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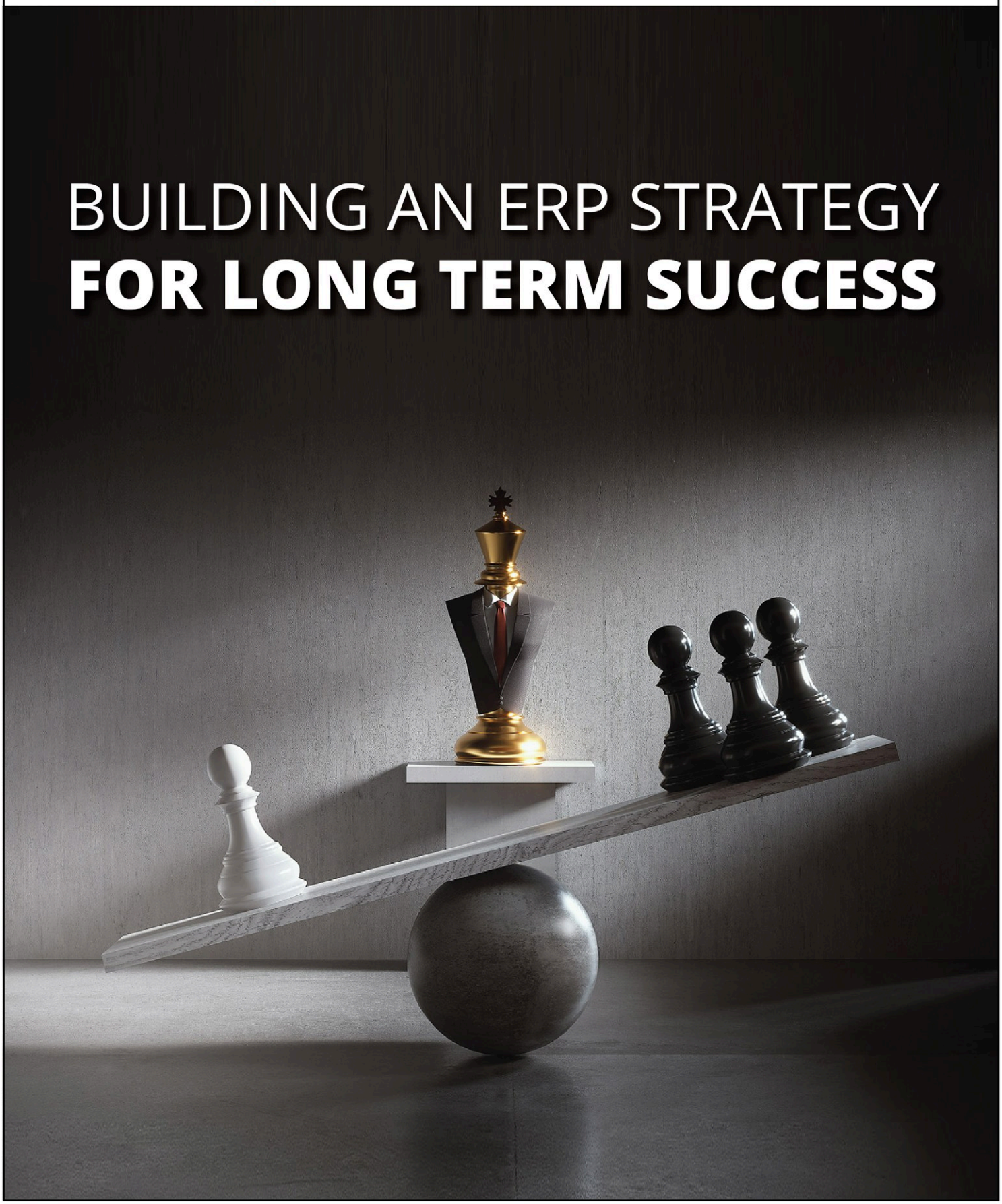
BUILDING AN ERP STRATEGY **FOR LONG TERM SUCCESS**



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Pinar SENGUL

EDITOR'S NOTE

Many of us are well aware of the benefits that ERP software brings to the development of businesses, but the truth is that success depends on how companies **deploy** and **apply** ERP systems. Businesses should have a clear ERP strategy that supports their business strategy.

Imagine your company has just gone live with a new ERP system and everyone is excited to see the benefits that everyone was talking about. Well, that might not be the case and the ERP system might fall far short of expectations. That is because your company did not have a clear roadmap beforehand.

In this issue of ERPNews Magazine, we have discussed why businesses should be building an ERP Strategy for long-term success and the key elements of a successful ERP deployment strategy.

Also, don't miss out on the special interview with **Adina Simu, Chief Product and Commercial Officer at Auditoria** in which we had the opportunity to discover her point of view about new and emerging technologies that are impacting fintech.

The latest news on the ERP industry, customer studies, and much more are also awaiting you through the following pages as always!

Sincerely,

Pinar Sengul

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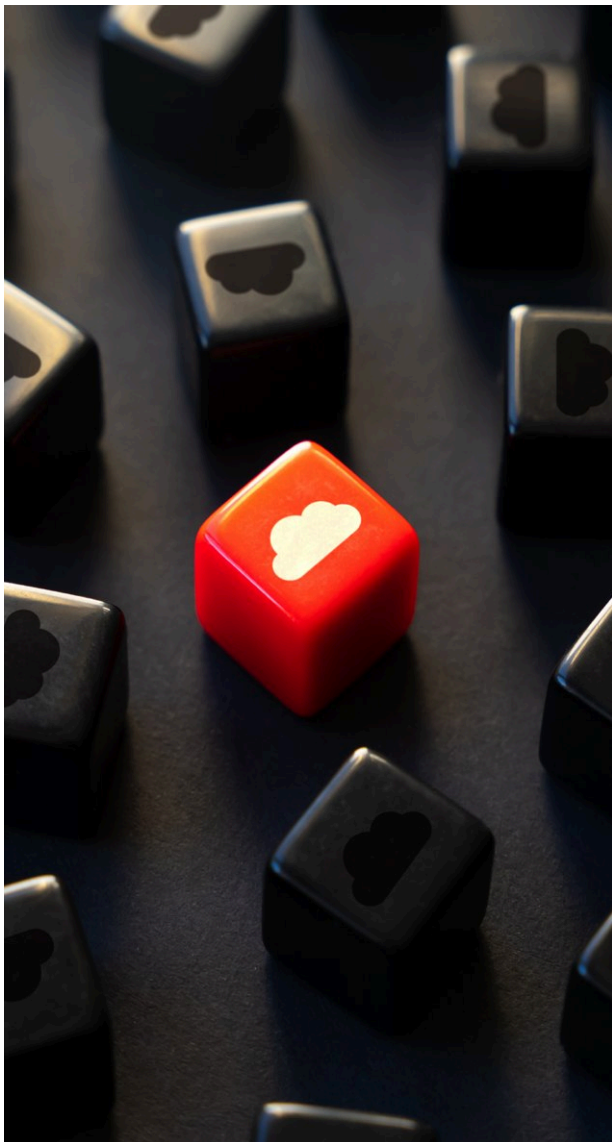

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PUSH THE BOUNDARIES WITH AUDITORIA!

*Interview with **Adina Simu,***
Chief Product and Commercial Officer, Auditoria

It can be difficult and labor-intensive to manage financial and accounting procedures. Intelligent automation can assist businesses in automating end-to-end financial processes by combining robotic process automation (RPA) and artificial intelligence (AI). This increases process efficiency, reduces the likelihood of errors, and frees up staff time for additional value-added activities.

Auditoria is the leader in natural language technologies for corporate finance, helping finance teams automate business processes in AP, AR, GL, and Vendor Management to accelerate cash performance. We have discussed the latest trends in finance automation with Adina Simu, Chief Product and Commercial Officer at Auditoria.AI and she shared her valuable insights about how new and emerging technologies are impacting fintech and the different applications of machine learning and AI in finance.

1. Could you tell ERP News readers about yourself and your role at Auditoria.AI?

I have been building and bringing Enterprise Software products to market for more than 20 years. My focus has been developing purpose-built automation solutions for corporate finance teams. As the Chief Product and Commercial Officer at Auditoria.AI, I lead the team that innovates and creates new products at Auditoria.

At Auditoria, I have led several product updates to build on our SmartFlow Platform and support new SmartFlow Skills that position Auditoria as a leader in finance automation.

2. Auditoria.AI's mission is to make organizations more efficient and competitive. Can you tell us the secret recipe for that?

The team at Auditoria strives day in and day out to dramatically improve the lives of finance professionals. Many finance professionals don't attend school to respond to vendors and customers all day. However, this is exactly what many finance teams have to do each and every day. Instead of being able to take the time to develop business strategies and have a seat at the table, finance is stuck reading and responding to emails, collecting data, and developing reports of data that may change in an instant.

Auditoria is flipping this on its head. We are empowering finance to take back control of their inbox. While some may say that AI may eliminate jobs, we embrace AI to create new, higher-level jobs, bringing more people to a function crucial to the business and opening up new opportunities for professionals across finance.

We aim to increase finance teams' speed, accuracy, and efficiency using intelligent SmartBots to automate manual and time-consuming accounting processes while deriving greater cash position visibility.

CFOS AND FINANCE EXECUTIVES NEED TO FIND SOLUTIONS THAT GET EMPLOYEES EXCITED AGAIN TO DO THE TYPE OF WORK THEY SIGNED UP FOR AND ARE EXPECTING TO DO. I FIRMLY BELIEVE THAT THE SOLUTION IS AUTOMATION. AUTOMATION IS THE FUTURE OF FINANCE.

3. Following the epidemic, businesses have been impacted in various areas during the past year. Finance offices are the key department an organization needs to obtain a competitive advantage. Which actions should be taken by the CFOs in terms of improving the business performance?

One of the biggest challenges finance teams have been experiencing is that most of their time is spent on repetitive tasks. These tasks are often riddled with human error leading to inaccuracies and inefficiencies. It's no surprise that finance professionals have begun to lose interest in their jobs due to the routine, repetitive, mundane tasks they've been assigned to do.

CFOs and finance executives need to find solutions that get employees excited again to do the type of work they signed up for and are expecting to do. I firmly believe that the solution is automation. Automation is the future of finance.

The global pandemic proved the immediate effect of digital transformation: digitalization makes an organizational impact and advances global initiatives to enact real change. Intelligent automation replaces time-consuming finance processes. CFOs that lead their teams to embark on the journey of automation in the back office will soon realize they've recovered thousands of hours of lost time that was previously spent entering data and performing follow-up. These hours could now be spent on value-added business tasks.

4. New and emerging technologies are impacting fintech in many significant ways. Could you tell us about the different applications of machine learning and AI in finance?

Numerous use cases in Accounts Receivable, Accounts Payable, and General Accounting require constant communication with suppliers and customers, providing or receiving information in various form factors such as text, PDF or Excel, processing it for correctness in the context of the specific business process. Auditoria SmartBots equipped with Natural Language Technology, Computer Vision, and Knowledge Graphs assist the teams in communicating with stakeholders within and outside the organization and drastically cut down the time they spend reviewing emails and looking up data.

Typical use cases include employing SmartBots to provide payment status, process incoming documents, and prepare monthly close with accurate information. SmartBots also offer general support close to real-time, with constant communication with suppliers and customers - a practice that is becoming a prerequisite for companies these days who want to be profitable and successful, and deliver outstanding serviceability across interactions.

5. What are the benefits of machine learning and AI for finance departments?

In my mind, there are three significant benefits of Machine Learning and AI for finance departments: reducing human errors, being more time-efficient, and reducing workload. At Auditoria, our solutions are designed to achieve these benefits by employing Intelligent Applications. Built with cutting-edge AI, Machine Learning, Cognitive RPA, NLP/U, and Computer Vision, Auditoria streamlines and automates collections, adds controls to procurement spending, optimizes shared inboxes, improves vendor management, and maximizes cash performance. It removes friction and repetition from mundane tasks while automating complex functions, such as collections, complex data extraction, invoice accrual capture and creation, and strategic insights.

AUDITORIA SMARTBOTS EQUIPPED WITH NATURAL LANGUAGE TECHNOLOGY, COMPUTER VISION, AND KNOWLEDGE GRAPHS ASSIST THE TEAMS IN COMMUNICATING WITH STAKEHOLDERS WITHIN AND OUTSIDE THE ORGANIZATION AND DRASTICALLY CUT DOWN THE TIME THEY SPEND REVIEWING EMAILS AND LOOKING UP DATA.

Automation enables finance teams to think outside the box and push the boundaries of the capabilities and accomplishments of the finance office. AI-based automation improves the day-to-day work life with automated work. It also allows finance professionals to advance in their careers with new insights to revolutionize how they do their job while also helping propel the enterprise forward.

6. Finance process automation uses software to improve overall efficiency, and with the right software, financial processes no longer become bottlenecks for other business workflows. What should be the top criteria when choosing the right software for finance automation?

When looking for the right software for finance automation, remember a few things to remember when evaluating which SaaS system will best automate finance tasks in your back office. You should consider four main criteria when choosing your automation systems.

Your AI-based SaaS automation system should:

1. Adapt quickly to your existing systems
2. Inherently understand finance back office challenges and industry challenges in general
3. Provide decision support and recommendations
4. Be purpose-built for your needs

7. Could you summarize Auditoria's new product innovations for 2023?

Our AP and AR Helpdesk SmartBots will be supercharged with the latest Natural Language Technology that understands, processes, and generates content based on Large Language Models, the same base technology that powers ChatGPT. This buzzy AI-tech tool has taken the world by storm in the last few months.

We also invest in the SmartBots' advanced analytic capabilities, providing recommendations, insights, instant metrics, and KPIs for AP and AR teams.

Having these kinds of capabilities and visibility has been a perennial challenge for finance teams - and they are now solved with Intelligent Apps that deliver autonomous engagement through an automation platform built for ERPs and finance, such as the Auditoria SmartFlows Skills Platform.

"OUR AP AND AR HELPDESK SMARTBOTS WILL BE SUPERCHARGED WITH THE LATEST NATURAL LANGUAGE TECHNOLOGY THAT UNDERSTANDS, PROCESSES, AND GENERATES CONTENT BASED ON LARGE LANGUAGE MODELS, THE SAME BASE TECHNOLOGY THAT POWERS CHATGPT. THIS BUZZY AI-TECH TOOL HAS TAKEN THE WORLD BY STORM IN THE LAST FEW MONTHS.

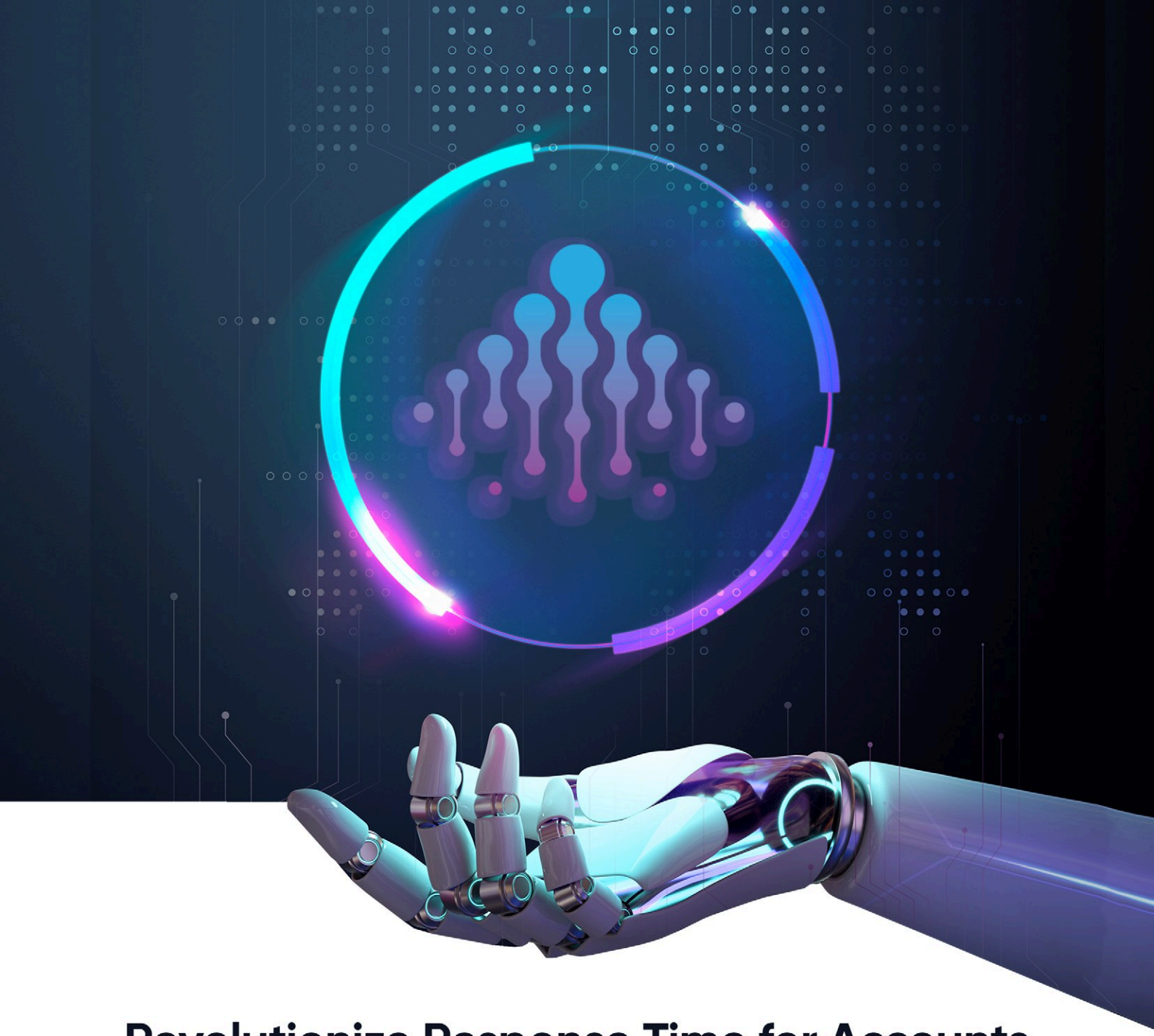
8. What are the future strategies for the growth of Auditoria.AI? Are you planning to expand to different locations globally?

Our customers today cover three continents. We are looking to continue on our growth trajectory and are partnering with companies such as Workday, who deeply understand the needs in the enterprise back office. We are committed to supporting them with new, advanced, cloud-based technology worldwide. In our experience, Enterprise Finance and Accounting teams are already global!

A 20+ year veteran of IT, networking, security, data management, virtualization, cryptography, and cloud technology, Adina leads the team that innovates and creates new products at Auditoria. Prior to co-founding Auditoria, Adina held roles in product management at Oracle, Palerra, CipherCloud, VMware, ProofPoint, ZL Technologies, and Cisco. Adina holds an MBA from The Wharton School, a master's degree in Computer Science from IMT Atlantique, and bachelor's degree in Computer Science from University POLITEHNICA of Bucharest. Adina is CISSP certified and has been issued four USPTO patents.

About Auditoria

Auditoria is the leader in natural language technologies for corporate finance, helping finance teams automate business processes in AP, AR, GL, and Vendor Management to accelerate cash performance. By leveraging natural language processing, artificial intelligence, and machine learning, Auditoria removes friction and repetition from mundane tasks while automating complex functions, and providing real-time visibility into cash performance. Corporate finance and accounting teams at leading companies including Armanino, Arrive Logistics, FreshWorks, LiveRamp, UserTesting, and more use Auditoria to accelerate business value while minimizing heavy IT involvement, improving business resilience, lowering attrition, and accelerating business insights.



Revolutionize Response Time for Accounts Payable and Receivable

Auditoria's AP and AR Helpdesks utilize automated responses to speed-up response time, improve vendor and customer satisfaction, and scale with automation using AI-enabled SmartBots that automate redundant and manual management of shared AP and AR email inboxes.

Schedule a demo

www.auditoria.ai

AUDITORIA®

BUILDING A COMPOSABLE ERP STRATEGY FOR LONG-TERM SUCCESS

*Article by **Mike Guay,***
Vice President Customer Success, Infor

During my years as an ERP analyst at Gartner, we spent considerable time helping customers define and refine their ERP strategies. They differ based on your organization, where you're starting from, your risk tolerance and other factors. The best ERP strategies align to organizational objectives and are measurable and actionable. Composable ERP introduces several new factors.

A composable ERP strategy must accommodate democratized development and integration beyond the typical IT-centric and standard business process approach. Periodic reviews have always been a best practice, but now they are necessary to account for new technology and capabilities constantly emerging in the market.

There is not enough time and space here to do a comprehensive analysis of all the factors involved in a successful composable ERP strategy, so I'll focus on some key components and a few specific examples.

To achieve long-term success, an ERP strategy must at a minimum:

- Align to business or organizational objectives
- Establish value based on outcomes
- Focus on flexibility and user experiences
- Enhance workforce skills to leverage new technology

Align to business or organizational objectives

Every organization will have specific objectives based their industry. A for-profit enterprise might want to increase margin and/or increase revenue and market share. A nonprofit organization may want to operate more efficiently, provide more services with the same budget and improve stakeholder satisfaction. Whatever your organization or vertical, start by defining your objectives broadly and refine them with specific outcomes.

Something like "achieving digital transformation" is too broad and of minimal use. "Leveraging a composable ERP suite and its associated enterprise application platform (EAP) technology to improve efficiency across the organization" is better but is really just a principle upon which to build. Another example might be "leveraging process automation and AI capabilities to automate routine processes across the organization."

One intangible objective is common for many organizations: "We will utilize state-of-the-art technology to differentiate us as an organization and entice talent to join." In this era of fierce competition for talent, this can be an important factor. These are all legitimate business objectives. Yet to achieve success, organizations should define objectives in terms of measurable outcomes.

