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FORMVERSE USE CASE SERIES

Complex Approvals for Global Procurement

September 2018

FORMVERSE

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PROBLEM STATEMENT & SOLUTION

Being the world's largest product support services company is no easy task. For this Business Process Outsourcing (BPO) leader, building brand awareness and loyalty for its clients through customer service and accounts receivable management is extremely important.

This US-based firm covers 66 countries, 5 continents and 22 time zones, all supported by its 45,000 employees. With the sheer number of staff members, it was natural that, over time, the procurement processes would become daunting. The volume of procurement requests, the complexities of obtaining appropriate authorizations based upon the items being procured, plus the need to provide both staff and management with an easy way for reporting and recordkeeping, all contributed to the chaos related to this process.

The system that had been used previously was not up to the task of properly routing different requisitions to the right approvers, particularly in the case of complex purchases. Not to mention that user licenses were required for all staff, regardless of the frequency of procurement requests.

FORMVERSE was ultimately selected due to a variety of factors:

- The ability to create configurable No-Code applications with complex routing rules
- Meet the short time span the client had to replace the old system (**FORMVERSE's** rapid deployment)

FORMVERSE's flexible deployment options allow any customer to deploy in multiple ways, including, being fully hosted by **FORMVERSE** on Amazon Web Services (AWS) (with all software components and data within the USA) or in a customer-controlled public or private cloud environment, as a hybrid deployment. All of these were material factors in this company's decision to adopt **FORMVERSE**.

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A HIGHLY CUSTOMIZABLE APPLICATION WITH WORKFLOW AUTOMATION, BASED ON CUSTOMER-DEFINED SPECIFICATIONS

Whether staff procures a case of copy paper, a new piece of machinery, or a piece of real estate, all expenditures must be accounted for, justified, and approved at varying degrees. Those levels of approval are based on specifications and requirements set forth by a customer and resulted in a set of complex and widely dependent approval structures.

"*If you just need a box of legal pads it may need one level of approval, but procuring a forklift requires a more sophisticated set of actions including multiple levels of approval,*" said an IT Solutions Analyst.

While the workflow steps and processes related to applications at large global organizations are complex, that complexity is shielded from the end user with **FORMVERSE**.

This customer needed a powerful yet easy to use purchasing application, that was able to support their own set of requirements, even if those rules were complex.

"*The logic that has been built into the purchasing workflow using* **FORMVERSE** *allows us the breadth to cover continents and the depth to go from front-line employee all the way to the CEO,*" said IT Solutions Analyst.

Complex purchasing and procurement procedures are not new to multinational organizations and have traditionally been slow and inefficient, resulting in long wait times for mission-critical inventory and lost opportunities.

Automation is only the first step, what was needed was a solution that:

- Could manage the volume of 45,000 employees
- Was easy for users to understand
- Sophisticated enough to deal with a complex international approval system

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Must-have's in this new system were to have:

- One application for all requisitions
- One application whose workflow could support all the rules based on the item procured
- An application which automatically routes requests to the correct people and provides real-time reporting to management
- An application interface that allowed users to intuitively use the system without extensive training

PREVIOUS PROCESS

Employees from across the company would log into a ticketing system, fill out a requisition, and then the ticket would be manually routed based on internal purchasing rules. By manually routing the requests through a ticketing system this customer was running into long wait times, errors in manual entry of data, and misrouted data.

When the request was delivered to the approver it could sit in their email, unanswered for days, halting productivity. In each approval chain, this delay could happen many times as the request advanced through the approval progression to ultimately get approved.

This process was inefficient, resulting in missed purchase requests and lost time. This inefficiency, coupled with the high cost associated with the ticketing system, led this customer to look for a solution with greater flexibility and one that could be used more broadly throughout the organization.

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THE FORMVERSE PROCESS –
A UNIQUE APPROACH TO A COMMON PROBLEM

Like at most large organizations, this customer's staff members are required to use multiple software applications just to complete their daily tasks.

