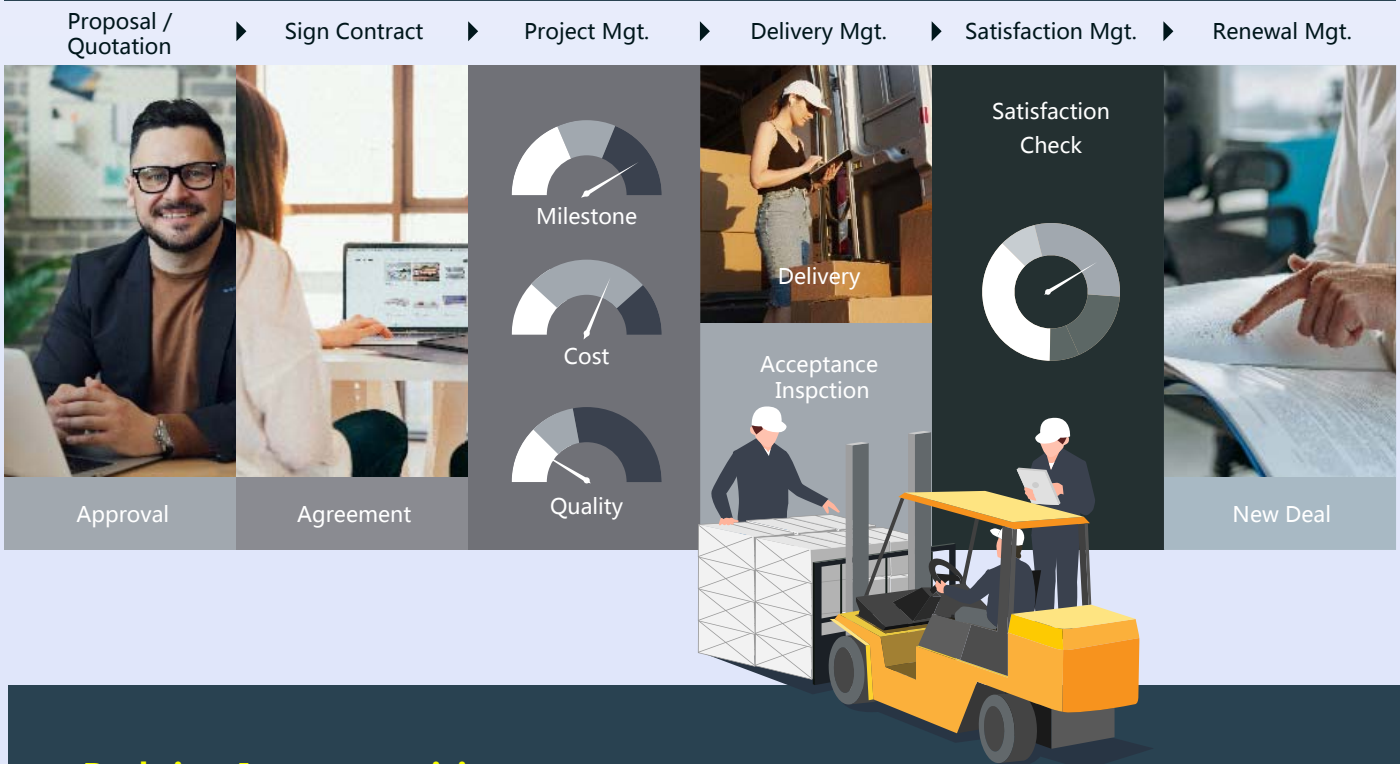# Outsourcing Mgt.

Enables professional and project outsourcing

Contract and Project Integrated Mgt.

Ⓑ supports the entire contract and project life cycle which includes:

- Proposal and quotation mgt
- Contract and project execution mgt
- Milestone completion and SLA monitoring
- Change, change impact, revenue, cost and profit mgt
- Invoice and payment mgt
- Client satisfaction and contract renewal mgt

Proposal / Quotation ▶ Sign Contract ▶ Project Mgt. ▶ Delivery Mgt. ▶ Satisfaction Mgt. ▶ Renewal Mgt.

Milestone

Cost

Quality

Delivery

Acceptance Inspction

Satisfaction Check

Approval   Agreement   New Deal

Real-time Interconnectivity

Ⓑ contract and project are interconnected in real-time, for example:

- Project cost would directly affect contract cost and profit
- The delay in project deliverable would directly affect contract revenue.
- The quality of project deliverable would directly affect contract SLA results.

