Use Case 4: Software Requests with Multi-Level Approvals

TaskAtlas turns software requests into a catalogue form that routes each licence to the right approvers automatically, then hands the approved request to procurement and IT.

Illustrative scenario: For this example we will use Ferngate Community Credit Union, and all figures are estimates for demonstration, not measured results.

At a glance

Company	Ferngate Community Credit Union
Industry	Financial services (regulated)
Size	310 staff across 9 branches and a head office
Volume	About 25 software requests a month
Workflow	Software and licence requests with multi-level approval
Approvers	Manager, finance, IT security, privacy officer, CFO, depending on the request
Hand-off	Procurement buys, and IT installs and records the licence

The challenge

At Ferngate, asking for software means an email to IT, and from there nobody is sure who needs to approve it or where it's stuck.

- **Unclear approvers.** A $50 tool and a $20,000 platform that touches member data go through the same inbox, with no rule for who signs off.
- **Shadow IT.** Staff who wait too long buy software on a credit card, outside security and privacy review.
- **Licence sprawl.** Nobody has a full list of who has which licence, so the credit union pays for unused seats.
- **Regulatory pressure.** As a regulated institution, Ferngate must show that software handling member data was reviewed and approved.

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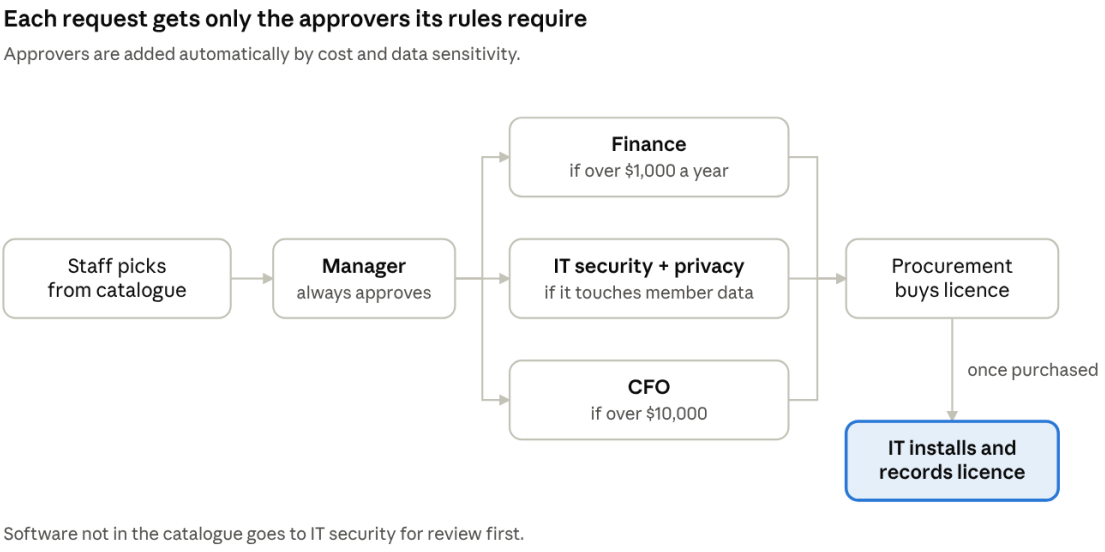
The workflow

Staff choose from an approved software catalogue, TaskAtlas adds the right approvers based on each licence's rules, and the approved request goes straight to procurement and IT.



software request · rule-based approvers

1. **Software catalogue form.** Staff pick from a list of approved software and licence types, and add the business reason and number of seats. "Other" sends unlisted software to IT security first.
2. **Rules pick the approvers.** Each catalogue item carries its own approval rules, so one licence may need only a manager while another needs four people.
3. **Approvals in order or in parallel.** Approvers get an email and can approve, reject or ask a question; the journey shows who it's waiting on.
4. **Hand-off to procurement or IT.** Once every approval is in, the request goes to procurement to buy, then IT to install, assign and record the licence.

Example request	Annual cost	Member data?	Approvers added
Adobe Acrobat Pro, 1 seat	About $300	No	Manager
Microsoft Visio, 5 seats	About $1,500	No	Manager, finance
Survey tool for member feedback	About $4,000	Yes	Manager, finance, IT security, privacy officer
New lending analytics platform	About $25,000	Yes	Manager, finance, IT security, privacy officer, CFO

Costs are illustrative, not vendor quotes.

Controls and audit trail

Every licence has a documented approval chain, which is exactly the evidence auditors and regulators ask for.

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- **Rules, not judgement calls.** Approval routing is set by cost, data sensitivity and department, and applies the same way every time.
- **Segregation of duties.** The requester can't approve their own request, and procurement can't buy until all approvals are in.
- **Security and privacy gate.** Anything that handles member data can't move forward without IT security and privacy sign-off.
- **Complete history.** Each request shows who approved, rejected or asked questions, and when.
- **Licence register.** Every approved purchase is recorded with its owner, cost and renewal date, ready for access reviews and renewals.

Illustrative impact

At 25 requests a month, rule-based routing could cut approval time from about two weeks to three days and give Ferngate a complete licence register.

Measure	Before TaskAtlas	With TaskAtlas (estimated)
Days from request to approved	About 10 working days	About 3 working days
IT time triaging requests per month	About 12 hours	About 3 hours
Requests with a documented approval chain	Some, scattered in email	All of them
Software bought outside review	Common	Rare; the official route is faster
Licence register	Partial spreadsheet	Complete, with owners and renewal dates

Assumptions: 25 requests a month; time saved comes from automatic routing and removing back-and-forth email. Replace with real pilot data before quoting externally.

Demo script

About five minutes; the moment that lands is two requests from the same form taking completely different approval paths.

1. **Set the scene (30 sec).** "Ferngate is a regulated credit union. Every software request has to show who approved it. Today that proof lives in email."
2. **Submit a simple request (1 min).** As a staff member, pick Adobe Acrobat Pro from the catalogue. Show that it routes to the manager only.
3. **Submit a sensitive one (1 min).** Pick a tool that handles member data. Show it automatically adds IT security, the privacy officer and finance.
4. **Approve from email (1 min).** As the manager, approve from the notification. Show the journey moving to the next approvers.
5. **Hand off (30 sec).** After the last approval, the request lands with procurement, then IT, which records the licence.
6. **Show the evidence (30 sec).** The full approval history and the licence register.
7. **Close (30 sec).** "Same form, the right approvers every time, and audit evidence created automatically."

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Why it matters

Multi-level approval is where simple form tools break down, and it's the clearest proof that TaskAtlas handles complex, regulated processes.

- **Built for regulated buyers.** Credit unions, accounting firms, healthcare and government contractors all need documented approvals.
- **The same engine, many uses.** Purchase orders, expense approvals, contract reviews and access requests use the same rule-based routing.
- **Pays for itself.** The licence register exposes unused seats and surprise renewals, an easy cost-savings story for a CFO.
- **IT is the champion.** IT directors feel this pain first, which gives TaskAtlas a natural buyer inside every target company.

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