



Scheduled Process Executor

ROI Consul

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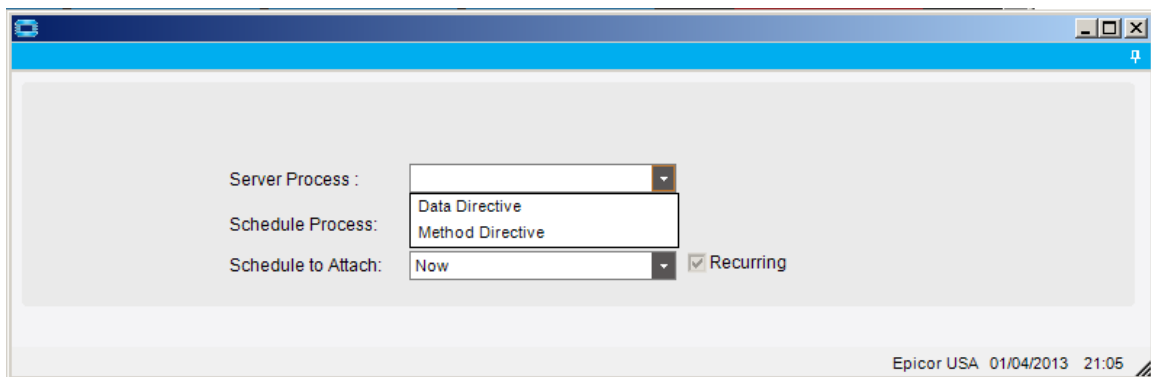
## Introduction

The driving force behind the concept, creation and development of the ROI Scheduled Process Enhancement is provide the ability to run Epicor server logic such as auto-printing reports, including completely customer SSRS / Crystal Reporting and essentially executing business critical or automated tasks which can be assigned to a “set and forget” schedule.

You can have as many pre-defined system agent tasks / schedules which DO NOT depend on an event trigger such as an import channel of a service connect workflow mapping.

With that in mind, it is also a perfect replacement for service connect, should you not have the ability / skill set in-house.

