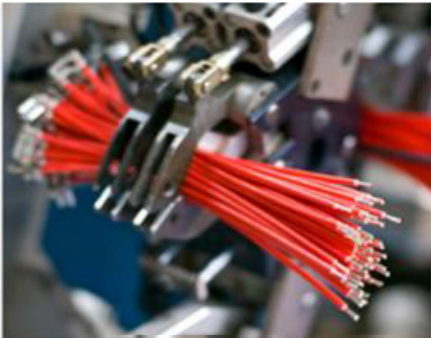


'Data-Driven' Approval Routing and Workflow Technology for QAD



**WE ARE
STRATEGIC**



Panel



Sr VP Solutions Architecture

Tim Rabaut



CEO

Andrew Weinstein



*Director of Manufacturing &
Supply Chain*

Craig Jones



VP Solutions

Frank Salesi



Channel Partner



Strategic Information Group Introduction

About us

- Established: 1992
- Employees: 115+
- Locations: USA (5), Ireland, UK
- Customers: 1200+ Companies
 - 650+ full implementations
 - 350+ life science customers
 - 100+ reached exit strategy
- Products
 - QAD Adaptive ERP
 - Quality Systems
 - ERP Integrations & Extensions
 - FDA Validation Toolkit/Protocols
- Services
 - Implementations
 - Upgrades
 - Integrations
 - FDA Validation
 - Managed Services QAD and EDI
 - QAD Help Desk (helpSERV)
 - Staff Augmentation



Why does Strategic Recommend ISSG Approval Routing Technology?

- We specialize in helping small companies grow exponentially, and large(r) companies gain efficiencies in their processes. Tools that streamline processes and add process visibility/control are critical to achieve this objective.
- **FDA Validated** for our Life Science Clients and **SOX Compliant** for our Public Clients.
- To satisfy more complex routing requirements not satisfied by QAD approval routing functionality and create **validated QAD transactions** upon approval of process requests.
- **Approval requests** can be created by a user completing a pre-defined web Process Request Form; also based on a *triggering event** within QAD.

*such as a change in a Supplier Remit to Address or a Sales Order Price change



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ISSG

Introduction

ISS Group Introduction



- Founded in 1986 (www.ISSGroup.com)
- 1986 – 2000 sold and implemented various ERP, CRM and eCommerce Solutions to SMB and Fortune 1000 Manufacturers
 - 1995 – 2000 QAD Reseller
 - 1996 released 1st QAD add-on Solution:
MFG/PRO on the Web; Trading Partner Transactions
- 1995 – Today have provided add-value Solutions and Implementation Services to 300+ QAD User Organizations
- Provider of “*Data-Driven Approval Routing/Workflow Solutions for QAD*”



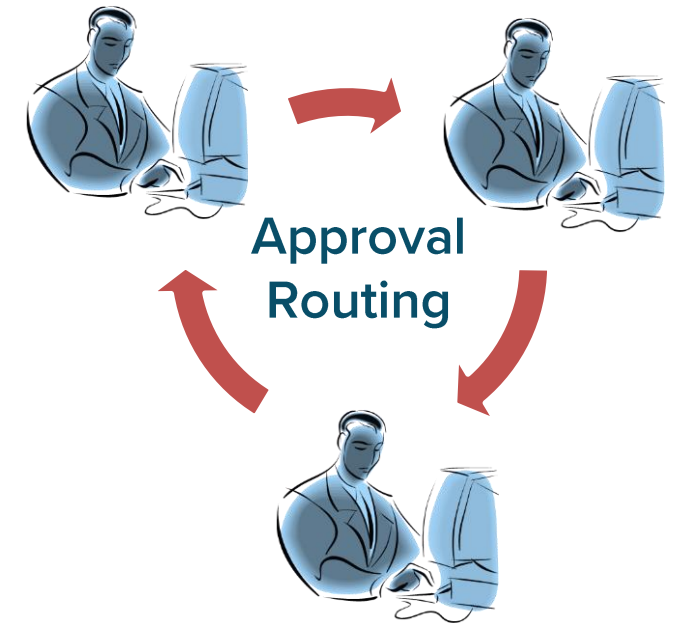
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What is *Data-Driven* Approval Routing?

