



AUTOCENE
A NEW ERA IN AUTOMATION

**Autocene Use Case
Series**



AUTOCENE

Procure-to-Pay - Complex Approval
Automation for Global Procurement

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Complex Approvals for Global Procurement

Problem Statement and 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 solution 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.

Autocene was ultimately selected due to a variety of factors:

- The ability to create configurable **No-Code** Automation Applications or "**Workcenes**" with complex routing rules
- Meet the short time span the client had to replace the old system (**Autocene's** rapid deployment)

Autocene's flexible deployment options allow any customer to deploy in multiple ways, including, being fully hosted by **Autocene** 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, or On-Premise. All of these were material factors in this company's decision to adopt **Autocene**.

A Highly Customizable Automation Application--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 processes related to Procure-to-Pay at large global organizations are complex, that complexity is shielded from the end user with **Autocene**.

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 **Autocene** allows us the breadth to cover continents and the depth to go from front-line employee all the way to the CEO,”* said an 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

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

- One application for all requisitions
- One application whose automated 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.

The Autocene 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 Autocene, users can choose a method to interact with the Procure-to-Pay Application by:

- Accessing the browser-based **Autocene WebApp** 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, OWA or G Suite

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

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

1. Open the **Autocene WebApp** or start a new email message
2. Select a new **Purchase Requisition** from the list of Automation Applications or "**Workcenes**" to which they have been granted access
3. The initial structured data User Interface associated with the application is accessed through the **Autocene 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 **Autocene 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, **Autocene** 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 **Autocene WebApp**
7. Then, the recipient can take an **Action** on that application submission, either from within an email or the **Autocene 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.

Autocene has the capability to support both simple tasks and complex processes. 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 automation 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.

Reporting & Audit

Each time applicant data is entered into an **Autocene** Automation 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 **Autocene**, 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.

Discover Autocene

Autocene Enterprise Automation Platform give customers the flexibility of a **Code-Free** Application Development Platform, combined with the power of an Intelligent Process Automation solution. It gives enterprises the ability to rapidly deploy fully configurable **Autocene "Workcenes"** that are capable of automating even the most complicated business processes.

Autocene Workcenes improve productivity by automating both high value, mission critical processes and eliminating time consuming repetitive tasks. **Autocene** makes both Attended, Semi-Attended & Unattended automations easy, freeing end users and adding value to your organization's critical processes & bottom line. All with no developers needed!

Autocene Passport bidirectionally integrates data with any of your existing Enterprise applications & databases (On-Premise or Cloud Hosted). Data can seamlessly travel to and from multiple disparate systems and/or **Autocene Workcenes**, monitoring databases and automating integrations, centralizing data for end users & eliminating time-consuming manual data entry.