range you want to display data for.' Below this, there are four main charts and a filter sidebar on the right.

- Backlog by Region:** A bar chart showing backlog values for APAC (194k), Americas (428k), and EMEA (746k). The Y-axis ranges from 0 to 800k. Filters include 'Region' (set to 'Level 01').
- Backlog (USD):** A summary card showing a total of 1.4M USD.
- Backlog Project Status by Month:** A stacked bar chart for months 2023-07, 2023-08, and 2023-09. The Y-axis is in USD (0 to 500k). Project statuses are Green, N/A, Red, and Yellow. Values for Green are 254k, 256k, and 254k respectively. Values for N/A are 161k, 167k, and 168k.
- Backlog by Account:** A treemap chart showing backlog distribution across various accounts, with Primatech (91k) highlighted. A legend includes ABC Consultancy Group, AMEX, Airtech Australia, and Airtech Car.
- Backlog by Type:** A horizontal bar chart showing the distribution of backlog by project type, with 'Time and Materials (1.3M)' being the dominant category. A legend includes Fixed Price, Fixed Price (Upfront), Managed Services, and Milesto.

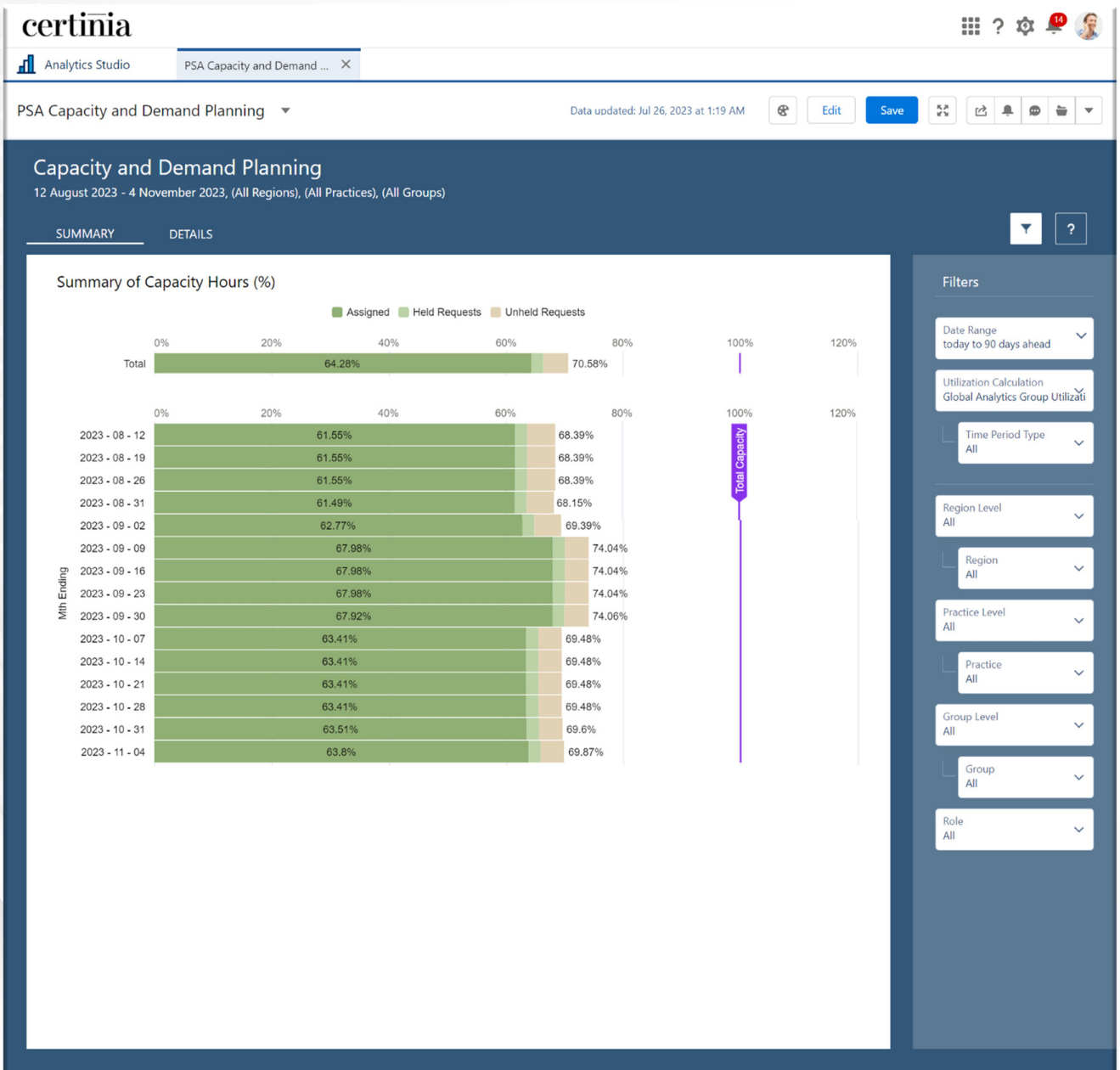
The right sidebar contains a 'Filters' section with the following settings:

- Backlog Calculation: Global Analytics Main Backlog
- Time Period Type: Month
- Date: this fiscal quarter
- Billing Type: All
- Stage: All
- Region: All
- Practice: All
- Group: All
- Account: All
- Project Name: All
- Project Manager: All

The PSA Backlog Dashboard offers a comprehensive overview of your organization's backlog data. This dashboard presents data from the Backlog dataset for the current fiscal quarter. It presents a visual representation of your backlog and unscheduled backlog, allowing you to monitor these key metrics immediately.

By analyzing this dashboard, you can make informed decisions about resource allocation, project scheduling, and overall workload management. With real-time insights into your backlog, you can ensure efficient project planning and execution, leading to improved project outcomes and client satisfaction.

