



CONSTRUCTION INDUSTRY SOLUTIONS
FROM PEGASUS

Taking control of your contracts and costs



Reasons to Upgrade Guide





The Future: Pegasus CIS 5

New technology, new look and feel, new functionality, a new future – Pegasus CIS 5

Pegasus CIS 5 is a complete rewrite of the Pegasus Construction Industry Solutions product that was first release in 2005 which has over 2000 users. Rewritten using the latest technologies, Pegasus CIS 5 delivers added power, security, reliability and a host of new features and functionality. Pegasus CIS 5 is the future.

An investment in Pegasus CIS 5 will protect your business as you move into the future. The design of Pegasus CIS 5 follows Microsoft best practice for modern client server applications and the technology on which it is built means that you are investing in a solution that will continually deliver intelligent additions to its functionality.

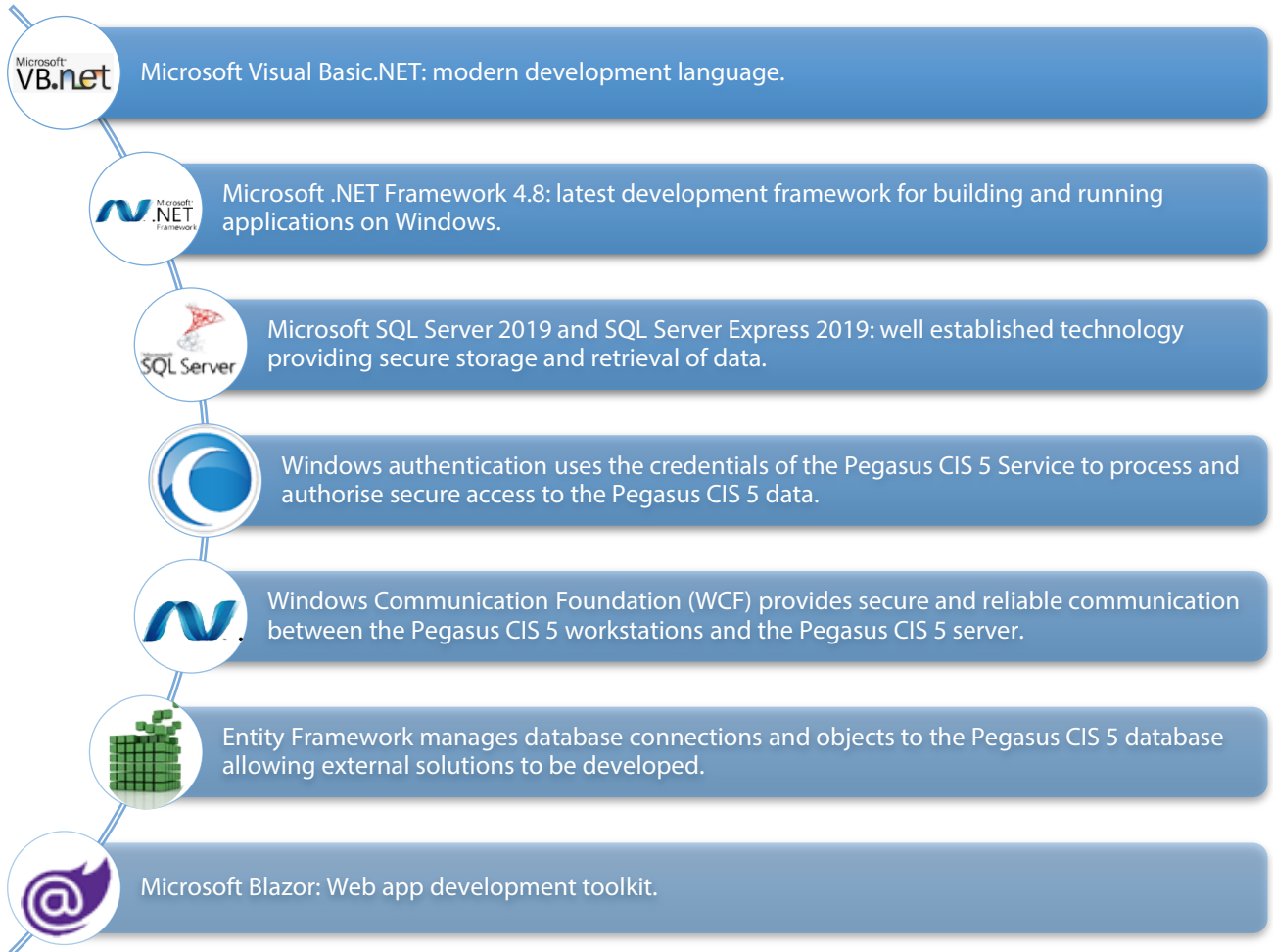


Login Screen

At Pegasus we have always believed that your investment in our products is an investment in your business. Here we explore some of the features and functionality that the new technology used in Pegasus CIS 5 can deliver.

Technical foundation

The technical foundation includes;