One contract can represent one or more projects

In most cases, a contract represents a single project. But in some areas such as investment and outsourcing, it is possible that a contract can create multiple projects and their results collectively affect the return of investment.

Project Mgt.

8 provides features to support the following 10 major areas:

Scope Mgt

Time Mgt.

Cost Mgt.

Quality Mgt.

Human Resource Mgt.

Communication Mgt.

Stakeholder Mgt.

Risk Mgt.

**Procurement Mgt.**

Integration Mgt.

You can select part or all of these features to manage your projects.

- Policy setting
- Project plan and cost approval
- Resource Mgt
- Deliverable planning, quality control and delivery and acceptance
- Schedule, cost, problem and change tracking
- Risk recording and mitigation

Product Mgt.

8 CRM provides the following for you to manage your products:

• Product Master to allow you to define product types and subtypes, families, attributes and prices

• Product Component to allow you to define product structure, components, bundle and costs

• Cross-sell and Up-sell to allow you to define relationships with other products and services

• Pick-Pack-Ship to allow you to define the lead time, storage, inventory, packaging and transportation info
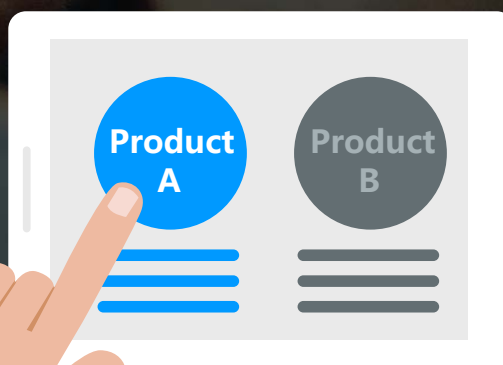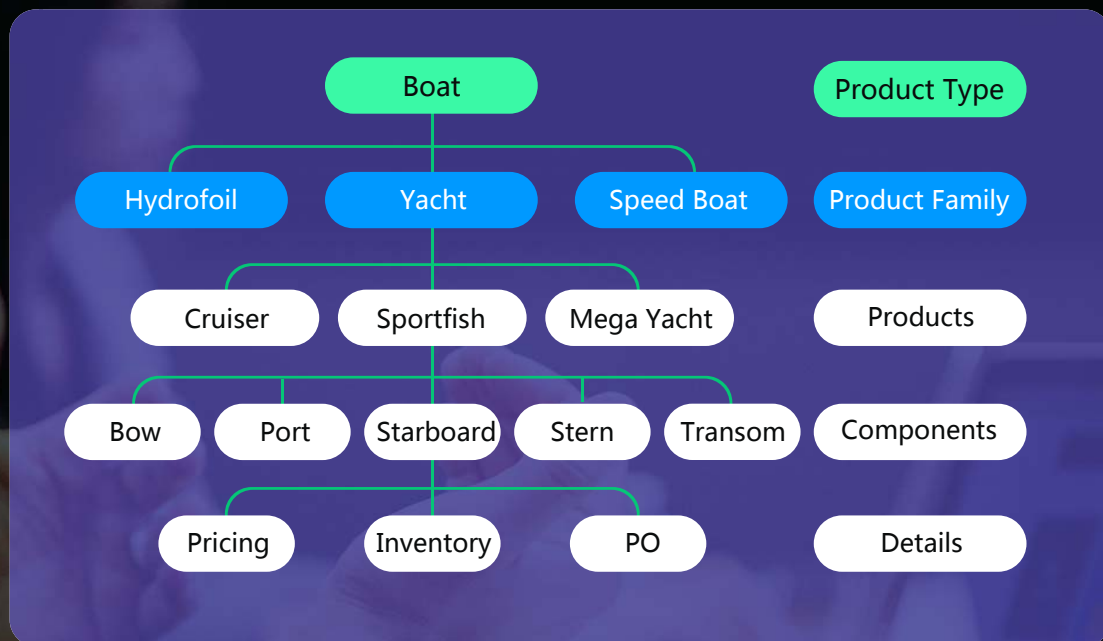
The Product module in 8 CRM is the heart of CRM in the sense that it links to all client orders, returns and satisfactions/complaints associated with products. It is also the backbone for client, business and operation big data analysis.