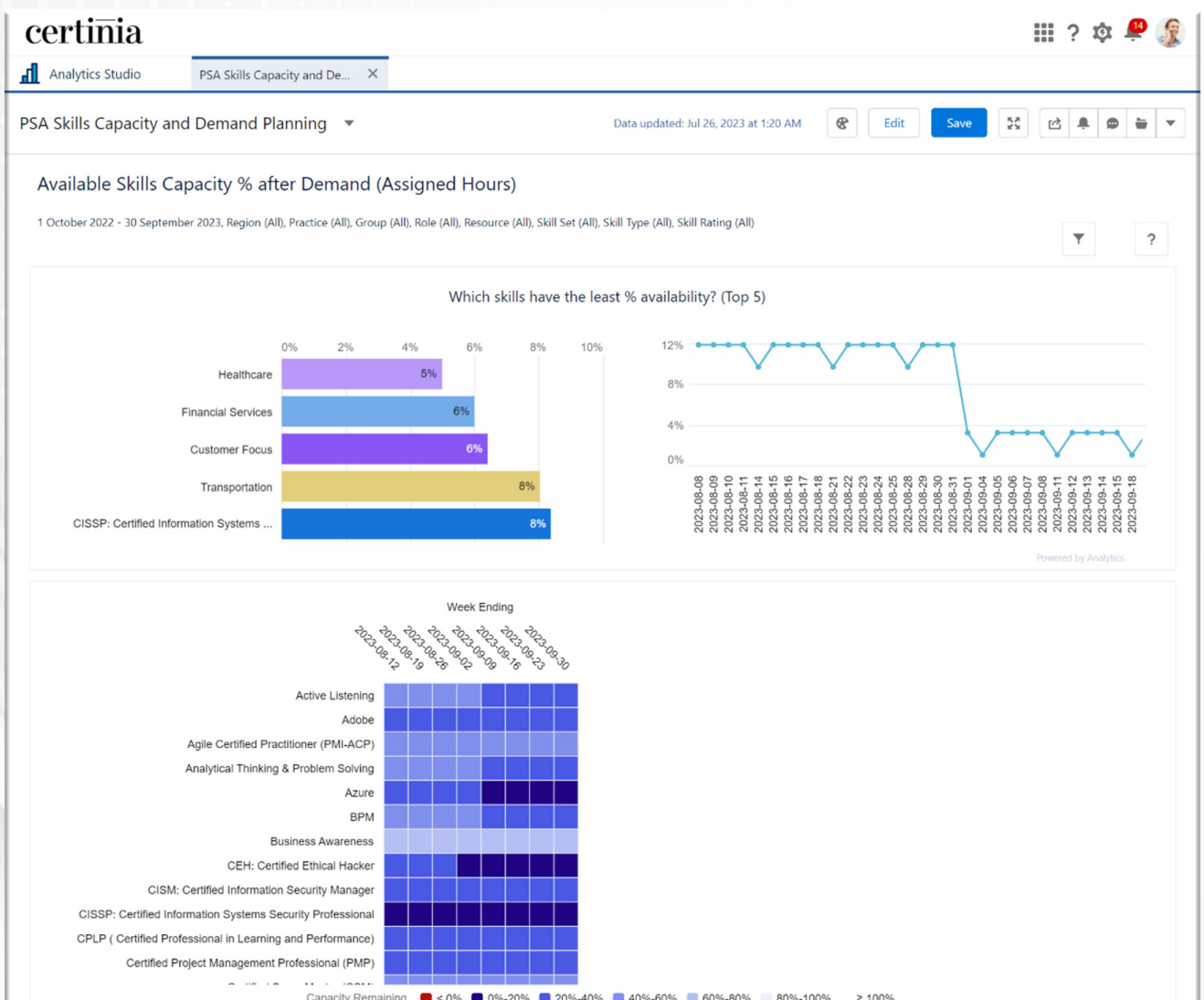
#2: PSA Capacity and Demand Planning Dashboard



The PSA Capacity and Demand Planning Dashboard provides real-time insights into resource capacity and demand, aiding effective project planning and resource allocation. This dashboard optimizes resource allocation, enhancing overall operational efficiency. It offers:

- **Resource Availability:** Visualize available capacity by roles, regions, and more.
- **Capacity Breakdown:** Analyze Assigned, Held, Unheld, and Available capacity.
- **Utilization Tracking:** Monitor resource usage trends.
- **Detailed Resource Data:** View individual capacity and roles.
- **Drill-Through:** Access detailed resource information for informed decisions.

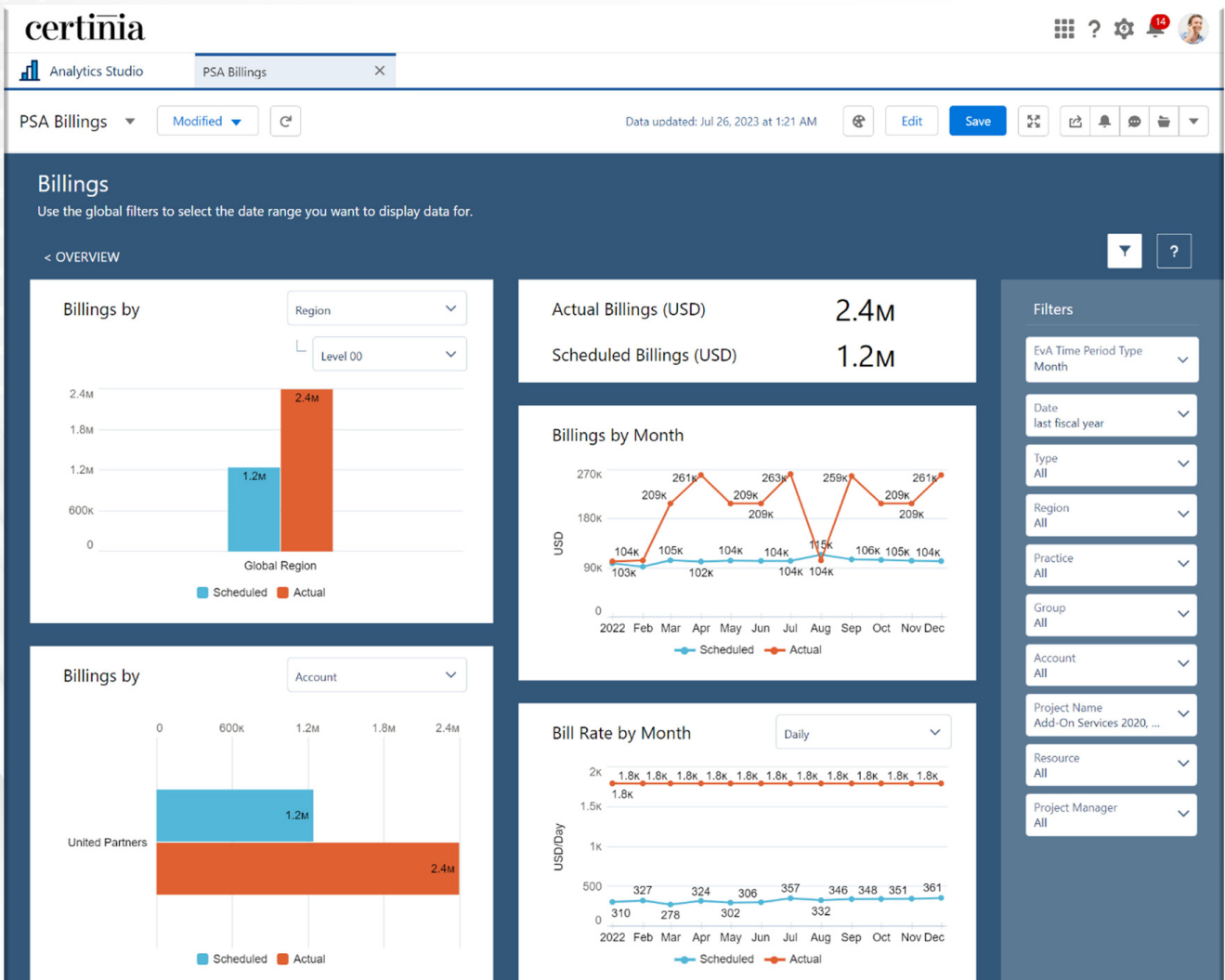
#3: PSA Skills Capacity and Demand Planning Dashboard



This dashboard shows capacity availability based on skills/certifications using data from multiple datasets. It is designed for the PSA Resource Management workspace, and the data helps answer various operational and strategic business questions.

