



SharePoint for Business Process Automation

Case Study: Accounts Payable System

WHO WE ARE

ShareSquared, Inc. is a Microsoft Gold Certified Partner comprised of Microsoft SharePoint Certified Masters, Microsoft SharePoint MVP's, people formerly on the Microsoft SharePoint Development team and Senior Architects and Developers.

WHAT IS BUSINESS PROCESS AUTOMATION?

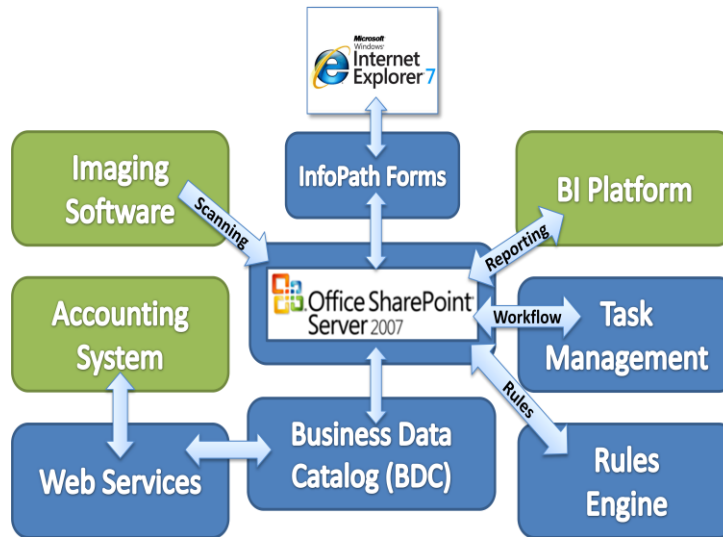
BPA is used by businesses to enhance efficiency and reduce costs by:

- Improving and automating processes through the use of software systems
- Integrating disparate software applications
- Reducing keystrokes and input errors

This case study demonstrates how SharePoint can be used as a platform for BPA. The solution in this case is an Accounts Payable Processing System.

Find out how you can use SharePoint to automate your most critical business processes.

800.445.1279 x300



- **Automate** Critical Business Processes and Cut Costs
- **Harness the power** of MOSS workflow, forms, security, document management, etc
- **Rapidly develop and deploy** business solutions
- **Seamlessly integrate** with other business systems to share data throughout the enterprise
- **Identify process bottlenecks** and improve efficiency
- **Enhance business intelligence** with reporting, audit logs, dashboards & alerts

Microsoft Office SharePoint Server (MOSS) is typically used for portal and collaboration solutions. While MOSS is well-suited for this use, it inherently has many architectural components that can be used to build sophisticated web-based applications beyond portals.

SharePoint components such as InfoPath Forms, Workflow, Document Management, Role-based Security, Audit Logging and Alerts, among others, can be uniquely combined to create specific line of business applications that automate various business processes.

With the proper design, scalable, extensible, enterprise applications can be assembled using SharePoint's existing architecture. Because these systems "re-use" SharePoint components, they can be developed and deployed throughout an enterprise in a fraction of the time it takes to implement solutions from the ground up using other platforms.

These applications are as extensible as SharePoint itself. For example, adding a document library to a

SharePoint-based business application or creating a filtered view of the data within an application is the same "point and click" operation as in a SharePoint portal. Because the platform supports extensibility, applications built on the platform are inherently extensible, oftentimes without custom development.

One key form of extensibility is the ability to integrate these applications with other systems in the enterprise. MOSS ships with a component called the Business Data Catalog (BDC). The BDC facilitates integration to disparate systems via configuration, i.e. without custom programming. Using the BDC, data and functionality can be "exported" out of and shared amongst myriad applications in the enterprise. This data can be used in BI applications, dashboards, portals, etc.

Application integration is further enhanced by the support of deep integration with the Microsoft Office suite of products, imaging software, BI tools, etc.

SharePoint is an unparalleled platform for building extensible, integrated, enterprise applications that automate critical business processes.

