

Professional Services

SunGard Investran Professional Services offers a series of solutions to improve our customer's business processes, reporting functions and general business support. With proven and established methodology Investran Professional Services can manage and implement changes in client requirements and provide the needed expertise to execute the growing needs of your business.

System Assessment

Private Equity has evolved over time and so have our clients. Processes and requirements that may have been a focus several years ago during implementation have grown into a new set of requirements. Expansion of the business has created a more tightly integrated client environment. Our professional services team can examine your current business process. Whether it is implementing new system functionality to improving current workflow, Investran can provide expertise in improving your business practices.

Enhanced Reporting

In the current climate, investors are demanding and applying pressure for more transparency in reporting and greater access to information.

Our team can scope and guide you through the requirements process to identify gaps and develop solutions. It is no longer about Financial Statements - Investran can meet the requirements of straight through reporting inclusive of Deal Pipeline, Portfolio Monitoring and Financial Statements. We offer Crystal Reports, flexible Investran Excel OLE DB reporting and Custom Report Wizard tools to meet your reporting needs.

Process Automation and System Integration

Repetitive business processes, extensive month end reporting to outside systems, systematic calculations for daily or quarterly transactions; Investran Professional Services provides expertise and experience automating client business processes. Through automation clients have consistent execution of tasks that saves finance and IT man hours during critical periods and eliminates the risk of human error. Our team manages clients through all phases of the project; requirements, specification, development, quality assurance and user acceptance testing.

User Training

Investran Professional Services offer training to meet all our client needs. Training is offered on all Investran Core modules, our integrated applications and Active Template development. Training offers the added value of brushing up on current version enhancements as well as polishing client's current skill set. Depending on your requirements, training can be tailored to specific areas of focus or general system functionality. New this spring, Investran is rolling out standardized group trainings available to all users to accommodate clients with new starters or those looking to enhance their existing skills.

WE OFFER

- System Assessment
- Enhanced Reporting
- Process Automation and System Integration
- User Training
- Upgrade Support / Services
- Investran Dedicated Resource
- Investran 6.0

"I was concerned that the course would be too basic or too advanced as I am only an occasional user and only use limited functions, BUT it was neither!

It clarified certain things and educated on lots more, this course is well constructed for beginners."

Administrator

"Good course, good speakers. It was very instructive."

Real Estate Investment Firm



If you would like to discuss professional services and how we can help with projects, please contact us at investran.services@sungard.com

EMEA and APAC
Tel: +44 791 96 91 012

Americas
Tel: +1 646 445 8214

Upgrade Support Services

With the launch of Investran version 6.0 many clients are making decisions on next steps within their business and how Investran will help. Our team can provide understanding of current version enhancements and how they can be applied to the client business model. Upgrading to a new version is a project that Investran Professional Services can help manage. We offer project management, test plan preparation and execution, review and upgrade of custom solutions and general evaluation of benefits for your business.

Investran Dedicated Resource

Investran outsourcing services deliver all the benefits of an in-house team, while minimizing risk and administrative overhead. We help organizations quickly resource projects that need specialist application skills and extensive domain experience. An Investran Dedicated Resource is a highly skilled professional with extensive knowledge of private equity, your line of business and Investran.

An Investran Dedicated Resource spends 50 - 100 percent of his or her time within your organization as an active team member, working exclusively on your internal projects and issues. In addition, the Investran Dedicated Resource reduces the workload of your own resources by taking on tasks according to your requirements. The specifics of the Investran Dedicated Resource role vary, but typically include:

- Functional and / or Technical System Business Analysis
- Process Documentation and Workflow
- Interest / Impact Evaluation of New Releases
- Project Management / Participation
- Migration and Reporting Assistance
- Issue Coordination and Resolution
- Internal Project Resourcing

Investran 6.0

Work with Investran Professional Services to help you implement and further simplify your pipeline management and fundraising, integrate accounting into your front office workflow, centralize document management and improve Investran security concept. Investran 6.0 provides more control over field layout including the ability to mix and match system and user defined fields, hide unused system fields, and render editable and read-only sections. Capture data according to your business needs with custom business rules. Investran can also perform arithmetic operations against any combination of data fields to provide an additional level of input validation.

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