After implementing FORMVERSE, users can choose a method to interact with workflows by:

- Accessing the browser-based version on a PC/Mac
- Using the mobile version on any smart device or
- Interacting with the application directly from within their email via MS Outlook, Office 365 or G Suite

This customer was able to introduce a new application through **FORMVERSE WebApp** and Office 365. This deployment approach results in an extremely high adoption rate.

Staff desiring to initiate a new Purchase Approval workflow, would simply:

1. Open the **FORMVERSE WebApp** or start a new email message
2. Select a new **Purchase Requisition** from the list of applications they have been granted access to
3. The initial structured data UI associated with the application is accessed through the **FV WebApp** or rendered natively within their new Microsoft Outlook email message window
   a. With Outlook integration, the structured data is not an attachment; the entire user experience is made directly from within their Microsoft Outlook email
4. The initial application data is filled out and completed
   a. Supporting documents may be attached
5. The user submits through **FORMVERSE WebApp** or sends the email (email integration) no differently than any other email they send throughout the day
   a. Once a user clicks submit/send, **FORMVERSE** will automate all the routing according to the rules that have been designed into the workflow
6. The recipient then receives an email where they can review the submitted data, either directly in the email message or are taken to the **FORMVERSE WebApp**

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7. Then, the recipient can take an **Action** on that application submission, either from within an email or the **FORMVERSE WebApp**.
   a. **Actions** can be anything as simple like: "Approve", "Deny" or complex like: "Create Record in SAP", "Send Agreement to DocuSign for E-Signature", "Store Document in SharePoint", etc.

The application's automated workflow will continue this routing whether there are 2 steps or 2,000 steps. Applications are also fully customizable.

FORMVERSE has the capability to support both simple and complex workflows. Those rules may be defined statically or be defined based upon data that is entered by the respective users.

For example, if the application's workflow rules dictate, based on the requirements, that a procurement request must be routed to a specific person, group, or team within Finance, the routing is automatic. The User Interface associated with that step, is dynamically created "on-the-fly" and is presented to the user with fields containing the details of the purchase.

In cases when there is more than one level of approval, the request will be routed in accordance with a customer's rules. At each step, the approver can take actions that could be virtually anything and are determined by the customer's specifications. The data moves through the automated process acquiring the necessary sign-offs until it is either approved at the desired level or denied. Once one of these actions takes place, the initiator is alerted to the decision.

No need to send additional emails or to check on the status, it's all fully automated. The employee can then send the request and be alerted to the outcome without any further steps.

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REPORTING & AUDIT

Each time applicant data is entered into a **FORMVERSE Application**, all data, metadata, and attachments are automatically stored within the database. That information can then be accessed through custom real-time reporting by authorized users, or automatically integrated into ANY other existing enterprise applications.

Data made available within reports are fully customizable and could include any or all data/metadata captured during the application's flow. With **FORMVERSE**, users can view reports which can then be sorted, grouped, and filtered by any field within the application. This allows staff to interpret data in multiple ways.

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Discover FORMVERSE

FORMVERSE EAP (Enterprise Automation Platform) give customers the flexibility of a No-Code Application Development Platform, combined with the power of an Intelligent Process Automation solution. It gives every employee the ability to rapidly deploy configurable **FORMVERSE Apps** that are capable of automating even the most complicated business processes.

FORMVERSE Apps improve productivity by automating both high value strategic processes and eliminating time consuming repetitive tasks. **FORMVERSE EAP** makes both Attended and Unattended automations easy, freeing end users and adding value to your organization's bottom line. All with no developers needed!

FORMVERSE PASSPORT bidirectionally integrates data between your company's **FORMVERSE Apps** and any of your existing Enterprise applications. Data can seamlessly travel to and from multiple disparate systems, centralizing end user's work, inside one easy-to-use interface and eliminating time-consuming manual data entry.

Host with us or on your public or private cloud!

Contact us today at 1.403.456.3035 or askus@formverse.com, for a completely free Demo or Pilot!

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