



Joget Case Studies Booklet

Showcasing the success stories of organizations across various industries as they overcome business challenges with Joget DX.

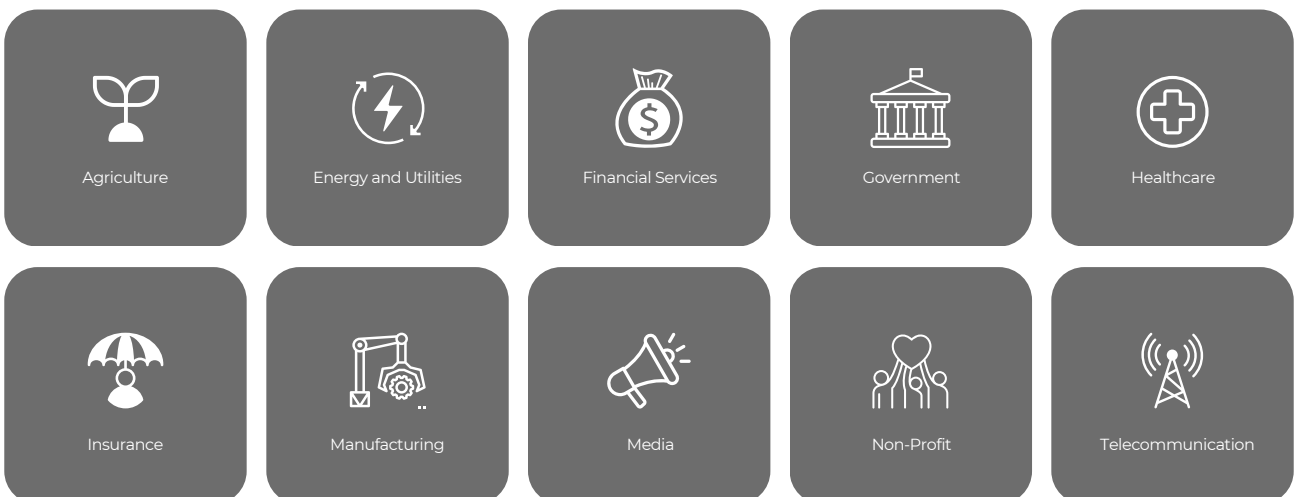


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Automated Order Approval System

Mokxa Technologies has a customer who is a Fortune 100 global company and among the top general insurance providers in the world, with product offerings including life, property and casualty insurance, as well as asset and wealth management services.

Implementation Partner: Mokxa Technologies

ABOUT PARTNER

Mokxa Technologies is a global business solutions provider focused on delivering peace of mind to its clients by simplifying enterprise IT.

Powered by hybrid thinking and deep technology expertise, Mokxa specializes in providing CIO services, futuristic platforms, enterprise architecture, and enterprise risk assurance to industries like healthcare, BFSI, manufacturing, and more.

CUSTOMER AT A GLANCE

Before

- Needed to improve the quality, accuracy, and traceability of documents and approval statuses
- Relied on manual processes for document routing, escalations, and approvals
- Paper documents manually sent for signatures
- Time-consuming, labor-intensive, and lacked auditability for approved/rejected documents

After

- 60% reduction in paper usage, 45% increase in the velocity of document approval process
- Projected to save approximately \$59K equivalent in man-hours
- Utilized POP3 protocol to read emails with approval requests and predetermined document formats
- PDF reader to parse data such as approver, document ID and transaction amount from PDF attachments, and intelligent validation and routing based on business rules for approval
- Pre-determined email responses to indicate request approval or rejection
- Approve/reject orders via automated emails, without logging in to the application interface



60%
Paper
reduction



45%
Increased
velocity



\$59K+
Savings equivalent
in man-hours

CHALLENGES

The customer engaged with Mokxa and outlined the challenges they were facing:

- Needed to improve the quality, accuracy, and traceability of documents and approval statuses
- Had to relied on manual processes for document routing, escalations, and approvals
- Purchase orders and insurance documents were sent and routed via email as PDF attachments for review
- Paper documents were manually sent for approvers to sign
- The business flow was time-consuming, labor-intensive, and lacked auditability for approved/rejected documents
- Storage of physical documents became a problem with increased storage costs and the need to comply with government regulations

SOLUTION

An Automated Order Approval System was built on the Joget platform to automate and digitalize the approval processes and eliminate the need for manual effort on email responses.