Supplier (Outsourcer) Mgt.

Manage many suppliers in their each step

Supplier Segmentation

🔲 allows you to segment your suppliers into groups based on certain criteria, you can decide on the type and level of attention needed. By doing so, you will achieve the following benefits:

- Procurement teams can focus on specific suppliers and categories, improving efficiency.
- Buyers can have access to data for better price negotiation and risk management.
- Finance teams can track spending by supplier type, making it easier to identify cost drivers.

Evaluation & Selection

Evaluation

Selection

8 provides you the workflow to identify, evaluate, and select suppliers that meet your specific requirements. You can have many criteria to consider when selecting your suppliers, such as quality, price, delivery time, track record and potential conflicts of interest.

Onboarding and Implementation

Drastically easier onboarding

Contract driven implementation

8 supplier portal provides the automated workflows for collecting and analyzing supplier information in order to register and approve suppliers for the purpose of procurement of goods and service in a secure and compliant manner.

8 provides the workflows for putting a contract into action. Since contract implementation can be complex and time-consuming, it is very important to get it right so that both parties receive the benefits they expect from the agreement. *8* tracks contractual terms to ensure both parties meet the contractual obligations. It also provides visibility to the large business.

Supplier (Outsourcer) Performance Mgt.

Performance dashboard

Effective risk mgt.
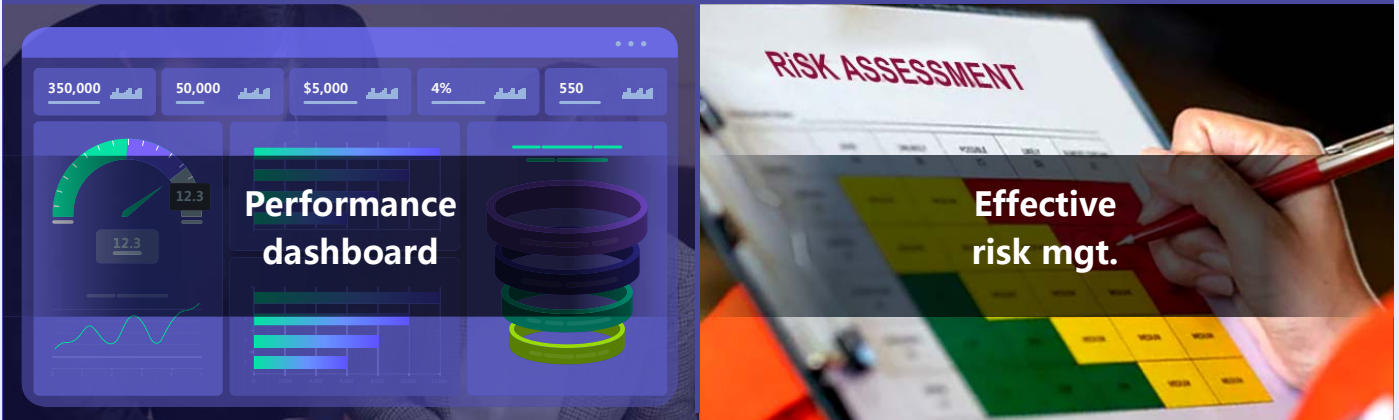
8 provides the workflows to measure, analyze, and manage the supplier's performance in an effort to cut costs, alleviate risks, and drive continuous improvement. Supplier performance can be assessed by evaluating a few characteristics which can include:

- Product or service quality
- Percentages of incoming rejects
- Delivery accuracy
- Warranty claims

- Customer service
- Delivery lead times
- Account management
- Commercial costs

Supplier (Outsourcer) Relationship Mgt.

Supplier development

Leverage Categories

Strategic ategories

Supplier relationship mgt.

Non-Critical Categories

Bottleneck Categories

Replacing a supplier can be costly and time-consuming and may slow your business down. *8* keeps accurate records and provides you better data and enhanced collaboration to ensure your relationships with your suppliers remain profitable. It's a win-win for all parties. Over time you'll notice that communications improve and mutual goals will align more closely.

Procurement (Outsourcing) Contract

8 Procurement Contract is for long-term arrangements between your organization and suppliers.

Cost Budgeting

8 Procurement Contract provides you tools to estimate contractual costs, set an agreed budget and manage the actual and forecast costs against that budget.

