

automate | capture | integrate



FORMVERSE: GOVERNMENT OF CANADA INDEPENDENT PERFORMANCE REVIEW

Independent Performance Review of FORMVERSE
Enterprise Automation Platform

July 2019

FORMVERSE, INC.

USA
275 Rose Avenue, Suite 216
Pleasanton, CA 94566

CANADA
622 5th Ave. SW, Suite 102
Calgary, AB T2P 0M6

USA 1.925.264.0045
CANADA 1.403.456.3035

FORMVERSE

Independent Performance Review of FORMVERSE Enterprise Automation Platform

How valuable is implementing automated solutions for companies? To answer this, several **FORMVERSE** automation applications were selected by a Canadian Federal Government customer to determine **cost and time savings** for the agency, over previous methods of work completion. The resulting findings highlighted in the following pages show the time and monetary costs of not automating processes. Below you will find descriptions of the applications tested and the results as provided by the testing organization.

TESTED APPLICATIONS

FORMVERSE APPLICATION/AUTOMATED PROCESS	COST/TIME BENEFITS FROM IMPLEMENTING THE CONTRACTOR TECHNOLOGY
<p>1 Training Request and Fulfillment Application</p>	<p>This FORMVERSE Application was designed to streamline the training process of all staff within the Government of Canada agency. It initialized training paths based on employee onboarding data while tracking the progress of each trainee.</p> <p>Benefits:</p> <ul style="list-style-type: none"> • The process was designed for continuous communication between the Program Manager, Trainer and Trainee. This was achieved by integrating the client's existing email infrastructure so that all stakeholders were able to quickly and easily communicate throughout the entire process. • An alert system was configured within the application to help expedite the process, ensuring all employees would take action as soon as possible. • The ability to access the full application from any internet-connected device allowed for all action takers to complete their training no matter where they were located. • All data/metadata was stored within FORMVERSE's Database, allowing for in-depth custom retrieval and reporting. This provided descriptive data on progress and completion reports to managers within the organization, allowing for vital insights to each new employee's training.

2 Project Evaluation and Planning Application

This application automates an Internal Project Evaluation and Planning Scorecard/Cost Recovery Evaluation Scorecard activities. Approximately 10 levels of approvals are required for some processes within this application. Examples approvers were: Project Leaders, Program Managers, Directors, ASGs, ETs, IPMOs, CCs, BAs and DGs.

The Evaluation/Analysis included:

- Occupational Health and Safety Checklist for Projects;
- Task Hazard Analysis (THA);
- Avoidance of Competition with the Canadian Private Sector – Screening Process;
- Canadian Environmental Assessment Act Screening Form (CEASF);
- Project Planning: Assessment of Mining Capability.

Benefits:

- The elimination of all paper documents in trade for easy and fast access to these documents through structured menus.
- No manual interventions, the process was streamlined so that the correct approver was notified in a timely manner.
- No hassle, quick access for users, for any steps in the application through browser access – no extra desktop software required to download/open.

3 Project Amendment Process Application

This process automates Project Amendment activities. An amendment can be initiated internally or externally by outside contractors. The amendment can be related to the project schedule, changes in costs or technical changes. Persons involved in this process: Project Leader, Client, Program Manager, Director and Contract Coordinator.

Benefits:

- A project can be amended multiple times and all amendment data (including unstructured data) is saved within the **FORMVERSE** Database automatically. This allows authorized users to rapidly access this data for ad hoc or “canned” reports.
- Easy identification of both the status and location of documents within approval processes.

4 Project Completion Process Application

This process automates activities related to the completion and closure of a project by making sure that:

- All-time spent on the project by each person, is properly recorded.
- All operating expenses are recorded.
- Finance Department has issued related invoices in case of a cost recovery project.
- All invoices are submitted and complete.

Other Requirements:

- Track total project cost, completed tasks, discrepancies (if any), the total number of amendments initiated by customer and outside contractors on this project;
- Experiences, Challenges, Contributions and Postmortems,

The following people were involved in the completion/closure of a project: Project Leader, Program Manager, Finances, Director, Contract Coordinator, and Quality System Manager.

