

Tech Briefs

Accorde Context & Process

Imaging, Workflow & Report Management For Effectively Managing & Processing Information

Intelligently Managing Transaction Information

The Internet is creating new opportunities for enhancing the way business is conducted – companies can now do things faster, for less. But new web technologies as well as existing systems create enormous volumes and varieties of information and documents surrounding business transactions, including a wide range of both paper and electronic formats.

To efficiently conduct everyday business transactions, both between internal departments and externally with trading partners, companies need immediate access to all relevant transaction information – from paper documents like scanned images and faxes to electronic information such as EDI, HTML/XML forms and line-of-business reports and data. In addition, the automated collection and delivery of information to the right people at the right time is critical to an organization's ability to securely manage and process the huge volumes of incoming documents, such as purchase orders, invoices and contracts, that create the full context around business transactions.

The Solution

The Accorde product family delivers powerful imaging, workflow and report management (COLD) technology to revolutionize how companies and their trading partners process, fulfill and support business transactions. Accorde Context and Accorde Process provide unique and flexible tools for more effectively managing business processes and the wide range of surrounding documents and information, delivering transaction content as a complete package to the desktop and ultimately enabling collaborative resolution over the web.

By making documents and data securely available to every user involved in a transaction, Accorde enables companies to cross traditional organizational, geographical and technological boundaries in sharing and exchanging information. Companies can accelerate information communication and process-

ing of business transactions, resulting in significant cost savings and stronger trading partner relationships. Beyond this core functionality, businesses can leverage Acorde Context and Process with Acorde Resolve to add collaboration to the process, ultimately resolving transaction discrepancies in an efficient, cost-effective and interactive manner.

Acorde Context and Process offer a variety of components that can be used individually or together to deliver a comprehensive solution for more efficiently managing business transactions.

Acorde Context

Using an architecture that is designed to harness the power of the web, Acorde Context delivers powerful imaging and report management (COLD) functionality that allows companies to securely capture, store, retrieve and display the wide variety of content supporting everyday transactions. From purchases and invoices in environments such as manufacturing and retail to insurance and loan applications within financial services, Acorde Context manages all business transaction information, including scanned documents, fax, email, HTML/XML, EDI, electronic forms, and data and reports (COLD) from line-of-business applications such as ERP and CRM.

Acorde Context helps businesses leverage the power of information that is continually received, processed and delivered to users via the following tools:

Acorde Client

Through the Acorde Client, Acorde Context offers a flexible, intuitive user interface. Whether transactions are conducted through paper-based or electronic mediums, the Acorde Client offers the tools necessary for users, regardless of location, to view and interact with related documents and data. All users can securely access the wide array of transaction data from a variety of client desktops, including both browser and Windows-based clients as well as the opportunity to enable existing line-of-business applications through the Acorde Software Development Kit (SDK).

Acorde Storage Service

Acorde Storage Service allows departments and companies to store business content from a wide variety of disparate sources and environments. Storage Service migrates, stores and protects the volumes of transaction data created in any organization, enabling a powerful

repository for all business content that is readily accessible over the web from any client desktop.

Acorde Context offers simple and intelligent management of all types of transaction content, for both internal and external business processes, resulting in enhanced ability to access and share information that is necessary to process and potentially resolve transaction issues.

Acorde Process

Capturing business content is just the beginning. Transaction information must be internal processing efficiency and enhance partner relationships. For processing-intensive environments such as loan applications, payment processing and invoicing, Acorde Process enables automated, intelligent delivery of business documents and information across department, organization and over the web with trading partners.

With Acorde Process, participants can quickly begin prioritized work specific to their job functions, obtain status updates, and add information or change processing requirements for a particular transaction. Acorde Process enhances overall connectivity of business processes, breaking down both inter-departmental and inter-company barriers, through several powerful components, including:

Acorde Process Builder

As the cornerstone of the electronic process, Acorde Process Builder is a graphical tool allowing business analysts to visually identify, create, update and maintain the automated flow of information, enhancing existing business systems and processes. Process Builder defines business rules, events and tasks – such as approval, review and reconciliation – for the collection, distribution and processing of relevant content.