Data-Driven Approval Routing

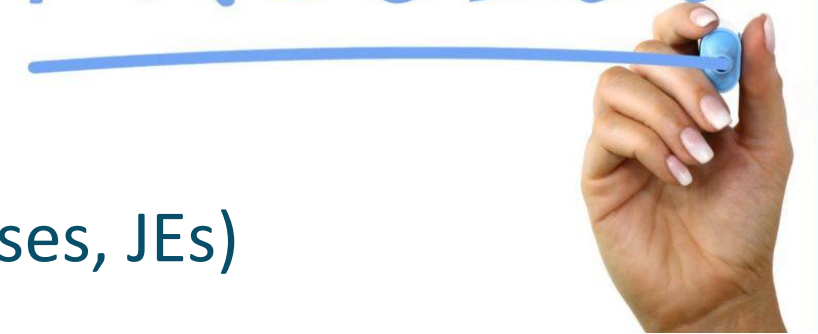
is technology that creates and alerts a list of Approvers based on the data associated with a specific *Process Request*, and then performs an *Action* upon final approval of that Request.



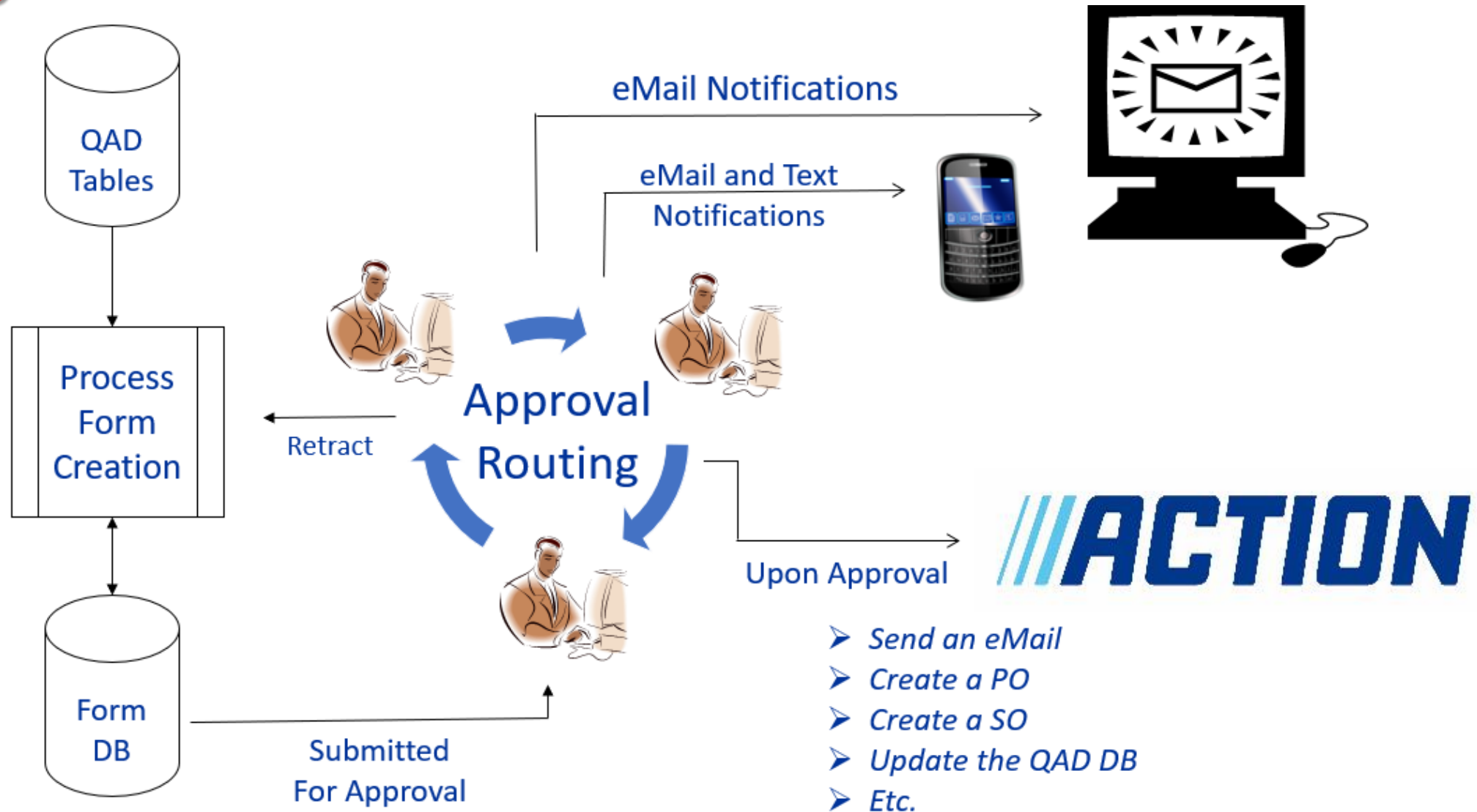
Examples of Process Requests

- ❁ PO Requisition Approval
- ❁ Supplier Invoice Approval
- ❁ Customer Sales Quote Approval
- ❁ Financial Requests (i.e.; Project Budgets, Expenses, JEs)
- ❁ Inventory Requests (i.e.; Unplanned Issues/Receipts)
- ❁ Production Requests (i.e.; Scrap Authorization, Assembly Rework)
- ❁ Shipping Requests (i.e.; Freight Authorizations)
- ❁ Documented QAD DB Updates (i.e.; Customer Credit Limit)

PROCESS



Integrated with QAD



Any data on the Request can be used for Routing!

PO Requisition Process Request Form

Req#: T0405004 Entry Date: 08/15/2019 Need Date: 08/22/2019 Perf Date: 08/22/2019 Type: Capex

Header Information Header Notes/Attachments Master Comments Approval History Blanket Information **Not Yet Submitted**

PO Number: **5004000** Ship To: Textbook Dollars Buyer: Tomoko Koyama (Buyer) Customer: Supplier: CDW Bill To: Textbook Dollars Originator: Frank PEA: Supplier Nbr: 5004000 Site: Textbook Dollars On Behalf Of: Frank Capital Equipment: Supplier Address: A Division of Hughes Intl. Currency: United States Dollar Deliver To: Frank CAL List: Oxnard, CA 90293 Who Pays Freight: Copied From: Chemical: Terms - 2/10-30 Ship Via: United Parcel Service Supplier Phone: 805-923-1254 Supplier Fax: Supplier Contact: Ms. Danielle Gregory Supplier Email: fsalesi@gmail.com

