Sage ERP I White Paper

Improving ERP Usability:
How Intuitive ERP Drives Productivity, Improves ROI and Enhances Collaboration
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Executive Summary

Enterprise resource planning (ERP) solutions have always offered powerful capabilities for managing operational data and improving business efficiency. Today’s organizations realize that ERP solutions are critical to helping them serve customers throughout their lifecycle and providing the accurate, up-to-date information they need to make better decisions more quickly. And modern ERP solutions are delivering these capabilities with greater ease of use which further improves their benefits and ROI.

The best ERP vendors today are meeting customer demands by upgrading their solutions with a wide range of capabilities that improve usability. This whitepaper details the business impact of modern usability enhancements that include visual processes, dashboards, an intuitive user interface, a common look and feel, configurability, SOA architecture, mobile interfaces, eCommerce integration and business intelligence. ERP solutions that incorporate these capabilities reduce training and implementation timeframes to deliver faster ROI, reduce total cost of ownership, improve productivity, improve staffing flexibility and enhance collaboration.

Traditional ERPs: Sophisticated Functionality; Difficult to Use

The sophisticated functionality that ERP solutions offer has historically come with considerable complexity. ERP usability has been plagued by issues that include:

- Difficult to learn—CFO Magazine reported that 20 percent of enterprise-software users responding to a recent survey said their top causes of wasted time were learning different modules and applications and just trying to find task-related information. Users required considerable training and were unable to perform unaccustomed tasks when taking on new responsibilities or filling in for another employee. Often, when users attempted to do something they hadn’t done before, they were unable to accomplish their task and immediately asked expert users in the organization for help. This reduced productivity for both end users and for expert users in the organization.
- Unfamiliar terminology that exacerbated their difficulty of use.
- Extraneous information onscreen. Often information presented on screen has often been irrelevant to the user’s task, leading to considerable confusion, particularly for new users.
- Tasks that run across multiple screens have made it difficult for users to navigate or even understand where they were in a particular process.
- Help systems that were difficult to use and understand.

Complexity and difficulty navigating and using enterprise applications have been among the primary barriers preventing ERP systems from delivering their potential benefits—and in many cases have inhibited the adoption of automated processes altogether.

Today, organizations are looking to ERP solutions to help more types of users more efficiently and effectively perform their everyday activities of driving business change and improvement. Strategic companies are demanding that ERP solutions help expand traditional business processes to support the complete customer lifecycle—from first contact to contract to cash to care.

To support this new approach, ERP solutions must provide staff across the business with accurate, up-to-date information in a format they can easily access and disseminate. ERP solutions must also help organizations improve their ability to analyze information to make better decisions and make high-risk decisions more quickly and accurately. Users are no longer willing to spend time digging through reports or struggling with hard-to-use solutions.

Improving the User Experience

Modern ERP vendors are responding to user demands by implementing a wide range of capabilities that make it faster and easier for users to complete business processes and

to obtain and analyze information to make more accurate and effective decisions. These capabilities include:

**Visual Processes**
While earlier solutions made it difficult for users to navigate work processes, new visual processes enable end users to easily see how to perform an entire process from end-to-end by providing a visual (graphical) map of a particular workflow. Users can see the entire work process at a glance to instantly determine where they are in the process and the steps necessary to complete it. Instead of navigating complex menus, users go directly to the area they need to use, click on it, and the appropriate screen appears. The screen can include ERP functions, reports, queries, requestors, statistics or other process pages. These visual processes make it very easy for new users on a system to get up to speed quickly.

Pre-defined processes provided by the ERP vendor make it easy to get started using these workflows. Some systems even provide graphical tools that enable users to modify pre-defined processes or create new ones specific to their business, further improving ease of use.

**Graphical Dashboards**
Modernized ERP user interfaces give executives and managers across the business access to key performance indicators, which are presented in easy to interpret textual and graphical elements within a dashboard environment. Individuals that may not be familiar with the ERP software can use dashboards to gain direct access to key information—which improves information sharing (collaboration) across the business.

Executives and managers no longer have to rely on spreadsheets or reports that have been compiled from multiple data sources and sent to them outside of the ERP system. They can gain direct access to the information, which creates a single source of the “truth” and facilitates faster, more accurate decisions. For example, executives and managers can see high-level “snapshots” and can drill down to underlying reports to get more information. Intuitive textual and graphical dashboards allow managers and executives to access this information without extensive training.