Benefits:

- Easy reporting on request.
- Data saved can be reviewed anytime for any management purpose.
- Multilingual (English and French).
- No paper – removing dependence on paper processes by transforming the focus of previous paper documents into **FORMVERSE's** configurable User Interface.

5 Contract Review and Change Request Process Application

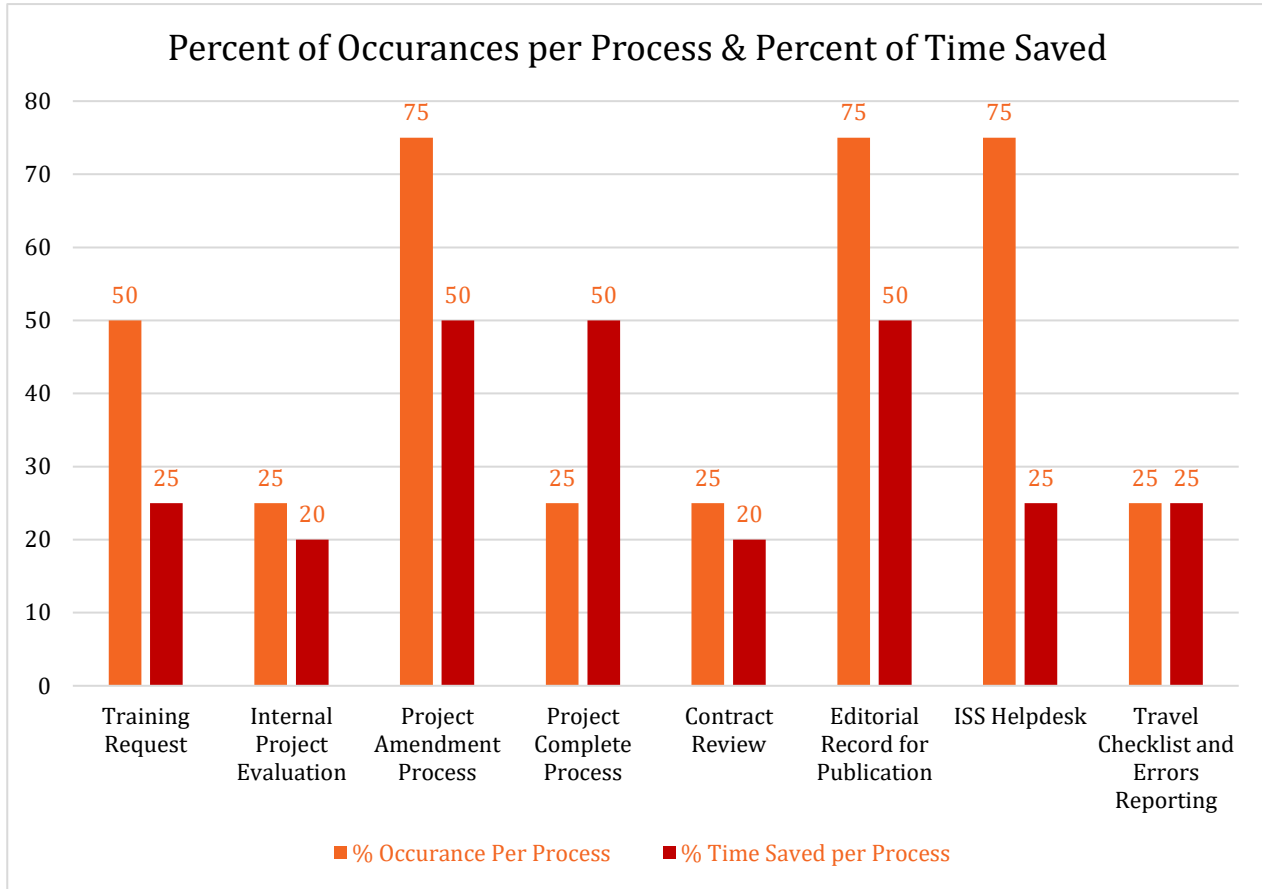
This process automates the approval process activities related to the review of a contract and handles requests for changes to a contract. It involves the Project Management Department, Legal Department, Program Manager (PM), Contract Coordinator, the Project Leader and the Customer.

