

## Business Intelligence and Reporting Workflow

**coins** Workflow addresses a wide range of business issues, bringing greater efficiency and automation to repetitive processes within the construction industry.

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People are most productive when they are doing the things they are good at – thinking, communication, creating. They are least productive and most error prone when they are involved in boring, repetitive processes. The opposite is true of systems.

Businesses are therefore most efficient when they have the three key resources of people, processes, and systems properly balanced, integrated, and focused on their strengths:

- People developing and implementing processes and new ways of working.
- Processes that optimise quality, consistency, timeliness and governance/audit.
- Systems that facilitate the way people work by automating the core processes.

**coins** Workflow brings the benefits of this integration to construction businesses. By using workflows within **coins**, customers can automate routine but essential processes such as invoice approvals, employee expenses processing, purchase orders and site requisitions. This frees costly people resources to focus on improving and managing the business.

### BUSINESS BENEFITS

Because of its flexibility, the applications and benefits of **coins** Workflow are limited only by your imagination. Key business benefits include:

- Process cost reduction.
- Improved productivity for professional staff who can spend less time on repetitive processes and more on managing the business.
- Improved process resilience with reduced dependence on individuals.
- Enhanced environmental responsibility through reduced reliance on paper.
- Enhanced audit trail.

### APPROACHES TO DEFINING WORKFLOW

Major business benefits do not come without effort. In the case of workflow, the main effort required is in defining and documenting the processes and responsibilities involved. **coins** recognises that many construction businesses do not have the resources available to define and document these processes from scratch. Therefore, **coins** can offer a mix of three different approaches:

- Standard Firstbase workflow processes - based on COINS' experience of industry best practice.
- Bespoke processes - configured to customer requirements by the **coins** Business Intelligence Team.
- Training for the customer's own technical staff in using the **coins** Workflow toolkit.

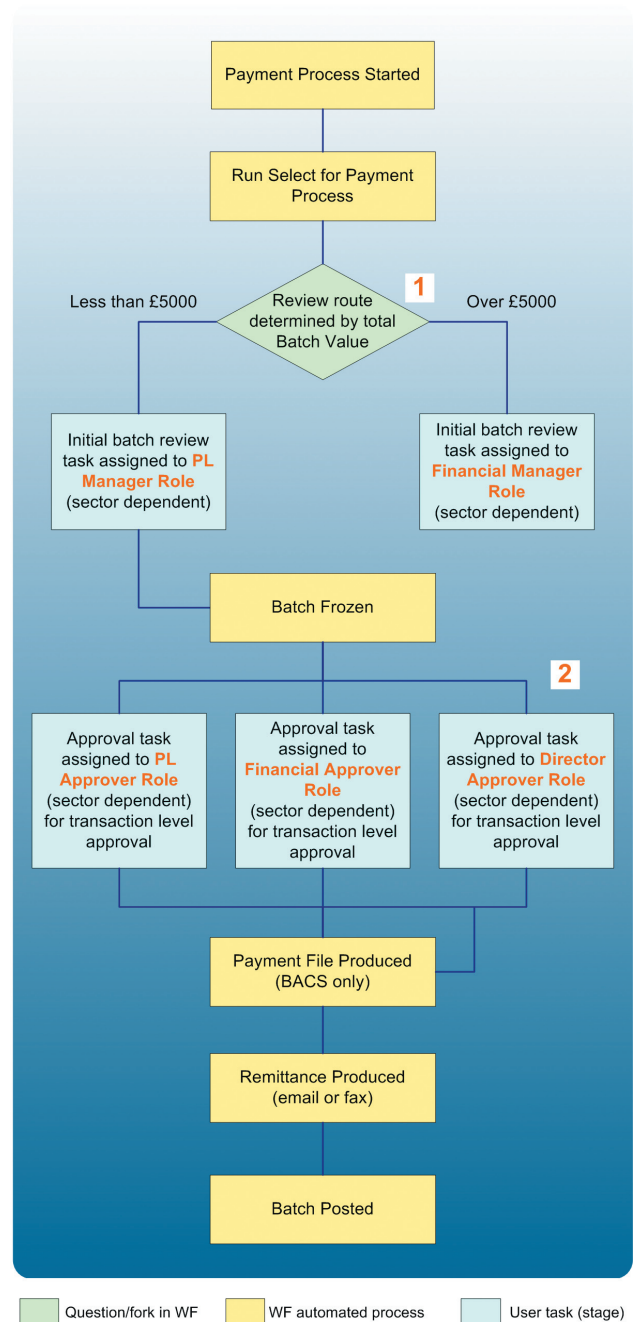
Whether you require to implement workflow across your whole business or only in a few targeted business areas, **coins** can offer you a solution tailored to your needs.

## THE **coins** WORKFLOW TOOLKIT

Whether **coins** workflow is configured by consultants from the **coins** Business Intelligence Team or by customers' own technical staff, the same toolkit is available. Its key features include:

- Triggering workflow processes by incoming documents, events within the **coins** database (such as a transaction occurring or a value being exceeded), or manually by users.
- Multiple workflow branches to allow parallel processes, and then optionally merge once each branch has completed. Conditional branching enables the implementation of complex authorisation levels and procedures.
- Workflow tasks and stages assigned to individuals or groups.
- User alerts communicated by email, SMS text message, or through a **coins** workbench, on a PC or a PDA.
- Full integration with all **coins** modules, with access to every database table and every **coins** OA function.
- User management of tasks and events through the **coins** Activity workbench, with links directly to the **coins** item or transaction to be processed.
- Integration with Microsoft Outlook, including the ability to link back to a **coins** transaction from within an email.
- Full security provided through the **coins** OA Business Logic Layer.
- Full audit trail of all workflow activities, with tracking of all current and completed workflows.
- Automatic escalations managed with defined task duration.
- Delegation of workflow actions during holidays or other absences, with expiry dates.
- Integrated Document Management with the ability to read data from scanned documents into workflow processes and **coins** input screens, avoiding manual processing. Document Management items can be created automatically from **coins** alerts, emails and SMS messages.

## EXAMPLE WORKFLOW PROCESS



- 1 This could be a check on total cash value of the payment run, to ensure that payments are only released where there are sufficient cash reserves.
- 2 This could be a multi-layered process based on individual payment value, or a fork where approval is requested from more than one source, for example double signature or a CEO signature if a single payment exceeds a threshold.

For further information on this or any other **coins** solution, please email [salesinfo@coins-global.com](mailto:salesinfo@coins-global.com) or contact Pauline Sargent on: +44 1753 501078

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