The system utilized a combination of features such as alerts, digital signatures, PDF reader and writer plugins to create a seamless process, significantly reduced the turnaround time for order approvals and increased the accuracy and transparency of the workflows.

RESULTS

The customer was delighted with the outcomes of the implemented solution on Joget, and the support and consulting services provided by Mokxa. The solution surpassed their initial expectations and effectively addressed their business pain points. Key results include:

- ✓ Achieved 60% reduction in paper usage and 45% increase in the velocity of document approval process, projected to save approximately \$59K equivalent in man-hours. This has led to a more environmentally friendly and sustainable approach while freeing up valuable resources and reducing the time it takes to complete approvals
- ✓ Utilized POP3 protocol to read emails with approval requests and predetermined document formats
- ✓ Implemented PDF reader to parse data such as approver, document ID and transaction amount from PDF attachments, and intelligent validation and routing based on business rules for approval
- ✓ Enabled pre-determined email responses to indicate request approval or rejection, and added pre-recorded digital signatures of the approvers to the documents in cases where the approval is being sent back to the requester
- ✓ Provided the capability for approvers to approve or reject invoice orders via automated emails, without logging in to the application interface. This feature further streamlined the approval process, reducing the amount of manual effort required

Group Health Insurance Client Onboarding

A customer of Mokxa Technologies, Allied Benefit Systems, is a national healthcare solutions company. Founded in 1980, they have grown to be the largest, independent third-party insurance administrator in the United States. As part of their customer onboarding process, they introduce customers to their insurer's products and services, such as policy information sheets and welcome packages. The onboarding process also includes setting up downstream functions for their customers like payments, recurring enrollments, etc.

Implementation Partner: Mokxa Technologies

ABOUT PARTNER

Mokxa Technologies is a global business solutions provider focused on delivering peace of mind to its clients by simplifying enterprise IT.

Powered by hybrid thinking and deep technology expertise, Mokxa specializes in providing CIO services, futuristic platforms, enterprise architecture, and enterprise risk assurance to industries like healthcare, BFSI, manufacturing, and more.

CUSTOMER AT A GLANCE

Before

- Key systems were not integrated
- Security risks due to a lack of permission-based access
- Limited tracking, error-prone, inefficiencies
- Difficult to monitor and keep track of SLA compliance and breaches
- Inadequate oversight for managing SLA violations

After

- 50% productivity improvement in client onboarding processes and 27% overall ROI
- More than 10 processes were automated through 25 user screens
- Digitalized forms, automated business activities, integrated business rules, and orchestrated workflows
- Able to seamlessly initiate, track, update and close the onboarding process
- Improved access level security with permission-controlled environment
- Accurate reporting with end-to-end tracking of business activities



50%
Productivity
improvement



27%
Overall
ROI



2000
Groups onboarded
within 6 weeks

CHALLENGES

Allied Benefit Systems engaged with Mokxa and outlined the challenges they encountered with their onboarding process, which consisted of several manual activities primarily managed through technologies such as spreadsheets and local databases. This resulted in:

- Onboarding database and business documents were not integrated
- Recurring activities such as updating business rules, adding new products/services, and onboarding new customers necessitated the involvement of local technology-savvy personnel
- Security risks due to a lack of permission-based access
- Issues associated with manual processes such as limited tracking, human errors, and inefficiencies
- Difficulty in keeping track of Service Level Agreement (SLA) compliances and breaches, with inadequate oversight for managing SLA violations

SOLUTION

Mokxa Technologies developed and delivered an end-to-end Customer Onboarding Platform within 3 months on Joget. The solution automated over 10 business processes through 25 user screens. It empowers business users to take charge of their business activities by practically eliminating their dependency on technical expertise.

RESULTS

The customer was delighted with the outcomes of the implemented solution on Joget, and the integration and consulting services provided by Mokxa. The solution surpassed their initial expectations and effectively addressed their business pain points. Key results include:

- ✓ An onboarding platform was successfully deployed with digitalized forms, automated business activities, integrated business rules, and orchestrated workflows, with an overall 27% ROI and 50% productivity improvement in client onboarding processes. Created a single system of record that seamlessly integrated with Allied Benefit's critical systems such as Enterprise Data Warehouse and Active Directory integration. Built a UI-based Record Management System that allowed business users to initiate, track, update and close the onboarding process
- ✓ Enabled supporting functions such as the ability to create new products and services, add/modify business rules, view reports/dashboards, and user access management. Creation and customization of new products and services were templated to eliminate dependence on technical resources
- ✓ To effectively govern SLAs, controls and features were built in to highlight delays, monitor execution timeframe, manage escalation matrix, and trigger alerts. All business activities had built-in thorough and configurable auditability
- ✓ Overlays like executive dashboards and detailed data downloads ensured the right data types and views available to the right users. Automated processes allowed staff focus on their tasks. Policies are baked into the design so no extra steps were required to ensure compliance, with Key Performance Metrics to ensure quality and performance
- ✓ Permission-controlled environment ensured access level security. UI-based user access management enabled administrative users to manage permissions. End-to-end tracking of business activities and relevant data resulted in effective and accurate reporting

