



# Automating Purchase Approvals and Tracking

Success Story

Provider of Asset and Risk based insurance services.

### Client Vision

Streamline the approval and tracking of capital expenditures in all locations of operations.

### Challenge

Leverage the use of the corporate intranet.

Convert from known paper based system to automated process.

Operate in a manner that allows for daily changes to signing authority.

### Nobilis Solution

Nobilis Ci - The ProcessWriter  
Nobilis Enterprise V4.01

### Success

Approvals cycle times reduced from weeks to hours

Rules governing approvals logic and routing flexible to change without programming

Reduced operational overhead tracking and governing approval by \$1000's.

### Problem

In the midst of a period of growth and expansion, our client, a leader in providing insurance based Risk and Asset Management services, faced new competition and increasing costs across multiple channels. One objective in reining in rising costs was to gain control over the purchasing of vendor products and the chaotic approvals process that accompanied it. The number of people tracking manual orders in process artificially extended the cycle time between the initiation of a purchase and the delivery of the product and cost the company countless man-hours better spent elsewhere.

“Nobilis gives us the visibility we need to see where any request is in the approvals process and the flexibility to change the rules that govern the process as we need.”

The original process involved a multi-layered paper-based procedure. Based on a set of criteria within each organizational group, the signatures and signoff process would start. Paper would be passed from the appropriate manager to the next for signing authority. In the midst of the paper shuffle, the person making the request lacked any visibility into the status of the order. Any changes to the order as it made its way through the organization would require the process to return to the beginning.

The fact that many forms were filled out improperly or were missing information led to chaos. Approval requirements were unclear, visibility was nil, and invoices were paid incorrectly. The chaotic nature of the process resulted in long cycle times and shortages in needed items.

### Solution

A solution to the problem required that a layer of control and process automation be applied to streamline the process for efficiency, adherence to policy, and the

elimination of mistakes in manual entries. Utilizing Nobilis Software to determine the business flow or activities associated to purchasing, order fulfillment and billing was step one. The activities defined represented the entire process from quote submission by the vendor to the company receiving and processing the purchase order. The steps were examined for possible redundancy in data as well as communication points as to the status at any point in the "orders" lifecycle.

Nobilis Enterprise then provided the business users in the cycle the ability to define the activities, business rules, and process logic that made up the order approvals process. Users could then configure a process agent to execute and monitor the process. Each manager could therefore configure a process, change a process and interact with others in the process as required. Requestors were also given the ability to participate by subscribing to notifications and updates as the order was fulfilled, providing much needed process visibility.

## Results

Today Nobilis has streamlined approvals based on roles, eliminated most errors and cases of missing information that were prevalent with forms, and slashed cycle times from weeks to hours. Business rules governing process logic are flexible to change as needed, purchase requestors now have visibility into the process, and manpower that used to spend days every month reconciling approvals and purchase orders may be utilized in more productive pursuits.

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Nobilis provides the leading self-service application development platform that meets the needs of business users and IT resources alike to automate processes across the enterprise, from everyday work to mission critical activities. Nobilis Ci - the ProcessWriter™ for the business desktop - is the leading self-service application development platform for business users. Nobilis Enterprise provides the scalable and extensible platform required by IT resources to support enterprise level computing.

Nobilis Software  
286 Congress Street  
Boston, MA 02210  
877-717-2424

[info@nobilis.com](mailto:info@nobilis.com)  
[www.nobilis.com](http://www.nobilis.com)



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