Cloud ready, fully supported in the Pegasus Business Cloud to provide access to project information from anywhere in the world that has an internet



Unrivalled User Interface

A totally new user interface that provides;

- Unequaled on-screen information retrieval capabilities.
- Screen layouts customisable by the user (employing drag and drop technology).
- Multiple Tabs, like a web browser, so people can work in different modules at the same time
- Powerful and easy to use List View creation.
- One-click integration with Microsoft Word® and Excel®.
- Multiple Windows are available on the forms such as Customers, Suppliers and Subcontractors so that people can display different types of information such as the base details, transactions and documents etc.

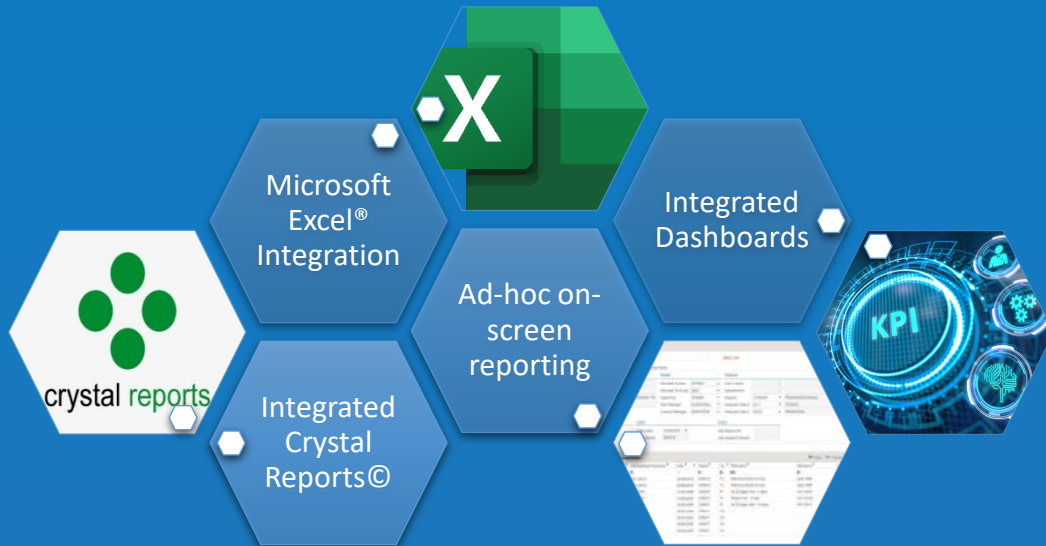
Personalised Home
Screen

Type	Document Description
INSURANCE	A1B001_PublicLiability - 010122
INSURANCE	A1B001_PublicLiability - 010121
INSURANCE	A1B001_PublicLiability - 010120
INSURANCE	A1B001_ProfessionalIndemnityInsurance_010122
OTHER	A1B001_DriverLicence_100621

Personalised Subcontractors Screen

Reporting

A totally new enhanced approach to management reporting across the system that provides;



Pegasus CIS 5 includes a number of predefined Dashboards, some are illustrated below.