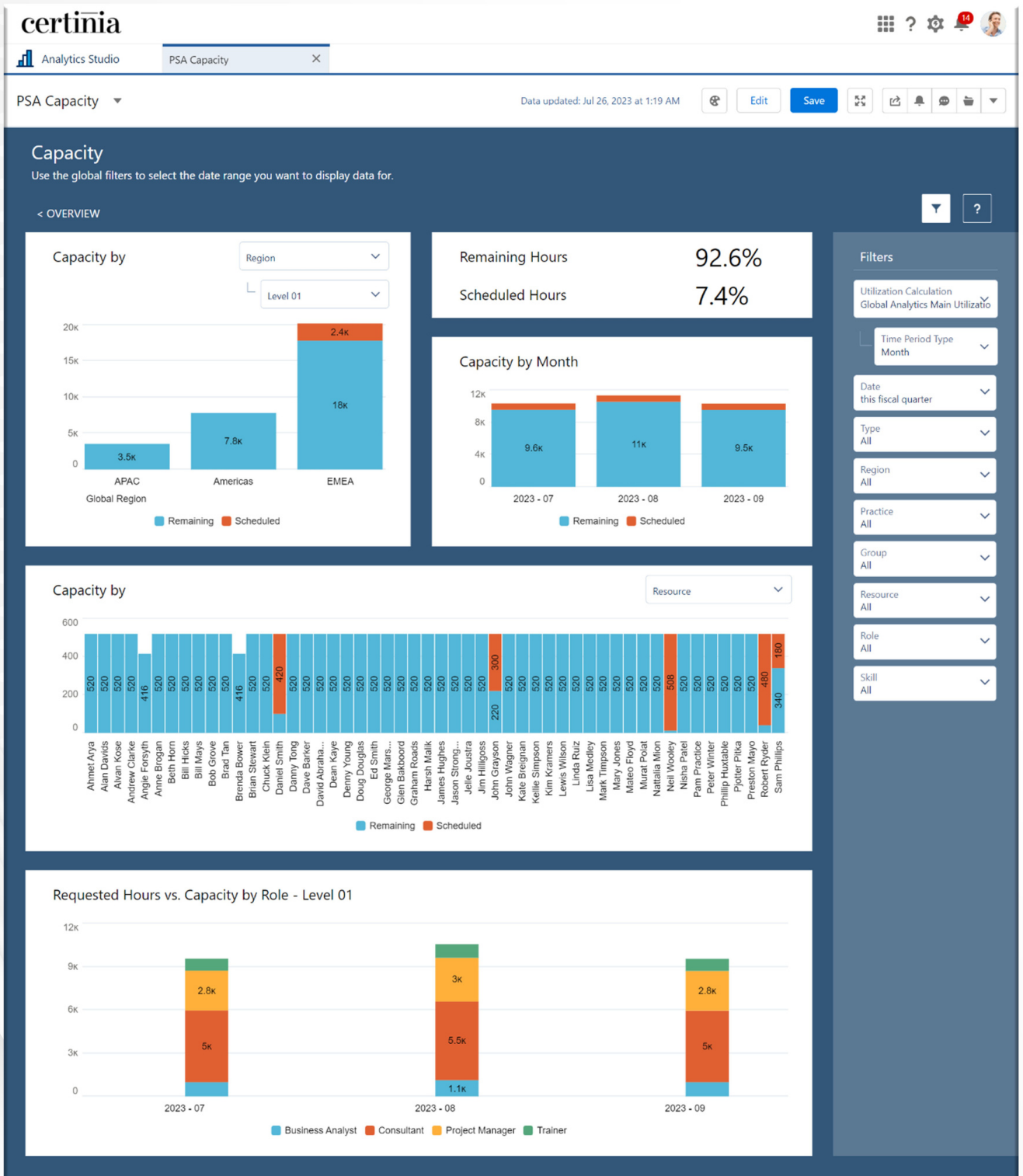
- Are the resources with the right skill sets available for your project?
- Do your resources possess the necessary skills to meet the demand?
- What is the number of available resources for a specific skill set?
- Should you utilize internal or external resources to meet the demand?
- Based on reporting trends, where should you focus on long-term development and growth?

