Feature List for ABW 5.5 SP2

This describes the main features that will be delivered with ABW 5.5 SP2. This release includes a number of new modules, some improvements to functionality that was introduced in ABW 5.5 and some enhancements driven by early customers of ABW 5.5.

Major Goals of ABW 5.5 SP2

The key mission for 55SP2 is to continue to deliver on the promise of 5.5. In particular we have concentrated on performance, usability, and ease of adoption.

- Enhanced and refined functionality to fulfill the potential of 5.5.
- A more stable technical platform, with improved performance and customization potential
- Standardised approach to Fixed Assets, by combining locally available solutions
- Low impact on customer of upgrade to the new Service Pack.
- High return of investment for the customer from existing features in ABW 5.5
- Focus on end user experience in the main product areas

New Modules

With the release of ABW 5.5 SP2 we are making available new modules: Service Orders and Project Tool Integration.

Service Orders

The target audience for the new Service Orders module is any organisation involved in field maintenance type activities. This can include service companies, Universities and local authorities. It can be used for example for computer hardware maintenance, internal system support, University estate maintenance, street repairs etc. It allows you to register maintenance requirements, find the appropriate resource to assign to the job, manage the required materials, track progress, record the cost and bill the customer. It is tightly integrated with other Agresso modules: Project Costing and Billing, Human Resources, Procurement and Financials.

Overview

It was originally developed by Agresso AB (Sweden) and is being used by several customers on ABW 5.4. It is now being incorporated into the standard ABW. There are 3 sub-modules within the full solution.

Service Orders: This provides functionality for recording, resourcing, tracking and billing maintenance orders.
Service Agreements: This allows you to handle scheduled maintenance contracts. *** NOTE*** This sub-module has not been released with ABW 5.5 SP2. However it will be released in the future, and is not needed to be able to use the main Service Order functionality.
Mobile integration: A tool set is available that allows you to interface to third party mobile devices. This allows assignments to be sent to field engineers, with

details of the job required. It then allows them to enter details of the time and materials taken and update Agresso. ***NOTE*** It is the interface that is provided by Agresso, not the mobile device application.

Integration with ABW

- Purchasing – generating and handling purchase orders
- Inventory – direct stock withdrawal
- Project – standard timesheet processing, standard invoicing
- Human Resources – Competence

General features

- A single point of entry for registering, planning resource, planning material, and tracking progress
- A single point of entry for managing customers
- Flexifields for defining additional information
- Ability to invoice approved transactions via PCB invoice base
- Improvements in invoicing
  - Flexible definition of GL analysis for invoices – from purchase order, sales order, service order or PCB.
  - Consolidated invoicing
  - Invoice selection based on relation values
- Ability to create credit invoices for both products and hours
- Sales price handling
  - Validation of discount code
  - Improved functionality for grouping of prices list.
  - The ability to use the same general prices and customer specific prices in Sales Orders and Service Orders.
- Import of products with flexible mapping to support different file formats
- Purchase optimization to compare prices from different suppliers

Fixed Assets

Fixed Assets will not be delivered with ABW 5.5SP2. It will be delivered at a later time.

Project Tool Integration

The PTI tool, originally released with ABW 5.4 has been upgraded and redesigned for ABW 5.5 SP2. This allows data to be transferred from Agresso PCB to Microsoft Project and vice versa.

In 55SP2 PTI supports integration with both server and client versions of MS Project 2003.

In addition functionality has been introduced to support Earned Value Analysis through integration with Planner. A new balance table that combines Earned value figures from Planner and actuals from PCB is also delivered to support this.

Enhancements to Other Modules

Workflow

- Simplification of error message handling to make it easier for users to figure out why something has ended up in items to follow up, and how they can fix this
- Improvements to sub-processes:
  - An item will be redistributed from the beginning of the main process.
  - An item can return from a sub-process and continue in main process.
- Possibility to use business logic functions in OR-splits
- The screen Element type specific properties is now part of the process designer.
- Show maps when more than one process is active for an element type.
- New datamodel for element types
  - Allow element type definitions to be maintained as any other system data with possibility to do changes on top of standard definitions.
  - Allow additional tables to be added to element types for customization needs.
- New split screen for enquiry/map
- Improved usability, particularly in approval screens
- Workflow enquiry per user to show all items a user has been involved in.
- Various HEAT cases
- Ability for the user to cancel or delete workflow also for active items (done from the screen Items to follow up)
- Scheduling of deadlines
- More flexible support of various web browsers

Expand Client Code

It is now possible to use a 6 character client code. The database changes for this were made in 5.5 and now the screens and reports have been adjusted to support this.