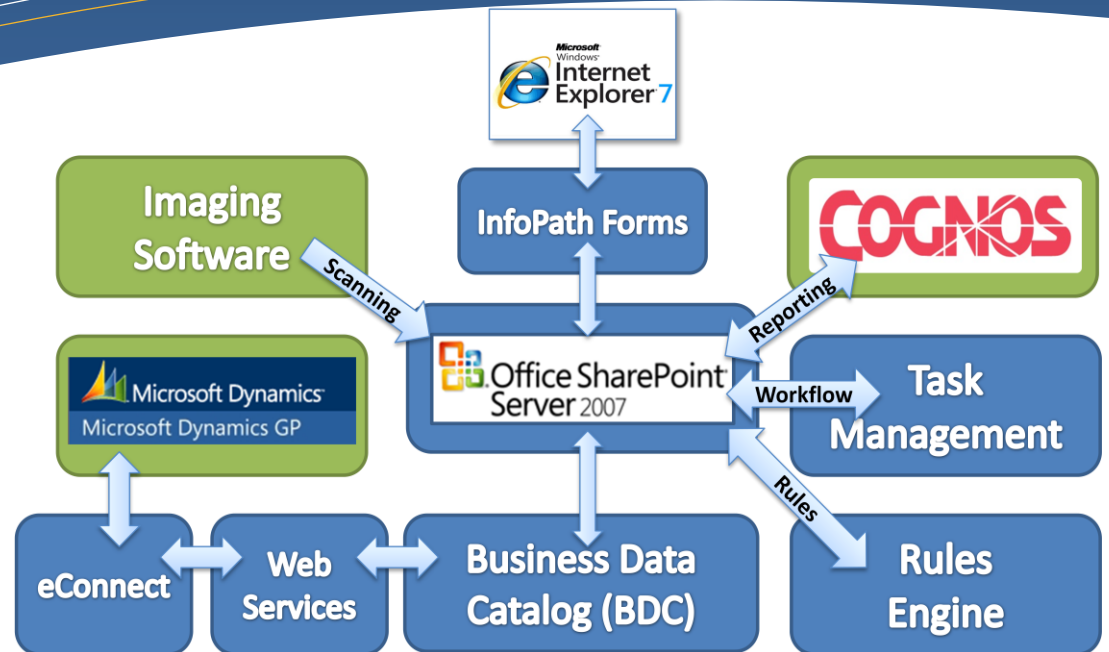
Share 
The SharePoint Solution Experts!

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Case Study: Accounts Payable Processing System

ACCOUNTS PAYABLE SYSTEM FEATURES

- Utilizes any imaging software to scan invoices into a SharePoint document library
- Sophisticated workflow that facilitates electronic approval of invoices on a line item basis by multiple approvers
- Integrates to virtually any accounting system using the Business Data Catalog
- Can be integrated with popular BI solutions such as Cognos, SQL Reporting Services and Microsoft PerformancePoint Server 2007
- Easy to use web based interface for setting up invoice approval rules & routing based on invoice amount, type, etc.
- Reports and alerts for invoices that are not processed or approved within configurable parameters
- Data can easily be exported to Excel using the built-in integration with SharePoint



Solution Overview

For many organizations, managing accounts payable activities is a time consuming, error prone and often manual process that requires several FTE's and involves significant overhead. Invoices can spend weeks on approvers desks, get lost or even worse, paid without the required approval. This problem is exacerbated when approvers are geographically dispersed in different offices and/or when invoices require approvals by more than one person, sometimes on a line item basis. Confidentiality is often a major concern as well (e.g. on legal services invoices that contain case information). With invoices floating around the organization, executives lack the necessary financial data to manage the enterprise effectively.

The Accounts Payable Processing System **built by ShareSquared on top of the SharePoint platform** automates invoice processing using a combination of scanning software, InfoPath Forms, Windows Workflow Foundation, the Business Data Catalog and a custom Web Service. The system enables users to scan and automatically route invoices electronically for approval.

Using SharePoint's role based security model, A/P Managers can monitor A/P Clerks' queues and overall process metrics. Approver groups are set up through the familiar SharePoint interface and facilitate line item approval on invoices, potentially by multiple approvers. Sophisticated workflows route invoices to designated approvers and track invoice progress. InfoPath forms are used for data entry with all data secured using SharePoint's security model, which in turn leverages Active Directory. Invoices are then stored and managed using SharePoint document libraries. Auditing and alerts are natively provided by SharePoint.

The system integrates with the Microsoft Dynamics Great Plains (GP) accounting application pulling purchase order and vendor data into SharePoint and, upon approval, putting the image of the invoice into GP. Because integration is achieved using the Business Data Catalog, virtually any accounting software can be used. SQL Reporting services and Cognos are used to provide business intelligence support.

The system is built on top of the SharePoint product and can therefore easily be extended and customized for the specific needs of an organization. Unlike proprietary solutions, this solution is based on a reusable and extensible Service Oriented Architecture. ShareSquared is at the forefront of using SharePoint beyond the traditional portal implementation as the next generation application development platform.

Contact us today!
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