

Bonita Springs Utilities, Inc.

Bonita Springs Utilities is a member-owned cooperative providing water and wastewater services to more than 30,000 customers throughout the picturesque Gulf Coast town of Bonita Springs, Florida.

Challenge

Distributed workforce. Lack of formal requisition workflow.

Bonita Springs Utilities' 130 employees work from four separate locations. Without centralized electronic requisition processing, all purchase requests landed on the desk of the organization's purchasing agent who would then need to verify budget compliance and route requests to the appropriate approvers. It was a time-consuming, inefficient process that lacked the controls the organization needed to ensure accuracy, visibility, and compliance.

Requirements

Robust approval workflows. Integration with Microsoft Dynamics GP.

Key requirements for the procurement solution included a robust requisition approval workflow engine that would allow the organization to vary the approval workflow based on the amount of purchase or department.

In addition, Bonita Springs Utilities utilizes Microsoft Dynamics GP as its accounting and financial application and sought a procurement management solution that offered integration to minimize duplicate data entry, enforce budget limits, and to ensure accurate encumbrance and accrual accounting.

Solution

Paramount WorkPlace Requisition & Procurement

Paramount WorkPlace provides the strategic functionality Bonita Springs Utilities needs, serving as its complete procurement management solution. The solution provides seamless integration to the utilities' accounting application, Microsoft Dynamics GP, and delivers flexible and robust approval routings that match the organization's unique workflows.

The organization reviewed several procurement management applications before selecting Paramount WorkPlace. "Our staff all preferred Paramount WorkPlace," recalls Jeff Neuenschwander, Business Analyst III and Paramount WorkPlace Administrator with Bonita Springs Utilities. "It has an intuitive interface that makes it easy to learn and use."



Benefits

Streamlined workflows. Time savings. Improved internal compliance.

A majority of Bonita Springs Utilities' 130 employees use Paramount WorkPlace to speed and simplify the entire procure-to-pay cycle. "We're using it to establish and maintain our procurement workflows and gain the necessary visibility and controls into the procurement cycle," says Neuenschwander. "Paramount WorkPlace has become an integral tool that helps us manage our procurement process."

Previously, the organization's purchasing manager was responsible for obtaining approvals and ensuring budget compliance for every requisition. With Paramount WorkPlace, approval routings and budget enforcement are automated, eliminating manual tasks and saving a tremendous amount of time. "Our purchasing agent is now able to spend time on more strategic tasks such as negotiating better pricing," says Neuenschwander.

Now, requisition requests follow the approval routing Bonita Springs Utilities has established in Paramount WorkPlace, which can vary by department, cost, or expense category, for example. Once each reviewer in the workflow has given their approval, the utility's purchase manager gives the final approval and the requisition is converted into a purchase order in Dynamics GP. The seamless integration with Dynamics GP is a real benefit to the organization. "We can create requisitions in Paramount WorkPlace using inventory item numbers, cost information, and our preferred vendors from GP. That's a huge time saver, and also ensures staff is buying the right parts from the right vendors."

The integration also ensures Bonita Springs Utilities has better control over its budget and visibility into encumbrances. "We continually monitor encumbrances to keep overall budgeting on track," Neuenschwander notes. "As users create requisitions in Paramount WorkPlace, the software checks the budget figures in Dynamics GP and warns or prevents users from continuing. And open requisitions are counted when we run encumbrance reports giving us true visibility into the purchasing cycle."

The utility is also benefiting from Punchout capabilities within Paramount WorkPlace to efficiently shop with key vendors, including Amazon and Grainger. "With Punchout, we can shop the vendor's websites normally, and during check out, Paramount WorkPlace creates a requisition that then enters the normal approval routing workflow," explains Neuenschwander. "It's very convenient, and we're sure our staff is shopping with approved vendors and receiving the best pricing."



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