Selection

8 Procurement Contract provides you the workflows for identifying, evaluating, and choosing third-party product suppliers or service providers. It involves seven main stages, starting from determining the needs of your organization and ending with managing the relationship with the supplier. The entire process ensures that suppliers meet the organization's specific needs and requirements for their operations.

Requirements Specification

8 Procurement Contract provides you tools to collect and specify requirements that are to be imposed on the design and verification of the product. The specification also contains other related information necessary for the design, verification, and maintenance of the product.

Due Diligence

⑧ Procurement Contract allows you to gather information to understand the credibility and suitability of the prospective supplier that you intend to have a business relationship with.

Service Level Agreement

⑧ Procurement Contract provides you tools to specify and track the commitment to the standards the provider must adhere to, and the metrics to measure the performance.

Terms & Conditions

⑧ Procurement Contract allows you to set the rules of how the product or service may be used including, but not limited to, things like copyright conditions, age limits, and the governing law of the contract.

Negotiation

When two companies negotiate, both parties seek to obtain favorable terms and minimize financial, legal and operational risk.
⑧ Procurement Contract provides you the communication tools to work with your suppliers to come to an agreement on a set of legally binding terms.

Legally Binding

8 Procurement Contract provides you the electronic signing tool to allow you and your supplier to append signatures to your contract, symbolizing agreement and understanding between the parties involved. This process is fundamental to business transactions, serving as the final step in formalizing agreements. The act of signing a contract holds significant legal weight.

Project Initialization

8 provides you tools for project initiation. Project initiation is the first step in starting a new project. During the project initiation phase, you establish why you're doing the project and what business value it will deliver—then use that information to secure buy-in from key stakeholders.

Project Delivery

8 Procurement Contract provides you and your supplier tools to manage each activity and deliverable in your procurement project to meet the delivery requirements.

Change Management

8 Procurement Contract provides you tools to manage unexpected changes to ensure that impacts are minimized, changes are made smoothly and without disrupting the other tasks.

Contract Amendment
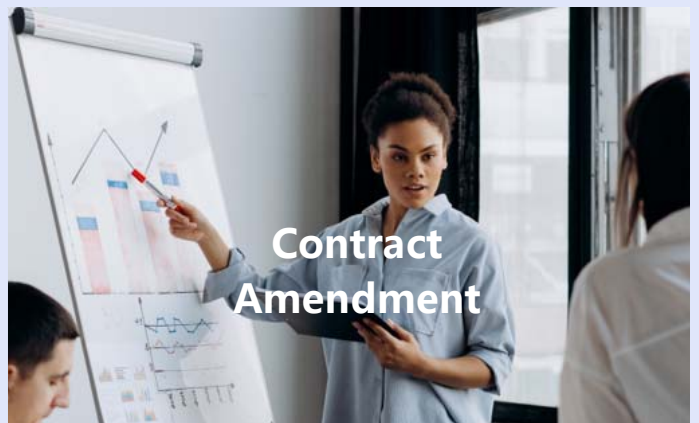
Final Acceptance

Under the common law of contracts, upon final acceptance, the owner takes control and ownership of the project and the risk of loss passes from the contractor to the owner. 8 Procurement Contract provides you tools to record the final acceptance of the work as completed, including any deficiencies known to exist.

Acceptance

Invoicing & Payment

8 Procurement Contract provides you tools for your supplier to submit invoices to you and you to request payments to pay the invoices according to the contractual payment terms.

Maintenance

8 Procurement Contract provides you tools to manage support service levels to ensure nursing activities and defect repairs are done according to the contractual terms.

Renewal

8 Procurement Contract provides you tools to track contractual renewal periods and pre-agreed upon prices and automatically generate reminders and renewal contract drafts for you.

Settlement

Settlement is a crucial step in the procurement process. ⑧ provides a secure cloud environment with the highest transparency and visibility into the settlement workflow. Immediate access to procurement budget information helps you detect inconsistencies and potential fraud before they become significant problems.

Supplier Invoice & AP

⑧ automates your supplier invoice and AP workflow seamless and simple. Say goodbye to wasted time managing invoices and payments.

3-way Matching

With ⑧ you can perform three-way matching between the delivery-and-acceptance document, supplier Invoice, and PO/Contract to check if you have received the order correctly and if there aren't any discrepancies. Once three-way matching is complete, the invoice is approved and forwarded to payment processing.

