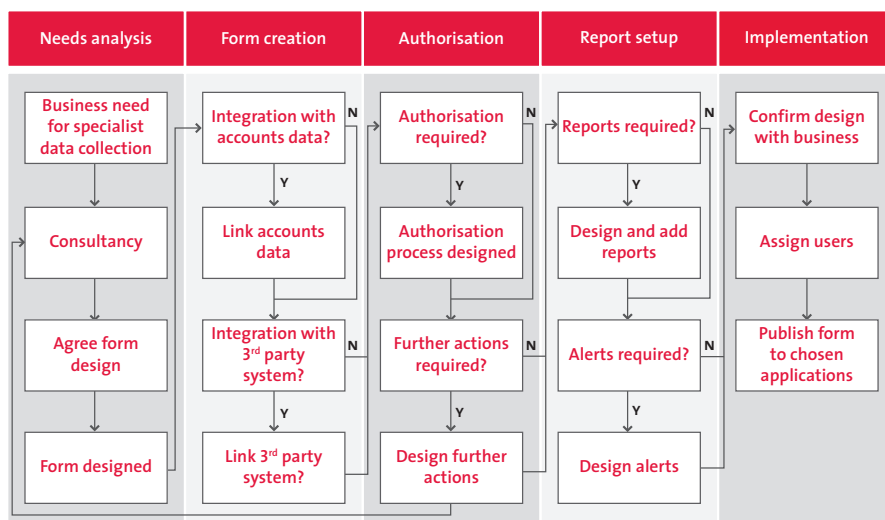


Workflow Forms

This innovative module lets you capture all your business information electronically and make it easily available to users all around your business. Workflow ensures forms take a pre-defined path as it moves between your staff and managers for extra information, authorisation and sign-off. To speed up the flow of information around your business, alerts can be used to advise if a procedure is delayed, breached or ready to action. Forms can be made in any chosen location within your software or via the web for access anytime, anywhere.



Creating your Workflow Form: our consultants follow a tried-and-tested formula to ensure that your Workflow Form is designed to your exact specification.

Increase efficiency

Workflow Forms enable you to recreate any business process electronically, using automation to speed the capture and flow of information around your organisation. By enabling users to create their own, more efficient workflows and linking them to your core processes, you empower your staff and release the burden on other departments.

Tasks that would normally require accounts intervention or specialist knowledge, such as a request for a new supplier code or information on staff absence, can now be instigated by any authorised user.

Reduce paper & storage

Labour-intensive processes requiring lengthy emails, printouts and hard copies can now be reduced to a few clicks. This not only saves paper but lowers the cost of storing it.

Flexible design

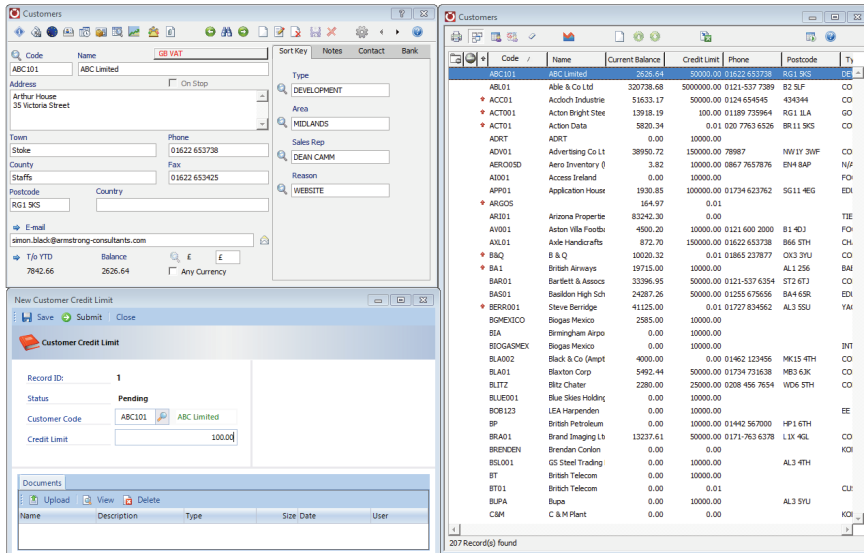
Using flexible layout tools, tabs, menus and labels, we will create a form to your exact specification – or train you to create your own. A single form can comprise multiple pages with the styling necessary for your business. Tabbed pages, drop-down menus, numerical fields, date fields, data grids, and notes can all be labelled with the terminology that makes sense to you.

To ensure the right information is collected, you can build rules into the design to prompt the user for the exact data required. The system will also ensure that mandatory fields are completed and that certain criteria is fully validated or adds up.

A number of forms are provided as standard with the module, including the ability to create and edit a supplier record. This enables users to instigate the process online, subject to a tight approval process.

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Quick & easy: this Workflow Form enables the user to easily adjust a chosen customer's credit limit and send for authorisation. The submission will appear in the approver's Inbox, enabling them to quickly prioritise and action tasks.

Configurable approval workflow

Configurable rules automate the route each form takes as it travels through your business.

You set the rules

You can set as many levels of authorisation as required, from simple one-step approvals to routines that encompass all the people and departments necessary to meet your stringent procedures. For example, a typical form might be originated by one person, added to by another, approved by a manager and authorised by a director. Each form can have independent rules for the data capture required and its route through your organisation.