Sales Retentions Dashboard

Job Number	Job Name	Certified Value	Discount Value	Retention Value	Pre-VAT Contra Value	Net Valuation Value	VAT Amount
09822	POLYMER HOME FOR THE ELDERLY	266,990.00	6,663.00	4,206.62	0.00	254,020.38	44,612.78
09871	ST MATTHEW IN THE SQUARE CHURCH	210,873.00	6,434.92	6,075.14	0.00	196,164.94	34,163.30
09874	MUSSELBURGH COTTAGE	97,680.00	2,380.22	2,441.25	0.00	62,828.53	0.00
09875	ST JOHN HOURS REPAIRS/IMPLMNT	903,300.00	22,247.06	4,000.00	0.00	907,243.94	158,851.89
09881	NEWCASTLE HERRONDAIRY A & F UNIT	1,050,000.00	23,716.00	15,063.33	0.00	988,160.71	171,107.59
09896	STRILING HOSPITAL	979,900.00	22,997.51	13,453.54	0.00	983,493.53	154,603.67
09897	MUSEUM OF FINE ARTS	544,087.00	13,647.42	8,190.00	0.00	532,249.58	91,143.68
09910	GRANVILLMOUTH LEISURE CENTRE	428,311.96	20,380.22	10,707.80	0.00	396,123.94	69,428.70
09919	HINKWOODS SCHOOL	288,228.02	7,208.33	4,716.82	0.00	276,503.87	48,428.18
09932	INFILTR LOCKS REPAIRS/IMPLMNT	130,228.58	3,912.49	2,444.80	0.00	95,347.29	16,685.77
				26,648.33	0.00	861,629.17	150,765.12
				955,201.16	0.00	16,025,544.57	2,889,725.53

Sales Aged Debtors Dashboard

Customer Code	Customer Name	Balance	Current	30 Days	60 Days	90 Days	120+ Days
ADA001	Adams Light Engineering Ltd	113,522.63	0.00	0.00	0.00	0.00	113,522.63
AHL001	Abington Hire Limited	10,637.91	0.00	0.00	0.00	0.00	10,637.91
AND001	Anderson Car Factors Ltd	30,614.66	0.00	0.00	0.00	0.00	30,614.66
BAR001	Barto Williams Limited	0.00	0.00	0.00	0.00	0.00	0.00
BR0002	Bristol Leather Limited	0.01	0.00	0.00	0.00	0.00	0.01
CAR001	CarMart	146,558.16	0.00	0.00	0.00	0.00	146,558.16
DGR001	DGR Enterprises Ltd	0.00	0.00	0.00	0.00	0.00	0.00
ELU001	Elbe Vehicle Products	154,392.82	0.00	0.00	0.00	0.00	154,392.82
		683,363.13	0.00	0.00	0.00	0.00	683,363.13

Sales Ledger Details

Customer Code	Contact	Phone
ADA001	Mr J Miller	01662 678543
AHL001	Mr Roger Davies	01534 495002
AND001	Alison Munden	01480 231442
BAR001	Mr Williams	0171 223 2233
BR0002	Mr Young	01204 565656
CAR001	David Percival	01954 240898
DGR001	Barry Ford	01803 694890

Sales Aged Debtors Dashboard

Sales Retention Dashboard

Enhanced Functionality

There are well over 100 new enhancements added into Pegasus CIS 5 which are fully documented in the Enhancement Guide. Below is a list of some of these enhancements;

Enhancement	Area	Details
Customisable Screens	Working Screen	Users can personalise their screens to suite their own specific needs to optimise processing and accessibility so improving productivity. The main Working Screen can be arranged as required to group options together into Favourites, Most Frequently Used, Most Recently Used and any user defined group such as Analytics, Sales or Purchasing.
	Updated user interface for detail screens	The updated user interface for detail screens shows a hybrid of tabs and groups that flow across the width, based on available screen area. The new Working Screen area can be easily arranged & manipulated as required to optimise processing and increase productivity while ensuring the user experience remains seamless and efficient.
	Working Tabs	Working Tabs allow for multiple forms to be opened at the same time to make accessing and moving between other areas easier, quicker and more efficient. For instance, you may wish to have both the Customer and Supplier forms open together with the Subcontractor Applications and Subcontractors Invoices Received. It is therefore a simple matter to hop between each of these forms quickly and simply.
	Forms	Forms can be customised to display related information at the point when the form is opened. For instance, the Jobs form can be opened, together with both the Cost Transactions and the Cost Phases. This enables the user to quickly move between each of these areas.
Redesigned various screens to optimise tabs, groups and the new tooltip controls	Working Screen	The redesigned Sales Invoicing, Contract Sales, Subcontractor Applications, Subcontractor Application Opening Balances, Subcontractor Application/Certificate/Invoice Transaction Enquiry and Staff screens offer optimised tabs, groups and new tooltip, warning & information controls. The new "groups" concept can also easily be permission controlled in the CIS Administration program. This is all part of the new enhanced Client User Interface.
Display Recently Used & Frequently Used Options on the main Working Screen with User Preferences to Show / Hide these options	Working Screen	The useful and effective new Most Recently Used and Most Frequently Used Menu groups help to show which processes are most frequently and recently used respectively. Start where you left off or go straight to the most common procedure used that may be part of a daily routine. Combined with the powerful Favourites Shortcut menu, it optimises the home screen to each user's requirements.