#4: PSA Billings Dashboard



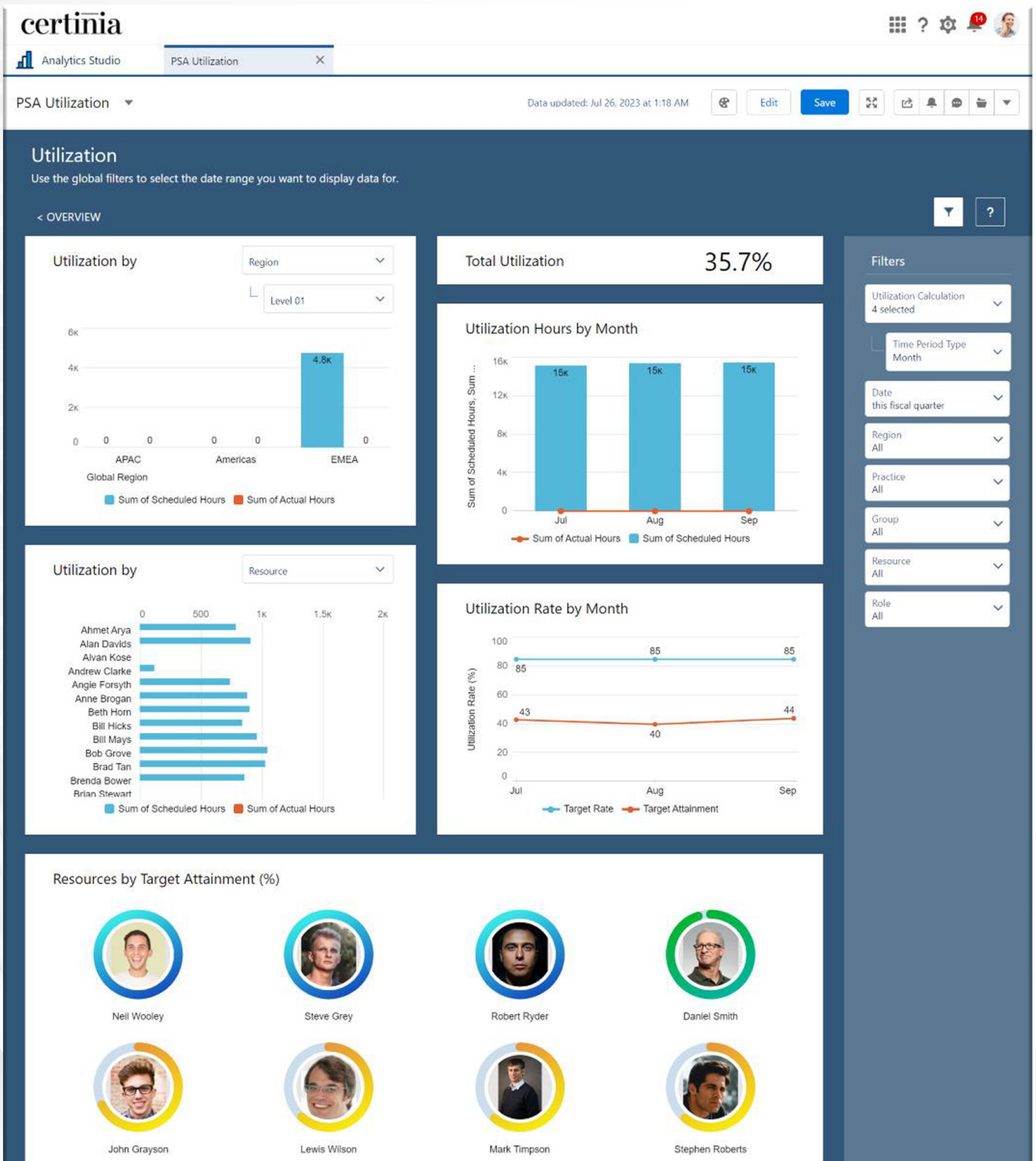
This dashboard displays data from the Billings dataset, which includes information from multiple objects in PSA such as Milestones, Expenses, Miscellaneous Adjustments, Budgets, and Timecards. By default, it shows data for the current fiscal quarter. It allows you to view KPIs for scheduled and actual billings, analyze historical actual billings data, and compare actual and scheduled billings data for the same period.

#5: PSA Capacity Dashboard



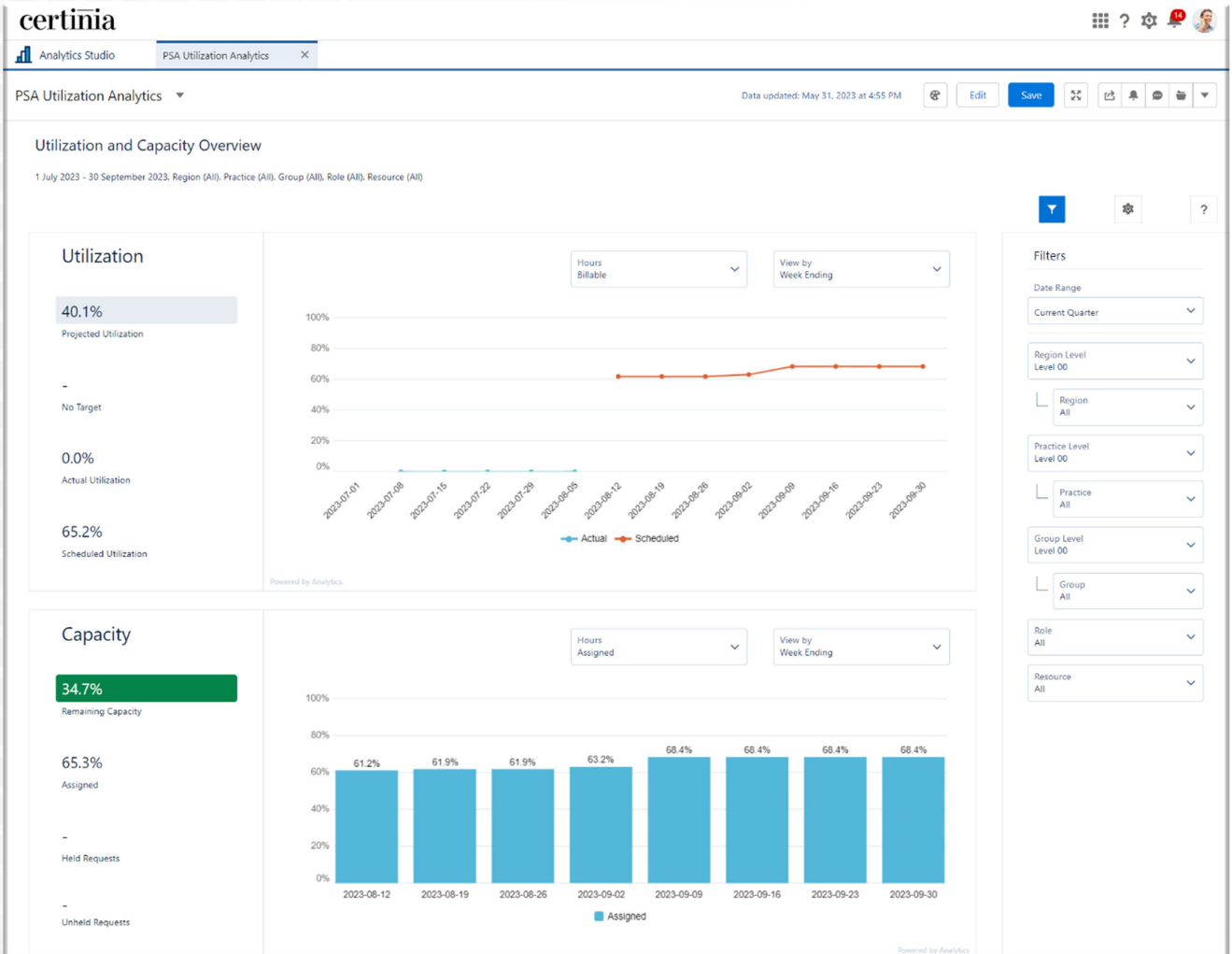
This dashboard displays data from the Capacity dataset and by default, shows information for the current fiscal quarter. It allows you to analyze the KPI for Remaining Hours percentage and view the KPI for Scheduled Hours percentage. Additionally, you can review the PSA scheduled utilization, calculate the total capacity hours data, and group the data to analyze the availability of remaining capacity.