> **"A COMPOSABLE ERP STRATEGY MUST ACCOMMODATE DEMOCRATIZED DEVELOPMENT AND INTEGRATION BEYOND THE TYPICAL IT-CENTRIC AND STANDARD BUSINESS PROCESS APPROACH. PERIODIC REVIEWS HAVE ALWAYS BEEN A BEST PRACTICE, BUT NOW THEY ARE NECESSARY TO ACCOUNT FOR NEW TECHNOLOGY AND CAPABILITIES CONSTANTLY EMERGING IN THE MARKET.**

Establish value based on outcomes

One example of establishing a specific business outcome might be onboarding new talent. An example is "We're going to reduce onboarding time from four weeks to three days." Historically, organizations would calculate the value of this outcome as a financial impact measured by the hours saved multiplied by some average hourly rate. This is not the best way to define the value — especially as part of an ERP strategy. Better would be:

- We are going to leverage new technology including social media linked directly to the HCM suite, talent science, and inherent ERP process automation to reduce onboarding time from four weeks to three days.
- The use of talent science will increase retention and reduce turnover among new hires.

These outcomes support the objective of becoming more efficient. They are measurable. They have the tangible benefit of improving the onboarding and retention process. They also have a very real but intangible benefit of creating a great applicant experience.

> **"A COMPOSABLE ERP STRATEGY MUST INCLUDE LEVERAGING THE ERP VENDOR'S ENTERPRISE APPLICATION PLATFORM (EAP) TO TAKE ADVANTAGE OF NEW CAPABILITIES AS SOON AS THEY EMERGE IN THE MARKETPLACE.**

Focus on flexibility and user experiences

Much of the value achieved from a modern composable ERP suite will come from enhanced user experiences. New capabilities, applications and processes will emerge both in your organization and externally. Your ERP strategy must recognize this and include processes and governance to support this new reality.

A composable ERP strategy must include leveraging the ERP vendor's enterprise application platform (EAP) to take advantage of new capabilities as soon as they emerge in the marketplace. Establish governance policies that enable the rapid adoption of new capabilities as they emerge.

- An agile / composable mindset should be established. Do not lock yourself into the way you have always done things.
- Adoption of enhanced user experiences should be prioritized but balanced based on the risk / reward tolerance of your organization.
- Leveraging AI and process automation to automate or eliminate routine tasks can free up resources for more valuable activities and enhance employees' job satisfaction.

Enhance workforce skills to leverage new technology

ERP strategies often focus on applications and technology. Organizations must also invest in workforce skills to achieve value and success. Some examples include:

- Business process evaluation and change controls: The nature of composable ERP means enterprise applications are constantly changing.
- Training and certifications in technology skills. Develop the skills to determine how you can and should leverage AI and data analysis.
- Provide development for soft skills such as change management, training, and mentoring.
- Shift your IT organization skills from primarily development to more that of advisors and curators.

Summary

A composable ERP strategy is a plan. It is not a one-and-done documentation process.

- Know where you want to end up. Define business objectives and link them to your ERP investments.
- Define the outcomes you want. Describe the new capabilities and process improvements want to achieve through composable ERP.
- Remember this isn't the '90s. Change your perceptions and thought processes. Composable ERP is much more flexible, changes faster and can assimilate new capabilities as they emerge. Plan for it.
- Don't forget the human element. Invest in your people. Achieving value from your ERP investments will depend largely on how well your workforce understands and leverages composable ERP capabilities.
- Review your strategy and assumptions at least annually. Technology and capabilities are changing rapidly.

"DON'T FORGET THE HUMAN ELEMENT. INVEST IN YOUR PEOPLE. ACHIEVING VALUE FROM YOUR ERP INVESTMENTS WILL DEPEND LARGELY ON HOW WELL YOUR WORKFORCE UNDERSTANDS AND LEVERAGES COMPOSABLE ERP CAPABILITIES.

Guay started working with business systems decades ago – before they were called ERP. His career has spanned over 35 years as a user, a vendor, and system integrator. His expertise and experience with ERP systems crosses HR, Finance, Supply Management and technology. He has worked with customers in many verticals including Public Sector, K-12, Higher Ed and others. Prior to joining Infor in 2020 Guay spent over 7 years as a senior ERP Analyst at Gartner. He was the lead author of the first Cloud ERP Magic Quadrant in 2018. He has expertise in best practices for adopting MT SaaS ERP and how customers can maximize value from the investments Infor is making in products and technology.

About Infor

Infor is a global leader in business cloud software specialized by industry. We develop complete solutions for our focus industries. Infor's mission-critical enterprise applications and services are designed to deliver sustainable operational advantages with security and faster time to value. Over 60,000 organizations in more than 175 countries rely on Infor's 17,000 employees to help achieve their business goals. As a Koch company, our financial strength, ownership structure, and long-term view empower us to foster enduring, mutually beneficial relationships with our customers. Visit www.infor.com.

WHAT ARE THE KEY ELEMENTS OF A SUCCESSFUL ERP STRATEGY?

"

Adopt a long term strategy based on business outcomes not technology.
Focus on developing business resilience in the face of uncertainty.
Think beyond ERP to truly embrace the benefits of digital.

"

Lucy Thorpe,
Head of Communications at Sapphire Systems

sapphire
frictionless digital

NIMBL Techedge Group

HOW TO MAXIMIZE VALUE OF YOUR SAP BTP CREDITS

Article by ***Nathan Williams,***
Practice Director, Development and Innovation, NIMBL

RISE with SAP offers businesses a streamlined path to the cloud and innovation. This "Business Transformation as a Service" platform simplifies the transition to a modern, SAP S/4HANA Cloud enterprise resource planning (ERP) environment, and it provides the tools necessary to support it, including SAP Business Technology Platform (SAP BTP) credits.

Why Use SAP BTP?

Businesses eager to advance digital transformation may overlook certain processes necessary to create connected IT environments. Okta reports that enterprises with 2,000 employees or more use an average of 175 apps. Companies with fewer than 2,000 employees use an average of 73. Furthermore, app deployment is trending up.

SAP BTP offers value to these organizations by providing the vehicle that allows businesses and enterprises to integrate, manage, and add applications to their IT ecosystems. Furthermore, SAP BTP's templatized integrations help companies connect SAP products developed for SAP S/4HANA Cloud and external applications such as Salesforce or Microsoft Dynamics and Electronic Data Interchange (EDI).

SAP BTP also provides IT teams with centralized oversight, decreasing some of the complexity involved with expanding tech stacks.

Additional SAP BTP capabilities include:

- ***Data Management:*** The platform gives businesses the ability to store, access, and process data via database and data management features through SAP HANA's in-memory database. Users also have access to SAP Data Warehouse Cloud, which provides a single view of data across the organization without transferring it to a common repository.

BUSINESSES OFTEN ADVANCE DIGITAL TRANSFORMATION TO LAY THE GROUNDWORK FOR INTELLIGENT TECHNOLOGIES, SUCH AS INTELLIGENT ROBOTIC PROCESS AUTOMATION (IRPA), MACHINE LEARNING (ML), AND CONVERSATIONAL ARTIFICIAL INTELLIGENCE (CAI) CHATBOTS. SAP BTP GIVES USERS A STREAMLINED PATH TO INTEGRATE THESE ADVANCED TECHNOLOGIES WITH BUSINESS PROCESSES.

- ***Application Development:*** Developers can create apps in a low-code/no-code environment while the SAP Extension Suite allows them to build and extend SAP solutions.
- ***Analytics:*** A major advantage of a connected IT environment is the ability to break down silos and use data from all sources to gain deeper insights. SAP BTP allows companies to analyze data, develop a clearer view of trends, spot anomalies, and use those insights to make data-driven decisions.
- ***Intelligent Technologies:*** Businesses often advance digital transformation to lay the groundwork for intelligent technologies, such as Intelligent Robotic Process Automation (iRPA), Machine Learning (ML), and Conversational Artificial Intelligence (CAI) chatbots. SAP BTP gives users a streamlined path to integrate these advanced technologies with business processes.

Where to Begin?

RISE with SAP and SAP BTP are designed to bring digital transformation within reach of more businesses and enterprises. Companies with internal IT resources may be able to use these platforms to accelerate their cloud transition and build a fully integrated IT environment. With assistance from an SAP partner, organizations with internal resources with IT expertise can quickly implement and integrate the business's systems.

However, other businesses with unused RISE credits might not have the in-house expertise to take full advantage of them before their expiration. In this case, the best strategy is to partner with their SAP solution provider to fill IT expertise gaps with outsourced services that enable them to take advantage of the integration, data management, analytics, application development, and intelligent technology capabilities that SAP BTP provides.

A technology partner with RISE and SAP BTP expertise helps a business derive the greatest value from these platforms by tailoring them to its industry and specific operation. The SAP partner can also educate internal resources to utilize different aspects of the platform on their own, such as managing a conversational AI chatbot or developing apps in a no-code environment.

Partnership with an SAP solution provider can enable a business to use its SAP BTP credits and get the greatest value out of its RISE with SAP investment. And as importantly, a trusted technology partnership can enable the business to advance digital transformation and gain from its benefits, including greater innovation and competitiveness.
Dedicating SAP BTP credits represents an opportunity to achieve transformational goals. Businesses should make the most of them.

PARTNERSHIP WITH AN SAP SOLUTION PROVIDER CAN ENABLE A BUSINESS TO USE ITS SAP BTP CREDITS AND GET THE GREATEST VALUE OUT OF ITS RISE WITH SAP INVESTMENT. AND AS IMPORTANTLY, A TRUSTED TECHNOLOGY PARTNERSHIP CAN ENABLE THE BUSINESS TO ADVANCE DIGITAL TRANSFORMATION AND GAIN FROM ITS BENEFITS, INCLUDING GREATER INNOVATION AND COMPETITIVENESS.

Nathan generates value, enables competitive advantages and resolves strategic challenges for modern businesses. His approach entails leveraging leading cloud technologies, applying current market trends and developing high-performing teams that share his passion for innovation. Nathan is a regular SAP Press author, with his latest publication on the SAP Business Technology Platform.

About NIMBL

NIMBL helps companies embrace the circular economy and transform into digital leaders with technological innovation. We drive business transformation by providing agile solutions that combine business advisory, technological expertise, and a passion for innovation. Through their digital evolution, our clients achieve distinct, competitive advantages, from operations to the boardroom.

UNIT4 LAUNCHES NEW MARKETPLACE PLATFORM TO EXTEND FUNCTIONALITY WITH APPS AND INTEGRATIONS FOR E-SIGNING, CREDIT RATINGS AND MORE

The company's ERP customers can extend the value and add powerful tools to their enterprise cloud stack

Unit4, a leader in enterprise cloud applications for people-centric organizations, announced the launch of Unit4 Marketplace, a new platform where its ISV, Reseller and Service partners can showcase their innovative, bespoke industry and vertical Apps that link to Unit4's ERP solutions.

The Unit4 Marketplace will launch with nine of Unit4's global partners and will enable customers to quickly discover partner innovations, as well as explore additional functionality to complement and extend the capabilities of their existing Unit4 solutions. As well as bolstering customer return on investment (ROI), the Marketplace also provides additional toolsets to aid growth, and enables customers to take advantage of ready-made, integrations, thereby saving on in-house development efforts.

Unit4's Marketplace will give customers access to a growing catalogue of reusable, deployable and protected apps, visible through a single storefront, which can be filtered by vertical, region, or functional area.

In addition, this new platform serves to complement Unit4's Developer4U program, designed to support partners to build extension apps which deliver value for customers, and provide partners with new revenue opportunities. Under Developer4U, partners have access to development environments, technology training, and support to develop applications. As of 2022, partners have developed nine applications which are available to Unit4 customers and will work in tandem with Unit4 Marketplace.

Speaking about the new platform, Tom Vandezande, Arribatec Business Services EVP, Arribatec said, "We are very pleased to be a part of Unit4's Marketplace and the

opportunities it presents and it is a modern way to offer value-add solutions to both existing and new customers. Being one of the first partners to release an application in the marketplace demonstrates our commitment to Unit4, and we will continue to develop more add-ons that can benefit their customers' business transformation journeys."

The Unit4 Marketplace will leverage partner innovations and development capacity to address customer needs, and the Apps provided by Unit4's partners are designed for use with Unit4 ERP & Unit4 Financials products. The offering will consist of a combination of core products, ERP capabilities, Industry Mesh, services, and ISV partner products. Visible to Unit4 customers, in a one-stop cloud destination, the Marketplace will not only give partners the opportunity to address a new audience, but also the chance build brand and sub-vertical awareness.

Dan André Nylænder, Head of Product Development, Tellit Solutions: "We are excited to be one of the first partners globally to join the Unit4 Marketplace and have six apps ready for the launch. This is a testament to our investments in innovation, integration, and automation on the Unit4 ERP platform. The Unit4 Marketplace will enable us to offer our value-added services and solutions to new customers globally."

Unit4 Marketplace will initially launch with 45 offerings with plans to add to this each quarter. New features include, but are not limited to, consumption-based pricing, integrated e-signing, integrated credit ratings, local legal requirements, automatic supplier maintenance. This is a rolling program which partners can join at any time - further details will be announced in due course.

"The launch of Unit4's Marketplace demonstrates our commitment to a highly networked and connected product and partner ecosystem and will offer both customers and partners a central hub to find and deploy new functionality. Now that it is launched, we look forward to expanding the Marketplace and welcoming more partners to join this global community." said Mike Ettling, CEO, Unit4.

About Unit4

Unit4's next-generation enterprise resource planning (ERP) solutions power many of the world's mid-market organizations, bringing together the capabilities of Financials, Procurement, Project Management, HR, and FP&A to share real-time information, and deliver greater insights to help organizations become more effective. By combining our mid-market expertise with a relentless focus on people, we've built flexible solutions to meet customers' unique and changing needs. Unit4 serves more than 5,100 customers globally across a number of sectors including professional services, nonprofit and public sector, with customers including Southampton City Council, Metro Vancouver, Buro Happold, Devoteam, Save the Children International, Global Green Growth Institute and Oxfam America. For further information visit www.unit4.com.

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BUILDING AN ERP STRATEGY FOR LONG TERM SUCCESS

Article By ***Lucy Thorpe,***
Head of Communications, *Sapphire Systems*

As business continues to navigate worldwide turbulence in everything from interest rates to supply chain - any long term technology strategy must surely be based on long term business strategy.

SAP's CEO Christian Klein has said publicly that we are entering "the next phase of globalization," with companies shifting their focus to building up greater resilience and improving their sustainability credentials.

There is no doubt that we have been through it lately, hard on the heels of the covid lockdowns we had the Ukraine-Russia war bringing energy price rises and worries about food, agriculture and industrial exports. That has led to higher prices for consumers and businesses around the world.

When it comes to devising a business strategy to cope with this, one word spring to mind - resilience! We need to build flexible businesses with the inner strength to adapt to anything the world throws at us.

To do this we need to think beyond ERP, using the benefits of cloud to drive a continuous innovation mindset. During the covid crisis there was a massive step change in IT innovation with companies increasing their investment in IT from a variety of starting points. (If you were on-premise maybe you moved to the cloud and if you were already in the cloud then it was all about how to take advantage of the cloud more effectively.)

This needs to continue, despite the fact that there is now some caution about spending, but analysts agree that doing nothing is not an option either. After being on the same system for 20 years many companies are now changing their backbone architecture leading to huge amounts of change and innovation for those who seize the day.

And it is not dependent on your size - from enterprise to mid-market everyone is looking to reap the advantage of improved business systems.

In order to justify the spend, keeping track of return on investment will be increasingly important this year, but the technology has now come of age and the ROI is proven enough to justify that spending. For those who have still done nothing, then the change is very much overdue.

For those already on a cloud journey the second chapter is full of opportunity to start to bring in AI services you can consume in the cloud - opportunities for transformation open up massively and become so much more than a systems upgrade.

> **YOU CAN TAKE STEPS TO UNLOCK THE BUSINESS VALUE IN THE DATA YOU HAVE BEEN STORING FOR YEARS TO CREATE A BUSINESS THAT CAN RIDE OUT THE CURRENT STORMS - IN TIME IT MAY ALSO BE ABLE TO START TO NAVIGATE ITSELF.**

Business Process Automation - also called RPA falls into this category and is something which can be deployed to improve efficiency with a clear return on investment pathway. In fact, according to the latest report from MarketWatch

"The Global RPA market is expected to rise at a significant rate through the forecast period, between 2023 and 2027... with an annual growth rate forecast to be 24.04% "

The citizen developer concept is being unlocked by low code companies but it's also becoming a key part of the strategies of the big software vendors who want more people to get hooked on building their own applications to solve the problems they face doing their jobs. Who knows the best way to make your job simpler than you?

Whether you are looking at finding a new ERP platform or implementing automation around your existing one there is plenty of scope for improving resilience. You can take steps to unlock the business value in the data you have been storing for years to create a business that can ride out the current storms - in time it may also be able to start to navigate itself.

The key to all this is a business outcomes-based focus - which is essential as we move beyond ERP to a place where it is never about tech for tech's sake. It is now up to your technology supplier to take the lead and talk to you about how best to work together - using the available tool kit and range of products to suit your desired business outcomes. The new reality is that your tech partner is now your trusted business advisor which is why we see so many tech companies becoming consultants and consultants becoming tech suppliers.

Digital will help build more sustainable, resilient, responsible, scalable, and profitable businesses with huge benefits to the people that work in them. So, extend your ERP and financials with leading-edge automation and digital workflow intelligence. Evaluate where you are on the digital roadmap and accelerate your transformation initiatives for a sustainable future!

> **DIGITAL WILL HELP BUILD MORE SUSTAINABLE, RESILIENT, RESPONSIBLE, SCALABLE, AND PROFITABLE BUSINESSES WITH HUGE BENEFITS TO THE PEOPLE THAT WORK IN THEM. SO, EXTEND YOUR ERP AND FINANCIALS WITH LEADING-EDGE AUTOMATION AND DIGITAL WORKFLOW INTELLIGENCE.**

Lucy Thorpe is head of communications for Sapphire Systems and a former BBC journalist.

About Sapphire Systems

Sapphire is the largest digital operating transformation provider to mid-market and small-enterprise clients. Our mission is to turn operating friction into digital business momentum. We are globally significant partners for SAP, ServiceNow, Automation Anywhere, Infor, HxGN and AWS with over 1,250 clients in the UK and US. Our portfolio includes consulting, design, delivery, lifecycle service, and cloud services.

Global Shop SOLUTIONS ERP SOFTWARE

THE GREAT 8 OF MANUFACTURING AND WHY YOU NEED THEM

*Article by **Mike Melzer,***
VP of Operations & Service, Global Shop Solutions

Today's manufacturing customers expect fast turnaround times, competitive pricing, and on-time delivery of quality parts with every job. Achieving these outcomes requires a variety of capabilities called the "Great 8 of Manufacturing." These consist of the ability to:

1. Move parts through the shop quickly and efficiently
2. Schedule and deliver on time
3. Know your costs
4. Maintain accurate inventory
5. Control your labor costs
6. Get quality right
7. Serve your customers the way you want
8. Grow sales

Falling short in even one these areas can impact your ability to deliver what customers want. Problems in several areas make it extremely difficult to compete against manufacturers that achieve all of them on a consistent basis. These Great 8 elements are inextricably linked to each other, and low performance in one area negatively impacts all the others.

If you consistently struggle with scheduling, on-time delivery rates suffer. When you can't accurately determine costs, incorrect quoting can cause you to lose jobs. When shop floor personnel can't count on having the correct inventory on hand, jobs get delayed, costs go up, and promised due dates are missed. All of which reduces your ability to go head to head with leaner, more efficient competitors.

Failure to attain the Great 8 of Manufacturing often results from using outdated manual data collection to manage the shop floor. If you're still filling out hand-written timecards, using manual spreadsheets to schedule jobs, and tracking inventory by hand, don't expect a high degree of accuracy in these areas. If you regularly have to schedule overtime or extra shifts to meet customer deadlines, labor costs will spiral out of control. If sales reps frequently walk down to the shop floor to hand-count parts in inventory before confirming a job, you won't be able to serve customers the way you want.

Perhaps the worst outcome is the atmosphere and culture that pervade the shop when key elements of the Great 8 are missing. When the same problems occur over and over again, frustration increases, tempers can rise, and a culture of blame rather than accountability takes over. Is it any wonder that productivity, performance, and profitability take a nosedive in such an environment?

> **MAKING THE GREAT 8 A WAY OF LIFE IN YOUR MANUFACTURING BUSINESS STARTS WITH GLOBAL SHOP SOLUTIONS ERP SOFTWARE. DESIGNED FOR SMALL TO MEDIUMSIZE MANUFACTURERS, THIS POWERFUL BUSINESS MANAGEMENT TOOL DIGITALLY TRACKS, MEASURES AND ORGANIZES PERFORMANCE DATA IN EVERY AREA OF YOUR SHOP FLOOR.**

Quote to Cash in One Complete ERP System

Making the Great 8 a way of life in your manufacturing business starts with Global Shop Solutions ERP software. Designed for small to mediumsize manufacturers, this powerful business management tool digitally tracks, measures and organizes performance data in every area of your shop floor. You can instantly see what's happening throughout the shop floor in real time and access the data needed to make smart decisions for your business.

A comprehensive ERP solution, Global Shop Solutions touches all critical aspects of the shop floor so that everything gets better. Automating manual processes enables all employees to work more efficiently and become more productive. Costs and waste decline while sales, margins and product quality go up. You can promise due dates to customers with confidence. Everything comes together in one integrated system so that you really can deliver a quality part on time every time.

Global Shop Solutions delivers these outcomes through a complete package of over 25 software applications. Some of the most used applications include:

- Planning & Scheduling
- Inventory
- Job Costing Accounting
- Quality Control
- Shop Floor Data Collection
- Sales
- Customer Relationship Management (CRM)

Global Shop Solutions is constantly adding new features that enable manufacturers to keep up with the increasingly interconnected Internet of Things (IoT). Some of the most recent IoT enhancements include Electronic Data Interchange (EDI), CAD Interface, and _ software. These offer phenomenal time savings and cost reductions by digitally importing job and customer information that would otherwise require time-consuming manual data entry.

To explore all that Global Shop Solutions has to offer, browse our complete list of software modules.

How the Great 8 Transforms Your Manufacturing From Good to Great

A manufacturing shop floor is like a jigsaw puzzle. All the different pieces have to come together at the right place at the right time to get the job done. The more complex the job, the more pieces you have to contend with. Each element of the Great 8 represents a key piece in the manufacturing puzzle. If even one is missing, you end up with a big hole in the puzzle. Here's how they work.

