

# UNIVERSITY

## FROM PAPER CLIPS TO PAPERLESS: IVY LEAGUE UNIVERSITY TRANSFORMS PURCHASE REQUISITIONING PROCESS

*This world-renowned Ivy League University has streamlined their purchasing process with an online workflow that integrates with their database for automatic approval routing.*

- ✓ Digital Workflow improves efficiency and eliminates lost paperwork.
- ✓ Database integration keeps the process in sync with Peoplesoft Workforce Management System.
- ✓ Sleek design makes the form easy to use for all experience levels.
- ✓ Attachments are uploaded directly to the form for simplified document management.
- ✓ The I.T. department has deployed frevvo campus-wide to automate workflows across the University.

### **Customer Profile**

This top US-based University is recognized worldwide for the quality of its academic programs and its dedication to developing leaders. Their Facilities department is made up of over 700 employees with projects ranging from maintenance to sustainability to capital improvements. It's critical to their success that administrative processes run efficiently.

### **Business Situation**

The purchase requisition process previously involved filling out a request on carbon triplicate paper and walking it down the hall to each approver's desk. The approval chain depends on the line items in the order and can be quite lengthy and complex. Quotes, bids, and other supporting documents had to be printed, copied, and paperclipped to the request. Once approved, the business office had to manually type data into their Peoplesoft Workforce Management System, including scanning and uploading documents, so the order could be dispatched to a supplier. It was easy to lose track of a request along the way or miss an important approval step.

*"The frevvo Requisition Process workflow was a lifesaver for facilities employees working remotely during the pandemic."*

**Manager - Information & Technology**

### **Solution Summary**

This customer chose **frevvo** to improve the requisitioning process for requesters, approvers and the business office. **frevvo**'s knowledgeable Client Services team helped them transform complex business requirements into digital workflow design, including providing thorough documentation and user training to ensure the sustainability of the solution.

They started with a **frevvo** workflow design that reflected the look of the original carbon copy request form and the "walk down the hall" process so that users could adopt the new solution easily. The form uses a dynamic table control that helps the user enter line items, select the correct finance account, and choose from existing suppliers. It also allows the user to attach supporting documents to the form, where they can be accessed by approvers and the business office without the need to print, copy, scan or paperclip.



*"Our users are very happy with the final product - it really helped a lot of people in our department."*

Web Developer - Information & Technology

To streamline the approval process, the customer integrated their workflow with Peoplesoft via a SQL database that tells the workflow which approvals are required for each requested line item. The workflow improves efficiency by grouping departmental line items which cuts down on the number of approval steps needed.

Next, the request is routed to the business office, where an analyst can create a purchase order. The analyst can drag and drop attached files right to their workforce management system, eliminating the need for scanners at every desk. Any participant can easily check the workflow's progress in the audit trail, preventing lost requests and missed approval steps.

#### *Implementation*

During the COVID-19 pandemic, work from home orders meant the "walk down the hallway" approach was no longer an option. Employees found that the digital **frevvo** workflow with automated approval routing made the requisition process faster, more efficient and easier to manage than the previous carbon copy method.

The University Facilities department recognized that going digital was a culture change, so they used a phased approach to user adoption, training and supporting one department each week on the new process. They also provide process documentation, screenshots and FAQs on their Sharepoint site to further support users learning the new process. As with any solution roll-out, requirements may be adjusted once real-world instances play out - with **frevvo**, such changes were easy to implement, test, and publish without disrupting the process.

#### *Key Features*

1. Database integration keeps workflow approvals in sync with the workforce management system.
2. Custom logic and conditional routing streamlines approvals, only routing to each approver once and showing the approver the relevant details.
3. Supporting documents are uploaded to the form, can be viewed by any approver, and can easily be transferred to file systems without printing and scanning.

#### *Benefits*

1. Improved efficiency - no more lost or misrouted requisition forms.
2. The sleek form provides clear direction and is easy for employees to complete.
3. The world-class **frevvo** Client Services team helped transform a manual paper-based process into an automated digital workflow.

The university plans to update their non-competitive order and supplier onboarding processes with **frevvo** workflows in the near future. They know **frevvo** workflows will improve employee efficiency by using streamlined automation and integration to simplify administrative processes.

The university's I.T. department has now deployed the frevvo solution to multiple departments to automate workflows in a variety of business areas across the entire University.

**frevvo** is visual, drag-and-drop workflow software to quickly transform inefficient manual processes into automated workflows at affordable cost. Connect your people, data and systems. Together with our partners, we are committed to helping you achieve success via our Customer Success Team that includes world-class support, services and training. To learn more, please visit <http://www.frevvo.com>, contact us at [info@frevvo.com](mailto:info@frevvo.com) or call 203.208.3117.