Benefits:

- Straightforward capability to consult all past reviews related to contracts on multiple interfaces.
- Repeated benefits mentioned above in other applications.

<p>6 Editorial Record for Publication Process Application</p>	<p>This process automates all activities related to the approvals of the Publication of a project. It collects and saves information related to the type of publication, internal/external authors and co-authors, internal and external reviewers, and all internal managers involved in this approval processes.</p> <p>Benefits:</p> <ul style="list-style-type: none"> • Email Integration for alerts and to take action. • Searchable structured data.
<p>7 ISS Helpdesk Process Application</p>	<p>This process is used by end-users to open tickets (log issues or request for services) with the ISS Helpdesk. The ISS Helpdesk will keep communications with the user through the same interface until the ticket is closed.</p> <p>Benefits:</p> <ul style="list-style-type: none"> • Save user's time – user keeps working within the FORMVERSE interface without switching to a multitude of software solutions.
<p>8 Travel Reimbursement Checklist and Errors Reporting Process Application</p>	<p>This process automates the control and verification activities within the travel reimbursements process. It also reports on all errors identified, by making sure that:</p> <ul style="list-style-type: none"> • All required receipts are available; All advances have been accounted for. • The payee is entitled to reimbursement. Amounts on the SAP document (TL) matches the total amount due to traveler on the EMS claim. • Meals and incidentals do not exceed those allowable by the NJC Travel Directive. Accommodation, Mileage Rates and Vehicle Rental Cost claims are in accordance with NJC Travel Directive. • Exchange rates are in accordance with NJC Travel Directive and/or internal desk procedures. • Expenditure Initiation on the Travel Request is approved by the correct delegated authority. • All travel, except local, must be approved by the Sector ADM/DM direct report or designated Executives. • Req. documentation is available for all Events over \$5K. <p>Benefits:</p> <ul style="list-style-type: none"> • Repeated benefits mentioned above in other applications.

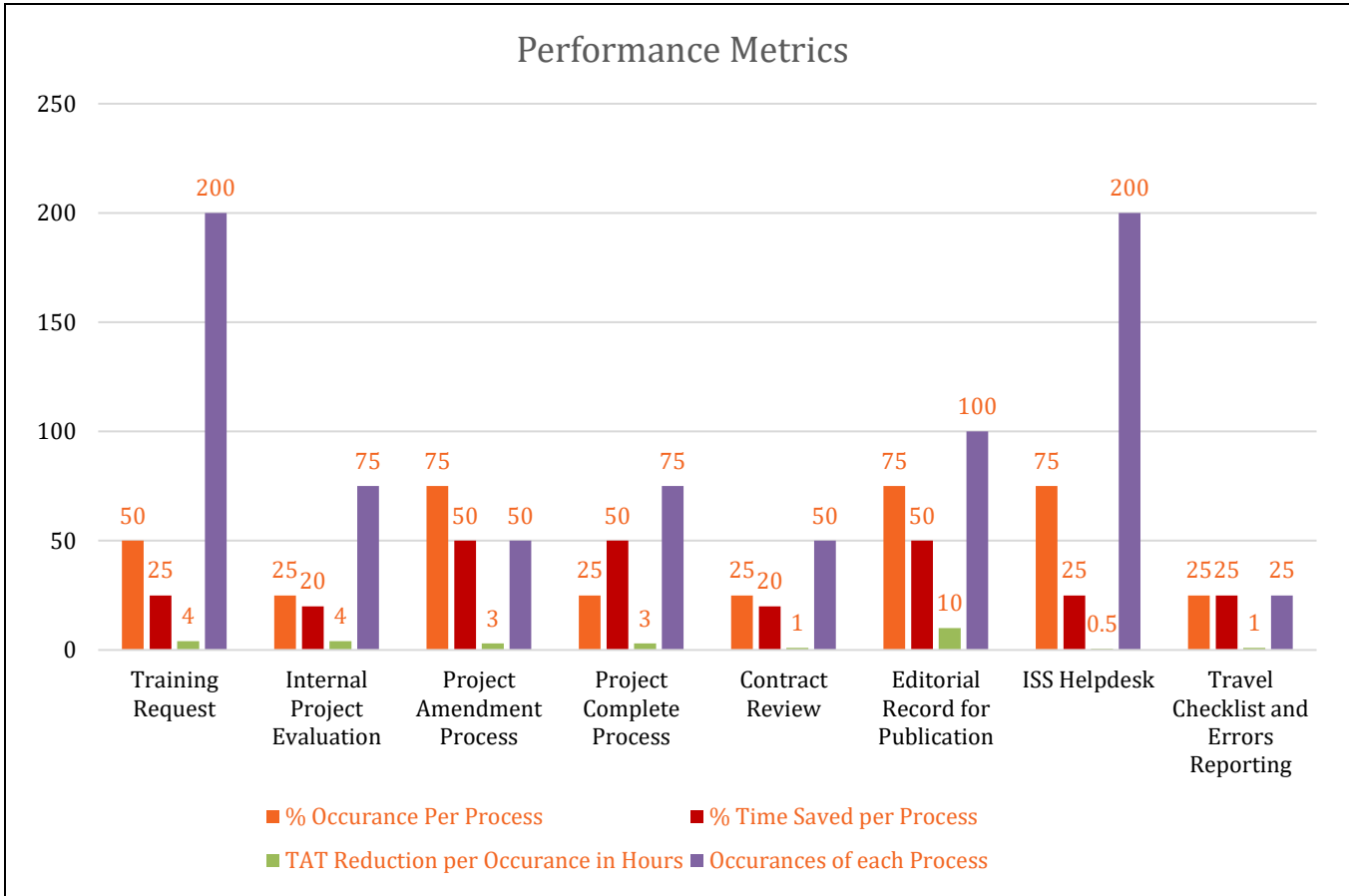
Graphical Representations of Savings Realized Through Testing