1. Move parts through the shop quickly and efficiently.

Having access to real-time production data facilitates fast, efficient movement of jobs through the shop floor. When you can schedule based on your true capacity, jobs get started and completed on time. Machinists know which jobs to work on now and next, and no longer waste time hunting down routers, BOMs, inventory lists or other job information in order to get started.

Having the right inventory on hand avoids the delays that can occur when waiting for parts to arrive. Electronically importing CAD/CAM, nesting, and customer data eliminates time-consuming double data entry. When bottlenecks occur, the data tells you why it's happening, allowing managers to take prompt action to resolve them. When you know the up-to-the-minute status of all jobs in production, they get done on time with the quality your customers expect.

> **ACCURATE SCHEDULING AND ON-TIME DELIVERY GO HAND IN HAND. GLOBAL SHOP SOLUTIONS' ADVANCED PLANNING & SCHEDULING (APS) MODULE PUTS YOU IN CONTROL WITH FULLY AUTOMATED SCHEDULING.**

2. Schedule and deliver on time.

Accurate scheduling and on-time delivery go hand in hand. Global Shop Solutions' Advanced Planning & Scheduling (APS) module puts you in control with fully automated scheduling. Enter the job and machine data into the router and other modules, and the system automatically schedules the job for you in minutes, transforming one of the most difficult and time-consuming tasks into a model of lean efficiency.

With APS, you can finitely or infinitely schedule, balance your workcenter loads, and engage in advanced labor scheduling. When customer changes require last-minute adjustments, you can forward, backward and global reschedule with ease. APS also displays how moving a job around will impact the entire schedule.

> **"THE DOCUMENT CONTROL™ MODULE MAKES IT SIMPLE TO MANAGE QUALITY DOCUMENTATION BY CONSOLIDATING ALL INTERNAL AND EXTERNAL DOCUMENTS INTO ONE CENTRAL AREA. SIMPLY SCAN EACH DOCUMENT, ASSIGN IT A LOCATION, AND YOU'RE GOOD TO GO.**

When multiple jobs get stacked on top of each other due to limited capacity, APS reduces or eliminates these bottlenecks by scheduling the right job on the right machine at the right time. Instead of "safe" due dates, you can tell customers when their jobs will be complete and know you can deliver on time.

3.Know your costs.

Accurate job costing is one of the most important activities in a manufacturing business, affecting everything from estimating and quoting to cash flow and profit margins. It's also one of the toughest to get right – unless you track and manage your costs with ERP software.

Global Shop Solutions automatically assigns the correct cost to all labor, parts and materials that go into a job so you know the exact costs as soon as it is complete. Our innovative FLOOOM product determines individual costing components by measuring freight, labor, overhead, outside services, other and material. With this data, you know exactly how much labor and materials went into a part or job.
Knowing your costs improves estimating and quoting accuracy and lets you generate sales and work orders in minutes rather than hours. It helps determine your most profitable products and gives your business a competitive edge over those that can only approximate their true costs.

4. Maintain accurate inventory.

Delays in production often result from disorganized inventory management. Global Shop Solutions provides realtime inventory data from one point of entry for precise management of materials needed for production.

Knowing exactly what you have in inventory and where eliminates the need to hunt for parts to get a job started. Lot bin tracking enables complete traceability of parts. Physical inventory counts are fast and accurate, and often not needed. Paying expedited shipping charges for incoming materials becomes the rare exception rather than a common occurrence. Automatic reorder points ensure materials get ordered before stock runs out, and jobs are never late due to lack of raw materials.

With ERP, you'll never miss another order for materials needed to keep your production line moving.

5. Control your labor costs.

ERP software provides complete visibility of one of the biggest line item costs in your business – direct labor. Workers electronically log on to each job and the system precisely measures estimated versus actual labor by job or part. When variation occurs, you can determine whether the problem lies with the machine, the machinist, or other factors. Daily productivity reports help identify problem areas and trend variances so you can take corrective action before they become major problems.

Accurate scheduling reduces overtime costs because jobs get completed on time. Downtime costs decline because shop floor personnel always know which job they should be working on. Separately tracking indirect labor categories helps control those with the highest costs. Whether direct or indirect, Global Shop Solutions provides a detailed picture of what employees are doing on and off the job so you can allocate your labor dollars appropriately.

6. Get quality right.

You can't improve quality unless you can track, measure and analyze the sources of quality problems. Global Shop Solutions' customizable reporting and statistical analysis tools allow you to track and measure quality information in real time. Nonconforming alerts help identify failure trends as they occur on the shop floor, making it possible to identify and correct bad parts before they go out the door rather than after.
The Document Control™ module makes it simple to manage quality documentation by consolidating all internal and external documents into one central area. Simply scan each document, assign it a location, and you're good to go. You can also link technical drawings and job spec sheets to routers, attach inspection and gauge calibration documents to work orders, and attach imported CAD/CAM .pdf files to specific part numbers. No matter what type of quality documents or level of traceability you need, ERP provides an effective solution for managing all your quality information.

7. Serve your customers the way you want.

In today's mobile manufacturing environment, fast, responsive customer service creates a real competitive advantage. CRM lets you provide the level of service and transparency needed to build profitable long-term relationships with today's demanding customers by managing and servicing them with accurate, real-time data.

Instantly check the status of work orders and open quotes with complete job, part and customer data from one screen. Easily create quotes, generate work orders, and make changes to existing work orders in minutes. Provide answers to customer inquiries in one phone call instead of spending hours chasing down information. Available in the palm of your hand, Mobile CRM helps you deliver superior customer service from the office or on the go.

8. Grow sales.

ERP software provides a complete business management system designed to grow sales. When you schedule jobs more efficiently, it lowers setup and labor costs, improves throughput, maximizes capacity, and increases on-time delivery. These outcomes improve estimating and quoting so you can give customers the best possible price. Efficient scheduling also reduces the time spent putting out fires on the shop floor, allowing more time to focus on generating new business and increasing sales.

As a manufacturing business, the ability to deliver on your promises is your biggest selling point. When you give customers a due date and follow through every time, it builds trust. When you deliver quality parts on time every time, sales go up. If you're struggling to grow sales, let ERP run your shop floor so you can focus on developing new ideas, new products, and new customer relationships.

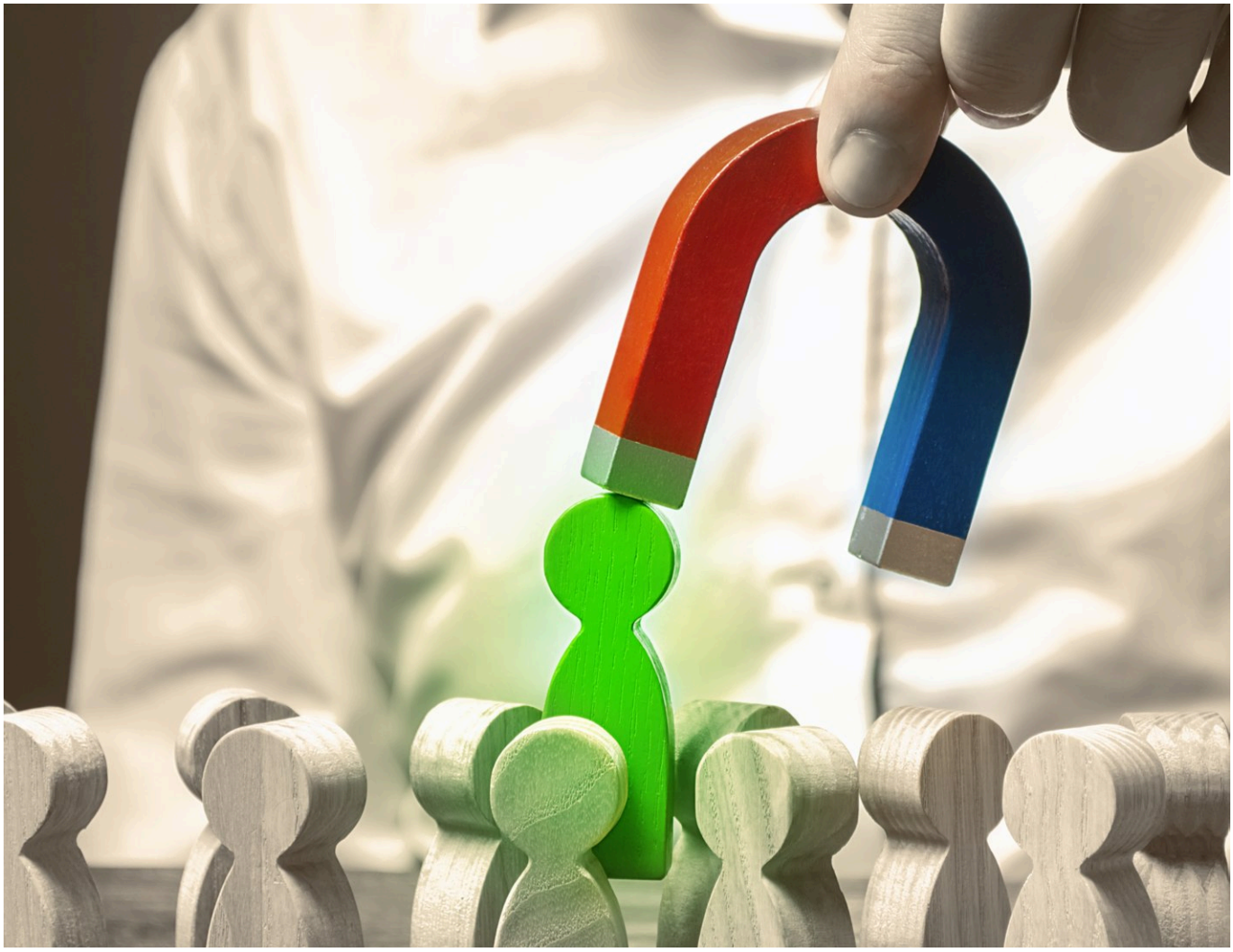
Wondering How Your Business Is Doing Overall?

Take the Manufacturing Health Test to identify how Global Shop Solutions can help make the Great 8 a way of life for your business.

Mike Melzer serves as VP of Operations for Global Shop Solutions and is a 20-year veteran of the company. As a graduate from The Colorado School of Mines, Melzer is an unparalleled leader, coaching the industry's top talent to ensure the continued success of Global Shop Solutions customers.

About Global Shop Solutions

We simplify your manufacturing.™ Global Shop Solutions ERP software provides the applications needed to deliver a quality part on time, every time from quote to cash and everything in between including shop management, scheduling, inventory, accounting, quality control, CRM and 25 more. Available in the cloud or on premise, our manufacturing customers benefit from real-time inventory accuracy, improved on-time delivery, lower administrative costs, increased sales and improved customer service. Headquarters in The Woodlands, Texas includes a state-of-the-art R&D facility and Global Shop Solutions training center. Through its offices in the U.S., Mexico, Indonesia, Singapore, Australia, New Zealand and the United Kingdom, the company supports thousands of manufacturing facilities in over 25 countries and nearly 30 industries.



CRITICAL FACTORS FOR THE SUCCESSFUL SELECTION AND IMPLEMENTATION OF ERP

Article By ***Allan Lessing,***
Director of Customer Solutions, OptiProERP

We've all heard the scary stories of implementations gone wrong. There are many statistics about the large percentage of ERP implementations that fail, but there are also many success stories. So why do some implementations go wrong, and how can you ensure that you achieve a positive outcome?

Select the Right Project Team and Set Them Up for Success

A significant factor in successful ERP selections/ implementations is a qualified project team. These are the people responsible for researching and recommending the software and then helping with its implementation. The other key component in successful implementations is the full and unwavering support of management. They must have the time and resources needed to thoroughly accomplish all tasks in the project.

Choose highly qualified staff

ERP Selection and Implementation will the MOST strategic undertaking that your organization will execute in the 2-5 years. Your best and brightest employees must be on the project team - someone from each key area of the organization who has a strong understanding of that department's operations. Leadership must view the project, which can take five months or more, as a worthwhile and strategic commitment that will significantly benefit the company. Staff should feel positive about the new system, which is essential to the project's success. It's also vital that the project team has the respect of staff members across the organization to achieve the desired results.

The project team structure

The project team is made up of three entities:

1. Steering Committee – Senior executives responsible for ensuring the project is completed successfully, and that the company's goals align with the implementation.
    - Project Sponsor - On the Steering Committee, the direct liaison with the Project Manager is the Project Sponsor. The Project Sponsor works directly with the Project Manager on an 'as required' basis to ensure that obstacles to project success are mitigated before involving the Steering Committee.

2. Project Management – Responsible for managing tasks, deliverables, risks, and changes needed to keep the project on budget and on time.

3. Core Team – Staff who will handle changes to processes, test the ERP system, and teach users how to use the ERP system.

Skills the project team needs:

- Functional departmental expertise
- Cross-functional business process knowledge
- An understanding of Fundamental ERP concepts
- Computing, documentation, and communication skills
- Adaptability to change

If the project team is unfamiliar with what ERP selection and implementation entail, they must become well-informed about what's involved before the project starts. It is a complex process, and it is easy to make costly missteps if unprepared.

"

THE STAFF MEMBERS ON THE TEAM WILL NEED AT LEAST 50% OF THEIR TIME DEDICATED TO THIS PROJECT, BUT A FULL-TIME COMMITMENT, WHERE POSSIBLE, IS IDEAL. PROJECT MEMBERS MAY NEED THEIR WORK DELEGATED TO OTHER STAFF WILLING AND ABLE TO TAKE ON THE ADDITIONAL TASKS, OR THE COMPANY CAN HIRE TEMPORARY STAFF TO ASSIST WITH THE WORKLOAD.

Project team time commitment

The staff members on the team will need at least 50% of their time dedicated to this project, but a full-time commitment, where possible, is ideal. Project members may need their work delegated to other staff willing and able to take on the additional tasks, or the company can hire temporary staff to assist with the workload. In larger implementations, the employees on the team should not be expected to handle their regular workload in addition to the project. Not only would that be unfair, but it would create resentment and prohibit a successful implementation.

Establish Requirements and Define KPIs

With help from leadership, the project team will need to establish the requirements that directly correlate to the business goals for the ERP implementation. Those goals are important to remember throughout the project to ensure the software and the selected vendor achieve them. As a result of the team's research, some goals may need to be realigned if they are unattainable. To keep it on track, the project team must identify Key Performance Indicators (KPIs) that can measure the project's duration, budget, and achievements. These KPIs will ultimately measure the success of the project and its objectives.

"

IT IS CRITICAL THAT YOUR PEOPLE CLEAN AND SCRUB YOUR DATA BEFORE UPLOADING IT INTO THE NEW SYSTEM. WHILE YOUR IMPLEMENTATION PARTNER WILL REVIEW YOUR DATA INTEGRITY, ONLY YOUR PEOPLE UNDERSTAND THE DATA ACCURACY/QUALITY.

Manage Change

With an ERP implementation comes change. People are naturally averse to change. Asking stakeholders who will use the system for their input will help them feel involved and more enthusiastic about the implementation and any changes it will bring. It's essential to consider their input, as their feedback may uncover concerns that hadn't been previously considered. It may reveal that adjustments are needed to the ERP strategy.

Collaboration and Communication

As with any project, ERP selection and implementation need a high level of collaboration and communication. The steering committee should meet regularly, monthly, or quarterly, with key project team members, and once the software is selected, with essential staff from your implementation partner. This is the opportunity to ensure everyone is on the same page and to address any key concerns. You'll also want to communicate with your vendors, business partners, external stakeholders, and customers about changing to an ERP system and the advantages it will provide for both your company and theirs.

Data Migration

Data migration is taking the needed data from any systems being replaced and moving it to the new system. This is essential, as you don't want to lose or have corrupt data, so it's critical to be well-prepared for this portion of the project. It is critical that your people clean and scrub your data before uploading it into the new system. While your implementation partner will review your data integrity, only your people understand the data accuracy/quality. Your vendor will need to know the reports that are essential to your business so they can be sure that you'll be able to

continue to retrieve the required analytics. It is highly recommended that you address the departmental critical reports earlier in the implementation cycle. Towards the end of the project, everyone is hectically busy with end-user acceptance testing, training, cutover, etc.– key reports, at this time, get short-changed. Do it early.

Data can be transferred through an automated process or manually, and your vendor, IT staff, and project team can work together to determine the best method to migrate your data. It is critical to ensure the data is migrated correctly, as this is significant to your implementation success. If your data gets corrupted by not migrating it correctly, future transactions and reports will be inaccurate. Make sure your data is carefully added to the new system to avoid the frustration of having to remove the data and start again.

Test Thoroughly

Each business process in every department should be examined to see if the ERP software can accommodate it. Below are three steps in the testing process.

1. Conference Room Pilot - define each process and write instructions to test them methodically.

2. Departmental Pilot – retest each process and test any others not recognized initially. Then create stress tests to ensure the system can support the data and transaction volumes.

3. Integrated Pilot – all transactions should be tried as they would be in real life with cross-functional integrated testing. They should flow smoothly between departments, and users should feel confident that their processes work effectively.

Final Thoughts

To have a successful ERP implementation, you must dedicate the necessary resources to the project and allow the time needed. The most crucial aspect of your project is choosing a team who can effectively select and implement the ERP system. They are the ones who will be responsible for carrying out each of the steps involved in the ERP project, so choose them wisely.

As the Director of Customer Solutions, Allan Lessing serves as OptiProERP's resident operational and business process advisor, ensuring that the global team from sales, implementation, and customer success, has a deep understanding of each customers' operations. Allan is also responsible for best practices to help customers optimize their business processes. Allan has more than 35 years of hands-on manufacturing operations and IT systems experience.

About OptiPro ERP

OptiProERP is an industry leading ERP solution for manufacturing and distribution. OptiProERP delivers best-in-class industry functionality embedded into SAP Business One, the market-leading business management platform for small and midsize enterprises. Customers gain an end-to-end business management solution, including financials, accounting, sales, CRM, and industry-specific functionality that fully leverages deep industry expertise of over 20 years dedicated to serving manufacturers and distributors. OptiProERP is an eWorkplace Manufacturing solution. eWorkplace Manufacturing is SAP's strategic industry partner for manufacturing and distribution and its first OEM partner as part of SAP's global PartnerEdge Program. Serving manufacturers and distributors for over 20 years with OptiProERP and BatchMaster as its two ERP solutions, eWorkplace Manufacturing has gained the trust of over 3,000 customers globally.

WHAT ARE THE KEY ELEMENTS OF A SUCCESSFUL ERP STRATEGY?

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A successful ERP strategy starts by looking at the businesses processes in place. This helps business leaders understand, revisit and if required, redo those processes to ensure you are meeting the needs of your organization and its customers.

It's important to assess what systems are currently in use and which will need to either be replaced or integrated within this new ERP system. Determining how this change will affect how your organization leverages their current tools will help you understand the future of its functionality. Successful ERP implementation depends on your business processes. By knowing what processes your organization relies on, you will be able to prevent lost time and revenue throughout the implementation phase.

Don't forget to take the time to reflect on your vision for success – both before and after implementing ERP. Know what business problems you are trying to solve for. What are the risks of not embracing digital transformation and implementing ERP? A strong strategic vision for your project will help you determine how your ERP should interact with the rest of your ecosystem and the total cost and benefit it represents.

"

Claus Jepsen,
Chief Technology Officer, Unit4

UNIT4

ENTERPRISE ASSET MANAGEMENT SOFTWARE PIONEER EZ WEB ENTERPRISES ADVANCES DIGITAL TRANSFORMATION IN BUSINESS OPERATIONS WITH LAUNCH OF STRATEGIC CONSOLIDATION AND NEW CORPORATE BRAND NAME, EZO

EZO expands its family of EAM software offerings and unveils innovative equipment maintenance solution, EZO CMMS.

EZ Web Enterprises, a leading cloud-based asset management software provider, announced that it has launched a strategic consolidation of its product offerings and renamed the company EZO. The name change reflects the organization's mission to provide operations teams with streamlined, easy-to-use, and powerful solutions for tracking and managing assets in almost any imaginable workflow.
EZO will provide customers with a SaaS solution, used to control and maintain operational assets and equipment in order to optimize the quality and utilization of assets throughout their lifecycle, increase productive uptime, and reduce operational costs. From physical business assets to IT hardware and software, since 2011 EZO has been at the forefront of helping companies streamline operations with its comprehensive solutions.

In addition to the company's new name, EZO also launched today its innovative equipment maintenance solution, EZO CMMS (computerized maintenance management system), an asset-first operations solution that seeks to go beyond simple work order management by providing intuitive workflows which support the end-to-end management of all team activity involved in asset maintenance. The system

makes both assets and work schedules easily accessible and manageable by maintenance supervisors from a single location. It also helps teams resolve issues before they happen, supporting preventative measures to maintain equipment for stable, continuous operations -- ensuring audit readiness and compliance, warranty tracking, and a focus on preempting issues that can be disruptive to business.

According to Global Market Insights, the Enterprise Asset Management market in 2022 was a $4B industry and is poised to grow by 9% in the next 10 years. Industry growth is being driven by the rising usage of IoT (Internet of Things) devices and platforms for managing enterprise assets, an increase in migrating from legacy systems to cloud-based SaaS-based platforms, and an increase in mobility usage among end-users.

"Our priority has always been to help operations leaders align asset management processes with the strategic goals of their respective organizations. And further, our solutions offer a solid foundation for data-driven decision-making that can both improve processes and help drive transformation methodologies across an entire organization," said Syed Ali, Chief Executive Officer, EZO. "Today marks a major milestone for our company and we could not be more excited about our new name and innovative CMMS product launch. The brand EZO is derived from the name of the company's flagship product, EZOfficeInventory, our award-winning physical asset tracking software system. We are proud of the last decade of work and can't wait to take the asset management industry to another level with the addition of new solutions."

By consolidating its innovative asset management solutions, EZO's products will continue to help thousands of organizations around the globe streamline operations in many key areas, including physical asset management with EZOfficeInventory, IT asset management with AssetSonar, rental business management with EZRentOut, and now equipment and maintenance management with EZO CMMS.

