

## CAPITAL EXPENDITURE REQUEST FORM AND WORKFLOW

### SAVE TIME AND MONEY



A nationally known newspaper needed a better way to track and record all documents associated with their Capital Expenditure Requests (CERs), which are often made up of summaries, ROI worksheets, copies of capital budgets and vendor quotes. They previously used Oracle’s Collaboration Manager and detailed workflows to track CER forms, but the process was not meeting their needs. The review process was not visual enough so it took reviewers a long time to approve, edit, or reject documents in the CER workflow. Also, CER forms and related documents could not be searched on in their Oracle Universal Content Management System (UCM), making it difficult to find approved CER forms. The end goal was to make the CER process easier for users, make the forms and workflow more visible, and store all revisions of the form and its workflow history in their UCM system so they could be found through search.

Fishbowl Solutions met with the customer to understand their current CER process and what they wanted out of a new process. To provide the best solution, Fishbowl re-architected the system to improve ease of use, and to better leverage the full capabilities of UCM. To better define the CER workflow process and notification of reviewers, Fishbowl leveraged their Workflow Solutions Set component that extends UCM out-of-the-box workflow capabilities. To bring the workflow process together in an easy to use interface, Fishbowl created a dashboard view for the CER forms and workflow. The dashboard view allows users to see where the form is in the workflow process, attach related documents to the workflow, see and participate in in-line discussion threads, and provide options around approving, rejecting, or withdrawing the CER form from workflow. All CER forms and their workflow revisions are then made available in UCM and can be found through search. To make search even easier for users, Fishbowl created a CER search interface where users can search on metadata associated with CERs. Fishbowl also re-designed the search results interface to encourage easier viewing for users. This new CER process has reduced the burden on IT, and reduced the amount of time executives spend on deciding how and where to spend money. An additional benefit is that the Treasury department can quickly report on where money is being spent because all of the information is stored in one repository (UCM). Overall, the new CER process has helped the organization save time, and money.



For more information please call Fishbowl Solutions at 952.465.3436 or send an email to [info@fishbowlsolutions.com](mailto:info@fishbowlsolutions.com).