Document Archive

- Access control extended to self service client
- Add documents before save
- Support for a bar code API
- Support for Pegasus v2.0 and 3.0. 5.5/SP1 only supports v3.0
- Various HEAT cases
- Improvements to Document archive API

Additional self service functionality

Additional smart client functionality is now available via Self Service.

- Project master file, including relation tab, workorder tab, project purpose tab, memo tab and flexifields
- Web entry of planner transactions
- Project approval screen;
- Transfer draft projects (TS43);
- Work order master file7
- TS36 Delete draft project.
- Attribute master file.

- Relation groups in project work order and attribute master files.

User Interface

- Increased use of descriptions instead of codes
- Improved error messages: green for information, red for errors
- New layout for approval screens
- Field help can find rows automatically, reducing the numbers of clicks required by the user
- When searching for values using field help the system will search in the code and description at the same time and will automatically assume the use of wild cards
- A Start Page can be defined for different users with links to favourite screens
- Mandatory fields are now marked with a red *

Financials

- New tax component to be able to handle rounding in a consistent way
- Updated OCR module for form recognition

Procurement

- Improvements to tax handling when importing invoices
- Improved error handing within EI02
- The ability to view image from the Invoice import maintenance sceen
- The ability to register invoices without a GRN
- More options available in workflow (use of business logic functions in OR-splits)
- Rewrite of the invoice preprocessor pipeline
- Import of contract invoices with EI02
- Improved usability in approval screens, including descrepancy handling, order information and sundry suppliers
- The ability to split a purchase invoices in the approval page.
- Improved handling/matching of delievered values with invoiced values.
- The ability to use the direct purchase option for purchase ordering with approval.
- Various HEAT cases

Planner

Integration with Excel via XML web service

- Rolling forecast – automatically created from previous timeframe
- Increase budget by fixed percentages
- Build budgets based on actuals or previous budgets
- Integration with payroll
- Performance improvements
- Integration with Project – various improvements

Project

- Various improvements to the timesheet entry and approval screens to increase usability, performance and stability
- A new simplified timesheet entry screen
- Web service for timesheet entry, allowing automatic entry of timesheets from other applications such as MS Outlook

Human Resources and Payroll

- A second attribute is now available in balances, e.g. allowing different overtime balances to be accumulated for one person per project
- Rates can now be used in combination with the factor fields in P&D codes
- Improvements to the P&D register formula field, with the possibility to check relations and retrieve rates from relations directly.
- Payroll self service: the ability to enter variable payroll transactions with workflow
- The ability to record the reason for a change of rate
- Possibility to start work schedules in different weeks.
- Printout of travel expenses. Now available as a print preview and a single click from the travel expense entry screen.
- Limit control now also works on travel expenses.
- Various user interface improvements for expense entry
- Receipt flag now available on travel expense entry.
- New functionality to prevent duplicate entry of travel expenses
- Dates can now be entered on relations in the position register
- New server process to export payroll information to Planner for payroll budgeting
- Various HEAT tickets

Reporting

- Browser templates are now held as definitions on tables, instead as BLOBS. This will make them easier to support and upgrade in the future
- The Query Engine Web Service has been improved to allow better integration with third party applications
- Allow users to zoom to individual transactions from the self service client
- Drill down will work from description field as well as code, and you can drill down to specific master files, not just the general attribute master file screen
- New, unlimited colour palette available for reporting, available for conditional formatting, break rows and grand total row
- New feature: Chart setup is now available from Smart client
- Additional controls on chart setup e.g. decimal precision and drill down
- Users can set the maximum number of rows for a browser report on the self service client
- Data control will work consistently when using Expand base
- Descriptions shown for macros and functions
- User definable descriptions for browser reports
- Use of buttons in the template viewer has been rationalized for improved ease of use
- Browser definitions now show original field name and source of data

Technology and Infrastructure

- Support for 2 new XML web services: timesheet entry and new users
- Improved business connectors for ‘real time’ integration
- Support for .Net 2.0
- Extended facilities for customization: with ACT it is now possible to
    - Customise both new and old screens
    - Create new screens
    - Customise and create server processes and reports
    - Customise and create business logic.

- Significant improvements have been made to performance based on customer experiences
- Various enhancements to printer configuration
- Planning and underlying changes for future support of VISTA

Disclaimer

Every effort has been made to supply complete and accurate information, however the information in this document is subject to change without notice. Agresso R&D AS assumes no responsibility for any errors that may occur in the documentation. Agresso R&D reserves the right to make changes to the feature list, should problems arise during product testing.

February 2007