With comprehensive team management and communications integrated into asset and work order management, EZO CMMS will help ensure peak uptime, equipment longevity, as well as productivity of both the maintenance team and all equipment users in facilities and manufacturing. It is a groundbreaking solution to streamline repairs and preventive maintenance for organizations in education, property management, public works, manufacturing, hospitality, healthcare and more.

"Business assets are foundational to the strategic success of virtually every organization on the planet, from schools to software companies, from law firms to manufacturing and everything in between. We are proud to continue our leadership in applying the science of asset management to so many different impactful areas of successful operations and business management. Our rebrand serves to strengthen our voice and help us refocus attention on the unlimited potential that is locked away in an organization's assets and how operational alignment is not only a key risk and cost limiter but also a powerful growth driver," added Ali.

About EZO

EZO was founded in 2011 with a mission to build easy-to-use yet powerful cloud-based operations solutions for organizations worldwide. Our team is passionate about delivering consistently amazing user experiences with best-in-class functionality and enterprise scalability. EZO's products help thousands of organizations around the globe streamline operations in many key areas, including physical asset management with EZOfficeInventory, IT asset management with AssetSonar, equipment maintenance management with EZO CMMS and rental business management with EZRentOut. For more information, visit ezo.io.

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LUMENIA CONSULTING RETURN TO IN-PERSON FOR THE ERP HEADTOHEAD™ EVENT

The Lumenia ERP HEADtoHEAD™ will return as an in-person event for 2023, taking place on 8-9 March in the DoubleTree by Hilton, Milton Keynes. The unique format of the event brings together the leading ERP vendors, who must follow a script during their presentations, allowing delegates to compare like for like. The event is facilitated by independent ERP consultants, Lumenia Consulting.

The event will feature ERP product demonstrations from 12 ERP vendors. Solutions suitable for various organisation sizes, from large corporations to SME's, will be represented. ERP solutions to be demonstrated include SAP S/4HANA, Oracle NetSuite, Epicor, Sage X3, SAP Business One, Microsoft Dynamics 365 Business Central, Infor, IFS, Priority Software, Microsoft Dynamics 365 Finance and Unit4.

At the start of Day 1, all the ERP vendors take part in an 'Elevator Speech'. During this session vendors present a summary of their USP's to convince delegates why it would be a good idea to attend their on-line demonstrations. Delegates can then choose to attend demo sessions focused on Finance, Production, Procurement, Business Intelligence & Analytics, Projects or Sales. The demonstrations are based on standardised high-level scripts which makes it easier to make system comparisons.

The ERP packed Agenda will also include presentations of keynote speeches from Lumenia on 'What Makes Successful ERP Projects' and 'Are you ERP Ready'? Also, ERP Sector focused presentations, Feature Showcase presentations and a panel-discussion on 'Avoiding ERP Implementation Mistakes'.

"ERP is as important as ever. It is a central platform for most organisations and a foundation on which many of their digital transformation initiatives will be built. The continued focus on ERP demonstrates its centrality to digitalisation, which is a key imperative across all sectors. Surveying the various options in the ERP market can take time. By attending this event you will get months of work done in 2 days", commented Ian O'Toole, Consulting Manager at Lumenia.

The ERP vendors will also be available in the expo area for questions and 1:1 meetings. and the expert ERP teams at Lumenia are on hand for impartial guidance and advice.

As attendance at the event is limited to organisations who are potential buyers of ERP, it's also an ideal opportunity to network with others about to embark on the same journey and the event will have ample time for networking.

For further information on the event, including early-bird discounts please visit the event website http://erpheadtohead.com/uk.

About Lumenia

Lumenia Consulting is an independent ERP consulting organisation, specialising in business transformation through the implementation of Enterprise Resource Planning and related enterprise software applications.

2023 RELEASE WAVE 1 PLANS FOR MICROSOFT DYNAMICS 365 AND POWER PLATFORM NOW AVAILABLE

On January 25, 2023, we published the 2023 release wave 1 plans for Microsoft Dynamics 365 and Microsoft Power Platform, a compilation of new capabilities planned to be released between April 2023 and September 2023. This first release wave of the year offers hundreds of new features and enhancements, demonstrating our continued investment to power digital transformation for our customers and partners.

This release wave builds on our commitment to create applications and experiences that add value to every role by breaking down silos between data, insights, and people. New capabilities empower new ways to make informed decisions with AI-guided insights and suggested actions, easier ways to automate tasks and processes, and collaboration seamlessly integrated into the flow of work, plus, new low-code ways for anyone to build solutions.

As part of our commitment to creating great customer experiences, we have introduced a new way to interact with release plans. The release planner for Dynamics 365 and Microsoft Power Platform enables users to view and manage release plans across all active waves in a unified and interactive interface while giving them the option to personalize, filter, sort, and share these plans.

Highlights from Dynamics 365

Dynamics 365 Marketing delivers connected sales and marketing capabilities to enable marketers and sellers to act as a unified team and accelerate their pipelines. New features such as a new business-to-business (B2B) analytics dashboard, frequency capping, multiple email recipient activation, emails timeline, customizable preference centers, and Urchin Tracking Module (UTM) marketing tagging will be released in this wave to allow businesses to increase their output, organizational efficiency, and analyze the impact of their campaigns to reach higher levels of marketing maturity.

Dynamics 365 Sales brings new features such as enhanced sequence capabilities supporting personalized and account-based engagement, actionable AI-powered suggestions within the seller workflow, an updated form layout, and new opportunity management workspace. Additionally, enhanced email templates, content suggestions and text message capabilities, as well as various new abilities to create, loop, and optimize sales sequences will be released during this wave.

Dynamics 365 Customer Service empowers agents to work more efficiently with enhancements to voice features, unified routing, embedded Microsoft Teams collaboration,

and elements of the agent workspace such as the case form, timeline, and conversation control. Throughout this wave, we will continue to invest in AI across the contact center with intelligent-suggested replies and robust real-time analytics with customization.

Dynamics 365 Field Service is continuing to improve the new schedule board for dispatchers this wave. We are also supporting our frontline workers by allowing them to see their appointments in Outlook, find information faster through improved global search, and recognize improvements in performance and reliability on the mobile app.

Dynamics 365 Finance is focused on enhancing organizations' visibility into their data, continuing finance automation, and expanding out-of-the-box country coverage in Latin America. Other enhancements such as further automation of complex tax scenarios, full end-to-end automation of accounts payable and ledger settlements to expedite the close and enable talented finance users to spend more time focusing on value-added activities will also be released.

Dynamics 365 Supply Chain Management continues to deliver increased agility and resilience across the supply chain with enhancements to omnichannel sales strategies with improved ways of managing attribute-based pricing, integrated soft reservations, and optimized end-to-end process integration across Dynamics 365 Sales and Supply Chain Management. Investments to improve agility and increase efficiency for discrete manufacturers, maintenance workers, and warehouse workers will also be a focus for this wave.

Dynamics 365 Project Operations is continuing to invest in capabilities to empower project managers and project teams with new features like expanding the project budgeting and time-phased forecasting to resource/non-stocked deployment modes and completely lighting up the core experiences for expense management on the web and mobile form factors. Across-the-board investments in performance and usability with an uptake of modern and fluent controls in sales, billing and pricing, and subcontracting experiences are also targeted for this release wave.

Dynamics 365 Guides will continue investing in capabilities to improve collaboration experiences for users on HoloLens 2. Key updates include improvements in handling incoming calls, join settings, and more accurate mixed reality annotations will also be coming in this wave. We will also be adding new holographic workflows and features like the ability to manipulate a hologram as an operator and taking a photo while in a guide.

Dynamics 365 Human Resources will continue to expand the human capital management (HCM) ecosystem and further investment in expanding our payroll partner network to provide broader coverage for global organizations. We will also be providing better experiences to resource managers in Project Operations by integrating employee skill, compensation, and leave information while helping employees grow their careers by bringing project and experience information back into employee profiles.

Dynamics 365 Commerce is enabling new and updated B2B experiences, including the modeling of distributers as sellers, introducing a distributer fulfillment dashboard, and improving the out-of-the-box B2B user sign-up flow. We are revising and improving our payment flows and enabling network health checks to diagnose network-related issues that can impact point of sale (POS) uptime for POS and Store Commerce users. We will also be investing in asynchronous payment capabilities to provide support for Klarna and other "buy now, pay later" methods and ACH real-time banking.

Dynamics 365 Fraud Protection is introducing Assessments API in 2023 release wave 1 that will allow customers to define their own fraud event (in addition to the default events covered by Fraud Protection such as Purchase Protection and Account Protection). This functionality will allow customers to configure Fraud Protection to protect against fraud events specific to their businesses.

Dynamics 365 Business Central will continue developing enhanced finance capabilities for intercompany transactions as well as several improvements to the warehouse management area to make customers' processes more efficient. More default setup data will also be provided during this wave to expedite customers' onboarding procedures. Furthermore, Microsoft Power Platform and Microsoft 365, including Teams, capabilities will be improved enabling better reporting, automation, and collaboration opportunities.

Dynamics 365 Customer Insights will bring enhancements such as improved data interoperability and governance features allowing the ability to control and restrict access to data, configurations, and actions; an increased maturity around application lifecycle management and enterprise lifecycle management; increased activation capabilities through tighter integration with Microsoft Dataverse; and will receive navigational guidance, AI-powered suggestions, and task assistance increasing the depth of insights obtained from the product with less time investment.

Dynamics 365 Connected Spaces delivers alerts and notifications via Teams or Outlook when business AI-skills detect actionable patterns within a space containing vehicles—stationary or mobile. Throughout this wave, improvements will be released enabling customers to use the Microsoft Azure Stack HCI devices for configuring Connected Spaces to run AI models at the edge in addition to the existing Microsoft Azure Stack Edge devices.

Dynamics 365 Customer Voice is investing in functionalities to unblock key scenarios for customers and is focusing on improving the overall usage experience along with the architecture evolution and stability fixes for survey owners and responders. We will focus on delivering features such as the transfer ownership of an orphan project in case a project owner has left the organization, as well as allowing survey responders to record partial survey responses.

Microsoft Supply Chain Center delivers improvements to organizations' management of their supply chain by enhancing their end-to-end visibility of their supply chain, improving AI-based recommendations, and enabling them to seamlessly collaborate with their teams and suppliers on the workflow, resulting in better orchestrated business processes.

Implementation portal

We are launching a new implementation portal to provide contextual guidance and recommended practices for Dynamics 365 implementations, in order to enable greater success once implementations go live. This portal is based on the Success by Design for Dynamics 365 framework put together by the FastTrack for Dynamics 365 team.

Highlights from Microsoft Power Platform

Power BI continues to invest in empowering individuals, teams, and organizations to drive a data culture. For individuals, we're enhancing the creation experience, bringing more parity on the web, and adding the Power Query diagram view into Power BI. For teams, we're bringing enhancements to meetings and multitasking to help users seamlessly work with their data wherever they work.

Power Apps is focusing on reducing risk for organizations with advanced governance capabilities—ensuring easy onboarding and using low-code capabilities in a manageable way for the organization to scale. Makers and developers of all skill levels will be more productive with modern experiences to build apps, manage data, and logic. Customers will benefit from modernization of web and mobile experiences ensuring modern and fast experiences across apps.

Power Pages continues to invest in bringing more out-of-the-box capabilities to support both low-code and no-code development as well as professional developers. New features in this release will allow makers to have additional capabilities and solution templates in the design studio. Professional developers will be able to perform additional actions and work with code productively using the Microsoft Power Platform CLI tool and Microsoft Visual Studio Code, and administrators will be enabled to better manage and govern their Power Pages sites.

Power Automate is releasing new capabilities to simplify creating new flows by describing them in natural language. This, with other experience improvements for creating and authoring flows, means it'll be easier than ever for new users to get started. These improvements include introducing work queues where automatable tasks can be viewed and managed together as well as providing simpler connectivity to a machine for desktop flows, eliminating the need for additional installs and managing password management.

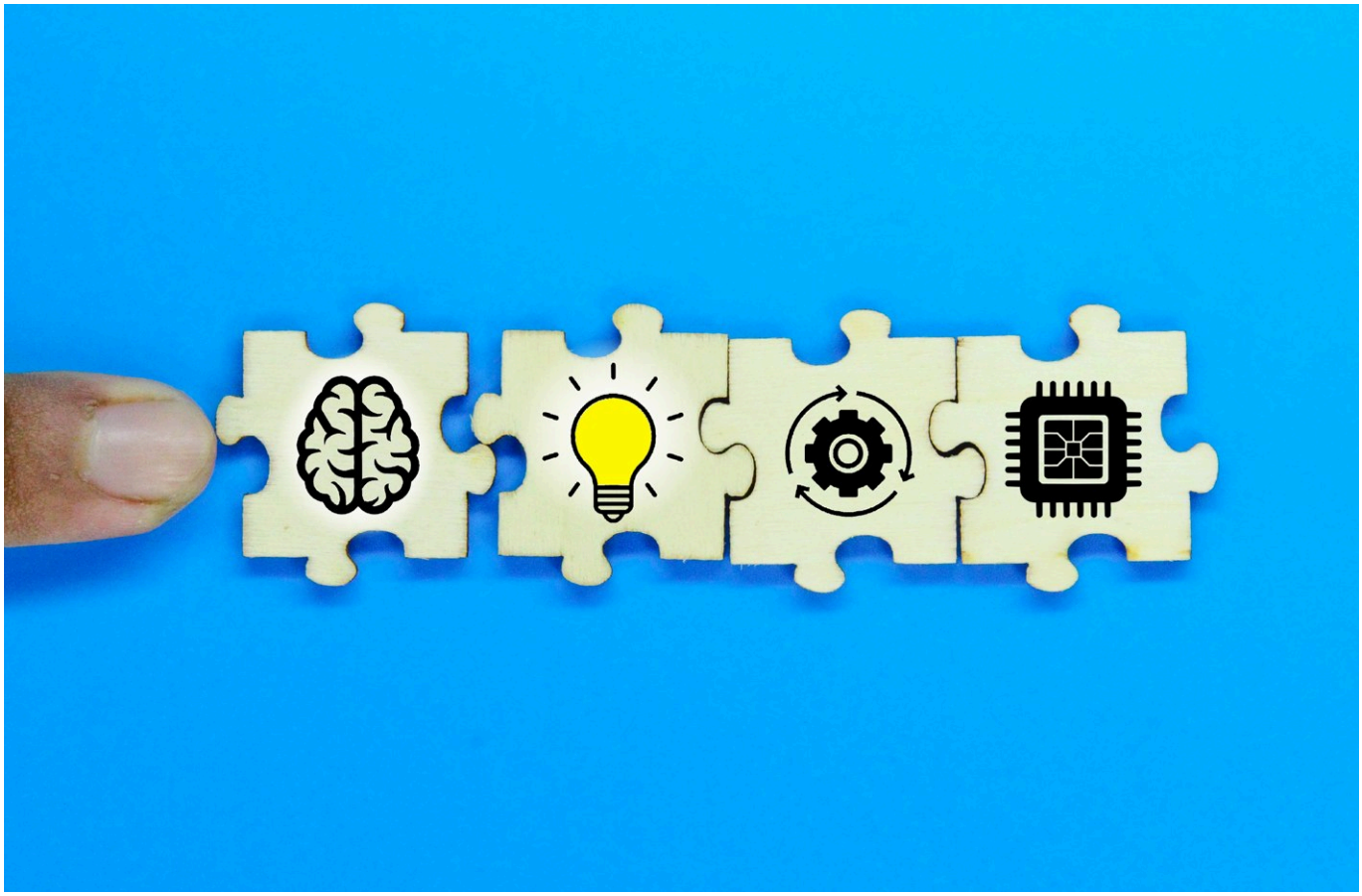
Power Virtual Agents offers a new unified authoring canvas that is Microsoft's single conversational AI studio for all bot-building needs. With the continuing integration with Microsoft Bot Framework capabilities and Microsoft Azure Cognitive Services, bot creators—from subject matter experts to developers—are empowered to begin building today with the public preview. The advanced authoring canvas will be generally available this wave.

AI Builder will bring document processing improvements that will include more prebuilt model capabilities like contract processing, the ability to identify personal information, and the possibility to extract field types from documents. We're also focusing on facilitating model governance and licensing by improving our admin interfaces to make it easier to govern how AI Builder credits are used across environments, apps, and flows.

For a complete list of new capabilities, please check out the Dynamics 365 2023 release wave 1 plan and the Microsoft Power Platform 2023 release wave 1 plan.

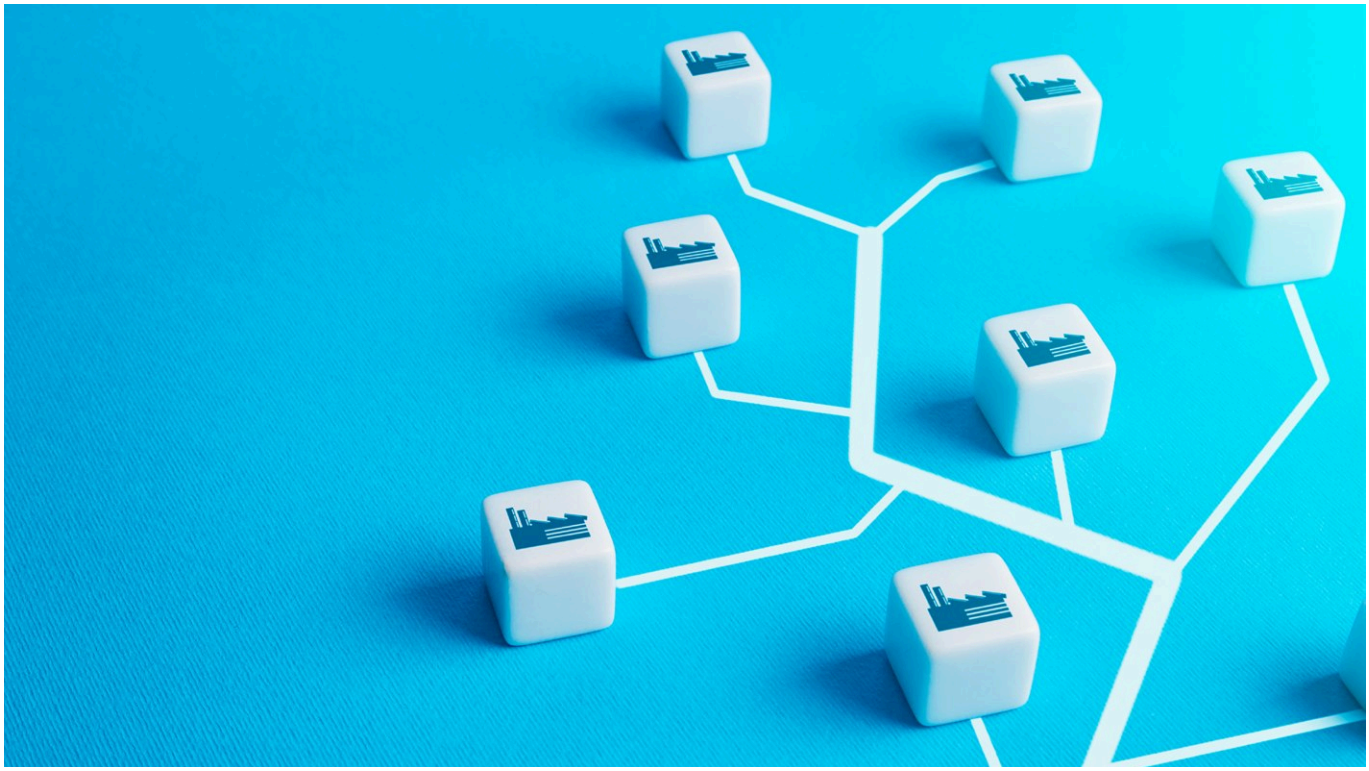
Early access period

Starting January 30, 2023, customers and partners will be able to validate the latest features in a non-production environment. These features include user experience enhancements that will be automatically enabled for users in production environments during April 2023. To take advantage of the early access period, try out the latest updates in a non-production environment and effectively plan for your customer rollout. To take advantage of the early access period, try out the latest updates in a non-production environment, and effectively plan for your customer rollout. Check out the 2023 release wave 1 early access features for Dynamics 365 and Power Platform or visit the early access FAQ page.



About Microsoft

Microsoft (Nasdaq "MSFT" @microsoft) enables digital transformation for the era of an intelligent cloud and an intelligent edge. Its mission is to empower every person and every organization on the planet to achieve more.



NULOGY LAUNCHES "NULOGY CONNECT" TO ENABLE BILATERAL COMMUNICATION & COLLABORATION BETWEEN SUPPLY CHAIN PARTNERS

Nulogy, a leading provider of supply chain collaboration solutions, announced the launch of the company's newest addition to its Multi-Enterprise Supply Chain Business Network Platform (MESCBN): Nulogy Connect. The solution helps businesses bolster their service levels and speed-to-market by enabling seamless connectivity between their own software solutions and that of their customers and suppliers.

Nulogy Connect leverages advanced low-code, no-code technology to make it simple, easy, and cost-effective for customers to connect with their trading partners. The solution also automates and accelerates the delivery of operational data to ensure that both internal and external teams stay in sync and are making decisions based on accurate, timely data.

Jason Tham, Nulogy CEO and co-founder, said, "Supply chains continue to be challenged by disruptions and uncertainty, which reinforces the need for better visibility, collaboration, connectivity, and integration amongst partners. Nulogy Connect delivers speed and cost efficiencies by enabling organizations to integrate into their other technology solutions with little to no IT or third party support."

The solution enables organizations to:

- Improve collaboration and synchronization with trading partners through robust, cost-effective, and flexible integrations
- Create their own email and SMS notifications and workflow automations using simple, low-code interface
- Support productivity and efficiency improvements with custom workflows, while increasing agility and responsiveness

"Nulogy Connect offers MSI Express the ability to perform its own integrations between Nulogy and other applications to automate data connectivity in a user-friendly, yet feature-rich manner," said David Freed, CIO at Nulogy customer MSI Express. "It enables us to drive exception handling in a more sustainable and scalable manner, thereby lowering cost and improving outcomes for our customers."