Payment

8 allows you to pay one or multiple approved invoices to the supplier. After your payment request is approved, your finance department will be notified to issue the payment.

Bookkeeping

After the payment process, you make a record of it for bookkeeping and auditing. All appropriate documents right from purchase requests to payment are stored in the 8 system.
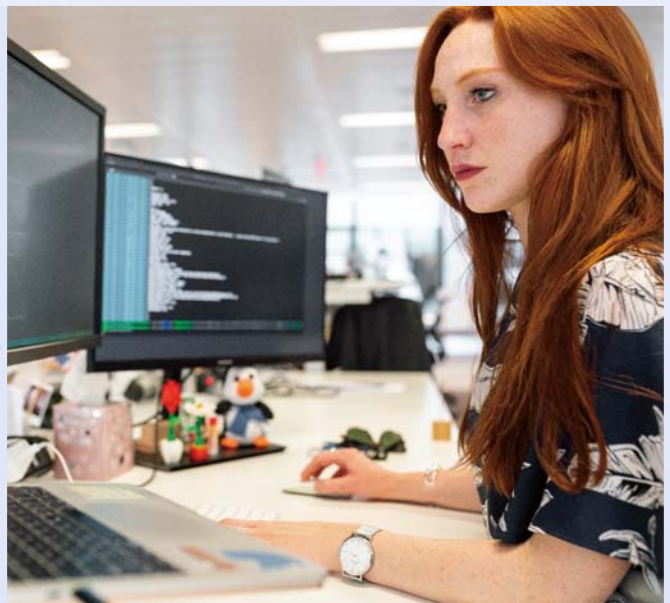
Traceability and Auditability

8 allows a simple and cost-effective way for a business to investigate its transactions and invoices presented by its suppliers. You can use 8 to examine invoice integrity prior to paying a supplier. 8 provides valuable information on the status of an invoice and signals a warning when receivables are disputed or goods are undelivered.

Business & IT Outsourcing Mgt. Feature list

Feature	Description
Project Mgt.	
Project Request	
Create Project Request	Record project name, project type, requested budget and other info in project requests.
Risk Assessment	Support risk assessment for project requests.
Approval	Support to submit project requests for approval.
Linked to a Project	Support to link an approved project request with a project.
Project Initialization	
Create Project	Allow to create project by different methods, such as creating from the template, importing from mpp file, creating from scratch or copying an existing project.
Define Project Team	Allow to define project planners, project sponsors, project supervisors, managers, project assistants and approvers and grant appropriate privileges.
Define Project Chapter	Allow to define info such as objectives, stakeholders, assumptions, approaches, high-level scope, high-level schedule and budget ballpark in project charter.
Project Scope Document Mgt.	Support the uploading and easy access of scope-related documents.
Project Library	Support user-define library template for creating a new project library.
	Support auto creation of project library automatically when a new project is created.
	Support linkages of project deliverables to documents in project library so that documents created from a project can be accessed independently from project library.
	Support knowledge Mgt. in project library.
Project Activity Planning	
WBS	The form of 8Manage WBS is similar to Excel format, in which users can re-arrange the activity sequence, outdent or indent an activity by mouse or shortcuts. The system also supports the import and export of MS project files.
Assign Activity Owners	Able to assign the responsible person of the activities individually or by bulk replace;
	Allow multiple persons to be responsible for the same activity.
Set Up Deliverables	Allow to define deliverable details of activities/projects, including responsible person, scheduled FD, review and acceptance flow, quality standard etc.
Planning Methods	Support "top-down" and "bottom-up" planning methods; by combination of the two methods, it can better ensure the time restriction as well as the flexibility.
Sub-projects	A project can be inserted as an activity to another project's WBS.
Critical Path	Critical path activities are visually displayed on WBS and 8Manage supports showing real-time critical path on web page and exporting PDF document.
Gantt Chart	Able to show the Gantt Chart in real-time and allow exporting it into PDF.
Baseline	Support the establishment of baselines for projects and individual activities.
Project Resource Planning	
Resource Type	Allow self-defining the resource type such as internal human resources, external human resources, and non-human resources for the projects; allow self-defining the resources properties.

