



Providing Solutions to Improve Business Processes™

iApprove™

(An Approval Workflow Solution)

Presented by:

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ISS Group: Summary

- **Founded in 1986 (www.issgroup.com)**
- **Implemented ERP Solutions 1986 – 2000**
 - **QAD 1995 – 2000**
 - **Developed first QAD B2B eCommerce application jointly with QAD in 1996 called *MFG/PRO on the Web: Trading Partner Transactions (TPT)***
 - **Ingersoll Rand, Tyco, Eaton, GE Lighting, John Crane, Remy International,**
- **Developed V.1 of **iApprove™** in 2004 as part of our iPurchase™ Solution**
- **Providing Web-based Business Process Improvement Solutions to the QAD User Community 1996 - Today**

ISS Group: Business Process Improvement

- **iApprove™** – An Approval Workflow Management Solution
- **iPurchase™** – A PO Requisition Management Solution
- **iQuote™** – A Customer Sales Quote Management Solution
- **iBridge™** – A Real-time Bi-directional Integration Solution
- **Microsoft CRM™** – A Sales/Marketing & Customer Service Solution
- **Infor EAM™** – A Plant Maintenance and MRO Inventory Solution
- **Replenishment+™** - An Inventory Planning and Execution Solution

ISS Group: Clients



International Automotive Components



HOME diagnostics™



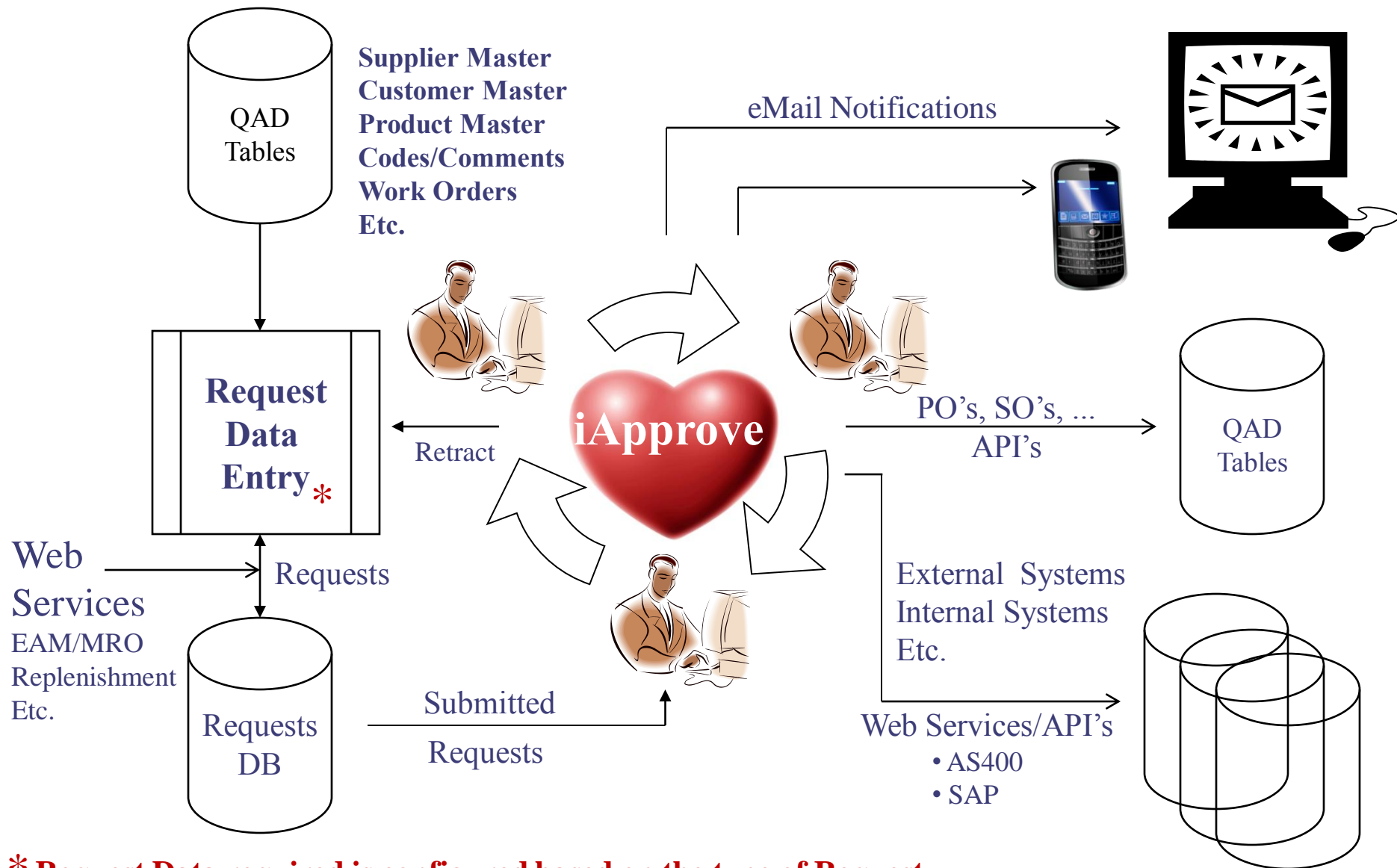
iApprove™ : Functional Objective

To provide a solution for electronically routing 'requests' through an organization for review and approval.