The solution is available immediately for existing Nulogy customers and prospective customers. For more information about the solution, please visit www.nulogy.com or contact your Nulogy representative.

About Nulogy

Nulogy, a leading supplier of digital supply chain solutions, enables customers and their supplier communities to collaborate on a multi-enterprise platform in order to deliver with excellence to an ever-changing consumer market. The Nulogy Multi-Enterprise Supply Chain Business Network Platform optimizes upstream supply ecosystems composed of brand manufacturers, contract manufacturers and packagers, third party logistics providers, raw material and packaging suppliers to accelerate supply chain responsiveness and collaborate at the speed of today's market.

Acumatica

ERP-DRIVEN BUSINESS SUCCESS AND CUSTOMER RIGHTS TAKE CENTER STAGE AT ACUMATICA SUMMIT 2023

Cloud ERP Company Surpasses 10,000 Customers, Announces Updated Customer Bill of Rights and Celebrates Customer Success at Annual Event

Acumatica, the world's fastest-growing cloud ERP company, outlined how its community of customers, partners and developers shapes business technology that is responsive to the real-world needs of small and mid-sized businesses (SMBs). The company announced these valuable impacts and articulated specific rights customers should expect from their technology vendors in an opening day keynote address at its annual Summit event in Las Vegas, Nev., which was attended by more than 2,800 customers, partners and analysts.

The opening keynote address featured Acumatica CEO John Case, who underlined the cloud ERP provider's dedication to supporting SMBs as they face the challenges of today's economy. Case noted that, despite the economic environment, Acumatica continues to grow, surpassing 10,000 customers. He credited the continued momentum to the Acumatica Community, which understands the needs of its customers.

"The Summit is a key touchpoint in an ongoing dialogue that takes place throughout the year in community forums, in meetings and at events," said Case. "It's the voices of our customers that drive us all forward in everything we do. Summit is a great opportunity to learn from the entire community – our customers, our partners, our people."

Case also announced an update to Acumatica's Customer Bill of Rights, which was initially published in July 2019. The new version expands on core principles to reflect the current business environment and the evolving organizational needs of today's companies. In a blog post published today outlining each of the ten rights, Case wrote that Acumatica "firmly believes that all businesses have certain core rights in their dealings with technology vendors. Beyond just talking about it, today, we are spelling out these rights and recommitting to these promises."

The Customer Bill of Rights includes practices customers deserve and should expect from software vendors, including clear fee structures, unlimited user licenses, pricing agreements without long-term commitments, complete ownership of and access to their data, a comprehensive security model and free training.

Throughout the Day 1 keynote presentation, Acumatica demonstrated its continued devotion to customer success following another year of record customer growth. Acumatica honored Avante Health Solutions as its Customer of the Year and LifeSource as its Impact Customer of the Year, highlighting the revenue growth each company experienced in 2022.

"Acumatica was the catalyst that helped us to reimagine our business services to better serve our customers, solving many challenges," said Khan Tran, chief technology officer at Avante Health Solutions. "By introducing a digital 'superstructure' founded on Acumatica, we have basically embarked on a digital transformation journey with the creation of a single consolidated system, a System of Actions."

"Acumatica was easy for our entire team to learn, and it's also affordable," said Kelly White, CEO of LifeSource. "I love that the product will grow with us as our organization size grows to save more lives. If you're looking for ways to become more efficient, don't wait any longer to find the right solution."

"Small and midsized companies are the lifeblood of today's digital economy—providing jobs, powering economic growth and driving innovation," said Case. "Acumatica is focused on providing the features these businesses need and helping them propel the global economy forward."

Acumatica was recently recognized as a Champion in SoftwareReviews' 2022 Emotional Footprint Report, Enterprise Resource Planning – Midmarket, which was based on real-user reviews. The report indicated that 100% of the customers surveyed plan to renew their Acumatica engagements, and 94% find Acumatica's solutions important to their professional success.

Schedule a live demo to learn more about what Acumatica can do for your business.

About Acumatica

Acumatica Cloud ERP provides the best business management solution for transforming your company to thrive in the new digital economy. Built on a future-proof platform with open architecture for rapid integrations, scalability, and ease of use, Acumatica delivers unparalleled value to small and midmarket organizations. Connected Business. Delivered. For more information, visit www.acumatica.com.

MICROSOFT AND OPENAI EXTEND PARTNERSHIP

We are announcing announcing the third phase of our long-term partnership with OpenAI through a multiyear, multibillion dollar investment to accelerate AI breakthroughs to ensure these benefits are broadly shared with the world.

This agreement follows our previous investments in 2019 and 2021. It extends our ongoing collaboration across AI supercomputing and research and enables each of us to independently commercialize the resulting advanced AI technologies.

- **Supercomputing at scale** – Microsoft will increase our investments in the development and deployment of specialized supercomputing systems to accelerate OpenAI's groundbreaking independent AI research. We will also continue to build out Azure's leading AI infrastructure to help customers build and deploy their AI applications on a global scale.
- **New AI-powered experiences** – Microsoft will deploy OpenAI's models across our consumer and enterprise products and introduce new categories of digital experiences built on OpenAI's technology. This includes Microsoft's Azure OpenAI Service, which empowers developers to build cutting-edge AI applications through direct access to OpenAI models backed by Azure's trusted, enterprise-grade capabilities and AI-optimized infrastructure and tools.
- **Exclusive cloud provider** – As OpenAI's exclusive cloud provider, Azure will power all OpenAI workloads across research, products and API services.

"We formed our partnership with OpenAI around a shared ambition to responsibly advance cutting-edge AI research and democratize AI as a new technology platform," said Satya Nadella, Chairman and CEO, Microsoft. "In this next phase of our partnership, developers and organizations across industries will have access to the best AI infrastructure, models, and toolchain with Azure to build and run their applications."

"The past three years of our partnership have been great," said Sam Altman, CEO of OpenAI. "Microsoft shares our values and we are excited to continue our independent research and work toward creating advanced AI that benefits everyone."

Since 2016, Microsoft has committed to building Azure into an AI supercomputer for the world, serving as the foundation of our vision to democratize AI as a platform. Through our initial investment and collaboration, Microsoft and OpenAI pushed the frontier of cloud supercomputing technology, announcing our first top-5 supercomputer in 2020, and subsequently constructing multiple AI supercomputing systems at massive scale. OpenAI has used this infrastructure to train its breakthrough models, which are now deployed in Azure to power category-defining AI products like GitHub Copilot, DALL·E 2 and ChatGPT.

These innovations have captured imaginations and introduced large-scale AI as a powerful, general-purpose technology platform that we believe will create transformative impact at the magnitude of the personal computer, the internet, mobile devices and the cloud.

Underpinning all of our efforts is Microsoft and OpenAI's shared commitment to building AI systems and products that are trustworthy and safe. OpenAI's leading research on AI Alignment and Microsoft's Responsible AI Standard not only establish a leading and advancing framework for the safe deployment of our own AI technologies, but will also help guide the industry toward more responsible outcomes.

About Microsoft

Microsoft (Nasdaq "MSFT" @microsoft) enables digital transformation for the era of an intelligent cloud and an intelligent edge. Its mission is to empower every person and every organization on the planet to achieve more.

BMW GROUP CHOOSES RISE WITH SAP TO DRIVE BUSINESS TRANSFORMATION

SAP announced that BMW Group will expand its strategic partnership with SAP to accelerate its digital transformation.

On January 25, 2023, this was sealed by both companies. Using the RISE with SAP solution, BMW Group will move its entire SAP software landscape. The company will merge its cloud strategy with its existing SAP S/4HANA systems, allowing for joint innovation for critical business areas, including finance, parts supply, warehousing, supply chain and production. This will help BMW Group to digitalize faster, more comprehensively and more efficiently in the future.

Expanding a Long-Standing Strategic Partnership

BMW Group and SAP look back on a long-standing strategic partnership. As part of RISE with SAP, BMW Group will have access to a cloud platform for end-to-end business processes.

Alexander Buresch, CIO and Senior Vice President, BMW Group IT, said: "This strategic decision will help us to drive our digitalization leadership even faster forward. We are increasing the flexibility of our infrastructure and creating maximum global scalability. And most importantly, it allows us to bring business innovations to our customers and users much faster than before. That's why I'm very much looking forward to the next steps on this joint journey with SAP."

Thomas Saueressig, member of the Executive Board of SAP SE responsible for SAP Product Engineering, added: "Our two companies are closely connected through 30 years of trusting cooperation. By expanding our partnership, we are taking a decisive step toward a digital future. This shows how SAP S/4HANA Cloud and our broad portfolio of solutions create the foundation for companies to drive innovation and ensure our customers' long-term success in a competitive world."

Shaping the Future of the Automotive Industry Together

RISE with SAP bundles the applications, platforms, tools and services needed to drive business transformation in one contract. It will enable BMW Group to combine the latest SAP technology and cloud solutions to drive business innovation. BMW Group and SAP will move from a traditional licensing model towards an operating model covering infrastructure, cloud applications and operations. As part of this expanded partnership, BMW Group and SAP will shape the future of business process innovation in the automotive industry together.

About SAP

As a market leader in enterprise software, SAP turns businesses into intelligent, sustainable enterprises. Our applications and services enable business and public customers across 25 industries globally to operate profitably and adapt continuously. With a global network of customers, partners, and employees, SAP helps the world run better and improve people's lives. For more information, visit www.sap.com.

ROOTSTOCK SOFTWARE® NAMES GEOFF BRANNON AS CHIEF FINANCIAL OFFICER

Experienced CFO in the global technology industry brings business and financial acumen to help accelerate Rootstock's growth

Rootstock Software, provider of the #1 Manufacturing ERP on the Salesforce Platform, today announced the appointment of Geoff Brannon to the position of Chief Financial Officer. In this role, Brannon will be responsible for all finance and accounting functions, and he'll also oversee Rootstock's information technology and human resources departments.

"We're pleased to welcome Geoff to our executive leadership team," said David Stephans, CEO of Rootstock Software. "He's a seasoned CFO that has in-depth experience in the global technology industry, as well as being skilled in acquisition integration, business development, and process improvement. He brings the business and financial acumen needed to support our company's decisions for growth and strategic investment."

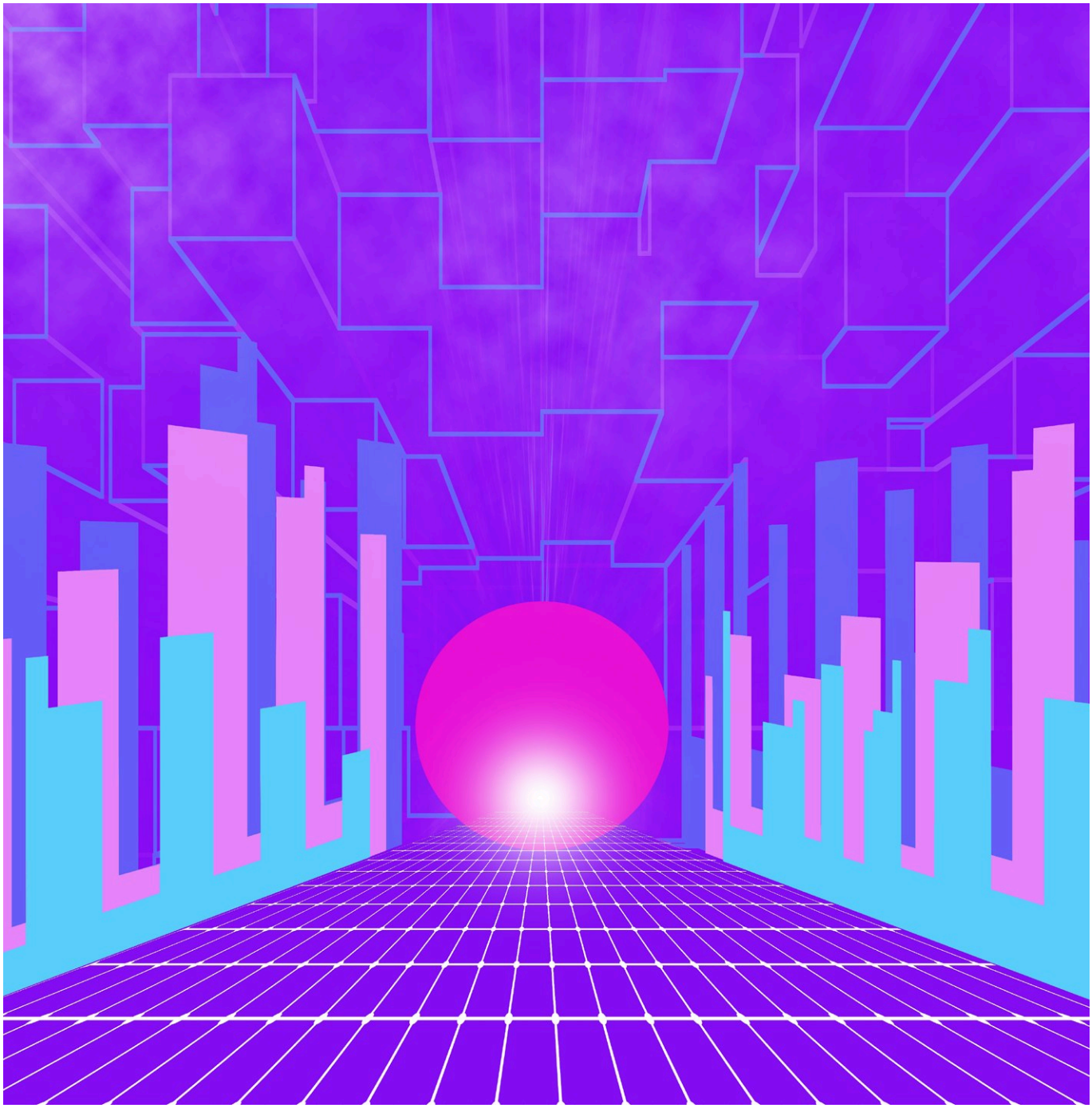
"It's an exciting time to join Rootstock," Brannon said. "As a known leader in its software category of Manufacturing Cloud ERP, Rootstock is on a fast track for expansion for a number of reasons. First, it has an impressive reputation in the market with high customer satisfaction and retention rates, and second, the company is led by an outstanding executive team, phenomenal investment partners in Gryphon Investors and Salesforce Ventures, and an experienced board. I'm looking forward to doing my part to help Rootstock accelerate growth."

Brannon brings more than 20 years of experience leading financial planning and analysis, treasury, accounting, M&A, compliance, and financial reporting functions in global technology organizations. Throughout his career, he has focused on ensuring operational excellence at companies that offered an array of solutions, including software, hardware, and professional services, which helped customers address their complex business needs. Prior to joining Rootstock, Brannon served as CFO at Oversight, where he helped manage a successful exit strategy via a private equity acquisition. And prior to Oversight, he was Division CFO of NCR Corporation's hospitality business. Brannon also worked at Radiant Systems and LSI Corporation and started his career in the assurance practice of KPMG. He holds a BA in Accounting and an MBA in Finance from Georgia State University.

Brannon will be growing the finance team; potential candidates should stay tuned to Rootstock's career opportunities.

About Rootstock

At Rootstock Software, our connected Manufacturing Cloud ERP enables hundreds of manufacturers, distributors, and supply chain organizations to turbocharge their operations in a dynamic, post-pandemic world. With our solution natively built on the Salesforce Platform, our customers leverage the industry's leading Cloud ERP, Rootstock, to connect with their suppliers, trading partners, and the broader ecosystem. Ranked as a leader in the ERP Value Matrix by industry analysts, Rootstock has vertical expertise in discrete manufacturing, medical devices and high-tech verticals. Rootstock team members partner with customers as trusted advisors in driving change and transformation to what's next. We continue to grow, so stay tuned to our new customers, career opportunities, and LinkedIn posts.



ACCENTURE INVESTS IN FORMA VISION TO BRING 3D VOLUMETRIC VIDEO TO THE METAVERSE

Accenture has made a strategic investment, through Accenture Ventures, in Forma Vision, a provider of live-streamed, volumetric video technology that enables 3D holographic images of people, objects and environments to be beamed into the metaverse from any office, home or other location.

Until now, the metaverse opportunity has been constrained to enterprise use cases appropriate for avatar-to-avatar interactions. Now, using Forma Vision's low-cost, live-streaming volumetric video technology, enterprises of any size can teleport people, places and things into their metaverse experience. For example, Accenture and others have conducted executive town-halls, training, and small group meetings using Forma Vision.

"Accenture sees the metaverse as an evolving and expanding continuum of technologies that will increasingly blur the boundary between the physical and the digital and transform the way businesses and consumers interact," said David Treat, senior managing director and global lead of Accenture's Metaverse Continuum business group. "We believe Forma Vision's volumetric video technology will enable more immersive, engaging interactions and help further bridge real and virtual worlds by allowing people, places and things to be more authentically represented in the metaverse."

In March 2022, Accenture formed the Accenture Metaverse Continuum business group, which combines metaverse-skilled professionals with deep capabilities in customer

experience, digital commerce, extended reality, blockchain, digital twins, artificial intelligence and computer vision to help clients design, execute and accelerate their metaverse journeys. Growing consumer and business interest in the metaverse as a creator economy and tool to enhance day-to-day tasks is expected to fuel a $1 trillion commerce opportunity by the end of 2025, according to Accenture findings released in early January 2023.

Adam Kirk, founder and CEO of Forma Vision, said "Volumetric collaboration is the future of hybrid work. Our mission is to bring truly natural communication to enterprise, to allow everyone to contribute meaningfully independent of location. With Accenture as our partner, we will deliver unparalleled collaboration experiences to a wide range of enterprise customers."

Forma Vision is the latest company to join Accenture Ventures' Project Spotlight, an engagement and investment program focused on investing in companies that create or apply disruptive enterprise technologies. In addition to funding, Project Spotlight connects emerging technology startups with the Global 2000 to fill strategic innovation gaps and offers extensive access to Accenture's domain expertise and enterprise clients, helping startups harness human creativity and deliver on the promise of their technology.

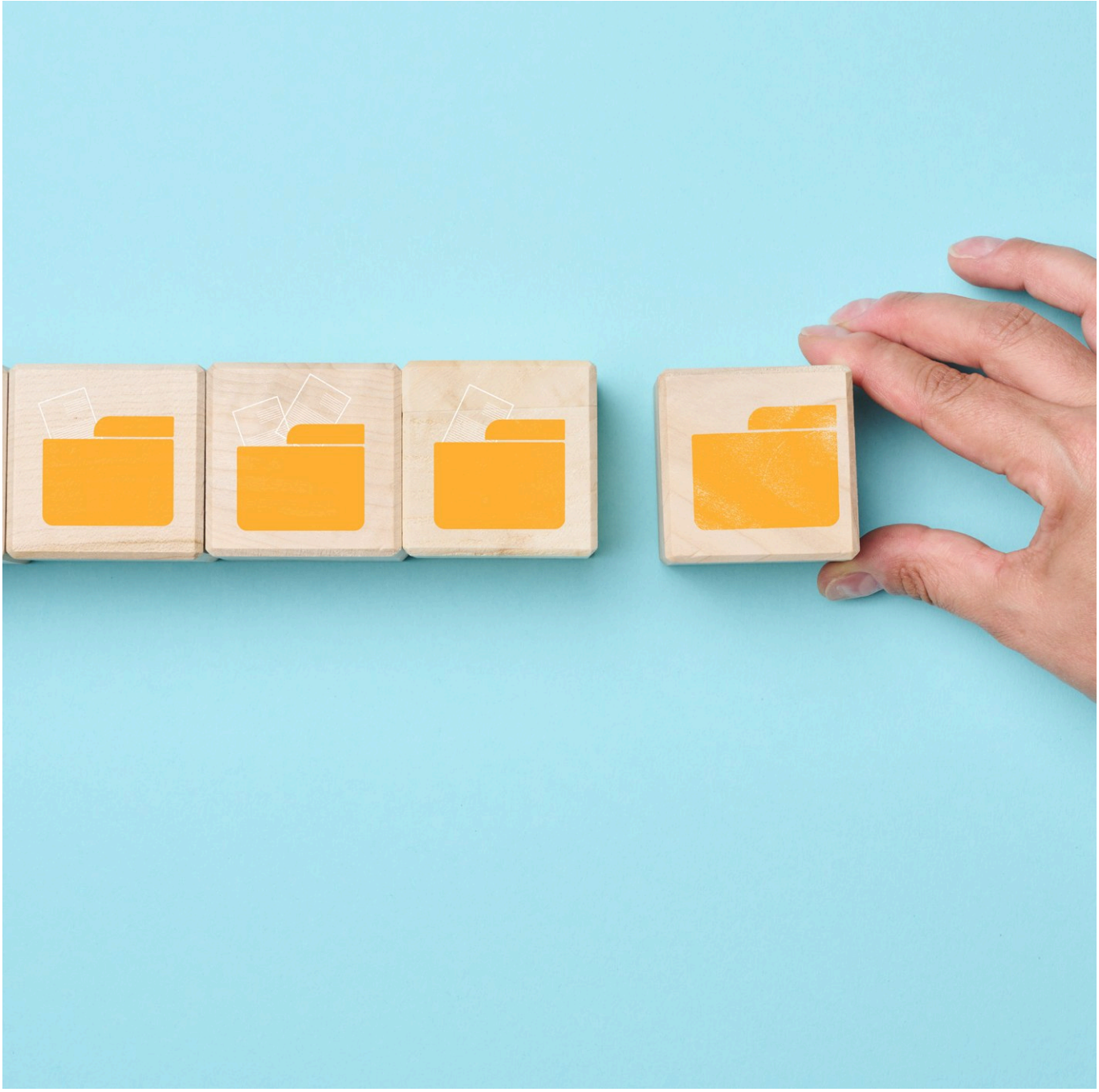
"For enterprise teams, Forma Vision's holographic meeting platform can enable remote meeting and other experiences in a highly engaging, 3D virtual format," said Tom Lounibos, managing director, Accenture Ventures. "Volumetric video allows people to show up as their authentic selves in the metaverse. Imagine having your favorite music artist perform in your living room. We believe video holograms can dynamically enhance everything from e-commerce, gaming and other media, sports and entertainment experiences to virtual healthcare, medicine and even product design."