<p>Filters & Views</p>	<p>System Wide</p>	<p>Loading forms within a module takes you to a List View screen that offers a myriad of streamlined functionality. List Views are customisable, columns can be added and removed, groups, totals, sums and Filters can be added. These Views and Filters can be saved and shared with other users.</p> <p>Views and Filters offer an extremely flexible way of interrogating the data within Pegasus CIS 5 with the results being published to printer, Excel spreadsheet, PDF file or shared with others via Email.</p>
<p>Added company and user details to new status bar on detail screens</p>	<p>General</p>	<p>The Company details have been added to the main Working Screen to help easily identify the Company you are in, and further user details can also be obtained by hovering over the "User" icon.</p>
<p>Automatic Emailing of Documents</p>	<p>Subcontractors</p> <p>Sales</p> <p>Labour</p>	<p>Automatic emailing of Subcontractor Self Bill Invoices. In addition, new Email Templates allow Subcontractor Orders to be emailed with a pre-set message and terms and conditions.</p> <p>Automatic emailing of Sales Invoices, Credit Notes and Contract Certificates.</p> <p>Automatic emailing of Remote Timesheets.</p>
<p>A new 'Purchase Order Documents' items option has been added to Purchase Orders that allows the user to associate multiple documents with an order and optionally include them as an attachment when emailing orders to a Supplier</p>	<p>Purchases</p>	<p>This could be used to attach a copy of a quote received from the supplier or specification documents generated by an external bespoke ordering system. Any documents added here will be automatically added to the main Documents list when the order is approved and can be included as attachments on the email sent to the supplier.</p> <p>Emailing of Purchase Order has been updated to allow for the addition of recipient options including "To", "Cc" as well as "Bcc" and also allow the employee who entered the order to be a recipient.</p> <p>Updated the manual email of Purchase Orders process so that the system picks up the email addresses, attachments and template in the same way as when the system automatically sends emails.</p> <p>These changes make the whole process of emailing Purchase Orders quicker, simpler and more powerful.</p>
<p>The system has been updated to allow Sent email messages to be resent and to allow unsent email messages to be edited</p>	<p>E-mailing</p>	<p>Existing sent email messages can now be resent by resetting the message status to Pending.</p> <p>In conjunction with this new functionality, unsent email messages may also be edited if required.</p>