Is a PO Required?: Allow PO Consolidation?:
Are all Items Req'd?: High Priority?:
PO Blanket?: Need a Quote?:

New Item Add from Catalog Add from Punchout View Deleted Items Batch Edit Items

Line	LT	Item	Due	Acct-Sub-Dept	Project	Budget Code	Qty	Cost	Ext Cost
001	P	3679037 - Apple USB C Digital AV Multiport Adapter 43201401 - Graphics or video accelerator cards	08/22/19	8200-1000-0900			1.00	67.62	\$ 67.62

Total \$ 67.62



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Another Process Request Example

Unplanned Issues/Receipts

Inventory Trans Number: 1 User: Frank Salesi (Logoff) DEMO1 Theme: Cupertino

Status: **APPROVED** Requestor: **FRANK** Entry Date: 2019-10-23 12:13 -04:00

Header Approval History

Number: 1

Short Name: *

Reason Code: *

Description: This is my description for the issues that will be listed below. *

Total Issues:	0.00
Total Receipts:	0.00
Net Total:	0.00

Items

Type: Issue *	Site: 10000 - San Diego Main Plant *	Total: 385.50
Item: 10-10000 *	Loc: 100 - Raw Materials/Assemblies	Cost Center: 0100 - Assembly
Description: OASIS(TM) COOLING SYSTEM HOME/I	Lot/Serial:	Account: 5100 - PURCHASES (EXPENSED)
UOM: EA *	Ref:	Sub Account: 1000 - Entity 1000
Qty: 1 *	Sales/Job:	Project: 111
Remarks:		