About Accenture

Accenture is a leading global professional services company that helps the world's leading businesses, governments and other organizations build their digital core, optimize their operations, accelerate revenue growth and enhance citizen services—creating tangible value at speed and scale. We are a talent and innovation led company with 738,000 people serving clients in more than 120 countries. Technology is at the core of change today, and we are one of the world's leaders in helping drive that change, with strong ecosystem relationships. We combine our strength in technology with unmatched industry experience, functional expertise and global delivery capability. We are uniquely able to deliver tangible outcomes because of our broad range of services, solutions and assets across Strategy & Consulting, Technology, Operations, Industry X and Accenture Song. These capabilities, together with our culture of shared success and commitment to creating 360° value, enable us to help our clients succeed and build trusted, lasting relationships. We measure our success by the 360° value we create for our clients, each other, our shareholders, partners and communities. Visit us at www.accenture.com.

About Forma Vision

Forma Vision brings face-to-face collaboration to the metaverse. With our real-time volumetric service, remote users meet and work in immersive 3D, just like real-life. Instead of avatars, users look like themselves, making a Forma Vision meeting more authentic and engaging. Our enterprise service operates on today's commodity hardware and networks, and calls can be viewed on any device. To experience the future of communication with Forma Vision, visit us at www.formavision.io.



80% OF PUBLIC SECTOR ORGANIZATIONS HAVE STARTED IMPLEMENTING DATA SHARING INITIATIVES

According to a new report from the Capgemini Research Institute, 'Connecting the Dots: Data sharing in the public sector', a vast majority (80%) of public sector organizations surveyed across the world have started implementing collaborative data ecosystems[1] *initiatives, thus recognizing the need for a joined-up, data-driven approach to tackle the complex challenges they are facing. However, most are at the early stages of implementation, and few have deployed data ecosystems at scale. Besides the challenges of technology, people-based challenges are the main concern – specifically, culture and trust.*

Capgemini's research reveals that those that have deployed collaborative data ecosystems or are in the midst of a deployment phase – are already realizing significant benefits of effective data sharing, including an improved citizen experience, and better data-driven policy making.

Tackling operational and societal challenges with effective data sharing

The report finds that collaborative data ecosystems are helping public sector organizations across key functional areas including administration, security and defense, tax and customs, and welfare. For instance, 81% of local, state and central administrations that have deployed or are deploying data ecosystems say that they improved citizen engagement and 69% their sustainability roadmaps. 93% of respondents also highlight an increase in open government.

In addition, citizens are able to benefit from better government services such as a more targeted delivery of welfare programs for the most vulnerable citizens, and

improved public safety, police departments citing notably better juridical implementation and improved response times. 74% of public sector organizations that have deployed or are deploying data ecosystems are also seeing improved resilience against cyberthreats.

"Whether it's the pandemic, societal issues such as youth unemployment, or the climate and biodiversity crises: the challenges we face today require a joined-up response from our governments. That's why they have to share data systematically," comments Marc Reinhardt, Global Industry Leader for Public Sector at Capgemini. "Creating a culture where decision-making is informed by real-time data is a long-term journey. All players in the data ecosystem must have trust and confidence. But the measurable benefits to citizens' experience and government efficiency show that data sharing improves outcomes."

Adoption trends and barriers

The report finds that barriers related to trust, culture, and technology are currently impeding wider adoption. For example, 56% of respondents face one or more trust related challenges; it includes challenges such as citizen resistance to sharing data, lack of trust in the quality of the data involved, among others.

The research also highlights the important role of talent. Public sector organizations require the availability of the right skillsets and the presence of a data-driven culture within their organizations, in addition to developing a holistic skilling program to equip employees with the necessary data management and Artificial Intelligence skills, as well as skills related to managing data privacy. Only 55% of organizations have reported having trained employees on the ethical use of citizen data.

Building trust with privacy preservation technology

Embedding security and privacy by design is critical to the success of collaborative data ecosystems to allow public organizations to balance the benefits of data sharing with the need to safeguard data privacy. This also requires developing strong governance structures, data mesh architectures**[2]** as well as the use of Privacy-enhancing technologies (PETs) such as differential privacy**[3]**, federated learning**[4]**, and homomorphic encryption**[5]**.

Read the full report here.

Methodology

The Capgemini Research Institute surveyed, in June 2022, 1,000 senior officials from public sector organizations from 12 countries across North America, Europe and Asia, that are working on or planning to work on data ecosystems. The Capgemini Research Institute team also conducted in-depth interviews with more than 20 senior public sector leaders and academics. The survey covered key functional areas including welfare, tax and customs, security and defense, and local, state and central administrations

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[1] For the purposes of this research, a public sector data ecosystem is defined as: "A system of data collaboration involving a public sector entity along with other private and/or public organizations and/or citizens. These data collaboration initiatives should benefit the public organizations participating in the ecosystem and/or other target beneficiaries, such as citizens, and help them attain their overall strategic goals and mission."

[2] Data mesh architectures allow for data governance policies to be defined and managed centrally. In the context of data ecosystems, this ensures that security and compliance in the ecosystem are managed according to a common set of standards and policies.

[3] Differential privacy is a technique that introduces statistical noise when performing a data analysis on a dataset to mask identifiable characteristics of individuals within that dataset.

[4] Federated learning is a decentralized approach to developing machine learning models that allows AI algorithms to be trained using data that is stored locally in multiple, distributed sources. As a result, data does not need to be pooled in a centralized location, which helps protect the privacy of sensitive data.

[5] Homomorphic encryption is a technique that allows mathematical computations to be performed on encrypted data without first decrypting it. The results of the computations remain encrypted and can only be decrypted with the correct decryption key. As such, homomorphic encryption can enable organizations to share sensitive data for processing and analytics, without revealing the original data.

About Capgemini

Capgemini is a global leader in partnering with companies to transform and manage their business by harnessing the power of technology. The Group is guided everyday by its purpose of unleashing human energy through technology for an inclusive and sustainable future. It is a responsible and diverse organization of over 350,000 team members in more than 50 countries. With its strong 55-year heritage and deep industry expertise, Capgemini is trusted by its clients to address the entire breadth of their business needs, from strategy and design to operations, fueled by the fast evolving and innovative world of cloud, data, AI, connectivity, software, digital engineering and platforms. The Group reported in 2021 global revenues of €18 billion.

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About the Capgemini Research Institute

The Capgemini Research Institute is Capgemini's in-house think-tank on all things digital. The Institute publishes research on the impact of digital technologies on large traditional businesses. The team draws on the worldwide network of Capgemini experts and works closely with academic and technology partners. The Institute has dedicated research centers in India, Singapore, the United Kingdom and the United States. It was recently ranked #1 in the world for the quality of its research by independent analysts.

Visit us at https://www.capgemini.com/researchinstitute/

KODAK ALARIS ENHANCES ERP RESILIENCE WITH MICROSOFT DYNAMICS 365

As part of a brand that's more than 130 years old and synonymous with imaging, Kodak Alaris combines the latest innovations in imaging science, artificial intelligence, and advanced process automation to help deliver digital transformation and smart business solutions to customers around the world. Their advanced, patented intellectual property combines breakthrough technologies and human know-how to unlock the power of images and information. They enable businesses to run faster and governments to run smarter by turning data into powerful, actionable insights, and they provide consumers with innovative solutions to preserve and enjoy their most cherished memories.

Kodak Alaris has two distinct business divisions, Alaris and Kodak Moments. The Alaris division is a leading provider of information capture solutions that simplify business processes. They offer an award-winning range of scanners, software, and services available worldwide. The Kodak Moments division is a leading global provider of photo products and services to retailers, consumers, and entertainment properties. They offer consumers retail order stations, retail collection stations, the Kodak Moments app, and KodakMoments.com.

The company's mission can be summed up as invest in growth businesses, systematically and reliably deliver on financial commitments, operate in an efficient, cost-effective infrastructure, and based all decisions on a cultural foundation of innovation, transparency, discipline, and accountability. Their vision is to be an industry leader through better products, better quality and reliability, better customer service, the best and the brightest employee talent, and world-class partners around the globe.

"The outcome of all this work, coupled with Dynamics 365 being a more modern and capable solution, has resulted in a reduction of customization by 45% and a reduction in ISV's (independent software vendors) by 25%. As a result, the implementation of this new global technology ERP software will provide Kodak Alaris with a more secure and efficient way of operating for the future."_Paul Wells: CEO, Kodak Alaris

Planning begins

In early 2020, Kodak Alaris began to assess potential options for an Enterprise Resource Planning (ERP) solution. They had outgrown their current system, and mainstream support would end in October 2021.

Three key stakeholders sponsored the project:

- Paul Wells, Chief Executive Officer. Paul has overall leadership responsibility for Kodak Alaris, its financial and operational performance and strategy, and cultural transformation.
- Diane Gardner, Chief Financial Officer. Diane has more than 20 years of progressive finance experience with both public and private companies and oversees all Kodak Alaris financial operations.
- John F. Milazzo Jr., Chief Information Officer. John manages and implements computer and information technology systems across Kodak Alaris and has extensive experience in the IT industry.

"It was important that we made a sound business and technical decision. Due to the end of life of AX, this was the second time we had the company go through an ERP project. While this was more of an upgrade/modernization, it has all the aspects of a full ERP implementation. Dynamics 365 provided us continuity from a technical and business process perspective and provided us the lowest cost and fastest path." John F. Milazzo Jr.: CIO, Kodak Alaris

Kodak Alaris leadership urged their team to open a request for proposal (RFP) with strict guidance to focus on solutions that provided standard functionality needed to support the business. The scope included the following business process areas across both the Alaris and Kodak Moments divisions:

- Asset management
- Billing
- Business intelligence and analytics
- Compliance
- Costing
- Data management
- Finance and accounting
- Inventory management
- Order management
- Planning and scheduling
- Production control (discrete manufacturing)
- Project management
- Procurement
- Sales
- Service management integration
- Shipping and distribution
- Supply chain management
- Warehouse management

In early 2020, the team performed an initial high-level assessment of a dozen ERP solutions. This effort resulted in a short list of five ERP vendor software solutions, including Microsoft Dynamics 365.

The RFP was executed to determine which of the five solutions would be selected for the company's system modernization program. Each vendor solution was assessed based on its standard capabilities. Although Kodak Alaris understood that some processes would likely need to be re-engineered, the focus was on using out-of-the-box software capabilities rather than customization to support the current state of the business.

During the RFP process, Microsoft provided product demonstrations that showcased the value proposition of Dynamics 365 and the Microsoft ecosystem. Microsoft also introduced the Dynamics Migration Program, designed to help customers update key customizations and data from legacy Dynamics AX 2012 to Dynamics 365. This program differentiated Microsoft from other contenders.

In the end, Kodak Alaris selected Microsoft Dynamics 365 Finance and Supply Chain Management based on the combination of fit for business processes, cost, and ease of implementation.

The simplification story

The Kodak Alaris team got to work quickly, creating a list of business objectives. The first objective was overarching: provide a modern solution that offered standardized processes enterprise-wide, while ensuring business operations would continue running efficiently.

Kodak Alaris also wanted to reduce overall total cost of ownership associated with the ERP ecosystem. It was a priority to reduce the number and complexity of customizations and upgrade or replace ISVs and third-party solutions with standard functionality or current versions, where applicable. A cross-functional simplification team was formed to ensure that standard capabilities were fully explored, and customization was only considered when essential. Each customization required a strong business justification and management approval.

Within months, Kodak Alaris and the Microsoft Dynamics Migration Program team completed the code and initial data upgrade. This achievement reduced the project timeline by more than six months. With the migration work complete, the Kodak Alaris team moved on, completing integration development, system configuration, testing, tuning, and solution validation.

The project was organized around a series of conference room pilots (CRPs). In a CRP, logical groups of business processes were designed, set up, and tested progressively until the whole business was supported. Each CRP cycle had formal entrance and exit criteria to ensure quality results.

Kodak Alaris decided to use a "big bang" approach to the roll-out. All functionality, in all countries, would go live at once. This meant shutting down the legacy system globally to execute migration steps, including data upgrade and validation and connecting ancillary components (ISVs, third-party products, etc.). Finally, with testing and remediation complete and steering committee approval, it was time to go live.

On July 18, 2022, Kodak Alaris went into production on Dynamics 365, with more than 700 users worldwide using Dynamics 365 Finance, Supply Chain Management, Sales, Synapse Analytics, and Power BI.

Benefits and impacts

Kodak Alaris now has a cost-efficient, out-of-the-box ERP system that runs the business efficiently. Most importantly, the system is evergreen. When technology or standards change, Kodak Alaris won't need to implement another ERP.

Cost reductions. Kodak Alaris analyzed the total cost of their new ERP system and projected approximately a 25 percent cost reduction versus the legacy system. This analysis included Dynamics 365, ISVs, third-party products, Azure, and others.

Foundation for innovation. With Dynamics 365 up and running, Kodak Alaris has the capability to support their business needs in the future.

"Dynamics 365 is working very, very well for us and the business is just starting to realize what a powerful engine we have. Our new Dynamics 365 ecosystem has positioned us well for the future. We have an evergreen environment that keeps us current, allows us to take advantage of new features in a timely manner, and provides a flexible architecture to help fulfill new business needs." Mark Buckley, IT ERP Program Manager, Kodak Alaris

Streamlined reporting. Kodak Alaris is especially enthusiastic about Azure Data Lake and its reporting capabilities. The system is now more resilient and no longer slows to a crawl when conducting product reporting, because the data is contained in the Azure Data Lake and not in the ERP. "This was one of my focuses and I wish I had full-time availability to work on it because it is so cool what you can do," said Buckley. "Before Dynamics 365, data extracts were transformed and formatted into static report files before they could be shared with managers. Today we have Azure Data Lake export running continuously, managers can use Power BI to access their data, and decision-making is based on a single source of truth, eliminating discussions as to data accuracy."

Elimination of customization. Customizations are now the exception, not the rule, and they are based on absolute necessity. With simplicity and the emphasis on out-of-the-box processes, the number of customizations has been cut significantly. By go-live, the company's fit gap was 70 percent out-of-the-box and 30 percent custom-built.

Move to remote. In March 2020, the IT team switched to working 100 percent remotely and has been ever since. The team uses Microsoft tools such as Teams, Azure DevOps, and others, to collaborate and manage projects.

Going slow to go fast

Bringing a new ERP system live months ahead of schedule is uncommon, but as the Kodak Alaris team proved, it's not impossible. Their success includes the following best practices:

Tight governance

- Disciplined project governance throughout the implementation followed scope and change management.
- The team planned rigorously and made extensive use of Azure DevOps to track requirements, deliverables, bugs, test cases, cutover plan, etc.

Reduce complexity and customizations

- The company achieved the following key simplifications, significantly reducing complexity and the need for customizations:

Testing

- Subject matter experts from the business team were involved throughout the project to define requirements, conduct early validation, and perform testing and training.
- Multiple rounds of data upgrades were executed to iron out issues and optimize overall performance.
- A detailed cutover plan with every activity and allotted time was prepared and test runs were conducted during user acceptance testing (UAT). A full mock cutover was performed leading up to the go-live.
- Two full UAT cycles were conducted to test each end-to-end business process, including upgraded data, integrations, and customizations.
- A performance test was conducted with many users across the globe simulating day-in-the-life transactions to ensure that each business process was completed as needed.

Adoption

- Adoption was simpler because the users were familiar with Dynamics AX 2012 and there were similarities to Dynamics 365. On core functions, change management was light.
- The team held workshops prior to go-live, which helped to get people familiar with the new system. They had a good portion of the user base engaged in the CRP cycles, so go-live was not their first experience of Dynamics 365.

The journey continues

With Dynamics 365, Kodak Alaris can accept updates and enhancements continuously and can implement new features delivered by Microsoft throughout the year. They have a Dynamics 365 Commerce implementation underway, expected to go live in late 2022.

"We had a homegrown e-commerce solution that was deprecated," said Buckley. "We conducted a build versus buy analysis and ended up deciding to go with the Dynamics 365 Commerce."

"It was a pleasure working with the Dynamics Migration team. The work was performed with high quality, completed in a timely fashion, and with efficient communications. I have no hesitation giving the work and the team two thumbs up!" Crystal Ahrens: Solutions Architect, Kodak Alaris

About Microsoft

Microsoft (Nasdaq "MSFT" @microsoft) enables digital transformation for the era of an intelligent cloud and an intelligent edge. Its mission is to empower every person and every organization on the planet to achieve more.

lumenia

PAPERLESS ERP VALIDATION

Last year with our help, one of our clients, a high-profile biotech business, chose SAP S/4 HANA as their new ERP solution. One of the implementation challenges for this project was the requirement for the new ERP solution to be validated.

Our client asked us to work alongside their internal quality team, providing validation advisory and project management services. One of our early recommendations was that they should adopt a fully paperless approach to validation by implementing a specialist electronic validation management solution. They accepted this advice and while it did take some effort to set up the new solution initially, the subsequent validation process has proven to be significantly better than traditional paper or hybrid approaches. Some of the main benefits that we have found include:

Much more efficient and effective document control and approval.

The document approval process is completely paperless. All validation-related documents are maintained in a single repository, with approvers receiving electronic notifications that their review is required. Approvals are captured in the validation solution using time-stamped electronic signatures, with any annotations or comments also being recorded. While in theory, similar processes can be set up using generic tools such as SharePoint, our experience in practice is that they are seldom configured or managed well enough to maintain effective document version control. There is also the fact that a SharePoint-based process itself needs to be configured and custom-validated for this purpose, whereas the e-validation solution is designed for this purpose, has vendor pre-validation and a structured approach to the remaining in-house validation prior to deployment for use.

Automatic generation of the requirements traceability matrix.

Traditionally, RTM generation required the maintenance of a large spreadsheet, which listed each functional requirement and needed to be updated as a separate task once each test script was defined or modified. It was typically a big challenge to ensure that the spreadsheet was updated properly each time and that there were no omissions. With the e-validation solution, links between test scripts and requirements are made in a single step as each script is being documented. Once this is done, there is no further work to do – the system can generate the RTM at any point and there is certainty that it is up to date.

More efficient capture and review of test results.

We found that the process of executing test scripts was greatly improved compared to traditional methods. First of all, the e-validation solution ensures that the correct version of test script is used and paper is never printed, so issues relating to incorrect versions of scripts are eliminated. The application provides a screen-based template for testers to confirm that each step in each script has passed, including a simple mechanism to upload evidence such as screenshots or report samples, with a time-stamped electronic signature being captured at each step. Where there are deviations, the system also manages these electronically by triggering a workflow process to review and assess the impact of each. The test review process is also much simpler than in traditional validation processes. There is a full electronic audit trail associated with each script and GDP errors are pretty much eliminated, as the e-validation application embeds attachments at the correct stage in each test script.

In summary, we have found the ERP validation process to be improved very significantly as a result of using the e-validation solution and by removing paper entirely. Of course, there are additional costs for the e-validation licences, and the set-up of the application takes time and needs to be well-managed. However, our belief is that the benefits in terms of faster execution and much less time-consuming review make the investment worthwhile in the long-run, particularly when the advantages of being audit-ready in future are factored in. I have deliberately not mentioned the e-validation solution we employed in this project, because this blog is not meant to be a sales testimonial for any particular application. There are a number of strong solutions in this space, each of which is likely to offer benefits such as those outlined above.

About Lumenia

Lumenia Consulting is an independent ERP consulting organisation, specialising in business transformation through the implementation of Enterprise Resource Planning and related enterprise software applications.

FILL BOOSTS ANALYTICS ADOPTION BY 400% TO ENHANCE MANUFACTURING OUTCOMES

Founded in 1966, Fill Gesellschaft M.B.H. has set global standards in manufacturing machinery for various industrial sectors. Fill focuses on data-driven core competencies such as robot processing, automation, image processing, and real-time monitoring. As the company expanded, now with over 1,000 employees, its custom-built data management solution wasn't able to keep up and was producing unreliable data. The company sought to modernize its analytics and restore performance standards for both internal users and customers.

We chose Infor Birst because it is a leading Cloud BI solution offered by our trusted partner Infor. We looked at other reporting services, but Infor Birst offered a complete and easy-to-use solution that we knew our users would adopt and trust." MARTIN REITER Chief Sales Officer, Fill Gesellschaft M.B.H.

Pursuing a new set of performance standards

Fill's manufacturing operations and sales workflows were heavily reliant on the company's data management and analytics solution, which drove much of the ongoing decision making. Over time, the old system began to slow down in processing performance. Response times lagged and data output lost confidence across teams, which caused user activity to steeply decline.

"They didn't trust the data," said Martin Reiter, Chief Sales Officer at Fill, "especially in the service department where the custom-made solution sometimes delivered wrong numbers. And that's why...we decided not to use it anymore."

Ongoing releases and upgrades in other interrelated systems contributed to analytics lag and interoperability challenges. With all of that in mind, Fill recognized it needed a modern solution that could reengage users and provide actionable insights for decision making. Reiter noted that, "Costly, manual reporting processes and lack of data-driven decision making led to loss in opportunities and inefficiencies."

Modernizing data and analytics

What good is a system, even a slower one, that the users refuse to engage? Fill's leadership across sales, operations, IT, and other departments worried that their teams were no longer using a central business intelligence (BI) system for the data, and therefore had no unified basis for their ongoing decision making.

"Since we deployed Birst, our analytics adoption has increased by 400%. We went from a few project managers to over 160 users across the sales, service, and purchasing departments gaining insights to trusted data in just a few easy clicks from their desktop or mobile device." MARTIN REITER Chief Sales Officer, Fill Gesellschaft M.B.H.

Business challenges

- The company experienced low BI adoption with the old, custom reporting solution
- The legacy system was increasingly slow in performance and inflexible with new software integrations
- Users didn't trust the data generated by the old system, undermining confidence in ongoing workflows
- Users were forced to waste time by creating Microsoft Excel™ reports with data exported directly from the ERP

Users turned to spreadsheets and data entry to manage analysis and reporting that should've been much simpler and more straightforward. After some consideration, Fill selected Infor Birst® as the solution of choice, and joined with longtime partner Solicon IT to integrate the new system into its network infrastructure.

