EXECUTIVE SUMMARY

Control of crit cal business processes

Accountability with traceability

Integrated directly into Embrace business processes

Mult-level workfow approval rout ngs

Escalatons of workfow approval

Electronic not f cat ons via Workf ow Manager, email and SMS

Allows both simple and complex workfow rules

Workfow rout ngs within user-defned teams and hierarchies Control over business decisions is simplifed with rules based workfow managing t me sensit ve processes

Overview

The Embrace workfow system is designed to allow control over core activtes associated with a variety of business processes within your organisat on. User defined workfow processes are linked to specific business processes, where the status of the linked workfow process is used to monitor and afect the optons available within Embrace applications. One example is Purchase Order Entry, where the conversion of a purchase requisit on into a purchase order can be controlled by a userdefined approval process.

Examples of standard workfow-enabled business act vit es within Embrace include Purchase Requisit on Conversions, Fixed Assets Management, Supplier Management, Service, and Master File changes The fow of these act vit es can be designed and controlled, based on userdef ned rules and logic, with the aim of giving businesses an enhanced level of control over crit cal business processes.



Users are grouped into user-defined teams, with each team member being allocated specific roles within the team. Workfow tasks are assigned to a particular role-player within a team with designated timeframes to complete the task.

Organisat ons implement workfow to achieve improved accountability and control of their business processes. In part cular, approval management enables business to delegate the capture of transact ons to lower levels of staf while retaining accountability at a managerial level.

Automat c escalations ensure that any transaction that is not approved within the stipulated time does not get held up, it can be automatically escalated through to the next party in the approval chain. Reporting and audits of all actions and escalations are available to track efficiency and maintain accountability.

Ef cient and t meous workfows af ect all areas of your business, from of ce stat onery through to raw materials.



Embrace Customers use workfow for :

Controlling of crit cal business processes Accountability with traceability

Mult-level workfow approval rout ngs

Escalat ons of workfow approval

Electronic notfcatons via Workfow Manager, email and SMS

Allowing both simple and complex workfow rules

Workfow rout ngs within user-defined teams and hierarchies



<u>Features</u>	<u>Benef ts</u>
Control of business processes	Accountability with traceability reducing risks and providing control
	Branch dependant workf ow processes allow diferent rules for diferent locat ons
	Select on of which areas require workf ow implementat on ensure control where relevant without creat ng unnecessary overhead
Integrated workf ow solut on	Auditable and visible management of transact ons directly within the ERP system including
	Purchasing approvals based on value or procurement budgets
	Credit note processing dependant on inspect on and approval
	Fixed Assets acquisit on, transfers and disposals authorised before act oned
User def ned teams	Teams can be def ned per locat on or job funct on
	Role based teams ensure staf turnover does not af ect workf ow processes with new staf merely taking over job funct ons within workf ow rout ngs
User defined rules and options	Flexible rules based workf ow triggered on transact on values or transact on types, specif c customer or supplier rules or specif c user defined rules
	Uniquely tailor workf ow processes to your specific needs using the simple workf ow design tools
	Ease of use using easily customised data validat on opt ons
Automatic Escalations and	Ensure t me based decisions are act oned
Stand-In Users	Overdue act ons do not hold up crit cal processes but can reroute based on your rules
	Temporary stand-in funct onality allows your team members to designate suitable replacements whilst they are on leave
Not f cat ons via email, SMS and online	All not f cat ons can be conf gured for frequency, format and delivery method
	Not f cat ons and escalat ons are accessible, traceable, auditable and visible
Workf ow Administrat on	New workfow processes are easily defined and managed
	Detailed history of steps and t melines for all workf ow processes
	Reset opt ons only available to authorised users to maintain integrity

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For more informaton on

or contact your Embrace Account Manager or Sales Representat ve.

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PRODUCT

Workfow

RELATED PRODUCTS

Financials

Service

Rental

Sales

Purchasing

Distributon

Manufacturing

Workfow Designer

The Workfow Designer is used to define specific workfow approval processes, related to specific Embrace transactions, that map the business specific operational processes.

Workfow processes are made up of groups of related workfow act ons steps that are interlinked to define a part cular process fow.

The logical rules required to determine the fow of a workfow approval process are set out in the Workfow Designer. With the fexibility of allocat ng specif c teams within part cular business units, a common workf ow process can be defined for use across the organisat on to ensure consistency, ensuring that specified

teams are targeted within ea separate business unit.

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Opt ons to pause, cancel and reset workfow processes can be linked to specific user defined status codes, allowing a completely user defined workfow process to be configured, unique to your organisat on specific rules and requirements.

Workf ow Manager

The Workfow Manager presents users with their list of workfow items to be act oned. Overdue items are highlighted and a range of fiters are available to assist in managing workloads.

Integration into the underlying Embrace transactions allows users to enquire directly on the specific transactions before approving items, with additional options to view any associated document at achments.

Designed to allow users to manage tasks, monitor interactions and provide insight to the individual

Workflow Mana	ager								
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workfow processes, the Workfow Manager also provides a centralised tools for supervisors to view, manage and reallocate tasks assigned to team members and subordinates.



Workfow Viewer

The Workfow Viewer allows users to view the status and progression of a specific transaction's workfow process.

Users are able to drill into the associated workf ow tasks, to both view and manage the associated tasks, with a history of all previous act ons taken during the current workf ow process being readily available. An auditable chronological history show all prior approvals and any workf ow or task rerout ng that has happened.

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Users are able to drill directly into the underlying Embrace applicat on in order to view the source transact ons. Access to relevant informat on is critical when taking workflow decisions.

Workfow Escalat on and Not f cat on Service

The Embrace Workfow module continually monitors assigned workfow tasks in the background, sending out reminders and escalation notifications to ensure users take timely action. The system allows user defined notifications to be sentivia email, Embrace mail and SMS. In addition, supervisors and team leaders are able to monitor tasks and activities that have been initiated for their colleagues and sub-ordinates, and intervene if necessary, to ensure that business continuity is not affected

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