Save New Delete Copy Notes Audit

Another Process Request Example

Customer Credit Limit Increase

Credit Increase Requisition User: root (Logout) Theme: Cupertino

Account Data | Credit/Sales Data | Approval History

Approval Information
Status: **APPROVED** Requestor: **KSCHNIDT** Entry Date: **05/16/19 12:47:16.032-04:00**

Account Data

Division: **John Crane** (circled)
Name: **ZENITH PUMP SERVICES**
Terms: **NET 30 DAYS** (circled)
Account: **87296** (circled)
Current Limit: **10,000.00** (circled)
Master Bill:
New Limit: **75,000.00** (circled)
Since Year: **2019**
Collector Code:

Other
UCC Filed: Type:

Credit Increase Requisition Browse












<input type="checkbox"/>	Status	Name	Account	New Limit	Current Limit	Terms	Originator	Req Date	Division
<input type="checkbox"/>	APPROVED	SUPERMETANOL C A V	75717	1.00	500,000.00	CIA	kschnidt	Fri May 10 2019 17:36:25 GMT-0400 (Eastern Daylight Time)	John Crane
<input type="checkbox"/>	APPROVED	DOW AGROSCIENCES	23565	100,000.00	100,000.00	N60	kschnidt	Fri May 10 2019 18:19:27 GMT-0400 (Eastern Daylight Time)	John Crane



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Example of Sequential, Multi-Channel, and Group Routing

Level	Approver	Approved By
Approval Attempt: 1 Submitted On 09/11/19 5:37:47 pm 		
50	 Vince (Director)	<div style="display: flex; align-items: center;"> <div style="font-size: 3em; margin-right: 10px;">}</div> <div>Sequential</div> </div> <div style="display: flex; align-items: center; margin-top: 10px;"> <div style="font-size: 3em; margin-right: 10px;">}</div> <div>Multi-Channel</div> </div> <div style="display: flex; align-items: center; margin-top: 10px;"> <div style="font-size: 3em; margin-right: 10px;">}</div> <div>Sequential</div> </div> <div style="display: flex; align-items: center; margin-top: 10px;"> <div style="font-size: 3em; margin-right: 10px;">}</div> <div>Sequential</div> </div> <div style="display: flex; align-items: center; margin-top: 10px;"> <div style="font-size: 3em; margin-right: 10px;">}</div> <div>Sequential</div> </div> <div style="display: flex; align-items: center; margin-top: 10px;"> <div style="font-size: 3em; margin-right: 10px;">}</div> <div>Group (and OOF Designee)</div> </div> <div style="display: flex; align-items: center; margin-top: 10px;"> <div style="font-size: 3em; margin-right: 10px;">}</div> <div>Sequential</div> </div>
100	 Demo Director (upto \$25K)	
100	 Brian Caulfield (Director - upto \$25K)	
175	 Vaseem Mahboob (CFO - upto \$300K)	
200	 John McDermott (President - upto \$1MM)	
600	Finance Group	
	 Glenn Weinstein - 	
	 Scott Carpenter  Kelly Anderson	
900	 Tomoko Koyama (Buyer)	



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eMail Notification to Approvers

From: iPurchase ISSG <iPurchase@issgroup.net>
Sent: Tuesday, December 15, 2020 12:45 PM
To: Frank Salesi <frank@njhitmen.org>
Subject: Inventory Transactions - Approval Required

Inventory Transactions

Andrew Weinstein, Peter Galvin,
Your approval is required for the below request.