Partnering with Infor all over again

In this instance, an Infor solution was an easier choice because Fill had an established relationship with the company. Fill has been an Infor customer since 2000, and integrated Infor COM® as an ERP solution in 2004, staying current with releases since then. This established a comfortable and familiar Infor landscape throughout the company and opened the way to add Infor Birst to the ecosystem.

Reiter said, "The wish of our users was to keep the layout of the report similar to the older version, and to add some new things; that's why it was also a criteria to link it to the old layout of the former system."

Infor Birst provided a modern user interface with intuitive navigation from dashboard to ad-hoc analysis, helping users switch to the new solution without too much transition or training. As an all-in-one tool, Birst gave Fill greater capabilities with less maintenance for data modeling and integration, data visualization, ad-hoc analysis, pixel perfect reports, and web and mobile dashboards. One of the key reasons for selecting Birst is the ease of bringing together diverse data sources to provide a unified view of data for newer insights.

Expanding organization-wide capabilities

With the former system being used primarily by project managers, there are now nearly 200 users working within the new Infor Birst solution. Sales data has been included, giving the whole sales department, plus the service and purchasing departments the ability to create data reviews pulled from daily input. Plus, everyone has immediate access to the same data sets, allowing for better inter-department management and oversight.

Fill enjoys how sales can quickly check all manufacturing quotes, including factoring in all quote probabilities, filtered by customer and other variables. Project managers have one-click access to their individual and team projects, supplier revenue can be analyzed, and reporting is easier than ever.

Reiter also added, "And for the purchasing department, for example, we have free ports where they can get an overview of the revenue of the supplier, of the quality of the parts that he delivers, and so on. And these are all reports where you get the information very quickly and don't have to check or extract some extra sheets out of the ERP system."

Business results

- Weekly sales reporting accelerated to provide on-demand daily reporting from any device for all users
- The increased use from a few project managers to 160 users across sales, service and purchasing, and project management has resulted in a 400% increase in analytics adoption
- Automated reporting has saved teams at least 40 hours per week of manual data management back-office team productivity has increased 5-10%

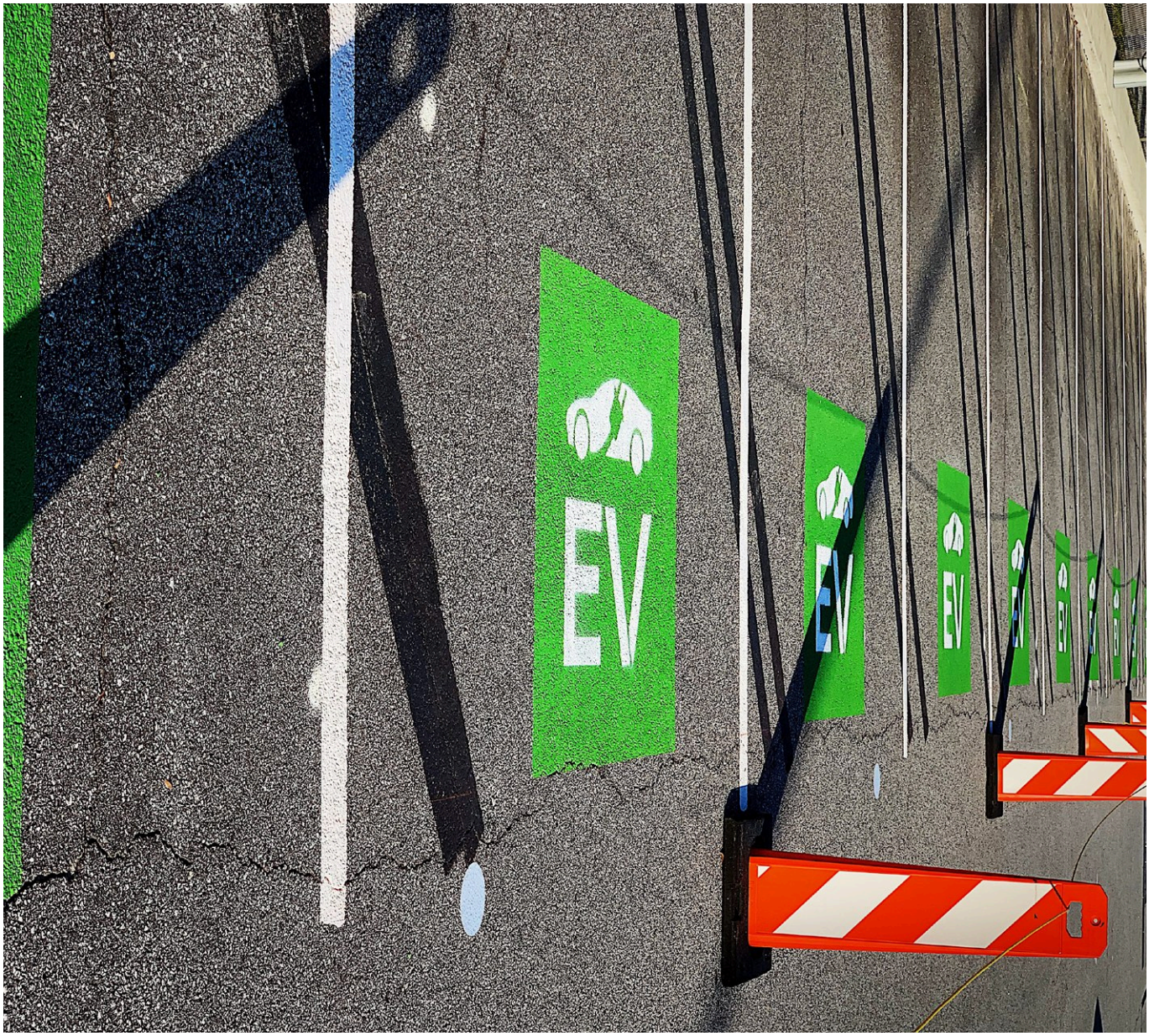
Streamlining strategic insights and results

The Birst integration has been done in successfully in implementation sprints, furthering Infor's reputation as a trusted partner for Fill's ERP and BI analytics. These individual stages of implementation allowed the Birst solution to be customized for maximal usability, and Infor continues to be welcomed across the organization.

Daily work across all departments has been streamlined, and different divisions have equally actionable views of the data. This has empowered productivity across the board and enabled better sales strategies to be developed. Fill is eager to move forward with a trustworthy data analytics solution, enjoying higher productivity and both cost and time savings.

About Infor

Infor is a global leader in business cloud software specialized by industry. We develop complete solutions for our focus industries. Infor's mission-critical enterprise applications and services are designed to deliver sustainable operational advantages with security and faster time to value. Over 60,000 organizations in more than 175 countries rely on Infor's 17,000 employees to help achieve their business goals. As a Koch company, our financial strength, ownership structure, and long-term view empower us to foster enduring, mutually beneficial relationships with our customers. Visit www.infor.com.



Capgemini

DIGITAL SERVICE POWERS GROWTH OF THE UK'S RESIDENTIAL NETWORK OF EV CHARGEPOINTS

Capgemini supports the Office for Zero Emission Vehicles to refresh and simplify access to grants to extend EV chargepoint infrastructure to more homes

Client Challenge: The Office for Zero Emission Vehicles wanted to digitize and automate the grant application process that is accelerating the growth of the UK's electric vehicle charging network.

Solution: Following detailed investigation and analysis of user needs, the Office for Zero Emission Vehicles partnered with Capgemini to implement a cloud-based web portal that provides a single access point and data repository for all grant applications.

Benefits:

- Fast, accurate assessment of grant eligibility
- Greater efficiency in processing applications and awarding grants
- Increased speed of payments to applicants and installers
- Reduced grant application administration costs
- Accelerated government chargepoint program roll out

The commitment to end the sale of new petrol and diesel vehicles by 2030, and to ensure that all new cars and vans are zero emission by 2035 is the centerpiece of the UK government's landmark Transport Decarbonization Plan and a key component of how it will achieve its overall Net Zero goals.

Transportation is the largest contributor to UK greenhouse gas emissions, with road travel accounting for almost a quarter of total emissions in 2019. The Office for Zero Emission Vehicles (OZEV) coordinates the government effort to support the transition to zero emission vehicles by promoting the use of plug-ins and providing access to funding for chargepoint infrastructure. The ultimate goal of this initiative is the creation of a self-sustaining market for electric vehicles (EVs).

"As the UK accelerates towards net-zero emissions by 2050, we are determined to deliver a world-leading electric vehicle charging network while we Build Back Greener and support economic growth across the country." Rachel Maclean, Transport Minister

£1.6 billion investment in chargepoint infrastructure

Fundamental to the success of the transition to EVs is the government's ongoing £1.6 billion investment in the extension of the country's electric vehicle chargepoint network. Doing so means making charging available wherever people live and work throughout the country.

When OZEV wished to improve the accessibility and management of the various programs that provided chargepoint infrastructure installation grants, the Office appointed Capgemini to review the existing landscape, identify how grant application processes and workflows could be streamlined, and recommend how digital technology could transform the structure and delivery of these vital services.

According to Department for Transport (DfT) statistics, there were more than 30,000 public EV charging devices available throughout the UK in April 2022. While this number continues to rise, a key priority for the government and OZEV was to stimulate the market for EVs in those areas where the availability of chargepoints was more limited.

A new policy initiative was launched to provide additional grant support for homeowners and renters living in multi-occupancy buildings and looking to buy their own chargepoints, as well as building owners and landlords who managed a residents' car park and wished to provide charging services for their customers.

As part of an agile program that leveraged user-centric design techniques, OZEV worked with Capgemini to assess existing policy and application schemes.

In addition, user research captured the views and needs of key stakeholders, such as residents, building owners, installers, and grant application administrators at the Driver and Vehicle Licensing Agency (DVLA), which ensured that the solution catered to the people it was meant to impact.

Accounting for the needs of all stakeholders

In the UK, EV chargepoint installers take on significant responsibility in submitting grant applications on behalf of their customers. As a result, they needed a simple application process that would create less friction between them and their customers and enable the delivery of the right chargepoint in a timely manner. Installers also needed the ability to submit multiple applications at once, track their progress in one place, and feel confident that they could avoid cash flow issues by getting grant payments sooner.

Similarly, EV owners, building owners, and landlords needed to know that they could get a chargepoint installed by an authorized installer at their property quickly and at a price they could afford. This meant gaining access to a straightforward, plain language way of checking installer eligibility and how much grant value they could apply for while receiving guidance about the right infrastructure for their property.

To achieve this, OZEV and DfT needed an automated, transparent EV grants platform that would allow them to significantly reduce the time spent assessing applications. Additionally, the government wanted an easy-to-learn solution with a consistent user experience that could handle multiple grants and large volumes at speed, which would enable multiple schemes to run simultaneously in a cost-effective way.

End-to-end digital application process

Working in close collaboration with DfT and DVLA stakeholders, OZEV and Capgemini worked in Agile teams. They scaled to build the solution incrementally while using the latest DevOps tools to fully automate the release process, thereby enabling the fast and predictable delivery of a quality service.

OZEV and Capgemini coordinated to build a bespoke, secure, and compliant web portal based on open-source technologies and hosted on Google Cloud. Meanwhile, a Microsoft Dynamics platform used principally by DVLA processing staff captures all relevant data, including application forms and site photographs of the completed installation. Doing so enables installers to have end-to-end oversight of the application process.

The collaboration between OZEV and Capgemini delivered a fully digitized, cloud-based service that processes EV chargepoint grants. This platform ensured that eligible applicants receive funding of up to 75% towards the cost of installing EV chargepoints at domestic properties across the UK. In addition, the platform replaced the previous EV Homecharge Scheme, which relied on manually processed, paper-based processes. Now, all eligibilities are verified and confirmed before work commences, which provides stakeholders with peace of mind while the pace of installation has accelerated.

Launched in August 2022, the EV chargepoint grant service provides a process template and repeatable technology platform on which associated grant application services currently using manual processes can be fully digitized.

Charging often starts at home, with most UK motorists having access to off-street parking. As an EV driver myself, I know that home-charging not only provides access to cheaper electricity prices, but also means my car is charged each morning and ready for the day ahead.

About Capgemini

Capgemini is a global leader in partnering with companies to transform and manage their business by harnessing the power of technology. The Group is guided everyday by its purpose of unleashing human energy through technology for an inclusive and sustainable future. It is a responsible and diverse organization of over 350,000 team members in more than 50 countries. With its strong 55-year heritage and deep industry expertise, Capgemini is trusted by its clients to address the entire breadth of their business needs, from strategy and design to operations, fueled by the fast evolving and innovative world of cloud, data, AI, connectivity, software, digital engineering and platforms. The Group reported in 2021 global revenues of €18 billion. Get The Future You Want | www.capgemini.com

Prophix

PROPHIX CEO SHARES PREDICTIONS FOR FINANCE: "CASH IS KING IN 2023"

Prophix CEO Alok Ajmera predicts a shift back to basics, including new processes, skill sets and technologies that help businesses weather 2023's uncertain economic climate

Just as organizations began to emerge from the many pandemic-related challenges over the last couple of years and pivot their attention back to innovation and growth, macroeconomic headwinds are poised to create another year of market uncertainty in 2023. According to Prophix CEO Alok Ajmera, finance teams that embrace a return to financial planning and analysis (FP&A) fundamentals, alongside infrastructure and data investments, will be better prepared to anticipate and respond to business fluctuations in the months ahead.

"It's common in times of uncertainty for businesses to shift into survival mode, abandoning the goals and initiatives that are central to their continued growth and success, such as adopting new innovative technology solutions," said Ajmera. "But as we saw during COVID-19, finance teams that embraced cloud-based FP&A technology were able to leverage scenario planning and make quick adjustments to forecasts based on informed data insights when faced with sudden market changes.

"The anticipated economic climate of 2023 will require finance teams to conduct weekly and even daily cash forecasting to survive this challenging environment. Having the right tools and processes will help them better predict and plan for potential scenarios to keep their businesses on track," Ajmera continued.

Ajmera shared five predictions for finance teams aiming to carry their businesses through periods of potential economic volatility in 2023:

1. Cash will retake the crown

The economic shifts of the last few years have led to the perfect storm: a trifecta of rising interest rates, growth headwinds and steep inflation are placing pressure on cash – and businesses are feeling the squeeze. The best way for businesses to survive this challenging economic environment where "cash is king" is through rigorous and consistent cash management.

Expect to see finance teams conduct weekly and even daily cash forecasting. Financial planning and analysis (FP&A) software will help companies best manage this consistency, by automatically tracking and analyzing cash inflows and outflows so finance leaders can predict and plan for a variety of scenarios. This level of granular visibility will allow finance leaders to make quicker, better and more informed decisions in the face of business uncertainties.

2. Financial covenant management will be front and center

For highly leveraged businesses – those with any significant amount of debt – covenant management will be critical in the year ahead to avoid putting the company at risk. If businesses are not managing their covenant tightly through advanced FP&A processes, they will be inviting the bank to come in and collect their cash. In contrast, businesses without debt are in a good position to prioritize growth and use their cash reserves to buy a competitor, grow market share or make other strategic investments.

3. Volatile currencies will require close oversight

Currency fluctuations will continue in 2023, impacting actual profit and global competitiveness and placing added pressure on finance teams to handle contractual and operational risks. Finance teams with international operations will need to closely monitor accounts receivables, accounts payables and debt obligations, as changes in exchange rates run the risk of increasing the actual cost of an outstanding payment or decreasing the actual dollars received in payment.

4. Back to basics in finance

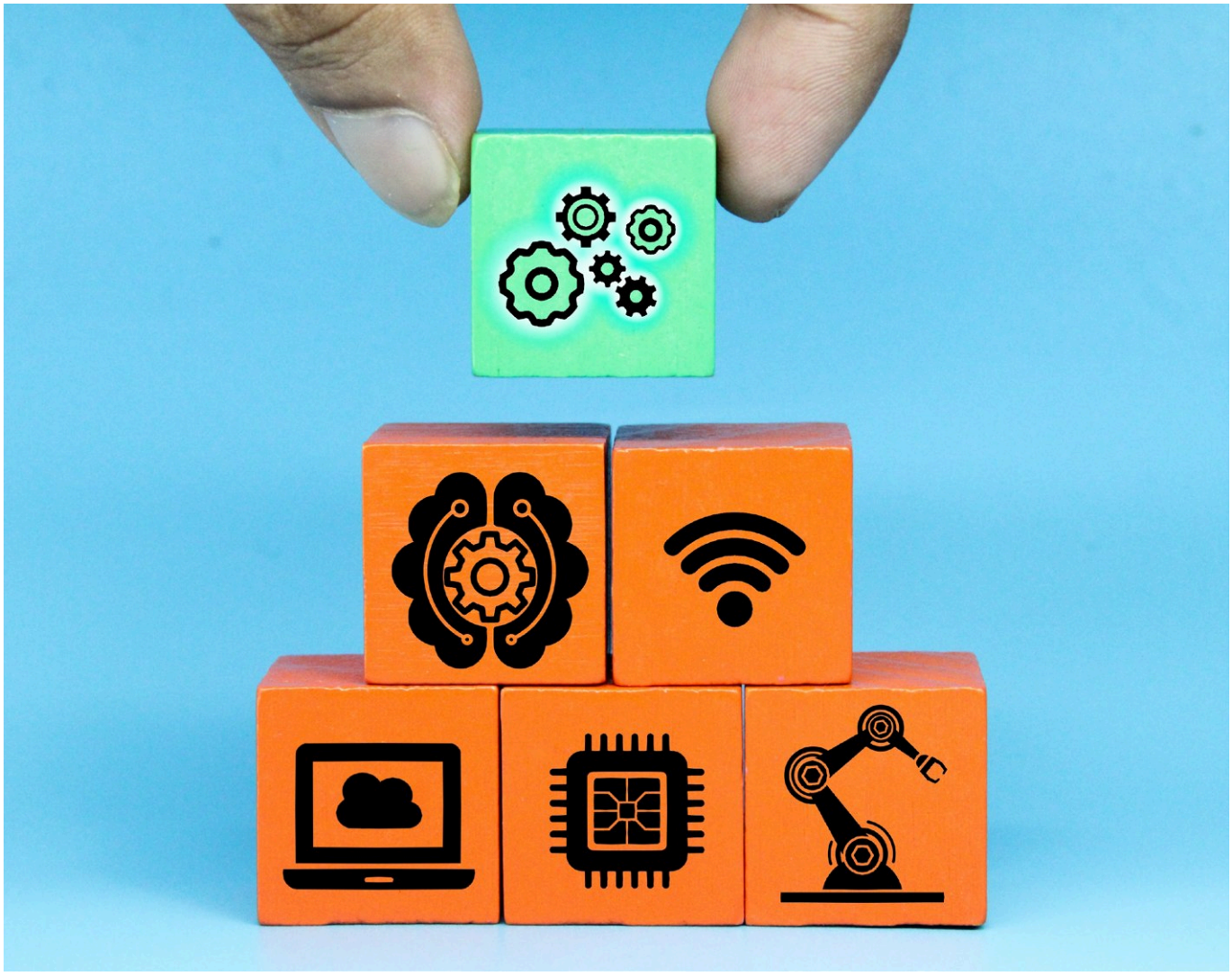
The new year will demand a return to fundamentals, where finance teams will be encouraged to step back and rethink processes, team skill sets and technologies to enable granular monitoring of financial principles and cash flow. Data visibility, financial discipline and human decision-making will rise to the forefront of finance activities, paving the way for the adoption of more advanced technologies like artificial intelligence (AI) and machine learning in the months ahead.

5. Infrastructure and data investments will pay off

An anonymous Navy Seal was quoted as saying, "Under pressure, you don't rise to the occasion, you sink to the level of your training." This same idea can be applied to businesses' financial planning and cash management headed into 2023. Businesses that double down on infrastructure, data and broad analytics technologies will now benefit from a higher level of visibility into critical metrics such as cash flow and debt covenant management for meticulous forecasting and strategic decision-making.

About Prophix

To empower mid-market companies to achieve their goals, Prophix provides an integrated, cloud-based platform to the Office of Finance; one that delivers planning, budgeting, reporting, forecasting, and consolidation solutions. With Prophix, finance leaders improve profitability and minimize risk, and put the focus back on what matters most – uncovering business opportunities. Prophix supports the future with AI innovations that adapt to meet the strategic realities of more than 2,600 active customers, globally, who rely on Prophix to deliver tangible business outcomes and transform the way they work. For more information, visit www.prophix.com.



Nolan Business Solutions

NETSUITE 2023.1: WHAT TO EXPECT & HOW TO PREPARE

NetSuite is bringing new and exciting features in its latest release, 2023.1. Set to be released on March 16th, the update will enhance the platform's capabilities to better the needs of all its users. New features will help improve inventory management, financial management, customer relationship management, and lots more.

If you're an existing NetSuite user and would like to find out exactly what to expect, stick around. In this article, we explore the 2023.1 release notes and provide our guidance on how to prepare for the update using your preview test account.

New features with NetSuite 2023.1

Here are some interesting items we think will be most valuable in NetSuite's latest release:

Intelligent Item Recommendations

Using AI algorithms to display product recommendations to sales reps and online shoppers, the Intelligent Item Recommendations feature will soon be available to NetSuite users. NetSuite accounts that have the Customer Relationship Management or Website features enabled will be able to take advantage of this feature come the 2023.1 update.

Intelligent Item Recommendations will enable sales reps to view and choose from item recommendations as they create opportunity records for prospects or customers. The AI algorithms that calculate these recommendations will use data such as:

- what the customer bought in the past
- what other customers with similar transaction history bought in the past
- what other items were bought by customers who bought a specific item
- items in the same account that have similar names, descriptions, and categories

NetSuite AP Automation improvements

AP Automation was launched at SuiteWorld last September – and NetSuite are already adding to its capabilities! The manual entry of vendor bills takes time and is prone to errors. Automating the entire bill capture process through AP automation is the way to go.