#6: PSA Utilization Dashboard



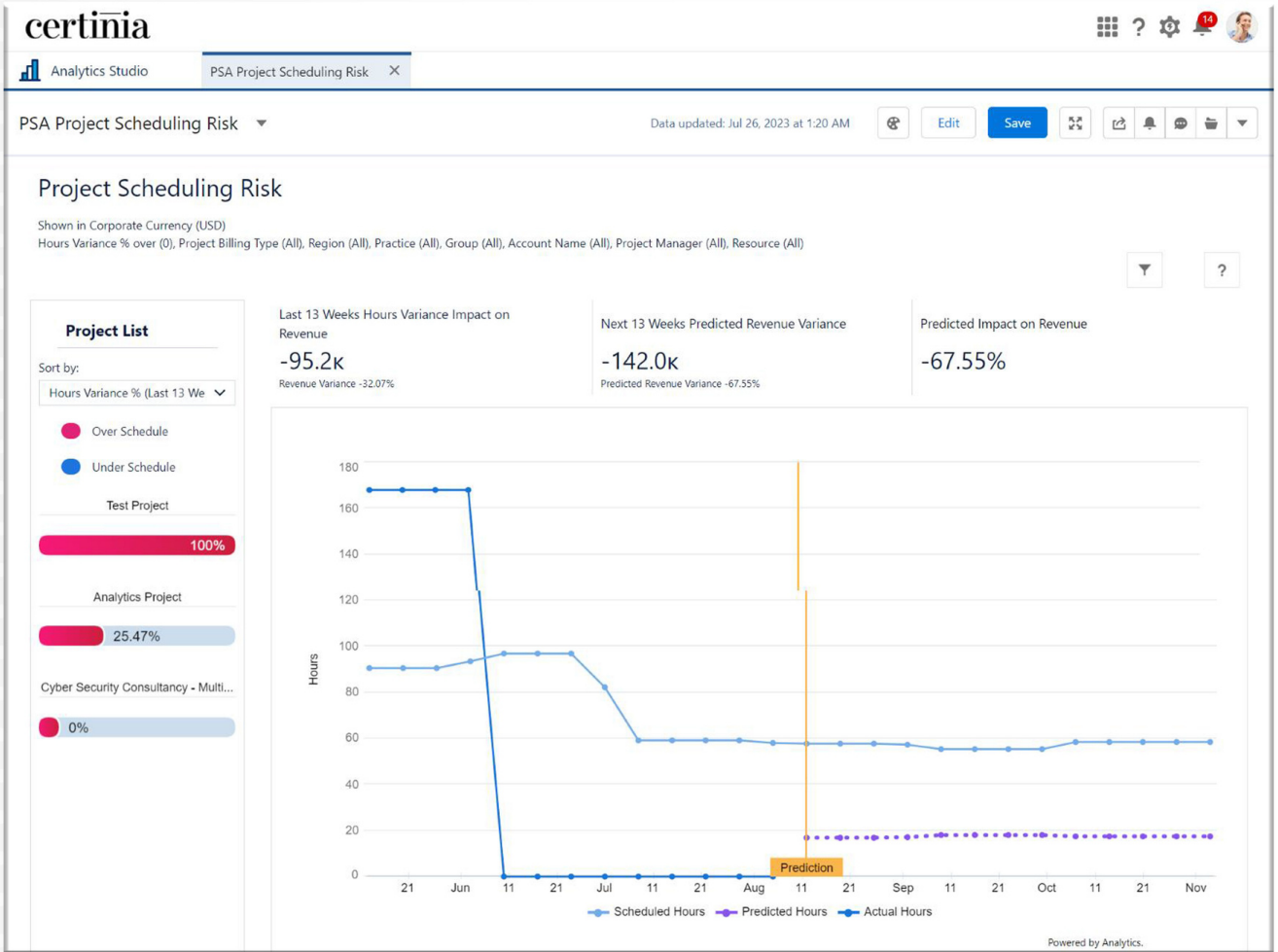
This dashboard uses data from the Utilization Results dataset and displays information for the current fiscal quarter. It allows you to analyze the Total Utilization percentage KPI, view the PSA scheduled hours, and compare scheduled hours with actual hours logged. It also helps identify over or under allocation of resources and their respective utilization rates.

#7: PSA Utilization Analytics Dashboard



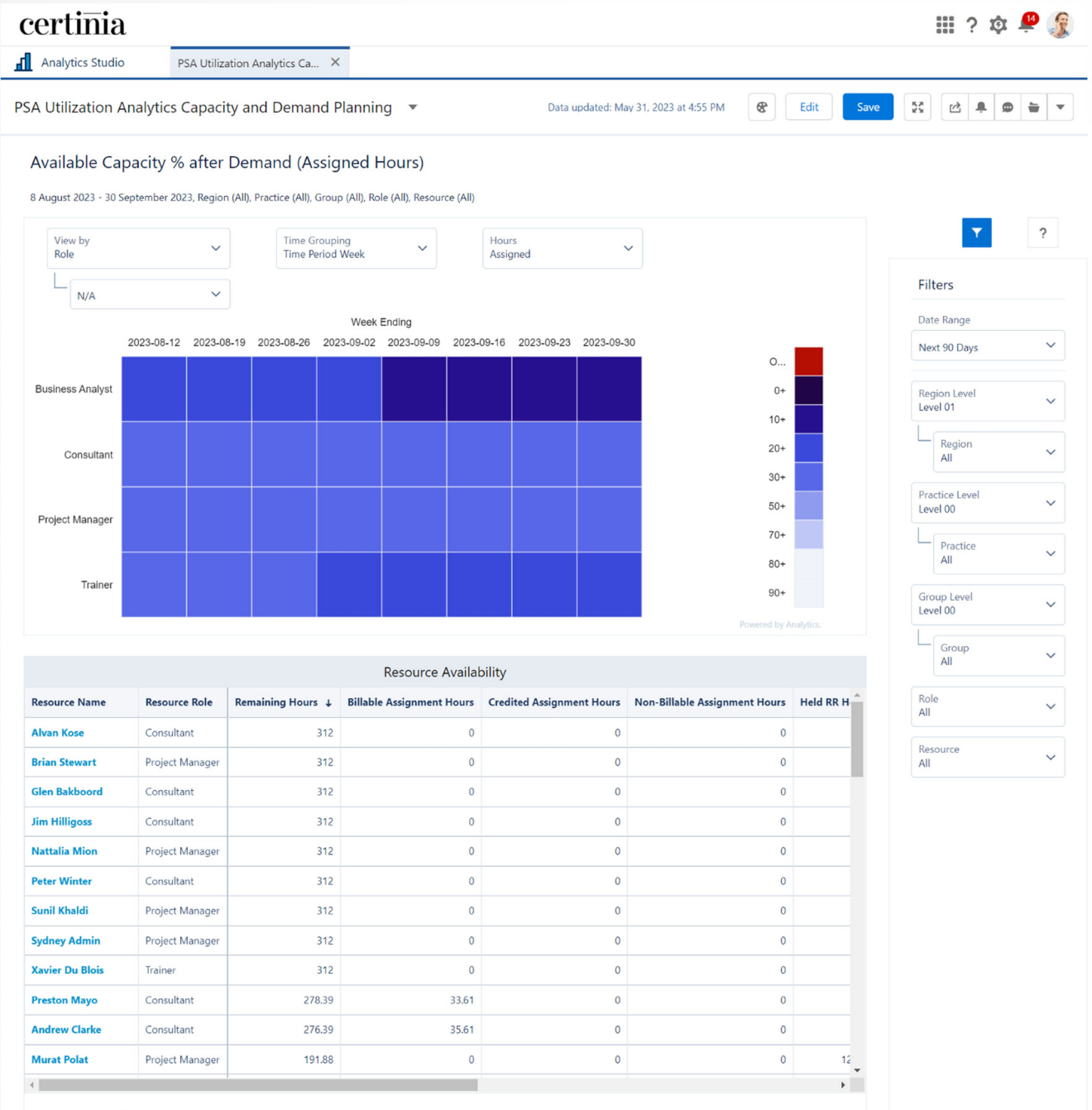
This dashboard provides businesses with a comprehensive view of resource performance and availability. By visualizing this data, you can optimize resource allocation, identify bottlenecks, and ensure that your team's capacity is maximized. It helps managers optimize resource allocation, balance workloads, and forecast future demand, leading to improved project efficiency and higher profitability.