Additional Reference Fields	BOM	Additional references and information fields have been added to the Job Bill of Requirements form, allowing more details to be stored against the record that can be used for various other functions including reporting. The fields include Manufacturer Code & Reference as well as 2 Narratives.
	Plant Asset Register	Multiple fields in the Internal Plant Hire Asset Record (Service Due Date, Test Date Due, Tax Due Date, Calibration Due Date and Inspection Due Date) have been added, allowing for more retained information. These fields offer further useful details that can be maintained per asset and be used for reporting & filtering where required.
	Subcontractors	<p>New CHAS Number, CHAS Expiry, Accreditation Number & Accreditation Expiry fields have been added to the Subcontractors form.</p> <p>A new reference field has been added to the Subcontractor Applications and Subcontractor Application Opening Balances forms.</p> <p>A new site contact information has been added to the Subcontractor Orders screen and defaults from the Job, allowing it to be changed on a per order basis.</p>
Plant Hire	Plant Asset Register	New flags have been added to define which fields are mandatory within Plant Assets, such as Analysis Codes, Service Due Date, Tax Due Date etc.
	Check Plant Asset Due Dates	When marking a contract "On Hire" manually or via the batch routine, the system will check the dates added against the new due dates (Service Due Date, Test Date Due, Tax Due Date, Calibration Due Date and Inspection Due Date) settings from the selected asset record and display a warning where necessary for any expired due dates before continuing, offering the opportunity to cancel out and review the information.
Added a "Job Heading Type" field to "Job Headings	Jobs	<p>Assign a Job Heading Type to a Job Heading. There are 5 pre-defined types;</p> <ul style="list-style-type: none"> • Labour • Material • Plant • Subcontract • Sundry. <p>These new Job Heading Types provide additional filtering, reporting and an alternate way of grouping data together.</p>
Increased the size of the Job Cost Headings Additional Description field to 200 characters	Jobs	The size of the Additional Description field as found in the Job Cost Heading record from a Job record, has been increased to 200 characters to allow more detail to be stored, previously it only allowed 30 characters.

<p>Added new “User Can Only View; Open Jobs / Their Own Jobs / Their Group’s Jobs” flags to the Staff table</p>	<p>Jobs</p>	<p>Added “User Can Only View Their Own Jobs”, “User Can Only View Their Own Jobs and Their Group’s Jobs” and “User Can Only View Open Jobs” flags to the Staff table to restrict the Jobs a user gets access to, offering further streamlined permissions for viewing Job records.</p> <p>This improves the security within the system by restricting the Jobs a user can access.</p>
<p>Added a new Staff Group Members table to allow Staff to be members of multiple Staff Groups</p>	<p>Jobs</p>	<p>A new Staff Group Members table allows Staff records to be set as members of multiple Staff Groups. This functionality will then be effective in controlling visibility of Jobs in the Jobs module.</p>
<p>Additional Reference and Narrative fields added to Payroll Allocations to allow posting as a separate nominal journal</p>	<p>Labour</p>	<p>New Reference & Narrative fields have been added to the Payroll Payment Allocation Item form. When either field contains an entry, they are posted as a separate journal to the nominal.</p> <p>These fields are available throughout the cycle of the transactions and can be easily reported on or used for Audit purposes.</p>
<p>Recharge Rates for Pay Elements</p>	<p>Labour</p>	<p>To improve the flexibility of the use of Recharge Rates within the system, it is now possible to assign Recharge Rates on the Pay Elements with overrides at the Employee Pay Element level.</p> <p>Alternatively, you can also specify recharge rates against individual Recharge Codes, which take precedent over the ones defined on the Pay Element and Employee Pay Element levels. Recharge rates defined for Pay Elements also take precedent over any rates defined at the Cost Heading level.</p>
<p>A new “Timesheet History” option has been added</p>	<p>Labour</p>	<p>The new Timesheet History option, found under the Timesheets menu, allows all previously posted timesheets to be viewed without the need to access individual batch histories. This provides a consolidated list of timesheets for improved accessibility and analysis.</p>
<p>Updated Subcontractor Orders so that the Variation Total can be edited when no Variation Items have been added</p>	<p>Subcontractors</p>	<p>It is now possible to enter a Variation Value directly to a Subcontractor Order without the need to add a Variation Item. This can improve the speed of creating Subcontractor Orders where Variation values are required.</p>
<p>New “On Hold” Flag added to Customers, Suppliers & Subcontractors</p>	<p>Customers Suppliers Subcontractors</p>	<p>A new “On Hold” flag is available on Customers, Suppliers and Subcontractors and is set to match the functionality of the Suspended Flag. The Suspended Flag allows records to be hidden from Lists / Lookups and is synchronised to the “Dormant” flag in Opera 3 (and “Inactive” flag in Sage 50).</p> <p>Additionally, Subcontractors Orders cannot be created and progressed when the Subcontractor is suspended.</p>