ViewApproveReject

Number	Reason	Name
80	Return Inventory	Heather wants two phones

Description

Longer description

Total Issues	Total Receipts	Net Total
106.00	0.00	-106.00

Notes

Entered By	Date/Time	Comment	File
Frank Salesi	12/15/20 12:35 pm	123	Excel 60_serial.txt
Frank Salesi	12/15/20 12:35 pm	See retired settings file attached	retired settings.txt
Frank Salesi	12/15/20 12:34 pm	Note 2	
Frank Salesi	12/15/20 12:34 pm	Note 1	

Type	Part	Qty	Remarks	Site/Loc	Serial/Ref	Total	Trans Nbr
ISS-UNP	22-100 CORD,POWER USA,EUROPE 1	1		10000 100		105.00	0
ISS-UNP	22-110 CORD,POWER,EUROPE,WEST	1		10000 100		1.00	0

Requestor	Request Date	Status
Frank Salesi	12/15/20 12:32 pm	PENDING

Approve or Reject
directly from eMail!

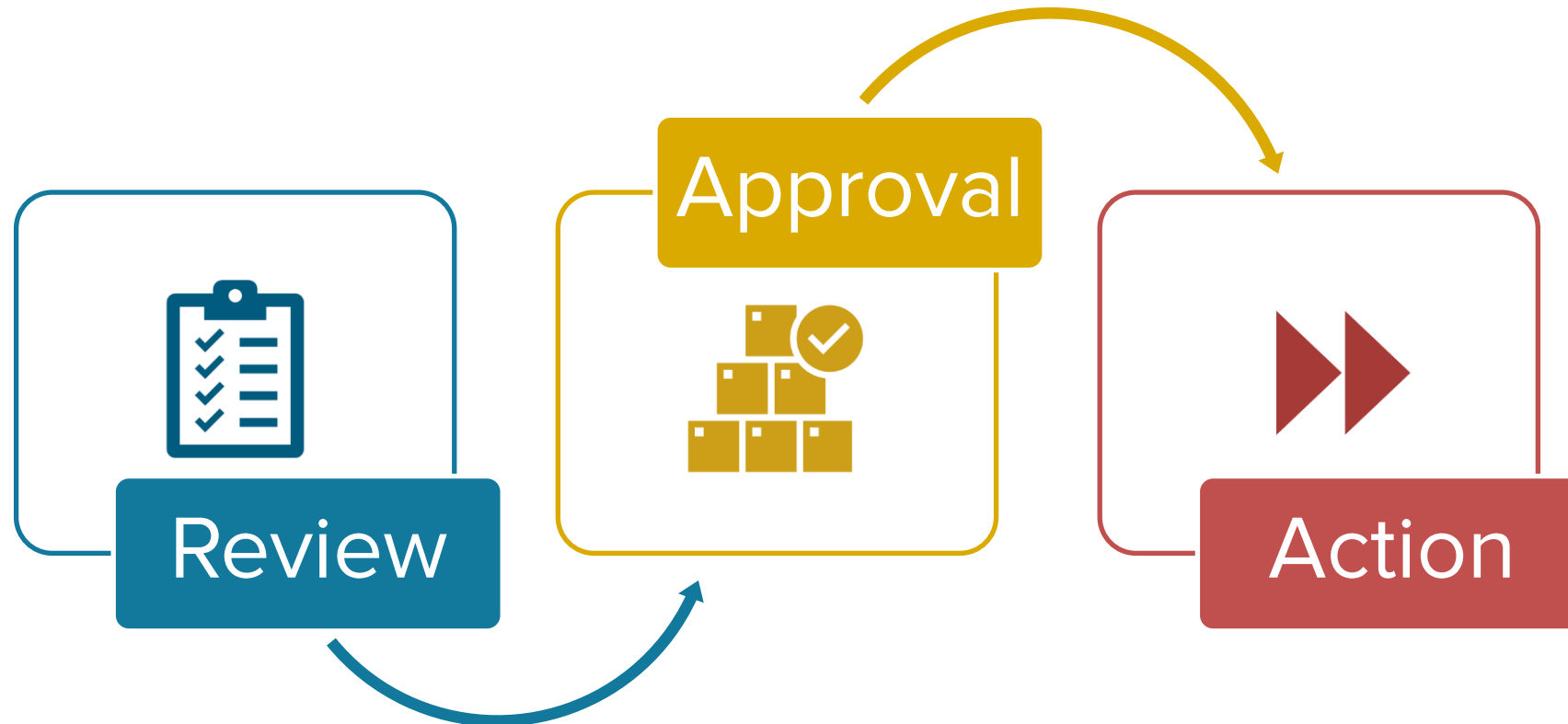


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Primary Objective of ISS Group Technology