#8: PSA Project Scheduling Risk Dashboard



This dashboard empowers project managers and services leaders to prioritize projects based on scheduling variance, track actual versus scheduled hours, and forecast potential risks for upcoming 13 weeks. It optimizes project outcomes and drives success in professional services endeavors.

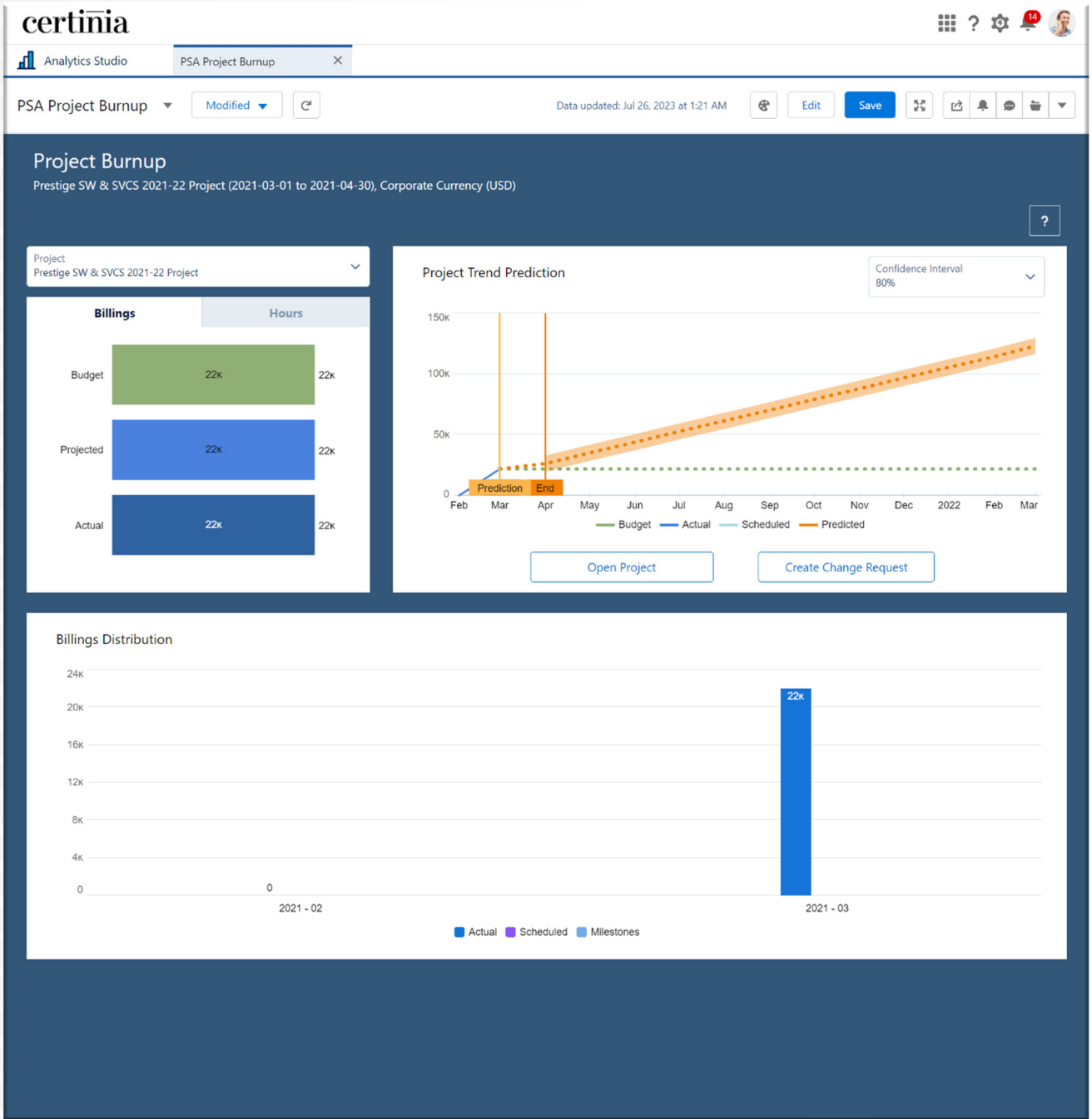
#9: PSA Utilization Analytics Capacity and Demand Planning Dashboard



This integrated dashboard allows you to easily view demand and capacity by Role, Region, Practice, or Group, and analyze capacity breakdown for your selected date range.