<p>Added warning prompts to Subcontractor Orders, Applications and Invoices when insurance will expire within 30 days, including Filter Options to the Subcontractors list view</p>	<p>Subcontractors</p>	<p>To help identify and highlight subcontractors whose Insurance(s) are expiring within 30 days (for both Public Liability & Professional Indemnity Insurances), warning prompts have been added to Subcontractor Orders, Applications and Invoices.</p>
<p>Added a Nominal Code override to Subcontractor Order Items and Variation Items</p>	<p>Subcontractors</p>	<p>A Nominal Code override to Subcontractor Order Items and Variation Items has been implemented, allowing both the Cost Heading and Nominal Code to be overridden when tagging these items on Subcontractor Invoices and Subcontractor Applications.</p>
<p>Updated various forms to allow some customer fields to be edited after posting</p>	<p>Sales Subcontractors</p>	<p>Various fields on numerous forms have been updated so that they can be edited once the transaction has been posted allowing for correcting adjustments. This provides more versatile editing functionality for Contract Applications, Contract Certificates and Sales Invoices/Credits records, specifically for the Customer Name and Address fields (Reference, Narrative & Notes fields can also be edited).</p> <p>The Subcontractor Application, Certificate and Invoice Transaction Enquiry forms have been updated so that the Reference, Narrative and Notes fields are editable after these records have been posted.</p>
<p>Updated the Post Code field types to load up in Google Maps</p>	<p>General</p>	<p>This facility applies to all Post Code fields throughout the system offering a fast and efficient location lookup of the post code area using Google Maps.</p>
<p>Added Customer Name and Address fields to Valuation & Measurements, Contract Applications, Consolidated Contract Applications, Contract Certificates, Consolidated Contract Certificates</p>	<p>General Editing</p>	<p>A new tab on various contract forms has been added to hold Customer's details that can be edited for reporting & printing purposes. These details include Customer Name, Short Name, Address 1-4 & Post Code (Including a F4 View on Map option – using Google Maps), Contact, Phone, Fax & Email.</p> <p>The standard invoice/application report layouts have been updated to use these new fields.</p> <p>These additional fields can be edited once the transaction has been posted providing the ability to ensure the data is correct.</p>

Added Bank Account to Sales Invoices, Contract Applications, Contract Certificates and Valuations & Measurements	Sales	<p>The added bank account field on the various forms will assist in offering alternate bank account information being used on the differing transactions and relevant report layouts (i.e. allowing alternate bank account information to be picked up on invoice / credit / application layouts).</p> <p>In line with this enhancement a default bank account option has been added to the Customers record.</p>
Simplified Purchase Invoice Data Entry	PIR	<p>Updated Purchase Invoice Register (PIR) so that instead of invoices being split into Single Job and Multiple Job/NL options, there is now an Enter Simple Purchase Invoice option and all invoices created there, feed into the one Purchase Invoices list. These can then be modified along with the entry of more complex invoices that have multiple job allocations and/or Nominal postings.</p>
Added Units to the Purchase Invoice Items screen and update all sales and purchasing screens to pick up the decimal places from the Units table when there is no Stock Code	PIR	<p>A new Units field has been added to the Purchase Invoice Items form. The drop down will offer the Unit records as set up within the system. This improves the speed of entry because the stock units are automatically inserted with the correct number of decimal places.</p>
Updated the numeric fields to show a calculator	General	<p>Updated the numeric fields to show a calculator when either F4 is pressed or the plus "+", divide "/" or multiply "*" keys are selected.</p>
Added default dimensions to Stock	Stock	<p>New Default Dimensions (up to 3) can be applied to a stock record and they can be picked up on all screens that prompt for a Stock Code which have dimensions, making data entry quicker.</p>
Implement Valuation & Measurement Items import routines	Import	<p>A new Valuation & Measurement Items import routine has been implemented. This allows items to be imported as well as parameters to allow a Job and Sales Phase to be specified. The import can be processed as multiple records or for a specific Contract Sales Prepare Valuation/Measurement record. Ideal where the customer has a third party application to define the Valuation & Measurement items.</p>
Implemented a Bank/Cash Expenditure import routine	Import	<p>A new Bank/Cash Expenditure import routine has been implemented to enhance integration with external systems that hold cost transactions that need to be allocated to Jobs within Pegasus CIS 5.</p>
Implemented a Material Groups import routine	Import	<p>A new Material Groups import routine has been implemented. Material Groups are an alternative to using Product Codes and can be used in Purchase Orders, Job Items etc. The Material Group also provides a convenient location for storing Nominal Ledger Codes for costing purposes.</p>