Acorde Process Monitor

As volume and complexity of business transactions grow, a flexible electronic process monitoring tool is critical to facilitate tracking and reporting on the flow of business processes. Acorde Process Monitor offers a graphical, real-time reporting manager that gives supervisory personnel the ability to view work being completed by all resources. Supervisors can constantly monitor and manage the system, including the ability to balance load and eliminate bottle necks through reallocation of work – all in real-time.

Acorde Workplace

Acorde Workplace is a unique web application for viewing and working with business process information to accomplish work and process transactions. Customizable based on specific user job roles or functions, Acorde Workplace, allows secure access to the extensive range of transaction information as well as the tools necessary to complete business tasks.

Acorde B2B Paks

Acorde extends into existing line-of-business applications through Acorde B2B Paks™, complementary modules to ERP and e-commerce applications that enhance user capabilities by enabling line-of-business applications as a single source to all transaction content. B2B Paks create the full context around business transactions from complementary application environments, increasing effectiveness of captured information and efficiency of the end user community. Optika offers the following B2B Paks:

Acorde ERP B2B Pak

Enterprises can further leverage their ERP investments through the ERP B2B Pak—integrations between Acorde and leading ERP providers like J.D. Edwards and PeopleSoft—to seamlessly store and retrieve transaction information from directly within enterprise business applications.

The certified integrations of Acorde with J.D. Edwards enterprise solutions allow companies to extend the functionality of their WorldSoftware and OneWorld solutions by adding process control and document retrieval capabilities.

Acorde Internet Forms B2B Pak

Integration of XML Internet Forms technology from PureEdge into the Acorde solution allows companies to electronically capture, retrieve and view intelligent XML forms along with other disparate formats of business transaction data – all from a single interface.

Acorde SDK

The Acorde SDK provides a comprehensive set of tools that facilitate integration of Acorde functionality directly into any line-of-business application environment. Widely used by Optika customers and partners, the SDK allows companies to extend the value of their current infrastructure invest-

ments while leveraging the power of Acorde's single point of access, enabling users to more effectively interact with business content such as documents, transaction data and workflow information, and efficiently drive processes.

Personalizing the Web

Leveraging the flexibility of the web, Acorde provides interfaces and tools that are easy to use and configure, allowing users to increase personal productivity and as a result, directly contribute to their organization's success. With this in mind, Optika delivers My Acorde™, a unique and flexible tool giving users the ability to easily configure their client interface specific to the way they conduct work. By establishing saved searches, access and view privileges for transaction content and links to regularly visited web sites or applications, My Acorde enables users to create their own personal web work environment.

Realizing Extensive Benefits

Together, Acorde Context and Acorde Process deliver the imaging, workflow and report management (COLD) capabilities that enable companies to create new opportunities for more efficient and effective business transactions, while extending the value of their current investments.

By allowing organizations to establish the necessary framework for capturing, storing, retrieving and processing huge volumes of disparate types of information associated with everyday business transactions, Acorde Context and Process help users, departments and enterprises extend their business to the web and resolve related transaction issues across group, organization and with trading partners.

The Acorde family of solutions enables businesses to improve internal productivity and reduce the amount of time, resources and money required to address problem transactions. As a result, businesses can consistently deliver superior service to customers and suppliers at significantly reduced costs, gaining and maintaining advantage over the competition.

Accorde Resolve & XML Gateway

Build Interactive Online Communities for Transaction Negotiation & Resolution

Collaborating in Real Time Over the Web

Companies worldwide are harnessing the power of the Internet to increase collaboration around operations and interactions with customers and partners-enabling more secure, efficient and less costly transactions. Many organizations electronically enable the sales/order entry process, but they stop there. Often, fulfillment and support of business transactions are still manual, expensive and timely processes. What happens once goods are ordered and received? Does the invoice match the purchase order and goods received? Was a substitution of product delivered without invoice adjustment?

And it's a fact, when a transaction has a problem, the digital and the physical world collide. Automated systems fail and manual intervention is required. Problem transactions are a major source of resource, dollar and efficiency drains on every company's productivity and ability to provide timely and effective service to their customers and partners.