To improve the flow and control of QAD ERP related Business Processes that require a review and Approval activity prior to performing an Action



Technology wrapped inside GoTo Market Solutions

iPurchase™ - PO Requisition Management/Approval

iVoucher™ - Supplier Invoice Reconciliation/Approval

iQuote™ - Customer Sales Quote Management/Approval

iApprove™ - Business Process Approval Routing/Workflow

- Inventory Processes (i.e.; Unplanned Issues/Receipts)
- Financial Processes (i.e.; Invoice Approvals, Budget Approvals)
- Production Processes (i.e.; Assembly Rework)
- Triggered QAD DB Changes



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Results achieved by our Clients

- ✓ Reduced process cycle time/costs
- ✓ Improved process visibility/tracking
- ✓ Elimination of redundant data entry
- ✓ Reduced auditing costs
- ✓ Implementation of process controls
- ✓ Elimination of paper forms
- ✓ Process standardization





Case Study

Craig Jones

Director of Manufacturing & Supply Chain



History



Who is SI-Bone?

- Headquartered in Santa Clara, Ca., SI-Bone, Inc. is a medical device company that pioneered minimally-invasive surgery of the SI joint with the iFuse Implant System. SI-Bone is focused on helping patients in one of the most under-served, under-diagnosed, and under-treated areas in orthopedics, the sacroiliac (SI) joint.

How were purchases managed prior to iPurchase™?

- Paper requisition routed for approval manually
- Manual entry of each data field on a paper form
- Excel spreadsheet used to track final approval
- PO Maintenance in QAD used by limited users to generate the PO



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Objectives of Implementing iPurchase™



- ✓ Eliminate manual entry and handling of PO Requisitions.
- ✓ Reduce cycle time from Requisition → PO creation.
- ✓ SOX compliance.
- ✓ Audit history for auditors.
- ✓ Broaden user base at a low cost.
- ✓ Integrate with QAD.



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Implementation Overview



Functionality

- 60 Users of iPurchase™
- Base Work Order add-in
- Blanket POs
- Modifications:
 - Buyer selected at the end of the process
 - Icon added to Req Inquiry indicates whether files are attached to Req.



Team

- Finance
- Buyers
- Supply Chain
- IT



Mentoring

- Help with Installation
- Help with Operational Qualification Docs
- Trained Users in a Single Session



Timeline

- 5 months from project kick-off to go-live
- GO-LIVE 7-27-20

2020 Volume Stats – 5 months



of Purchase Order Requisitions created – 979

of Purchase Orders created – 964

of PO Lines created – 1196

\$ of total spend - \$13.4M



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Time Savings Over Previous

- PO Approval/Placement process efficiency gains

SI-BONE has seen a **35-40% improvement in PO placement process time** thus allowing buyers to focus on other priorities.

Additional Benefits

- Improved control over PO's
- Improved productivity managing Orders
- Less 'touches' for Requisitions



ISSG Approval Routing Technology Demo

Frank Salesi

VP Solutions



Frequently asked questions...

1. How is this Technology integrated with QAD?
2. Can a request for approval be automatically created by QAD upon a 'triggering event' instead of a User having to complete a Form?
3. Can Actions occur during the approval process in addition to the end of the approval process upon final approval/rejection?
4. How is this Technology priced?



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Questions?



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To Learn More

Contact your Strategic or ISSG Account Executive



www.strategic.com

timr@strategic.com



www.issgroup.com

aweinstein@issgroup.net



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