- Approval of PO Requisitions (iPurchase)
- Approval of Sales Quotes (iQuote)
- Approval of Supplier Catalogs (iPurchase)
- Approval of HR Requests
- Approval of Expense Requests
- Approval of Travel Requests
- Approval of New Product Requests
- Approval of Project Budgets/Yearly Budgets
- **Any request made within your organization, which requires approval from people other than the individual making the request**



iApprove™ : The 'Heart' of iPurchase™ & iQuote™



*** Request Data required is configured based on the type of Request.**

iApprove™ : Approval Workflow Engine

- Web-based solution – Access Anytime/Anywhere with only Internet Browser
- Real-Time Integration with QAD EA
- Works with any ERP application for hybrid ERP Environments
- User Defined Approval Routing Rules based on any Data within Request, Unlimited Number of Rules
- Configurable Rules (Point and Click - no programming required)
- Dynamic Approval Routing based on Rules upon Request Submission
- Simultaneous/Sequential and Group Approvals, Out of Office Designation
- Approval Re-Routing Upon Request Change
- Line Item or Entire Request Approval

iApprove™ : Approval Workflow Engine

- Supervisory Escalation Approvals
- eMail Notifications to Required Approvers
- Ability to Retract Request prior to final Approval
- History of all Request Approval Attempts
- Approval Simulation prior to Request Submission
- eMail Notification to Request Originator upon final Approval or Rejection
- Time/Date Stamp of User Approvals/Rejections
- Ability to Add/Remove Approvers and Force Approval
- Request Queue for Approvers, Hold Requests, Batch Approval
- Mobile Functionality

iApprove™ : What's a Rule?

- ❑ Rules can be based on any and all of the data within the request.
- ❑ Rules work together to determine the people required to Approve a request.
 - **Example(s) of simple Rules:**
 - All Requisitions greater than \$10,000, John (CEO) or Joe (CFO) needs to Approve
 - All Sales Quotes with a discount greater than 10% and for Product Line 'x', Jane (Sales Manager) and Mary (Product Line Manager) needs to Approve
 - All new Supplier Catalogs, the Buyer responsible for that specific Supplier must Approve
 - All Vacation Requests, the Requestors immediate Supervisor and someone in the HR department needs to Approve

iApprove™ : What's a Rule?

➤ Example of complicated Rule

- All Capital Requisitions between \$1000 and \$25,000 which include the following Departments (a,b,c,d) for the Ohio or the Cleveland Plant being shipped UPS or FedEx, OR the Project Code begins with an 'M', OR the Account Code is ≥ 8000 and ≤ 8999 , OR Supplier is ISS Group, Sam, Jane, John, and someone from the Accounting Group need to Approve

Rules are conditions which are created with and's and or's, and determined to be true or false at the time a request is submitted for approval.

If a Rule is determined to be true, the people or Groups associated with that Rule are assigned as Approvers to the request.

ISS Group: Want to learn more?

For more information about the ISS Group solutions, please visit our website at:

➤ **www.issgroup.net**

For a one on one demonstration of any of the ISSG Solutions, please contact Andy Weinstein at:

➤ **aweinstein@issgroup.net**

➤ **or via phone at 973-879-6077**

iApprove™ Demonstration Example

- ❑ Using a PO Requisition for demonstration purposes we will show how the Approvers dynamically change based on the following Rules:
 - **1st Example – Buyer Rule (Buyer defaults from Supplier)**
 - No conditions, all Requisitions will require a Buyer to approve
 - Approver – Buyer on Requisition (Craig Wolffis)
 - **2nd Example– Plant Manager Rule**
 - Plant (Site) – 10000
 - Approvers – Plant Manager for Site 10000 (Alex Chen)
 - **3rd Example– Finance Group Rule**
 - Requisition Type – Expense Request
 - Department (Cost Center) – 2000
 - Plant (Site) – 10000
 - Approvers – Finance Group (Jim Bird, Bob Buckley)
 - **4th Example– CEO Rule**
 - Amount > \$25,000
 - Approvers – CEO (Scott Carpents)
 - **5th Example - Supervisor Approval Function**
 - Hierarchical escalation starting with Originator's Supervisor













iApprove™ Demonstration Example

Header Information

Header Notes/Attachments

Master Comments

Approval History

Activated On	Level	Approver	Approved By	Status	Notes	Last Notified
Approval Attempt: 1 submitted on 12/07/11 12:08:14 pm 						
12/07/11 12:08 pm	10	 Supervisor 1 -   Craig Wolfis		PENDING		12/07/11 12:08 pm
	11	 Supervisor 2				
	35	 Alex Chen -   Bill Kops				
	35	Finance Group  Jim Bird  Bob Buckley				
	800	 Scott Carpents				
	900	 Craig Wolfis				