Alert functionality

Alerts and reminders prompt your staff to originate, amend or approve forms as necessary. Once you have documented your procedures and stipulated the circumstance and timing of each necessary action, the system keeps you on track. Alerts ensure that the message is always delivered on-time wherever your staff might be.

Next actions can be instigated by replying to the alert if appropriate. Any data that needs further clarification can be routed back to the originator for re-submission along with explanatory notes if required.

Reduce errors & save time

When entering information on sundry forms, references to prime records such as employees, customers, suppliers, projects and products, can all be validated against data held in your core business system. This eliminates the mistakes and confusions that can occur when scribbling on paper-based forms.

Information brought to you

Each user has their own 'Inbox', enabling them to see all the actions pending, e.g. approvals and to drag/group inbox actions by type. By pushing information to the end user, rather than the end user having to go and find it for themselves, Workflow Forms save valuable time searching for information so increasing efficiency.

Improve data security

User permissions are easy to set within the software, giving you tight control over your information at all times. For example, you can assign security levels to fields on a Workflow Form so they are only visible and enabled for the right person and/or department at the right stage within the workflow.

You can enable/disable these fields dependant on the user and stage within the workflow and mark them as public or private.

Regardless of where data is entered, or how its image travels around your business, everything is saved and secured in the central database. This makes back-up and duplicating data off-site easier and much more reliable

Increase visibility

As an extension of your business system, Workflow Forms extend visibility into those hard-to-reach areas of your business.

Information can be shared with customer, supplier and employee records and analysed to provide a wealth of statistics and reports. Managers and staff are better informed, minimising the risk that anything will be hidden, overlooked or forgotten.

Collaborate more effectively

Digitally stored information is easier to share with a wider range of departments and staff making 'open book' policies more practical to deliver. More detailed information can be shared more cost-effectively and staying up-to-date takes less time and effort. Information can be shared with remote offices and home-based staff.

Increase governance

You determine who sees what and when. You remind staff to look at information that might have been ignored. You are alerted if essential tasks are delayed or overlooked.

Now you have the systems to ensure that your company is following best practice.

View online, 24:7

Workflow Forms are delivered in a number of ways depending on your Access solution. For example, you can view them directly from our accounts or manufacturing software. Or if you have purchased our web-based solution, all forms can be accessed online, providing any authorised user with instant visibility of documents wherever they are working – at home, on the move or at any of your global sites. Selected information can be made available through your company intranet, customer portals and your public website if appropriate.

Either way, Workflow Forms empower your staff and release the burden on other departments – you no longer need to trawl through paperwork or phone around for information.

Workflow Form examples

Workflow Forms are highly flexible. Here are just some examples of how this functionality could benefit your business:

Change or edit records

Useful where staff may need to:

- set or increase a credit limit
- enter/change a new supplier
- request a project code
- validate additional fields within a customer record (e.g. 'directions to site' which have been checked as current).

Store supplementary data

Use when you need to:

- view information held in other areas of the system e.g. HR and payroll
- store information against part records (manufacturing).

Approve credit card expenses

With a Workflow Form, you can:

- send all individuals a Workflow Form with a digital attachment of their business credit card statement for checking
- submit the form for approval by a manager
- post expense journals into the nominal ledger (breaking out VAT and differentiating re-chargeable expenses from subsistence).

Gain budgetary approvals

With this Workflow Form, you can:

- send budget templates to a wide range of staff
- have all these entries reviewed and approved before updating the departmental or project budget.

Smooth the appraisal process

Forms can be used in a HR context to create a smooth dialogue between managers and staff. For example:

- a manager could send the appraisee a form requesting an update on specific topics or projects
- the appraisee can then complete the form prior to the meeting with any additional information recorded during or after the appraisal
- on completion, the form can be forwarded to a divisional manager for reference and the entire dialogue saved in the central system (and attached to the person's HR record if required).

Who we are

Access UK is a specialist software developer and consultancy business with over 20 years' experience. Our consulting service consists of fully accredited consultants, experts in their field, operating across the UK and Ireland.

Proudly independent, all our software is developed in the UK, supported locally and accessible globally.

Our award-winning solutions take a whole-company approach, aiming to cut through complexity and increase efficiency. At every level.

Already field-leaders in accounting and finance, Access also offers solutions for manufacturing and distribution, professional services automation, carbon emissions measurement, reporting, HR, payroll, document management, service management and CRM.

Access has won a host of prestigious awards; most recently 'Software Package of the Year' at the 2010 Accountancy Age Awards and the 'Enterprise Accounting & Finance' and 'SME Human Resources & Human Capital Management' categories at the 2010 Sift Media Software Satisfaction Awards.

Our solutions are fully accredited by all the recognised industry bodies, including HM Revenue & Customs (HMRC), Business Application Software Developers Association (BASDA) and the Institute of Accountants in England and Wales (ICAEW). We're also committed to developing our software on a Microsoft platform and have been a certified 'Gold Partner' since 2002.

We are proud to have been ranked as one of the UK's top employers, reaching 85th in The Sunday Times 100 Best Companies to Work For 2011.

Further information

For further information on the Access software portfolio, please telephone us on **01206 322 575**, email **info@theaccessgroup.com** or, alternatively, visit our website at **www.theaccessgroup.com**