**Business Intelligence**
While graphical user portals and dashboards provide high-level information that allows users to monitor their operations and manage by exceptions, ERP solutions that offer integrated business intelligence allow users to performed more detailed analysis. With integrated business intelligence, users can analyze their business performance on-the-fly and build compelling reports using simple drag & drop of the data that is updated in real time with the flow of day-to-day operations. Systems with a built-in data warehouse further simplify set up and maintenance for system administrators.

**Intuitive User Interface**
Modern ERP vendors that want to make their user interfaces intuitive are taking into account user-centered design principles. When developing user-centered designs, product designers pay particular attention to the needs, wants and limitations of the product’s end users throughout the design process. Designers not only try to determine how users are likely to use the product, they also test their assumptions with real users. The goal is to optimize the product around the way users want and need to use it, rather than forcing users to change the way they work to accommodate the product.

One user-centered design principle that modern ERP vendors are incorporating is the idea that an ERP system is easier to use if it provides a familiar user interface, particularly a web-browser type interface. Web-based systems incorporate all instructions necessary to use the feature within the interface for the application. Resources on the web are designed to be accessed in standard, predictable ways using navigational structures like forward and backward navigation, access to a history of where users have been in the application and search bars. Other graphical elements that further improve ease of use include buttons, messages, graphics, images and icons. A familiar, graphical interface dramatically reduces training needs.
Common Look and Feel
Some ERP vendors increase the functionality of their solutions by purchasing and integrating best-of-breed products. These solutions often have inconsistent interfaces, including different commands, organizational structures and file structures for each module of the ERP system. A solution and add-ons with a common interface for the entire application is much easier for users to learn and use.

Ideally, the solution should provide a global application platform—where all offices of a company share common functionalities, processes and data—that incorporates different languages, regulations and currencies so that it can be used in many different locations, countries and regions. An ERP with a global application platform makes it easy to see critical business information in real time without users having to wait for branch offices to roll up the information. For example, a single ERP deployment at a corporate headquarters in Paris should be able to connect to the branch offices around the world and handle multiple currencies, business rules and legislations.

Configurability
A system that is easily configurable, allowing users to set preferences, enable or disable a feature, or change the user look and feel allows users to work with the system the way they want to without the need for extensive programming. It also allows users to eliminate extraneous information on application screens to reduce confusion.

Mobile Interface
Users increasingly need to access their ERP solution on the road. An ERP system that provides secure browser-based and mobile dashboards makes it easy for users to access the data they need while they’re out of the office from their laptop systems or mobile devices. Users should be able to query information and use application functions to perform tasks such as checking inventory or placing a purchase requisition. A mobility component to an ERP system helps broaden the user base to non-core ERP users – delivering more flexibility and improved collaboration.

eCommerce Applications
Many organizations need to provide non-employees, such as customers and partners, with access to data from their back office operations. An ERP system that manages back office details can also connect to non-employees such as customers and partners through Web Services for use in eCommerce. As a result, for example, when customers make a purchase using the eCommerce system, inventory and back office processes remain in lock step.

Benefits
By using an ERP solution designed for optimum usability, organizations can achieve the following benefits:

Reduce Training and Implementation Timeframes to Improve ROI
Users can learn to use a system that is intuitive and easy to use much faster than they can with complex and confusing systems. This reduces the required training cost and time, improving system adoption rates and employee morale. In addition, the faster users begin using the system, the faster the ERP can deliver its promised benefits and provide a return on investment.

Lower TCO
An easy to use system reduces the need for users to turn to system “power users” to teach them to do something unfamiliar, thus lowering support costs.

Improve Productivity
When an ERP is intuitive and allows users to easily navigate complex business processes, users can spend more time analyzing information to make better business decisions and drive business improvements.

Improve Staffing Flexibility
With visual processes, if someone goes on vacation, another user who is unfamiliar with the
system can easily cover for them without extensive additional training on the ERP module or processes applicable to their new tasks. The same is true when users wish to take on new responsibilities. In this way, an easy-to-use system makes the entire organization more flexible.

Enhance Collaboration with Stakeholders
Executives and managers can take advantage of the intuitive user interface, dashboards and drill down capabilities to directly access key information, rather than waiting for staff and managers to send reports. This improves collaboration and information sharing across the organization.

Conclusion
Today’s strategic organizations look to their ERP solutions to automate and support decision-making across the complete customer lifecycle from attraction to servicing; they can no longer tolerate the old tradeoffs between functionality and ease of use. Modern ERP solutions are addressing customer demand by incorporating a wide range of capabilities that improve usability. Organizations that employ more intuitive ERP solutions are benefitting from reduced training and implementation timeframes that speed ROI, lower TCO, improved productivity, greater staffing flexibility and enhanced collaboration with stakeholders.
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