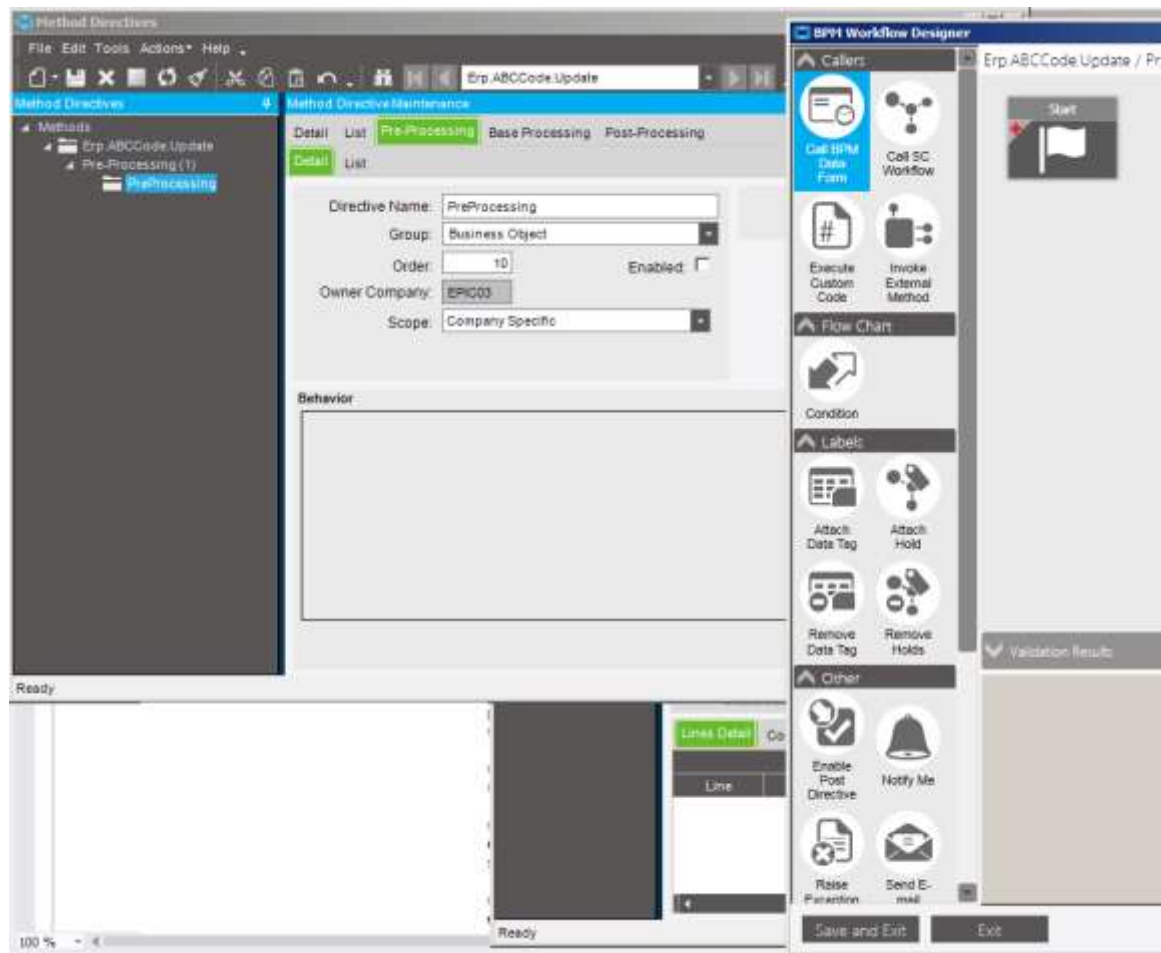
Example: an employee needs to run a nightly process that gathers CRM / sales order based KPI's to report on a daily, weekly or monthly basis – this can be done without specialized Service Connect Experience's as the ROI Scheduled Process Executor is essentially a specialist Epicor Session Based Business Object, so you can process or perform any criteria don action that is associated Epicor Business Object Methods, or indeed Data Directives,



**Figure 1: ROI Schedule Process Executor Infrastructure.**

So once you have setup one or more of your scheduled tasks, you can establish a decision tree combined with the power of the Epicor ICE BPM Method or Data Directive functionality, enabling you to maintain multiple server based schedules tasks. Some of the standard methods include:

