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FORMVERSE USE CASE SERIES

Eliminating Critical Shortages in Global
Manufacturing Operations

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FORMVERSE

ELIMINATING CRITICAL SHORTAGES IN GLOBAL MANUFACTURING OPERATIONS

PROBLEM STATEMENT

This **FORMVERSE** customer is a USA-headquartered corporation and a leading manufacturer of critical infrastructure technologies for large and high-profile data centers. The company maintains operation and manufacturing centers worldwide, where it manufactures critical infrastructure to many of the largest companies in the world, ensuring manufacturing projects are on time and on budget.

Identifying potential critical part(s) shortages in the manufacturing process and quickly replenishing those materials is essential to maximizing profitability, meeting customer commitments and ensuring client satisfaction. This is particularly important and challenging when those manufacturing facilities are physically located all around the world.

The escalation process can require up to four levels of approval before an acquisition is made. Before implementing **FORMVERSE**, this process involved sending multiple unstructured emails to communicate these vital time sensitive requests and approvals. Many times, managers and executives are traveling or involved with other projects, delaying the process of securing the needed materials. This caused frequent delays in the manufacturing process which negatively impacted production output and client delivery schedules. Further, even when on vacation, approvers needed to be tied to their mobile devices in case action was required.

THE FORMVERSE PROCESS – A UNIQUE APPROACH TO A COMMON PROBLEM

After implementing **FORMVERSE**, workflow initiators continued to use their existing email system, which was then transformed into a sophisticated **enterprise-class automation**, reporting, audit, and recordkeeping system. In addition, workflow rules were defined completely based on the specifications and requirements the customer developed for their business operations, which is crucial for **large multinational organizations**.

Initiating the **FORMVERSE EAP (Enterprise Automation Platform) Application**:

1. The buyer initiates the **Critical Parts Shortage** workflow by simply starting a new email message directly from within their existing **Microsoft Outlook** email. After opening the email message, the buyer sees a list of applications which that user has been granted access to.
2. The buyer fills in the required **structured data** (form) that is rendered directly within their Microsoft Outlook email, and attaches any supporting documents (if needed) and hits “Send”, no differently than sending any normal email message.
3. By hitting “Send”, all data/metadata entered into the form and any attachments are automatically stored into a **Microsoft SQL Server database**.
 - a. The workflow is also **automatically routed** to the Site Materials Manager who performs due diligence on the request, ensuring that the needed parts can't be found somewhere else in the system.
4. After the Manager completes their research and approves the request, the **structured data** (form) automatically moves via email to the Global Supply Manager for approval, then to the Commodity Manager, and if needed, to the VP of Supply Channel (sourcing lead).

At each step, **automatic reminders** are used to ensure that action is taken in a timely manner. Those reminders can range from minutes to hours to days, depending on the severity level.

Travel schedules and vacations are no longer interrupted as all parties in the process can **delegate action and responsibility** to other managers, in accordance with the customer's internal policies and procedures.

REPORTING & AUDIT

Each time applicant data is entered into a **FORMVERSE EAP 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.

WHY FORMVERSE?

The customer had multiple requirements in mind when creating this application. Those included using their existing ERP system and creating the workflow using Microsoft SharePoint. The lengthy deployment time needed to create comparable solutions using these systems was a primary factor in choosing **FORMVERSE's No-Code High Productivity Application Development Platform (HPaPaaS)**.

Our **bi-directional data integration** capability "to and from" the customer's other enterprise applications, was another significant factor in selecting **FORMVERSE**. This was achieved by using **FORMVERSE PASSPORT**, our Integration Platform as a Service (**IPaaS**), where all data, metadata, and attachments are collected in the **FORMVERSE** database and can be integrated easily with the customer's other enterprise applications.

The customer also considered **FORMVERSE's** cost-effective licensing model in its final decision. This model is based on the number of applications (**Application Templates**) used, not the number of users, locations or servers. This was an important consideration for a large, multinational organization.

FORMVERSE CUSTOMER SUCCESS TEAM

FORMVERSE strives to create the best customer experience by providing innovative software and top-notch professional services. As such, our experienced **Customer Success Team** provided the customer with the guidance and best practices important, in structuring this complex process and addressing the potential issues, that come into play when designing such an application. Most importantly, the result of implementing **FORMVERSE** is that, while the rules related to this application are quite intricate, the **complexity is hidden** from the day-to-day participants.

Comments received by the customer's Global Supplier Manager and Procurement Manager regarding the **FORMVERSE Customer Success Team included:**

- *“Good communication”*
- *“Never let us down”*
- *“Very good at setting and meeting expectations”*
- *“Responsive and flexible in providing additional functionality on-the-fly”*
- *“Pleased with the service received”*

COST BENEFIT & TIME SAVINGS

Although no formalized study has been completed, the time savings of implementing **FORMVERSE** are apparent. With the previously deployed method of escalation, an email could sit in a user's inbox for hours, days or even weeks. The initiator was tasked with tracking and follow up at every step of the process. With the **automated workflow** provided with **FORMVERSE reminders and delegations**, the escalation process takes a fraction of the time to complete!

The key benefits of implementing this system are:

- Avoid losing revenue due to delays in the manufacturing process
- The capability to confidently confirm order delivery dates
- The ability to win new customer contracts by eliminating shortages

WHAT'S NEXT FOR THIS APPLICATION?

This application is currently being used at plants in Mexico, Canada, and the United States. Later this year, it will be rolled out to plants in the South American countries of Peru, Chile, and Brazil. That will be followed by implementation by plants in Europe and Singapore.

The customer also plans to engage their **Suppliers** in the use of this critical application, utilizing **FORMVERSE** to assist in **Quality and Payment Resolution** processes.

CUSTOMIZED FEATURE SET

Please note, that this **Critical Parts Shortage** application is only one example of a **FORMVERSE EAP Application**. Since **FORMVERSE** software is created with a **flexible architecture**, a similar process can easily be customized for each customer requested variation.

A key benefit enjoyed by customers is that this powerful additional functionality is made available to users without the notion of introducing multiple new applications. This approach results in **high adoption, low cost, high-security, and enterprise-class functionality**.



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](tel:14034563035) or askus@formverse.com, for a completely free Demo or Pilot!

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