Resource Working Calendar	Allow defining different working calendars; each project and each resource can have different working calendars.
Key Resource Warning	Conflict or overloading of key resources will be alerted.
External Human Resources	Able to manage the external human resources that participate in the projects.
Resource Skills	Able to self-define needed fields to record all the skills of the resources.
Resource Plotter	The system will list the matched resources that meet the requirements based on resource plotter.
Resource Workload Warning	The workload of a resource can be tracked during resource planning process and any overload can be detected and alerted by the system automatically.
Resource Allocation	Support resource tracking and adjustment request on resource allocation according to the resource's usage.
Project Deliverable Planning	
Deliverable Review & Acceptance	Allow to define different review and acceptance flow for deliverables.
Minimum Quality Requirement of Deliverables	Support setting the minimum level of quality control for deliverables on Enterprise/Project level.
Minimum Quality Requirement of Milestones	Support setting the minimum level of quality control for milestones on Enterprise/Project level.
Deliverable Completion Methods	Allow to set up metrics to evaluate the quality of the deliverables.
	Support to set up the calculate methods of the completion rate according to the target value and the actual value of the metrics, or according to the review and acceptance status.
Budget Planning	
Approved Budget + Additional Forecast & Actual+Accrual	"Approved Budget + Additional Forecast" reflects the approved amount and the estimated amount acknowledged by the executives; "Actual+Accrual" reflects the actual amount and the amount estimated by the project team members. Their differences can provide overrun warnings.
Cost Control Rules	Allow to control the project cost in different cost classification levels and set up conditions when projects or cost should be (re)approved.
Cost Classifications	Allow to self-define different cost classifications by enterprise level or by each project.
Reserve Fund	Support managing the reserve fund of the project.
Asset Depreciation	Support managing the asset depreciation of the project.
Project Approval	
Multi-level Approval	Support multi-level approval function (e.g. allow project manager to approve top-level activities, project approvers to approve whole project plans).
Self-defined Approval Flow	Project approval flow can be pre-defined in the system or confirmed by the project manager when the project is submitted for approval.
Re-approval Restriction	Allow to define there-approval control parameters;when some critical goal was changed, such as the cost, scheduled FD etc., the system will require the project to be re-approved automatically.
Project Activity Execution	
Deliverable Mgt.	
Internal Review	Deliverable's responsible person submits the deliverable for internal review; Reviewer reviews the deliverable.
Acceptance	The accepter can accept or reject the deliverables after receiving the deliverables.
Commitment Mgt.	Allow the commitment management of the deliverables; the commitment process includes commitment-implementation/re-negotiation/commitment breaking.

Deliverable Structure	Allow to define deliverable structure through defining the components of deliverables.
Deliverable Completion Feedback	Allow setting up target value of the metrics to evaluate the deliverables.
	The responsible can update the actual value, and the system will calculate the completion rate according to the target value and the actual value of the metrics, or according to the review and acceptance status.
Project Resource Utilization	
Timesheet	Team members can use the timesheet to record their actual working hours in each project.
Resource Request & Approval	Support the resource request and approval process.
Resource Usage Record	Able to generate the usage records automatically according to the actual timesheet records, able to calculate the project resource costs automatically.
Resource Tracking	Resource tacking feature supports dynamically tracing the resource usage in a project and detecting any overload and resource conflict.
Commitment Mgt.	Allow the commitment management of the resource allocations; the commitment process includes commitment-implementation/re-negotiation/commitment breaking.
Cost Mgt.	
Expense	The system supports the expense flow management from request to payment delivery.
Cost Classifications	The project can inherit the cost classifications of enterprise, or adjust the inherited classifications to maintain its own one.
Budget & Actual Cost	Able to track the derivations between the planned budget and the real cost; able to provide warnings according to the pre-set cost warning rules.
Project Communication Mgt.	
Requests & Responses (Approval, Review, Acceptance)	When the user raises a request, the user being requested (such as the approver) will be able to receive and respond to it to achieve the purpose of interactions.
Notifications	When the plans are modified, or deliverables are reverted etc., the system will send out notifications automatically (the rules can be self-defined by the user).
	The system will also send out notifications to the responsible persons before the due day.
Escalations	Support to escalate to the leaders automatically if the pending requests are not being handled in due time.
Chat & Forum	Provide online chats and forums for instant communications.
Instant Comments & Emails	Allow team members to add comments for the projects, activities, deliverables, issues etc. online or via email at the same time.
	All the communications including the emails will be captured into the system by time sequences.
	Relevant team members will be able to keep track of the historical communication records when needed.
Project Change Mgt.	
Change Request	Allow users to record and handle the change request in the system.
Severity & Urgency Queue	Allow to define the severity of the change requests, provide urgency queue function to manage the change requests and to control the access rights.
Audit Trail	Provide audit trail to record all the changes of the change requests.
Self-define Function	Allow privileged user to self-define the basic information page and management flow of the CR.
Requirements Mgt.	
Requirements Capture	Allow users to record and handle project and product requirements in the system.