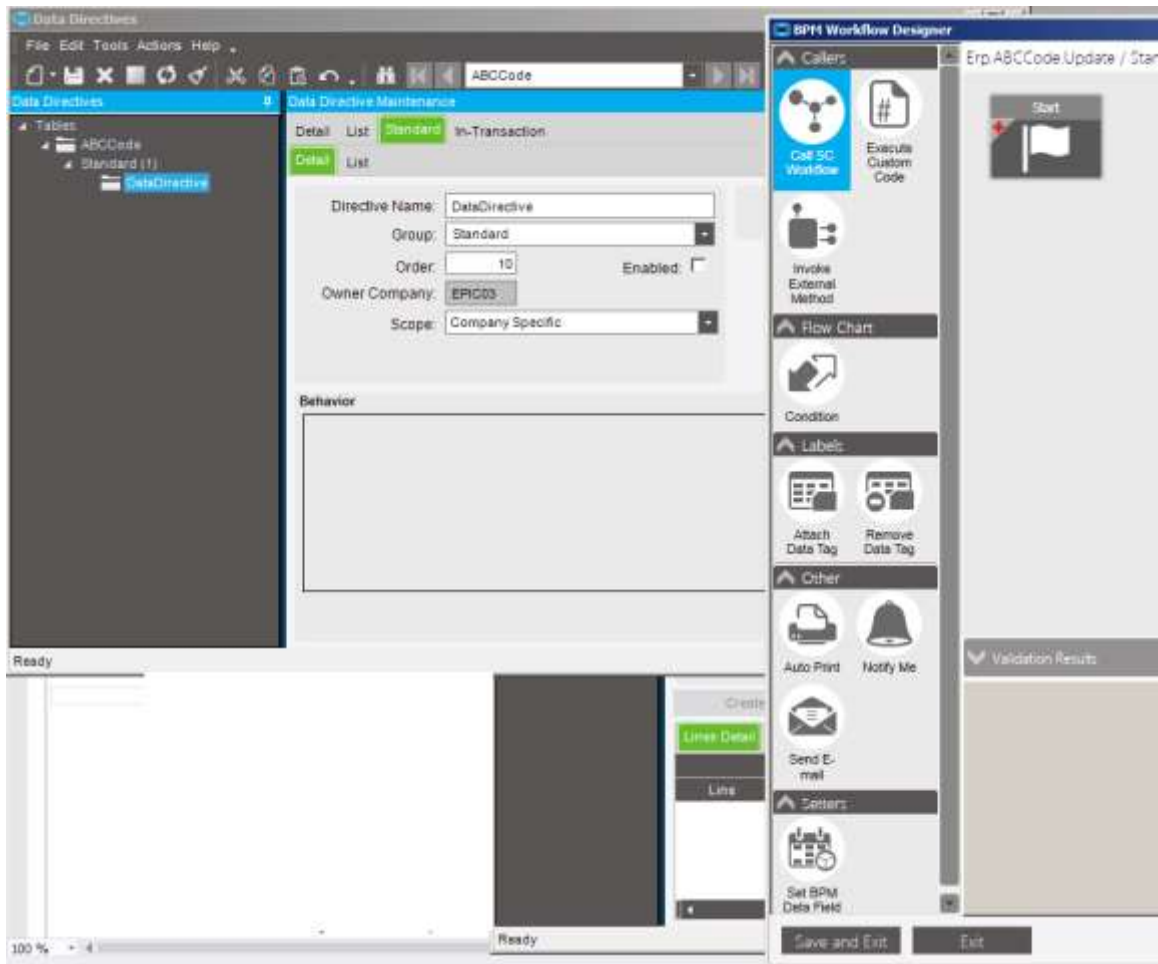
## Method Directives



**Figure 2: BPM Business Object Option: Conditions and Actions**

Configure the columns returned to the grid.