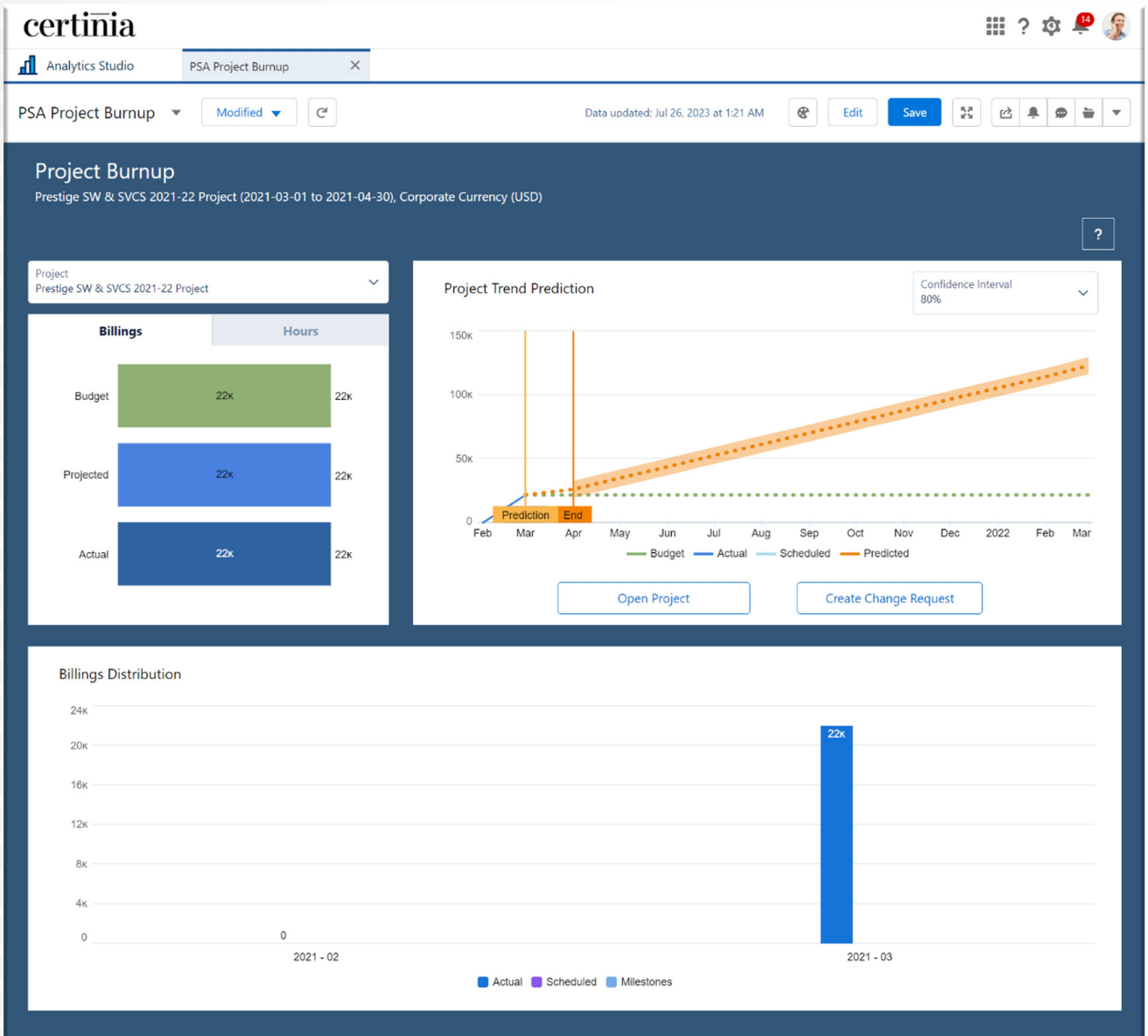
Additionally, you can view resources and their capacity hours for your chosen timeframe and role, with the option to “drill through” for more details in PSA. It streamlines resource management for efficient project allocation.

#10: PSA Project Burnup Plus Dashboard



The dashboard helps you monitor project scope changes, work completion, and billing status. It allows for easy comparison of project billings with the budget and tracking billed hours against planned hours. You can also use predictive analytics to observe velocity trends and track the “burn-through date” to manage project costs effectively.

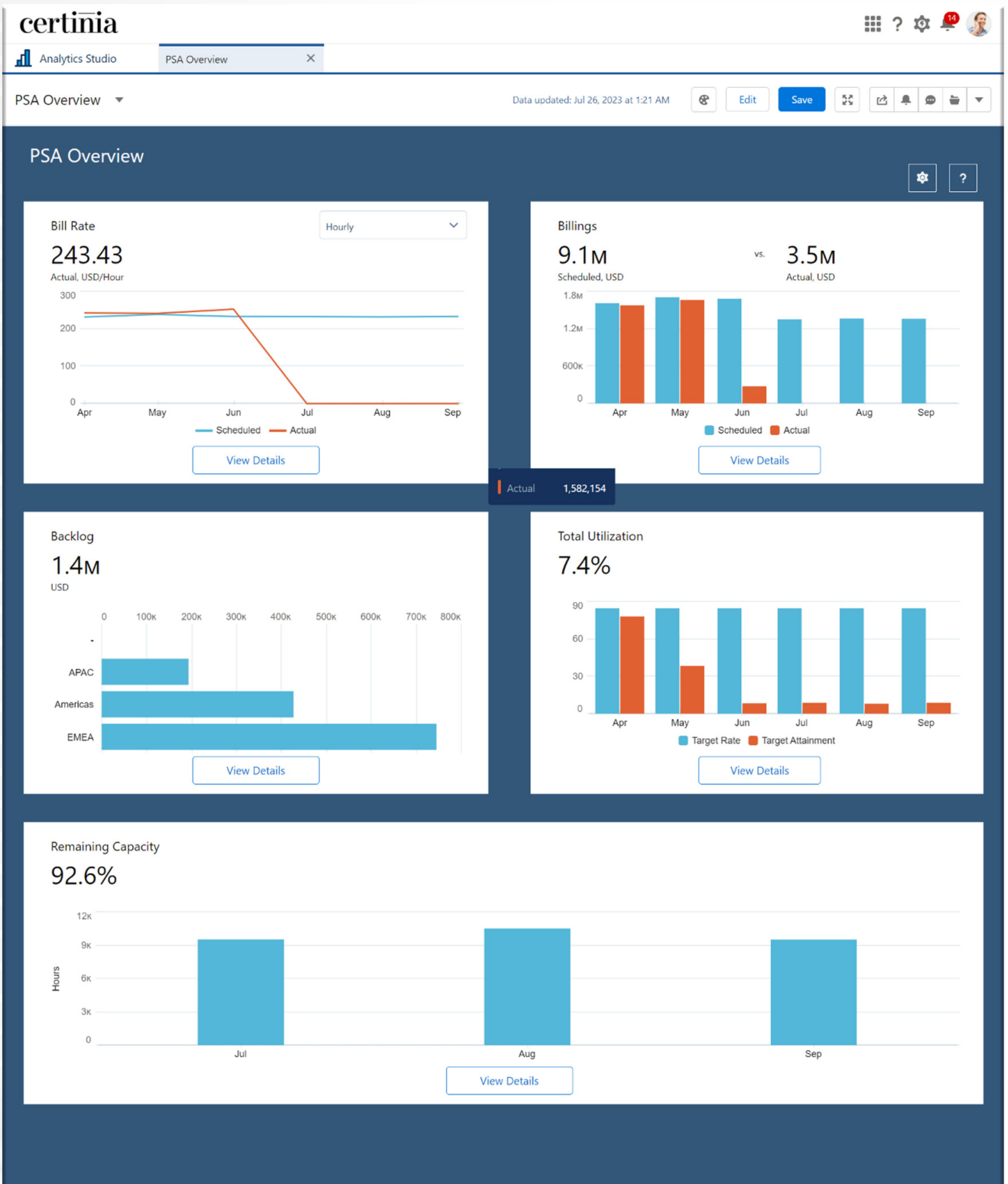
#11: PSA Revenue Forecast Dashboard



With this dashboard, you can effortlessly display forecasted revenue categorized into actual, scheduled, and unscheduled segments. It enables you to:

- Easily compare your live forecast with saved versions or compare two saved versions for insights.
- Use filters to analyze forecast versions based on Expected, Best, and Worst-Case scenarios.
- Dive deep into the value of adjustments made to projects, opportunities, milestones, or aggregated adjustments at RPG level.