Resolving transaction issues and creating transaction opportunities do not have to be so inefficient. By enabling organizations to build web interactive hubs, central points for collaboration around transaction content, Accorde Resolve brings together the necessary people, collaborative tools and critical transaction information in real and near time to facilitate online resolution and negotiation around transaction issues and opportunities. And, by utilizing the Accorde XML Gateway, a fully integrated solution for the automation and delivery of business transaction content between line-of-business systems and Accorde Resolve, Optika provides a powerful infrastructure for enhancing collaboration around transaction information.

Interaction – Internally and Externally

Acorde Resolve enables more effective communication between groups and users inside the walls of the organization and out into the trading partner community. At times, business transaction discrepancies can quickly be resolved within the company – through enhanced communication and information sharing by internal groups such as A/P, A/R, purchasing and receiving.

For example, within order processing and invoicing, if each participant has access to all relevant transaction information and interactive tools to collaborate, they can more effectively view the same critical business information and quickly come to resolution, resulting in increasingly efficient business processes. Acceleration of organizational processing time allows companies to provide better service externally – quicker payments and approvals, faster customer response times and reduced resolution costs.

In addition, through web interactive hubs, companies can create a secure site in which all authorized partners and customers have convenient self-service access to business transaction information, as well as the tools to initiate negotiation and issue resolution. Trading partners can easily inquire about the status of transactions like delivery timing, payment and application status – or proactively begin problem resolution without time-consuming back-and-forth processes that typically occur between trading partners.

Participants can check on transaction status using pre-configured options such as *show invoice details for last 30 days*, or execute searches based on user-defined criteria like invoice or purchase order number, amount and part number. When a particular problem is discovered, participants can view supporting transaction content, add information to facilitate resolution, and make direct contact with trading partners using interactive tools such as interactive chat, web page content sharing and co-browsing. All transaction information is accessible to participants – regardless of data type or source.

Through Acorde Resolve, Optika is enabling companies to decrease time and cost of resolving transactions, improving customer and vendor service and strengthening relationships.

Acorde Resolve Components

Acorde Resolve creates on-line resolution hubs through the following components:

Virtual Offices

Acorde Resolve provides a virtual office environment for each company, allowing businesses across many industries including manufacturing, retail, financial services and higher education, to collaborate in real-time to discuss and review transaction-related information. These interactive web workspaces create secure forums, both public and private, for enhancing the business of conducting business. As a result, enterprises gain improved access to their partners in crucial times of doing business such as negotiations, executing contracts, or proactively resolving issues resulting from fulfillment errors.

Resolution Paks

Acorde Resolution Paks are individual collections of transaction data and supporting information specifically related to transactions with issues or discrepancies. Resolution Paks contain all relevant information for a transaction issue, such as purchase orders, invoices and shipping documents, which participants can access and share using real time collaborative tools – resulting in a comprehensive, efficient method for achieving problem resolution.

Collaborative Tools

Acorde Resolve's Collaborative Tools are real-time, interactive tools that enable web-capable participants to facilitate transaction resolution. Delivered in Resolution Paks, participants utilize the following interactive tools to reduce processing time and costs:

- *Content Sharing* – a "show-and-tell" web page sharing facility giving users the ability to drive transaction content being viewed by other participants on a web resolution hub. Multiple participants can simultaneously view or share content on-line by one user driving web pages to all other participants;
- *Interactive Chat* – real-time interactive text-based communication between parties viewing the same transaction content;

- *Email* – near-time interaction when all participants are not simultaneously available enables users to bookmark information for future reference and deliver transaction data via email to trading partners, using secured links stored in email messages;
- *Fax* – a tool for fax output/input of content on web resolution hubs that allows participants who are not web-enabled to continue to work in their standard business environment without requiring web access; and
- *Electronic Member Lists* – comprehensive lists of trading partner community participants – such as purchasing agents, external vendor contacts, distributors and freight shippers – along with their preferred method of contact and availability.

Acorde XML Gateway

Information that is so critical to issue resolution – including purchase orders, applications, invoices and contracts – often originates from multiple applications and is in a variety of formats and types. To enable efficient collaboration, enterprises must find a common way to interface disparate applications and data sources both internally and with customers and partners. And in the fast-paced market today, immediate and direct access to this increasingly complex transaction information is a must for enhancing partner and customer relationships while lowering the cost of doing business.

