

Business Process Automation

Agresso Business Process Automation is an integral part of the Agresso Business World solution, a fully-integrated suite of ERP solutions for companies in the professional services and public sectors. It consists of intelligent and customizable processes, alert and response mechanisms, automated exception handling and flexible configuration tools to suit complex business needs.

Business Process Automation is at the heart of the exceptional productivity gains made possible with Agresso Business World. The workflow, business alerts and process automation capabilities in Business Process Automation alert managers when things go off track, proactively direct supervisors and employees to complete critical tasks and push actionable financial information to executives concerned with controlling costs. This results in continuous improvement in day-to-day operations and more efficient use of the organization’s people and assets.

Post-Implementation Agility

Agresso Business Process Automation offers cutting-edge “post-installation agility” making it ideal for evolving organizations that need to alter ERP system setup in response to change. This puts the individual user in the driver’s seat to meet organizational requirements rather than handcuffing your organization to a rigid information system that inhibits growth as your needs change.

Agresso is ERP with No Expiration Date – it protects organizations from the stress and high costs associated with ongoing ERP re-architecting.

Workflow

Agresso’s *Workflow* application allows best practices to be defined for any business process and creates workflow rules that automatically prompt completion of the process according to those defined practices.

For example, every time an employee undertakes the process of preparing an estimate for a project, processes are carried out correctly and on time. Estimating materials, projecting employee time or calculating commissions have the appropriate management approvals to ensure quality control. The bottom line is that the project is completed more quickly and efficiently.

"We also like the invoice scanning process — our previous process required that each accounts payable invoice be handled more than once; at minimum once by the approver and a second and often a third time by the accounts payable staff. With Agresso and the scanning process, we have eliminated at least one step and have minimized handling paper unnecessarily.

This creates an efficiency and has streamlined our process. As well, all approvers have found scanning to be easy to use and much quicker than the manual approval process in the past. The alerting is also just being explored by us. The initial feedback is that it's terrific!"

- Mark Roberts, Manager of Finance,
City of Port Moody

Agresso Business World includes a library of template best practices that organizations can use; there is no need to re-invent tried and true processes. Or Agresso’s templates can be used to significantly reduce the time to develop more organization-specific processes.

Processes in *Workflow* are built one step at a time, through defining rules and exceptions with an intuitive, drag-and-drop graphical tool. Further, automated alerts can be embedded to prompt for certain tasks to happen. For example, *IntellAgent* sends an alert when a manager’s approval hasn’t

Agresso Business World Applications

Financial Management	Human Resources and Payroll	Reporting and Analytics
Project Costing and Billing	Procurement Management	Business Process Automation

been given within the specified time, to ensure timely, efficient workflow.

Agresso's agility allows processes to be refined and re-defined in *Workflow* as often as necessary. Version control saves scenarios and multiple alternatives can be explored.

IntellAgent

After defining a process in *Workflow*, *IntellAgent* can automatically monitor data and events within that process for critical or time-sensitive conditions and then automatically generate alerts to the appropriate employees and/or managers. These alerts can be in the form of email messages, text messages, or pop up alerts within Agresso Business World. Users have the ability to define the method by which they prefer to receive alerts. *IntellAgent's* "watchdog" capability ensures that exceptions or problems don't slip through the cracks, making it a powerful tool for fast-moving organizations who need to respond rapidly to business critical events.

IntellAgent not only triggers processes within the Agresso Business World application, it can operate externally as well. For example, it can prompt a user to call a customer about an overdue invoice, send an email to a supplier about late delivery or issue a warning to a contractor about repeated safety violations.

Perhaps even more impressive, *IntellAgent* can go beyond mere alerts to actually initiate certain tasks on its own. For example, with *IntellAgent*, if an electronic invoice arrives from a vendor, that particular vendor's electronic invoices are automatically imported into Agresso. In this way, employees are freed from error-prone, manual tasks and are allowed to focus on value-added activities.

Action Overview

While *IntellAgent* alerts employees and managers when specific, time-critical events haven't occurred, *Action Overview* triggers user-defined, automated processes.

In addition to providing "to do" prompts, *Action Overview* also acts as the vehicle for recording the actions actually performed in response to the prompts, such as filing a building permit, confirming receipt of a shipment or awarding a project.

Flexi-fields

Unlike some ERP systems that confine the organization to working only within the system's defined parameters, Agresso *Flexi-fields* are user-defined fields, screen tabs and tables that capture critical business information unique to the organization. *Flexi-fields* contain the same rich functionality and system-wide integration as the standard Agresso Business World data fields, such as:

- User-defined field validation, data type and field length
- Full access to all reporting and analytics capabilities
- Seamless integration with other applications
- Access to all of Agresso's Business Process Automation tools —IntellAgent, Workflow and Action Overview

New flexi-fields can quickly be added to incorporate new information to as needs change, without having to re-implement the whole ERP solution. Some examples of uses of flexi-fields are:

- Add a screen tab that summarizes all time booked to a project
- Add a screen tab with information on forecasted, billed and collected revenue
- Add an Agresso screen with outstanding help desk inquiries stored in a third-party CRM system
- Add a table of the history of consultants who have been assigned to a project

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Agresso is the ERP Market's Definition of Agility