#12: PSA Overview Dashboard



This dashboard enables you to quickly assess the health of your projects, track revenue and expenses, and ensure that your team is on track to meet organizational goals. By utilizing this dashboard, you can streamline operations, improve collaboration, and drive the success of your professional services endeavors.

04

8 Common Reporting Challenges for Boards & How PSA Solves

Board members often encounter several reporting challenges that can hinder their ability to make informed decisions and effectively oversee the organization. Some common reporting challenges include:

Data Accessibility and Accuracy

It is a common challenge for board members, as they may encounter difficulties accessing real-time and pertinent data due to disparate systems, manual data entry, or limited integration between platforms. Additionally, ensuring data integrity and reliability can be problematic, especially when data is manually entered, or inconsistencies exist across multiple sources.

How does PSA address this challenge?

Certinia PSA solves this issue by offering a unified and centralized platform, ensuring easy access to real-time and relevant data. Integrating systems and automating data entry processes enhance data accuracy and reliability.

Data Overload

Board members may be overwhelmed with excessive data and reports, making it difficult to focus on critical insights and key performance indicators.

How does PSA address this challenge?

To avoid data overload, Certinia PSA offers customizable dashboards and reports, allowing board members to focus on critical insights and key performance indicators.

Lack of Visualization

Data presented in complex formats can be challenging to interpret, and without proper visualization, it becomes challenging to grasp the overall performance and trends.

How does PSA address this challenge?

Certinia PSA provides dynamic dashboards and reporting. This visual representation of data simplifies complex data, making overall performance and trends easier to understand.

Timeliness

Delays in data compilation and reporting can hinder timely decision-making, leading to missed opportunities or challenges in responding to emerging issues promptly.

How does PSA address this challenge?

You can fix this issue by streamlining data compilation and reporting in PSA. Certinia PSA also ensures timely access to information for prompt decision-making.

Data Security

Ensuring the confidentiality and security of sensitive information is crucial, and board members need assurance that data is protected from unauthorized access.

How does PSA address this challenge?

With Certinia PSA, data security is prioritized with robust measures in place to protect sensitive information from unauthorized access. Board members can have peace of mind knowing that confidentiality is maintained.

Communication

Communicating complex data findings effectively to board members with varying levels of expertise can be challenging.

How does PSA address this challenge?

Certinia PSA facilitates effective communication by presenting data findings in clear and concise formats, suitable for various levels of expertise. It helps board members understand the information more easily and collaborate efficiently for better decision-making.



05

6 Best Practices for Leveraging the Power of Certinia PSA

No matter the type of PSA dashboard you create, follow these 6 best practices to stay organized, productive, and efficient. Let's get into detail.

Select measurable metrics: Have you heard of SMART goals? SMART goals are specific, measurable, attainable, relevant, and timely objectives that help you track your performance against set standards. By developing SMART goals, you can objectively assess your progress. Remember, both qualitative and quantitative measures should be considered, and if you can't measure it, you can't manage it.

Customize dashboards for different roles: It allows users to have personalized views based on their specific responsibilities and needs. By tailoring the dashboards to match the requirements of different roles such as project managers, resource managers, or executives, users can access relevant data and metrics more efficiently.

Optimize user training: Ensure that users understand how to navigate and filter reports effectively to avoid data overload and to find the information they need swiftly.

Use predictive analytics to streamline processes and enhance collaboration: Certinia PSA enables the use of predictive analytics to optimize resource planning, project estimation, and forecasting. By analyzing historical data and patterns, it minimizes the reliance on spreadsheets and improves team collaboration, ensuring projects stay on track.

Centralize real-time data for clients and internal teams to improve decision-making: With Certinia PSA, businesses can consolidate data from various sources into a unified platform. This single source of truth provides clients and internal teams with up-to-date and accurate information, facilitating smarter decision-making and better project management.

Utilize dynamic data for monitoring KPIs and business performance: Businesses should use dynamic dashboards and reporting capabilities to track key performance indicators (KPIs) from PSA. This enables businesses to monitor project progress, resource utilization, and financial metrics in real-time, empowering them to make informed decisions and stay agile in a dynamic business environment.



06

Certinia PSA Dashboards: A Quick Recap

With Certinia PSA reports and dashboards, your business can say no to manual process and get the visibility to make informed decisions that will increase margins and generate more revenue. Leverage predictive analytics to stay ahead and enhance collaboration among your teams. Learn more about Certinia PSA to drive success in the competitive world of professional services.

[Book a meeting with our
PSA experts!](#)



AbyPro is a registered Certinia (FinancialForce) leading managed service provider. We help you to convert your business processes and requirements into a reliable, sensible, and usable PSA/ERP solution. Our consultants have vast experience and are certified in Certinia (FinancialForce) for companies across diverse industries.

ADOPT

Adopt a single point of contact for all your Certinia (FinancialForce) needs to save time strain when interacting with multiple team members.

AUGMENT

Augment expert staff to do regular data health checks on the system, use out-of-the-box functionality to resolve issues, and require a minimum number of customizations.

ACTIVATE

Our dedicated team activates and utilizes hours as per your Certinia (FinancialForce) and Consulting needs.

ADVANCE

Advance information security with ISO 27001:2013 certified organization that follows all the best practices for information security to protect your data.

ACCELERATE

Accelerate the process with trained Certinia (FinancialForce) analysts who can understand business terms and can have discovery sessions directly with the finance and accounting users.

5 A'S APPROACH

**Certinia
(FinancialForce)
PSA**



**Salesforce
Field Service**



**Salesforce
CPQ**



**Salesforce
Service Cloud**



**Certinia
(FinancialForce)
ERP**



CONTACT US



AblyPro
12410 Milestone Center Dr.
Suite 600
Germantown, MD 20876



240-259-3076



wecare@ablypro.com



ablypro.com