

# Automate your manual processes with BPA and Forms

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*Commercial in confidence*

# Agenda



What are Forms?



Forms and Business Process Automation (BPA)



Business Processes and Workflows



Demonstration



Questions

# What are BPA Forms?



A simple way to capture data from both users, and members of the public; replacing paper based forms and processes



Styled for either a corporate or consumer audience



Consistency in both design and implementation, regardless if they are for HRP or Financials.



Data enabled forms and logic and validation before submission



Capture supporting documents as attachments



# Where Forms are used in Ci Anywhere



HRP forms (17 shipped in 2018A)



Financials to request creation and update of a supplier/creditor and debtor details.



CRM Contact and relationship creation

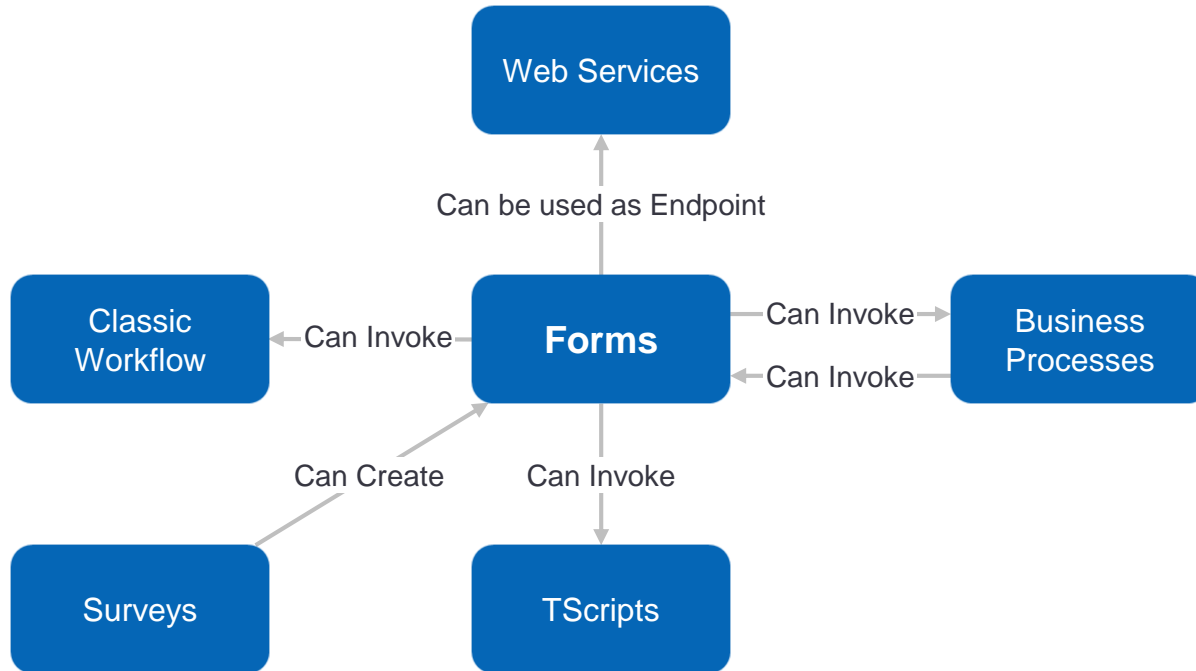


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# How Forms fit into BPA



# Demonstration



# What is a Business Process?



Simple way to assign tasks to users, allowing them to perform actions with a click.



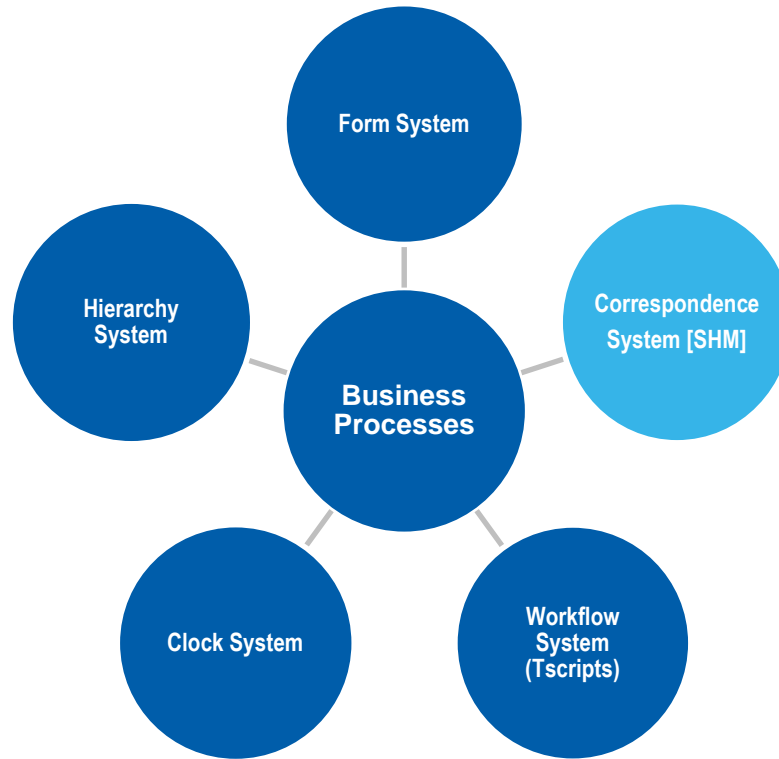
All tasks appear in a single place



Configure with service metrics and escalations for operational monitoring and management



# How Business Process fit into BPA





# What can a Business Process Do?

## Tasks and Actions



### User tasks

- e.g. request additional user input (via Forms)



### System automation tasks

- e.g. retrieve and update business entities



### Branch tasks



### Send Notifications



### Generate Documents (DocOne)



### Call External Services (via TScripts)



# What can a Business Process Do?

## Assignments



Assignments are fundamentally different to previous versions of software.

Task assignments options:

- Specific Users
- Resource Pools
- Positions (HRP)
- Profiles
- Roles
- Hierarchy (CiA)
- Group of Users
- To a Function

# What can a Business Process Do?

## Notifications and Escalations



### Notify Users

- Notification
- Standard Email
- Interactions (SHM)
- T1 Connect (actionable emails)

### Typical Escalation Actions

- Notify Users (as above)
- Reassign the Task
- Progress the Process (to the next step or alternate path)



# Demonstration





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Transforming business, making life simple