The time savings on the listed applications is significant, with 3 of the 8 applications cutting time in half, for each occurrence. The cost savings associated with this graph are estimated below, exemplifying how much time and money can be saved by introducing automation applications within business processes.

	OCCURRENCES OF EACH PROCESS	POTENTIAL \$ SAVING PER PROCESS
Training Request	200	\$ 28,000.00
Internal Project Evaluation	75	\$ 4,500.00
Project Amendment Process	50	\$ 5,500.00
Project Complete Process	75	\$ 8,000.00
Contract Review	50	\$ 1,500.00
Editorial Record for Publication	100	\$ 17,500.00
ISS Helpdesk	200	\$ 10,000.00
Travel Checklist and Errors Reporting	25	\$ 1,000.00
TOTAL SAVINGS		\$ 76,000.00

USA Office | 275 Rose Avenue, Suite 216 | Pleasanton, CA 94566
CANADA Office | 622 5th Avenue SW, Suite 102 | Calgary, AB T2P 0M6
 CANADA: (403) 456-3035 | USA: (925) 264-0045 | formverse.com | askus@formverse.com



USA Office | 275 Rose Avenue, Suite 216 | Pleasanton, CA 94566
CANADA Office | 622 5th Avenue SW, Suite 102 | Calgary, AB T2P 0M6
 CANADA: (403) 456-3035 | USA: (925) 264-0045 | formverse.com | askus@formverse.com

Discover FORMVERSE

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

FORMVERSE Applications improve productivity by automating both high-value strategic processes and eliminating time-consuming repetitive tasks. The **FORMVERSE Enterprise Automation Platform** makes both Attended and Unattended automation 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 Applications** 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.



Contact us today at [1.403.456.3035](tel:14034563035) or askus@formverse.com, for a completely free Demo or Pilot!

FORMVERSE

USA Office | 275 Rose Avenue, Suite 216 | Pleasanton, CA 94566
CANADA Office | 622 5th Avenue SW, Suite 102 | Calgary, AB T2P 0M6
CANADA: (403) 456-3035 | USA: (925) 264-0045 | formverse.com | askus@formverse.com