With 2023.1, NetSuite AP Automation will allow you to upload vendor bills simply by emailing them into NetSuite, which are then automatically processed to create digitised versions. There will also be the added flexibility of being able to edit subsidiaries, swap lines between items and expense tabs, as well as adjust taxes and shipping cost total amounts.

But there's more. Finance teams can also take advantage of the following features with NetSuite 2023.1:

- The SuiteBilling feature now includes the ability to automatically apply a percentage increase to a customer's renewal pricing.
- The Rebates and Trade Promotions SuiteApp has been expanded to include the automation of rebate and trade promotion calculations for kits and assembly items, in addition to standard inventory items.
- Those operating with tax-exempt units can now assign nexuses to a subsidiary, classify them as tax-exempt, and skip the assignment of a tax engine, disabling tax calculations on transactions for that nexus.

Warehouse Management updates

The NetSuite Warehouse Management System has been updated to improve efficiency in the picking process. With the 2023.1 update, floor workers will be able to mark partially picked orders as completed and mark a bin as empty, whether due to insufficient quantity, damaged goods, or other issues. This eliminates the need for workers to walk to empty bins, and alerts replenishment workers to restock. Additionally, if bins are unexpectedly empty or damaged, they can be blocked, and an alert will be sent.

Other improvements for warehouse workers and manufacturers include:

- The NetSuite Smart Count feature has been expanded to include the ability to count serialized and lot-numbered items.
- The Costed BOM Report SuiteApp provides a detailed overview of all expenses associated with producing assembly items, including costs for materials, labour, machinery, setup, and overhead.
- The Manufacturing Mobile SuiteApp has been updated to support standalone assemblies without an associated work order.
- The NetSuite Quality Management system enables quality assurance teams to create automated inspection requests for items produced by contract manufacturers.

So, how can you prepare for NetSuite 2023.1?

Alongside the updates mentioned above, NetSuite 2023.1 contains a host of exciting new enhancements, which can be found in the official release notes here. With many planned updates coming to NetSuite on March 16th, we recommend your business takes action to ensure you're fully prepared.

In order to do so, don't forget to request your Release Preview test account for hands-on access to the 2023.1 release. This will enable you to see how new features will work with your data, workflows, and customisations.

We recommend that a preview account is used for testing as soon as possible, giving you ample time to fix any teething issues before the update drops. Remember, March 16th is the current release date.

For official guidance on preparing your NetSuite application for testing, be sure to use the instructions shown on the Oracle Help Centre. Alternatively, reach out to our team of experts at Nolan Business Solutions. As accredited NetSuite partners, we're always happy to help.

About Nolan Business Solutions

Nolan Business Solutions has helped thousands of companies worldwide solve their business problems by implementing leading mid-market business software solutions and custom developed software applications for over 20 years. Nolan Business Solutions is a unique Microsoft Dynamics GP and NetSuite solution provider with the ability to deliver standard and customised enhancements, as well as straightforward out-of-the-box installations for both products. Their ability to deliver proven on-premise, as well as Software as a Service (SaaS) bespoke functionality makes them stand out from the crowd.

odlesERP

TOP REASONS FOR CHOOSING OPEN SOURCE ERP SOFTWARE IN 2023

Article By ***Anirudh Bhardwaj***

Open source ERP systems have become increasingly popular over recent years, as more businesses seek to leverage them to enhance their operational efficiency. Unlike off-the-shelf ERP solutions that are owned and controlled by a single entity, open source ERP software are developed and maintained by a community of users and developers. This collaborative approach to software development has many advantages, which we will discuss in this blog post.

Before we delve into the benefits of open source ERP software development in 2023, let us first learn its importance for small-scale businesses.

Open Source ERP For Small Businesses

Small-scale businesses often have limited budgets and fewer resources, making it difficult to choose and implement an ideal ERP system. This is where open-source ERP software may prove effective. Open source ERP development offers many advantages to small businesses including cost savings, customization, transparency, security, scalability, and more. If you are a small business owner or manager looking to improve your operations and streamline your processes, be sure to consider the following benefits of open source ERP.

Benefits of Open-Source ERP Software In 2023

Let us now move ahead and explore the key benefits of open-source ERP software. Subsequently, we shall discuss the ideal approach for ERP implementation in 2023.

Cost Savings

One of the key benefits of open-source ERP is cost savings. Vendor-based ERP systems can be very expensive, with high upfront costs for software licenses, implementation, and maintenance. Open source ERP systems, on the other hand, are generally free to use and implement. Here, the only costs involved are pertaining to their development, customization and support. This can result in significant savings for businesses, especially small and medium-sized enterprises (SMEs) that may have a limited budget.

Easy Customization

Another advantage of open-source ERP is customization. Off-the-shelf ERP systems are often very rigid and can be difficult to modify to meet the specific needs of a business. Open source ERP software, on the other hand, is highly customizable, allowing businesses to tailor the software to their specific needs. This can be especially useful for businesses that operate in niche industries or have unique processes, as it allows them to get the most out of their ERP system.

Flexibility

Open source ERP systems are often more flexible than off-the-shelf ERP solutions. Since they are developed and maintained by a community of developers, it is relatively easier to add new features and functionalities. It also means that businesses can take advantage of new developments and advancements in ERP technology without relying on a vendor to release an update.

Security

In addition to cost savings and customization, open source ERP systems offer greater transparency and security. With off-the-shelf ERP systems, businesses are reliant on the vendor to fix bugs and vulnerabilities in the software. However, in the case of open-source ERP, the source code is available for anyone to examine and improve. This not only makes it easier to identify and fix security issues. Moreover, it also means that businesses can have greater confidence in the security of their ERP system.

Scalability

As a business grows and expands, it may require additional features and functionalities or capacity from its existing ERP system. With off-the-shelf systems, it can be a costly and time-consuming process, as the vendor may need to release a new version of the software. In many cases, businesses even have to install additional hardware to enhance the existing capacity. With open source ERP, however, businesses can simply add new modules or upgrade their existing system without having to rely on vendors for software updates.

Ease of Integration

Open source ERP systems offer better integration support for proprietary modules, legacy systems, distributed systems, and third-party applications. At the same time, they are easy to integrate with new technologies, thereby offering the desired level of flexibility and interoperability. As a matter of fact, open source ERP solutions are designed to be flexible and interoperable, making it easier to integrate them with other systems and technologies. It can be especially beneficial for businesses that use a variety of different systems and technologies, as it would help streamline their operations and improve efficiency.

Conclusion

Understandably, open source ERP systems offer a plethora of benefits including cost savings, customization, flexibility, transparency, security, scalability, and ease of integration. Whether you are a small business or a large-scale enterprise, an open source ERP system can help you get the most out of your ERP investment, while also providing you with greater control and flexibility over your operations. It is, therefore, an opportune time to invest in open source ERP software development to enhance your business productivity and efficiency.

Why Choose Oodles ERP For Open Source ERP Development?

To extract maximum benefits from ERP, it is essential to seek assistance from professional developers. Also, instead of setting up an in-house team of developers or hiring freelancers, most businesses prefer outsourcing a trusted ERP development company. It is also the ideal approach since an ERP software development company would already have ample experience and resources available to help you with the project.

At Oodles ERP, we provide 360-degree ERP software development services to help enterprises achieve their goals and boost productivity. With over a decade of experience in building custom ERP solutions, we specialize in using open-source software platforms like Odoo, ERPNext, Opentaps, and Apache OFBiz. Our custom ERP development services help enterprises sail through their routine operational challenges and build resilience for the future. To learn more about our custom ERP application development services, reach out at erp@oodles.io.

He is a technology enthusiast with 5+ years of experience in producing insightful content on projects related to next-gen technologies like AI, Blockchain, ERP, OTT, Cloud, Big Data, AR/VR, IoT, and more.

About Oodles ERP

Oodles ERP is the subsidiary of Oodles Technologies Pvt. Ltd. that focuses on building cross-platform enterprise solutions to solve complex business problems. The company provides custom ERP software development services to businesses of all sizes, enabling them to achieve higher levels of productivity. For the past decade, Oodles ERP is consistently delivering enterprise-grade software solutions for CRM, HRM, warehouse management, workforce management, e-commerce, and supply chain management. The company has a proven track record and 10+ years of industry experience in developing user-centric software solutions for cross-industry business use cases. In addition to developing custom ERP solutions from scratch, Oodles ERP excels in providing custom integration solutions for platforms like Salesforce, Shopify, Magento, Zoho, Acumatica, Prestashop, HubSpot, and QuickBooks.

Deltek

8 WAYS PROJECT-BASED BUSINESSES CAN BE MORE SUCCESSFUL IN 2023

Article by ***Bret Tushaus,***
Vice President of Product Management, Deltek

From mitigating the challenges of attracting and retaining top talent to aiding customers on their digital transformation journey, enterprise resource planning (ERP), human capital management (HCM), project management and project execution solutions are front and center within project-based businesses.

Now more than ever, firms in every industry are recognizing the pervasiveness of technology and how it can drive profitability, competitive differentiation, operational optimization and new revenue streams.

How to Get Ahead

As we kick off this year and focus on future success, here are eight ways business applications and technology can benefit your project-based businesses in 2023 and beyond:

1. Stay Competitive for Top Talent

The modern project-based workforce's attributes have continued to evolve, and employers who have not evolved with them are finding it quite challenging to compete for talent and grow their businesses. Part of that evolution is leveraging the right tools and systems to recruit, onboard, develop and manage the people within an organization and provide the right technology to those people so they can most efficiently, effectively and intuitively perform their job.

2. Connect Disparate Systems Together

As organizations continue to identify point solutions to meet their specific company or industry needs, the necessity to connect those solutions to other operational business applications is imperative. It's essential for those systems to continue to offer expansive integration capabilities for key players and businesses to communicate with each other effectively.

3. Transition On-Premises Solutions to The Cloud

While this is a perennial trend that the pandemic has further fueled, it remains very relevant across every industry, regardless of size. Businesses continue their transition from on-premises to primarily cloud-based solutions and ERP products to save money and increase their accessibility, security and business continuity posture.

4. Create Better UI/UX

Broad user adoption significantly drives the value yielded from an organization's business applications. An intuitive user experience (UX) and an engaging, modern, accessible and visually appealing user interface can go a long way to drive user adoption. In addition, a modern and fresh user interface (UI) is another means to attract and retain talent from generations entering the workforce with technology prevalent in all aspects of their lives.

5. Make Cybersecuriy a Top Priority

With attacks on businesses increasing every day, it is more important than ever for all organizations to take cybersecurity seriously in business continuity and data privacy. Organizations should no longer grow complacent by the assumption that it will never happen to them; it is no longer a matter of if and is instead a matter of when and how severe.

6. Enhance Technology Offerings to Clients

Growing competitive pressure, economic uncertainty and the ongoing evolution of project-focused businesses have prompted the exploration of new service offerings and revenue streams. Technology is front and center in this exploration as companies that have historically focused on vertically oriented, industry-specific services are beginning to offer technology-based products and apps or technology-based consulting. This evolution is critical for businesses to diversify and identify new growth opportunities.

7. Focus on Project Managers & Their Tools

There is an amplified focus on project management tools and the discipline itself. The process begins with competent project managers and equipping them with the right tools and technology. Project management, project planning, and resource management tools are more and more accessible, and the combination of these tools with project management best practices leads to profitable projects and the ultimate goal of satisfying customers.

8. Build ESG Awareness

Awareness around Environmental, Social and Governance (ESG) is becoming increasingly critical for all organizations. A strong ESG proposition can create value and differentiation. Companies that demonstrate corporate responsibility are more likely to be trusted and, as a result, can tap new markets and opportunities. In addition, focusing on ESG can be another way to attract and retain talent and, as mentioned previously, anything that can differentiate an organization within the war for talent is beneficial in today's employment market. Business systems and applications can enable ESG reporting and visibility to inform organizations and identify areas of improvement.

As Vice President of Product Management, Bret Tushaus is responsible for leading the product strategy, roadmap and product management teams for Deltek's Vision, Maconomy, Ajera, People Planner, PIM, ConceptShare and WorkBook. Prior to joining Deltek, Bret spent 15 years at Eppstein Uhen Architects and holds a Master of Architecture from the University of Wisconsin at Milwaukee.

About Deltek

Better software means better projects. Deltek is the leading global provider of enterprise software and information solutions for project-based businesses. More than 30,000 organizations and millions of users in over 80 countries around the world rely on Deltek for superior levels of project intelligence, management, and collaboration. Our industry-focused expertise powers project success by helping firms achieve performance that maximizes productivity and revenue. www.deltek.com

THE CHANGING FACE OF HR: WHAT HR AND THE C-SUITE REALLY THINK OF THE SECTOR TODAY

*Article by **Jessica Fuhl,***

Head of content, Sage People

HR are dealing with a lot. Still.

The most-used phrase for HR leaders during the past two years – managing uncertainty – shows no sign of abating just yet.

Ripples from the impact of the worldwide economic downturn are beginning to touch businesses and workers.

HR leaders are having to manage employee wellbeing and fears over job security and pay, along with supporting the C-suite through even more unpredictability.

Interestingly, while 90% of HR leaders say they're excited about the future of HR, 81% are feeling burnt out and 62% tell us they are considering leaving the profession.

These are just some of the findings of Sage's new annual research report, The changing face of HR in 2024.

Here's what we cover in this article:

- About the research
- HR today: HR's temperature check
- The future of HR
- Solving HR's challenges
- The HR paradox

About the research

We spoke to more than 1,000 HR leaders and C-suite execs from small and medium organizations across the world to find out their candid thoughts on the sector today, what's keeping them up at night, and what their hopes are for the future of HR.

Specifically, the research focuses on:

- **HR today** – what life is like for HR leaders right now
- **What the future holds for HR** – how HR feel about the future of the sector
- **Solving HR challenges** – what HR leaders need to get ahead.

The respondents' answers provide a full 360-degree view of the sector, offering an up-to-date snapshot of the changing role of HR today.

The results make for interesting reading.

HR today: HR's temperature check

The past year or so has been challenging to say the least. A huge 95% of HR leaders told us working in HR is simply too much work and stress.

As one HR director puts it: "The last couple of years have been very stressful. We've had to face really complex issues at work and have also had to help our people who have been going through difficult times."

Despite this, 57% of HR leaders say they greatly enjoy working in HR, with "making an impact" and "shaping new ways of working" being some of the positive motivations for still liking their role.

Both HR and C-suite leaders strongly agree that HR's role has changed dramatically over the past five years, with around a third of HR leaders and 40% of the C-suite anticipating that these drastic changes won't slow down anytime soon.

Respondents universally recognize the challenge facing HR leaders that hasn't been solved everywhere just yet: that HR leaders are trying to evolve their functions from predominantly an administrative function to a more strategic one.

According to our research, 73% of HR leaders and 76% of the C-suite point out that the balance today often still tips in favor of being process-driven more than they would like.

More than 60% of C-suite leaders admit to still seeing HR's role as administrative, and many business leaders don't expect HR to play a leading role in key areas that would traditionally sit in their wheelhouse, such as workforce planning and company culture.

In addition, 73% of HR leaders and 75% of the C-suite claim the term 'human resources' is outdated.

The future of HR

When it comes to navigating the next few years, 91% of HR leaders and 95% of the C-suite tell us they're excited about the future of HR. However, 66% of HR leaders still have some worries about what lies ahead.

As the function moves towards a more people-focused role in the changing world of work, both HR and the C-suite agree that employee experiences and employee satisfaction will become more paramount areas for HR to focus on.

Eszter Lantos, head of people at TCC Global, explains: "There must be more focus on the people experience and looking at our colleagues like important customers. HR should become architects for great employee experiences."

HR leaders also told us that their experience makes them the perfect candidate to be future CEOs—and current business leaders agree.

In fact, 91% of HR leaders and 95% of C-suite execs say HR has the right skills to become heads of business.

However, while business leaders are prioritizing financial growth, putting it third in their list of priorities, it's 10th on the list for HR leaders today.

We've found that 93% of HR and business leaders are worried about the economic climate and both agree that it'll be a challenge for HR in the years ahead.

Asked what the top challenges will be for HR in 2024, 92% of HR leaders predict the sheer amount of work they must undertake will be a big barrier to future success in 2024.

Meanwhile, limited budgets, a lack of resources, and not having the right skills in the HR team were also seen as barriers.

Solving HR's challenges

We asked our respondents what HR will need in for future success.

The two things that feature highly on HR leaders' lists are a boost in HR skills and increased investment in specialisms.

In addition, 40% also want more technological know-how, and 33% want better peer-to-peer support networks within HR.

As Jat Bansal, director of talent at Funding Circle, puts it: "HR needs to be close to their CEO and leadership team, and show that they're planning for the future."

HR leaders also need to up the pace when it comes to HR tech. 83% of HR leaders say they don't currently have the right technology, with just 59% of companies using people analytics and cloud HR systems.

The HR paradox

HR leaders are grabbling with a range of personal conflicts today.

They're excited about the future of HR (91%) but also worried about what it holds (61%). They love what they do (57%) but are also considering leaving HR (62%).

They believe they have the right skills to be CEOs (91%) but only 13% are prioritizing financial growth today.

They feel the sector is adapting to become more speedy and agile (86%) but 63% of the C-suite still see HR's role as administrative.

Ultimately, many HR leaders get into the sector because they want to make a difference. At the best of times, HR is a rewarding sector, supporting people and building brilliant and resilient workforces.

However, there's a risk that the stress and heavy workloads can cancel this out. More so than ever right now with all the challenges and uncertainty HR teams are dealing with.

One, but not the only, answer to this lies in being more easily able to swap the time spent on paperwork and processes for time spent on people. If HR teams can cut the admin, then there's more time and energy to focus on what really matters instead.

Jessica Fuhl writes content for HR and People leaders and is passionate about the changing nature of work today. She focuses on the evolving role of HR and creates content across a range of topics in HR, including people analytics, workforce experiences, automation, compliance, digital transformation and HR agility. Previously head of digital for the UK Treasury, she has a keen interest in macroeconomics and productivity, and has had work published in the Financial Times, Forbes, and several HR trade publications. Jessica also previously worked as a journalist at The Guardian.

About Sage

Sage exists to knock down barriers so everyone can thrive, starting with the millions of small- and mid-sized businesses served by us, our partners, and accountants. Customers trust our finance, HR, and payroll software to make work and money flow. By digitizing business processes and relationships with customers, suppliers, employees, banks, and governments, our digital network connects SMBs, removing friction and delivering insights. Knocking down barriers also means we use our time, technology, and experience to tackle digital inequality, economic inequality, and the climate crisis. Learn more at www.sage.com/en-us/ and www.sageintacct.com.

Deloitte.

ERP STRATEGY AND DIGITAL FINANCE TRANSFORMATION

Getting the fundamentals right

New ERP systems alone won't bring about the digital finance transformation many executives seek. ERP implementation can only deliver results if the fundamentals are in place. Explore why ERP strategy is important, then dive deeper via our series of perspectives on how to develop an executable ERP strategy that can help you achieve desired capabilities, setting you up for success now and into the future.

Setting the stage for digital finance transformation

Your company has just gone live with a new enterprise resource planning (ERP) system. It's day one and everyone is excited to reap the benefits outlined in the business case: reduced manual effort, greater transparency, a single source of truth, and increased productivity. The first ask for your team is straightforward—a profitability analysis by customer and product across all business lines.

But eight hours later, you still haven't received the report. Your team tells you they're struggling to pull the data from the new system and will need to revert to spreadsheet models to generate the report. What happened? The new ERP system was supposed to solve all these problems and make your job easier, right? This isn't the response you expected.

New ERP systems and digital technologies, such as robotic process automation (RPA), cognitive computing, and machine learning, offer new capabilities that can make Finance more efficient and increase its ability to provide insights for better business decisions. But these results can only be achieved when the fundamentals are in place.

ERP strategy fundamentals

Many organizations assume that technology will solve all problems. In some cases, vendors will convince them that technology is a panacea. But if the fundamentals aren't in place, a well-intentioned ERP implementation initiative can fall far short of expectations. This can lead to a significantly lower return on investment, increase business user frustration, and cause users to be skeptical of future projects.

ERP strategy fundamentals include:

- A defined vision and clear understanding of business needs
- A right mix of business partners at the table
- A clear road map for enabling desired capabilities
- An understanding of functional and process integration points
- A meaningful data strategy
- A sound understanding of the reporting strategy with an enabling chart of accounts (CoA)
- A clear plan to identify and develop strong talent

Embarking on the ERP strategy journey

When embarking on the ERP journey, an organization must first know where it's going. With the plethora of digital technologies available in the market, the organization needs to understand the possibilities for business transformation. It must also determine the role each function and key business partner (for example, Finance, IT, and HR) will need to play during the digital finance transformation. Finally, it should develop a strategy to achieve desired business capabilities.

Based on our research of Finance organizations and digital technologies, Deloitte published Crunch Time: Finance 2025, a report that paints a picture of the future of Finance and outlines eight predictions.
Crunch time: Finance 2025, Deloitte Consulting LLP, 2018

Business-led vision, capability-focused ERP strategy

In order to benefit from what these predictions allude to, many companies are starting with ERP implementations to "digitize the core." But the companies that are getting the best results recognize that technology alone won't bring them the desired capabilities. Business capabilities, functional integrations, scalability and sustainability, operating models, talent, and desired business outcomes must all be considered, along with the technologies expected to enable them.

Having a business-led vision and a capability-focused technology strategy is important for many reasons:

- ***Cross-functional leadership alignment.*** Projects routinely fail because leadership isn't on the same page when it comes to defining success and expectations. Having a strategy that's clearly documented and understood helps drive the organization toward a common goal.
- ***Business requirements across functions.*** An ERP strategy ensures the right players (Finance, IT, order management, supply chain, and business units) have a seat at the table and that business needs and requirements are understood. This helps reduce rework costs if critical functionality is missed or doesn't deliver the expected capabilities.
- ***Defined scope to manage costs.*** A focused strategy includes a comprehensive scope that can be effectively managed. This allows for better cost management and more effective change management. It also provides a set of guardrails that guides decisions throughout the program.
- ***Road map to success.*** Like any type of journey, ERP programs can stray off course without a road map. A solid strategy with defined objectives provides this, along with more predictable outcomes.

About Deloitte

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