<p>Updated Excel import routines and Remote Timesheets Generation/Import routines</p>	<p>Import</p>	<p>Updated Excel import routines and Remote Timesheets Generation/Import routines to improve performance and remove the need to have Excel installed on the machine running the routine.</p>
<p>Implemented the ability to export just the summary values when exporting a list to Excel</p>	<p>Export</p>	<p>When a view has a grouped column, the single "Export" button turns into a split button with two drop down options;</p> <ul style="list-style-type: none"> • Export Summary Only (the default) • Export With Detail. <p>This provides a quicker method of exporting summary information because only the totals are exported as opposed to exporting all of the transactions.</p>
<p>Implement Dashboards</p>	<p>Dashboards</p>	<p>A set of default system Dashboards have been added to provide a superb interactive visual view of KPIs and commonly queried information. These can be seen in the following locations;</p> <ul style="list-style-type: none"> • Jobs – Committed Costs Dashboard • Sales – Aged Debtors (Base) Dashboard • Sales – Aged Debtors (Foreign) Dashboard • Sales – Sales Retentions Dashboard • Subcontractors – Subcontractor Aged Creditors Dashboard • Subcontractors – Subcontractor Retentions Dashboard. <p>The Dashboard Management module allows new Dashboards to be imported. Existing Dashboards can be modified and new Dashboards can be created.</p>
<p>Document Management & Related Documents</p>	<p>Document Management</p>	<p>When upgrading from Pegasus CIS 4.xx, the existing independent 'Module Documents' tables, e.g. Job Documents, Customer Documents, Subcontractor Documents, Stock Documents etc. have all been merged into one master 'Documents' table containing a reference to each unique document.</p> <p>This provides a central point to view all documents within Pegasus CIS 5. Upon release of the Document Management module then a host of new functionality will become available to allow these documents to be searched, filtered and grouped, to provide full Document Management capabilities.</p> <p>As part of the Document Management system, the inbound purchase Invoice (and Credit) emails from suppliers can be automatically imported into a pending purchase invoice table within Pegasus CIS 5. The system will extract the base information from that email to create an invoice header together with a link to the email and the invoice attachment. These can be approved and posted into the Pegasus CIS 5 system and the costs analysed against the contracts.</p>

<p>A new "Prevent Logins" option has been added to the CIS Administrator Programme</p>	<p>CIS Administrator</p>	<p>This option will prevent any logins to Pegasus CIS 5 which is ideal, for example, when upgrading the application or taking Data Backups / Restores. When the system is in this mode, it displays a permanent banner along the top of the login screen to indicate that logins are being prevented, but allows it to be turned off if required.</p> <p>Additionally, the ability to logout a user from the server has been added to the CIS Administrator. Either individual user sessions or all currently logged in user sessions can be closed. This will trigger the CIS client to prompt the user to finish what they are doing and logout of the application.</p>
<p>The ability for users to change their password from within the desktop application has been added to the Pegasus CIS 5 Client</p>	<p>CIS Client</p>	<p>Only those that had access to the CIS Administrator could manage passwords, now the individual user can change their own password.</p>

Pegasus CIS 5 Enhancement Guide

A full list of these enhancements together with a more detailed description of the functionality can be found in the Pegasus CIS 5 List of Enhancements document available on the Pegasus Website. For further information please feel free to contact your Pegasus Partner or contact Pegasus Software as detailed below.



Pegasus Software Orion House, Orion Way, Kettering NN15 6PE


T: 0800 919 704

T: +44 (0)1536 495000

F: +44 (0)1536 495001

E: info@pegasus.co.uk

www.pegasus.co.uk

 [@PegasusSoftware](https://twitter.com/PegasusSoftware)

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Registered office: One Central Boulevard, Blythe Valley Park, Shirley, Solihull, West Midlands, B90 8BG. Registered in England No. 2766416

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