Priority & Settings	Allow to define the priority of the requirements, provide urgency queue function for requirement management and to control the access rights.
Audit Trail	Provide audit trail to record all the changes of the requirements.
Test Mgt.	
Test Case	Allow users to create test cases and associate them with requirements.
Test Coverage	Allow users to measure the test coverage of requirements.
People Mgt.	
Project Work Performance Report	Provide various real-time project analysis reports as a reference during the executions, such as workload summary, quality summary, milestone completion status summary etc.
Reality Checks	Provide reality check functions to collect the comments from the project stakeholders and allow to answer the questions anonymously.
Project Monitoring	
Cost Monitoring	
Earned Value	Use the EVM management method recommended by the PMBOK to monitor the project cost.
Top-down & Bottom-up Budget Deviations	The system will monitor the deviations between the top-down and bottom-up budgets and by real-time.
Cost Overrun	The system will monitor the cost overrunning the approved budget in real-time automatically.
Budget Re-approval	With pre-set rules, when budget being modified, it will trigger the restriction to re-approve the project.
Progress Monitoring	
Dashboard & Warning	Provide project summary dashboard and the alert functions.
Earned Value	Use the EVM management method recommended by the PMBOK to monitor the project schedule.
Quality Monitoring	
Quality Monitoring	The system will keep track of the project quality dynamically by examining the following: uncommitted deliverables, overdue deliverables, deliverables without review and acceptance, rejected deliverables, deliverables with a high rejection rate, the most overdue deliverable etc.
Resource Monitoring	
Resource Overall Monitoring	The system will automatically monitor the overall resource conditions, including overdue resources, unreasonable allocations, overloaded resources, to-be-hired resources, un-committed resources etc.
Resource Effort Analysis Histogram	The system provides resource effort analysis histogram to analyze the total FTE, resource days or resource hours of the planned, requested, approved or actual resources usage.
Resource Effort Analysis Table	The system provides the analysis report to view and compare the FTE, resource days, resource hours of the total resource usage, the resource constraint and the variances.
Different Resource Reports	The system provides different resource reports to help monitoring the resource in different dimensions, e.g. the resource planning report, resource time & cost report, resource allocation & utilization report etc.
Risks & Issue Monitoring	
Risk Detection	Auto detection of the resource risk, schedule risk, cost risk, management risk etc. and demonstrates the risks in the project dashboard.
Risk Mgt.	Besides from the auto detection of the risk, the system also allows the user to record and monitor the risks found.
	The system supports to plan actions to deal with, reduce or avoid the risk, and supports the whole follow-up process until the risk is relieved or closed.
Issue Resolution	Support to keep track of the whole process of dealing with the issues found; including the issue registration, the impact analysis, the actions, actions follow-ups, issues solved and closed.

Re-forecast Mgt.	
Schedule Re-forecasting	8Manage supports schedule re-forecasting based on Schedule Performance Index (SPI), present date and mandatory dependencies.
Resources(Efforts) Re-forecasting	Allow to re-forecast the resources(efforts) according to the re-forecast schedule and the extra resources requests.
Cost Re-forecasting	Allow to re-forecast the cost budget according to the actual cost (AC) and the bottom-up budget cost.
Project Closing Mgt.	
Outstanding Item List	List all outstanding items (e.g., outstanding invoices) that must be handled before project closure.
Deliverable Archiving	Allow to move all the attachments of the deliverables into specific project folders in the project library.
Releasing Resources	Allow to release all the requested resources after closing the project.
Project Documents Mgt.	Allow to move all the remaining project documents into the project library.
Project Closure	Support to complete and close the project in the system.
Product Mgt.	
Product Master	Allow user-defined product types, families, sub-families and brands.
	Support auto generation of product ID based on user-defined rules.
	Support both global product view and group-oriented product view and access control.
	Able to store and maintain product info such as product type, product family, product name, product ID, product supplier, product price info in Product Master.
	Support to add user-defined fields in the product basic info page.
	Support packaging specification and quantity control.
	Support product costing based on purchase price or manufacturing cost.
	Support product pricing based on cost plus margin or list price minor discount.
	Support multiple price and discount rules based on client type and volume.
	Able to record up & cross sell product info.
	Provide inventory Mgt.: a) Track demand from sales orders b) Track supply from shipment info c) Track inventory movement and current quantity d) Support periodical stock check
	Support serial number or other identification Mgt.
	Allow user-defined product approval flow.
Product Analysis & Evaluations	Allow to analysis and evaluations of # of Clients, Total # of Campaigns, Presale ROI, Total Product Cost, Gross Profit, etc.