For example, many organizations rely heavily on enterprise resource planning (ERP) systems in accounting and back office processes for the notification and delivery of exceptions to users. Historically, these exceptions have been generated through a report and processed manually, requiring effort on the part of multiple people working through information in several systems. Fixing a problem transaction becomes even more costly when collaboration with a separate division or external organization is necessary.

In addition, resolution of exceptions requires access to data from both internal and trading partner systems such as mainframe, legacy, and line-of-business or ERP/customer relationship management (CRM) systems. Until now, it was nearly impossible to gather all relevant documents and information into one common place and comprehensible format, within a reasonable timeframe. The result: late payments, wrong shipments, receivable deductions. The impact: skyrocketing costs, plummeting customer and vendor satisfaction, little or no competitive edge.

Intuitive Information & Data Exchange

In addressing the management, fulfillment and support of business transactions, a critical area that until now has been virtually ignored, Optika provides an intuitive way for companies to gather and exchange the transaction information necessary for issue resolution – the powerful Acorde XML Gateway. Built upon open, scalable and extensible business-to-business integration (B2Bi) technology from webMethods, Inc., Optika delivers the XML Gateway, a conduit for the real and near-time exchange of transaction information to and from Acorde Resolve, enabling collaboration and efficient information transfer around business transactions.

The XML Gateway, based upon webMethods pre-built adapters, allows data exchange between virtually any line-of-business application, regardless of existing technology. Leveraging the common language of XML (extensible Markup Language) – the underlying standard for universal information translation due to its flexible design and web-based capabilities – the XML Gateway exchanges information between Acorde Resolve and various business applications in the data format expected by the line-of-business application.

The Gateway to Collaboration & Resolution

Many organizations utilize automated procedures and are adopting new Internet technologies for open, web-based capture and delivery of information to line-of-business systems that process orders, manage inventory, establish shipping contents and invoice and pay for goods and services. But these Internet technologies can often be additive – rather than streamlining the capture process, they require additional processing, compounding the amount and variety of data types that systems must assimilate.

The power of the XML Gateway is in its unique ability to eliminate the typically manual data collection and collaboration process, regardless of data type or source. Based upon the occurrence of certain business events such as exception reporting, the Gateway applies business rules for automatically identifying issues, collecting related data and delivering complete packages to Acorde Resolve. Participants can then evaluate all information within a virtual office environment, utilizing collaborative tools to facilitate a quick decision, which is then relayed to the originating line-of-business system in a format that makes sense to that system. Participants no longer have to care where or how transaction content is created or stored – the XML Gateway works all of its magic behind the scenes.

Simple, Powerful Collaborative Commerce

Through revolutionary solutions - Acorde Resolve and the Acorde XML Gateway - companies can more efficiently collaborate by eliminating the barriers to sharing transaction content and achieving rapid integration with internal business processes and trading partners, ultimately resulting in rapid return on investment. The combination of Acorde Resolve and the XML Gateway allow businesses to proactively rid themselves of inefficient and costly processes. As a result, companies are maintaining customer and vendor loyalty and strengthening relationships through increased levels of service, decreasing processing costs and continually sharpening the competitive edge in today's aggressive marketplace.

Acorde ERP B2B PAK

J.D. Edwards Integrations Extending Process Control & Efficiency of Existing ERP Solutions

Beyond ERP

The Internet drives value through velocity by creating new opportunities to enhance the way companies conduct business, both internally and with customers and suppliers. Cutting-edge web technologies, while accelerating speed and efficiency of transactions, are also generating an increasing amount and variety of information and documents critical to the processing, fulfillment and support of everyday business transactions.

Organizations like yours have invested a significant amount of time, money and resources into Enterprise Resource Planning (ERP) applications, which manage specific steps of complex business processes such as AP/AR, Order Processing and Purchasing. ERP deployments effectively handle back-office functions such as accounting and database reporting, but companies must be able to manage entire transactions and effectively access and interact with supporting data and documents. The goal is higher productivity and efficiency, better customer service and stronger relationships with supply chain partners.