## ROI Scheduled Process Executor



**Figure 3: Standard Data Directive Options and Actions**

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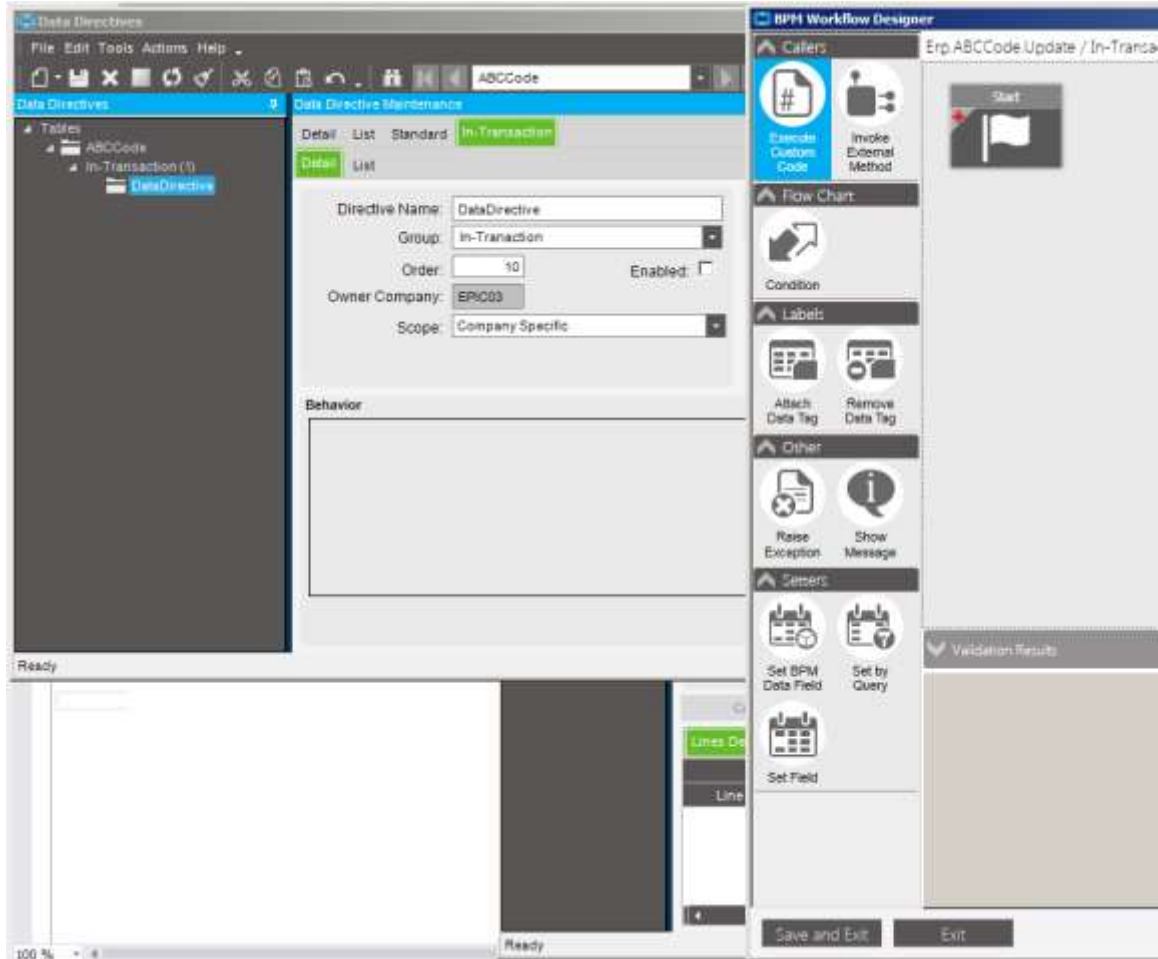
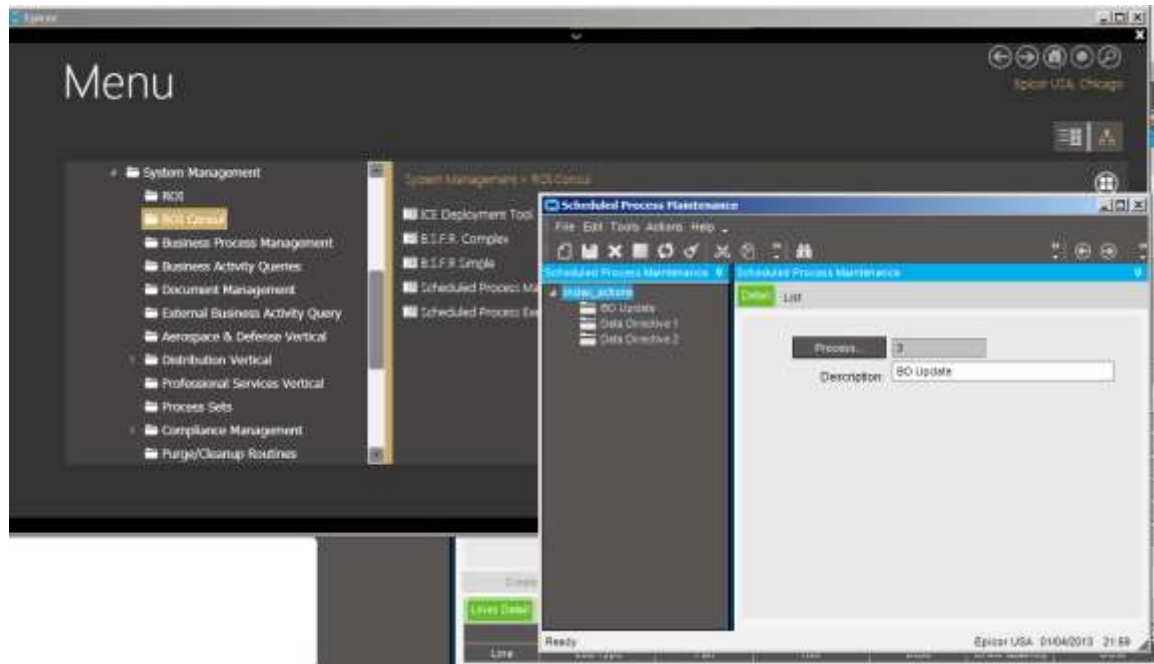