Procurement Mgt.		
Supplier (Outsourcer) Mgt.		
Info Mgt.	Support to record basic info of suppliers, such as region, industry, type, grade, product, status, etc.	
	Support to record communications with suppliers.	
	Support self-defined fields on the supplier page.	
On-boarding Approval	Support self-defined appraisal criteria for supplier on-boarding .	
	Support self-defined workflows for supplier on-boarding approval.	
Performance Appraisal	Support performance appraisal for suppliers.	
	Allow to score supplier performance and submit for approval.	
	Support supplier classification by grade.	
	Support to check the supplier blacklist.	
	Support flexible definition of questionnaire content.	
Risk identification	Support to connect TianYanCha business search platform to access suppliers' credit information.	
Purchase Request Mgt.		
Purchase Request Basics	Support online submission and approval of the purchase requests.	
	Allow to define different approval flows according to groups, cost levels etc.	
	Auto check of procurement budget when submitting a purchase request.	
	Able to assign a responsible person to follow-up the purchase request.	
	Allow to raise purchase request for products with info is already in Item Master and also for one-time purchase products with info entered on the fly.	
	Able to fetch effective quotations of a desired product.	
	Support quick-quote-request function.	
	Track for the procurement execution results of Purchase Request.	
Quotation Process	Allow suppliers to quote online.	
	Able to rank offers by quoted price.	
	Support quotation approval.	
	Allow to generate PO directly from the Purchase Request.	

Procurement (Outsourcing) Contract Mgt.	
Contract Basics	Allow user-defined contract types.
	Support basic contract info (e.g., Responsible parties, dates, cost items, payment terms, renewal)
	Allow to upload the contract attachments.
	Support recording of important interactions with suppliers related to the contract.
	Support contract budgeting and cost tracking.
	Support the online contract approval flow.
	Support assignments of contract activities.
	Support contract on-hold.
	Support contract version Mgt.
	Support contract evaluation.
	Support audit trail.
Blanket Contract	Support multiple types (e.g., fixed-price, time-and-material) of blanket contract.
	Support the end-to-end blanket contract process from establishment to fulfillment.
	Auto tracking execution of subcontracts or PO under the blanket contract.
SLA	Allow user-defined Service Level Agreements (SLA) based on per-defined SLA types.
	Auto real-time tracking of each SLA actual against target.
Procurement (Outsourcing) Financial Mgt.	
Invoice	Support to generate invoices based on a single receipt or payment terms.
Statement of Account	Support to gather goods receipt notices and returns based on the periods to generate statements of account.
	Support sending statements of account to the supplier contact for confirmation.
	Support to deduct the supplier advance payment from the bill amount to calculate the actual account payable.
Payment	Support payment based on confirmed statement or invoice amount.
	Support correlation between payment amount and invoice amount, and to filter payment records with difference between payment amount and invoice amount.

8 can provide best combination of standard products & redevelopment services for enterprise

management and over 500 corporations in Asia are using our following modules on-premises or SaaS:

8 SRM : Supplier Management, e-Procurement and e-Tender

8 PPM : Project and Portfolio Management

8 CRM : Corporate Client CRM and Consumer CRM

8 Timesheet : Resource Time and Cost Management

8 New Way : Visual Agile and Lean

8 Service : Service Management

8 EDMS : Electronic Document Management System

8 OA : Office Automation

8 HCM : Human Capital Management

8 All-in-one : Enterprise Full Automation