Investigation Portal Management System

Eleviant Technologies has a customer that ranks among the top 3 general insurance providers in India. Offering a wide range of insurance products including motor, health, property, accident, engineering, liability, marine, travel and crop insurance for individuals and corporates, the company achieved a Gross Written Premium (GWP) of approximately \$584K in FY 2021-22. The customer has a wide presence across India with 152 branches and over 50,000 intermediaries.

Implementation Partner: Eleviant Technologies

ABOUT PARTNER

Eleviant Technologies is an 18-year old technology organization with expertise in the field of mobile, cloud, web, IoT, AR, RPA and AI Technologies.

With over 250+ professionals spreading across the globe, Eleviant has helped businesses to rapidly transform ranging from start-ups to Fortune 500, catering to industries like manufacturing, logistics, retail, healthcare, financial services, and more.

CUSTOMER AT A GLANCE

Before

- Paper-based forms were used to capture investigation data
- Needed to outsource claim investigation data to third-party agencies
- Limited control over data collected by investigators
- Manual data collection and consolidation caused frequent delays and high claim turnaround times

After

- Over 300 data attributes including media assets were captured
- Location and timestamp data for each captured image was captured
- Seamless management of investigation-related expense claim submissions and approvals
- Able to cater to over 500 active users
- Handled over 2,000 active claims
- Eliminated duplicated workflows by over 75%



500+
Active users



2000+
Active claims handling



75%
Improvement in efficiency

CHALLENGES

The customer approached Eleviant describing the challenges they were facing:

- Needed to engage external parties to investigate and collect claims details
- Paper forms were used to capture investigation data and manually consolidated into a PDF report before sharing it with claims processing team
- Needed to outsource claim investigation data to third-party agencies with limited control over data collected by investigators
- Manual data collection and consolidation caused frequent delays, leading to high claim turnaround times

SOLUTION

An Investigation Portal Management System was built on the Joget platform within 3 months to replace the manual paper-based claims investigation process. The new system provides a centralized and automated solution for managing third-party agencies, employees, and investigation data.

It enables the operations team to easily assign cases, review investigation reports, request corrections, and process data through a multi-level approval process based on various criteria. A companion portal was also built for investigation agency heads to manage their team, assign field investigation tasks, review investigation data, and submit final reports.

RESULTS

The customer was delighted with the outcomes of the implemented solution on Joget, and the integration and consulting services provided by Eleviant. The solution surpassed their initial expectations and effectively addressed their business pain points. Key results include:

- ✓ Both portals supported multi-sectional forms capturing over 300 data attributes, including media assets such as images and audio/video files
- ✓ The solution was integrated with the legacy enterprise resource planning (ERP) and business process management (BPM) system to pull claim and case details and post investigation data for further processing
- ✓ A field investigator mobile app with dynamic form rendering support was also built to capture investigation data in real-time with location (latitude and longitude) and timestamp data for each captured image
- ✓ An exclusive module was added to manage investigation-related expense claim submissions and approvals. Various reports and dashboards were built for different stakeholders, enabling easy access to management information system (MIS) data
- ✓ The solution catered to more than 500 active users and handled over 2,000 active cases/claims at any given time, while eliminating duplicated workflows by over 75% with the automated multi-level data review and approval process
- ✓ Significant improvement in turnaround time for claim investigation data collection and submission. The success of the solution resulted in the development of two additional workflow applications/portals with the Joget platform

About Joget

Joget believes in empowering everyone—business users, non-coders, and coders—to turn their best ideas into future-ready solutions that accelerate digital transformation. Today, the Joget platform enables organizations and employees to build impactful enterprise apps that address organizational challenges, generate business value, and stimulate innovation across many industries.

Since its inception, Joget has had more than 12,000 community users and customers worldwide, including Fortune 500 companies and government agencies, as well as customers from the finance, insurance, banking, aviation, and manufacturing industries.

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