Figure 4: In-Transaction Data Directive Conditions and actions.

## Typical Processing

Firstly you would set up your schedule process identification using Scheduled process maintenance. A standard Epicor form link, as follows:



**Figure 5: Scheduled Process Maintenance.**

Once this is done, you can include your process identification as per the Process ID key field. This would be the basis for any decision tree that you may or may not have in your business object process or data directive.

## About ROI Consul

**Mission Statement: To provide our customers with robust IT consultancy that gives a measurable return on their investment in us.**

ROI Consul focus is as a System Architect, Business Analysis & Design, Software Delivery, Reporting and Integration Consultancy. We pride ourselves on proven skills in these areas.

Microsoft Certified experts with accreditation's in Business Analysis, Project Management and an in-depth experience. We can deconstruct your ERP, CRM, Web Solutions, Supply Chain or other internal systems to provide impartial advice on the best approach to integrations, customisations, operational and management reporting solutions, for your business.

We are also specialist in Vantage, Epicor 9 and Epicor 10 Technology, Including Epicor SDK.

ROI Consul can also provide you with reporting outside of the standard set provided by your system in a technology that suits you. Should your system operate using Crystal Reports or SQL Server Reporting Services, we can provide you with a consultation and then display your KPI's in a format that you understand.

With an in-depth understanding of the SDLC (Software Development Lifecycle) and a proven ability to speak to customers in their own language, globally. ROI Consul only work on solutions that we can prove and that are deliverable. All projects are fully managed, documented and tested using our own internal standards, although we will gladly work within your organizations quality and documentation parameters as required.

ROI Consul is a company that prides itself on being able to translate each business process into a technical implementation that is transparent and efficient for it's stakeholders. Our role is to understand how the business user interacts with the system, surrounding technology, the system itself and provide a solution that allows the user to do their job in the most efficient, effective and robust manner. This ultimately streamlines the organization, improves employee efficiency and makes life easy for all concerned!

We can integrate your systems into a synergy in which you can reduce cost and time per click, report on daily company activity effectively, as well as provide reporting for historical analysis, KPI Monitoring and improvement strategy.

8 [www.roiconsul.co.uk](http://www.roiconsul.co.uk) Call 0844 884 5993 or email [info@roiconsul.co.uk](mailto:info@roiconsul.co.uk) for more information.



## ROI Scheduled Process Executor

If your organization uses Epicor EPM, including Performance Canvas, or are planning to do so, we can offer you expert level assistance. This includes EPM Server, Performance Canvas and associated Content packs. All EPM areas are a specialist topic for ROI Consul, having unrivalled and demonstrable project experience of this vertical. We can also offer Epicor SDK Training.

ROI Consul specialize in the following areas:

- Epicor ERP Consultancy
  - SDK and Black-Belt Customisation
  - Epicor Service Level Agreements and Service Contracts
- Business Process Review, 'As-Is' and 'To-Be' Solicitation and Documentation
- Business Analysis
- Software Architecture
- Functional and Technical Design
- Project Management
- Documentation at all levels
- System Integration
- Online and Classroom Training

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