Acorde ERP B2B Paks, integrations of Acorde Context and Process with J.D. Edwards WorldSoftware and OneWorld solutions, enable companies to expand upon existing J.D. Edwards ERP deployments, adding extensive process control and document access capabilities. With ERP B2B Paks, users can capture, store and retrieve critical transaction information while dynamically managing the entire range of back-office processes from a single desktop.

Acorde-Integrating with WorldSoftware & OneWorld

The Acorde product family revolutionizes how companies process critical business content surrounding the fulfillment and support of transactions. By making transaction information securely available to all parties through

a J.D. Edwards client, Acorde enables companies to cross – traditional organizational, geographical and technological boundaries in sharing and exchanging information. Acorde delivers and allows access to transaction content generally not managed by J.D. Edwards – such as paper, fax and report output and presents it as a complete package to the desktop.

Certified integrations of Acorde with J.D. Edwards enterprise solutions enable companies to extend functionality of their WorldSoftware or OneWorld solution by adding process control and document retrieval efficiencies. In addition, the B2B Paks streamline data and voucher entry processes through innovative Single Step Data Entry capabilities. Acorde and J.D. Edwards solutions help businesses eliminate lost or misfiled documents, reduce transaction cycle times, decrease costs and significantly improve vendor and customer service.

Making Transaction Information Work for You

In such everyday accounting steps as purchase order matching and invoice approval, WorldSoftware and OneWorld users often need access to documents such as contracts, invoices and orders to compare and contrast relevant data. By capturing, storing and retrieving all types of business process information – including paper, fax, COLD and database reports, EDI, electronic forms and office documents – the Acorde ERP B2B Pak allows J.D. Edwards users to quickly and easily create new voucher records and check transaction status. As a result, businesses can dramatically reduce data entry costs, as well as make critical transaction information available to the right people at the right time.

Acorde Context allows all users, regardless of location or J.D. Edwards module, with a single point of access to transaction data from a variety of client desktops – including WorldSoftware, OneWorld, and the Acorde web or Windows client. Leveraging this unique client desktop, companies can significantly improve response times and eliminate time-consuming duplicate data entry, consistently gaining processing efficiencies and delivering superior levels of service.

Controlling & Automating the Process

While Acorde Context provides seamless access to documents and transaction information directly from within J.D. Edwards applications, Acorde Process enables automation and intelligent delivery of business documents such as contracts, invoices and purchase orders across department, organization and over the web to supply chain partners.

Using sophisticated workflow functionality, Acorde Process allows companies to graphically build, monitor and manage flow of business information, create prioritized work lists for processing and deliver information to the right people at the right time for quick approval. Expanding the traditional corporate environment to anyone virtually anywhere, Acorde Process accelerates business-processing speed and increases information sharing between all participants.

Extending to Collaborative Web Resolution

Regardless of how a transaction is executed and communicated, more than 10% of all transactions have problems or discrepancies, due to issues such as short shipments, substitutions and quantity mismatches. The cost to manually process and resolve problem transactions is nearly equal to that of processing all transactions that complete successfully. Once a company is ready to extend to the web, Acorde Resolve can significantly enhance return on investment by building upon existing investments in J.D. Edwards enterprise solutions. Acorde Resolve enables companies to quickly and easily resolve discrepancies internally and with supply chain partners by building web resolution hubs – secure forums for sharing all relevant transaction documents and information using collaborative tools like interactive chat, instant messaging and co-browsing. Acorde Resolve also extends collaborative capabilities to allow partners self-service access to obtain status updates and initiate problem resolution in real or near time.

A Mutual Partnership

Optika, a J.D. Edwards Certified Product Alliance Partner, and J.D. Edwards continue to build on their long-term partnership by delivering solutions that consistently help companies manage and share critical transaction information, breaking down both inter-departmental and inter-company barriers. By offering a fully integrated solution with a minimal impact on installed systems, Optika and J.D. Edwards provide user-friendly opportunities for companies to improve productivity and lower processing costs, ultimately gaining both strong relationships and even stronger competitive advantage.