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AgreeYa's
**Managed Services
Transforms**
a Nonprofit Organization's
**Expense Portal**

Established in 2012 and headquartered in Chicago, our customer is a nonprofit organization overseeing the largest public workforce system in the USA. As the designated administrator of federal workforce development funding for the City of Chicago and Cook County, the organization facilitates job and career growth opportunities through a network of over 90 community-based organizations, American job centers, satellite sites, and sector-driven centers. Operating various programs, it empowers individuals in the region to enhance their skills and competitiveness in the job market. The organization relies on a SharePoint-based expense portal to track operational expenses and fund disbursements, providing decision-makers with insights into expenditures against the annual budget.

## Overcoming Inefficiencies in Expense Portal Management

The organization utilizes the expense portal to process payments for its network of vendors and partners, managing the end-to-end invoicing process. However, as the organization expanded its programs and partnerships to support individuals' skilling requirements, the portal's limitations became apparent.

With projections indicating the need to process payments for over 200 vendors/partners through the application, the organization sought a technology partner to support its growth requirements, reduce processing time, proactively address application issues, and enhance user experience.



*"Our existing portal became overwhelmed, leading to delays in invoice approvals and payments as our projects and approvers increased. We needed a technology partner to streamline our operations through proactive monitoring and support."*

- Project Manager, Nonprofit Organization

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# Empowering Efficiency with Services for Enhanced Expense Portal Management

As a Global Systems Integrator and Microsoft Solution Partner, AgreeYa has a proven track record in Microsoft managed services, spanning various technologies and business needs. Our extensive track record and 25 years of technological depth made us the natural choice for the nonprofit organization.

Upon engagement, AgreeYa conducted a comprehensive assessment of the existing expense portal and engaged with key stakeholders to determine specific needs and future enhancement opportunities. Leveraging this insight, we proposed a robust application development and managed services model. This model would facilitate incremental enhancements, seamless integration of new features, and prompt support services to address usability and downtime issues effectively.

## Key Highlights of AgreeYa's Service

**Performance Tuning of Expense Portal**: Conducted periodic assessments and fine-tuned the expense portal, resulting in improved system responsiveness, scalability, and stability. This optimization ensured the system performed effectively amidst growing demands and changing requirements.

**Proactive Maintenance and Monitoring**: Implemented proactive monitoring strategies to detect and resolve potential issues early on. This approach, coupled with round-the-clock support, minimized downtime, mitigated risks, and enhanced overall system reliability.

**Comprehensive Support Activities**: Managed all support activities, addressing both higher and lower priority incidents efficiently. From developing enhancements to implementing patches and managing version upgrades, AgreeYa ensured seamless support for the expense portal.

**Seamless Integration with ERP System**: Seamlessly integrated the expense portal with the existing ERP system, providing real-time insights into expenses and financial data. This integration empowered the non-profit organization to make data-driven decisions and allocate resources efficiently.

**Streamlining Invoice Processing**: Ensured quick processing of invoices uploaded against contracts, especially when multiple invoices were associated with a single contract. By implementing efficient workflows and optimizing the invoice processing system, AgreeYa facilitated smoother and more accurate handling of invoices, ensuring transparency and compliance while reducing manual effort and errors.

**Application Modernization Roadmap**: Crafted a comprehensive roadmap to modernize and streamline the expense portal. Our approach involved assigning a dedicated team of developers to accelerate the application modernization initiatives. By prioritizing enhancements and introducing new features, AgreeYa ensured the expense portal remained vital, adaptable to future requirements, and elevated the overall user experience.

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# Enhancing System Efficiency and Fostering Better Operation at Scale

AgreeYa's application managed services have enabled a transformative journey for the customer, catalyzing technology evolution and reshaping its IT team from a cost center to a pivotal business enabler. Through our ongoing managed services engagement, the nonprofit organization has experienced a strategic, methodical, and steady enhancement of its expense portal and related infrastructure, resulting in a multitude of benefits:

**Enhanced System Reliability**: Achieved 99.99% system reliability, ensuring minimal downtime and uninterrupted operations.

**Efficient Expense Tracking and Payments**: Realized a 2X increase in efficiency for expense tracking, approval, and payments, streamlining financial processes.

**Real-time Insights and Reporting**: Enabled real-time insights through robust report generation capabilities, empowering informed decision-making.

**Improved Application Stability and Performance**: Demonstrated significant enhancements in application stability and performance, resulting in a 32% reduction in system errors and a 24% increase in application responsiveness.

**Reduced Total Cost of Ownership**: Successfully reduced the total cost of ownership for the expense portal infrastructure by 15%, optimizing resource utilization and minimizing operational expenses.



*"AgreeYa's proactive monitoring and support proved invaluable. Their 24x7 assistance ensured early issue detection and resolution, minimizing downtime and operational disruptions."*

- Project Manager, Nonprofit Organization

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**Decreased High Priority Incidents**: Implemented proactive measures resulting in a 23% reduction in recurring high priority incidents, ensuring a more stable and reliable system environment.

**Enhanced User Satisfaction**: Elevated user satisfaction levels to over 95%, as evidenced by positive feedback and surveys, reflecting the improved user experience and service quality.

**Implementation of Cloud Security Policies**: Implemented robust cloud security policies, resulting in a 42% reduction in security incidents and ensuring compliance with industry regulations.

# Technology Stack

**Power Automate**

**SharePoint**

# About AgreeYa

AgreeYa Solutions is a leading global provider of software, solutions and services to small, medium and global Fortune 100 organizations. Founded in 1999 and headquartered in Folsom, Calif., AgreeYa has over 2,500 professionals helping clients across U.S, India, Mexico, and Singapore. Leveraging a technology-enabled, consultative approach and diverse talent, AgreeYa offers modern workplace, smart analytics, intelligent automation, AI/ML, cloud transformation, mobility and talent management solutions to deliver digital transformation to its clients. AgreeYa has received considerable recognition including certifications like Microsoft Solutions Partner and Cloud Solutions Provider, AICPA SOC 2 Type 2, SEI CMMI and ISO 9001:2015; and awards including 'Dream Company to Work For' and 'Best Employer Brand'.

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