

Customer Profile: Baylor University

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Integrify based “BearQuest” is streamlining requests with financial components, improving the university’s visibility and use of budgets

Baylor University in Waco, Texas, is a private Baptist university, and a nationally ranked liberal arts institution. Chartered in 1845 by the Republic of Texas, Baylor is the oldest, continually operating university in the state. With 80% of the students coming from within Texas, there are students representing all 50 states, and 70 countries.

With over 12,000 enrolled undergraduates and hundreds of academic and administrative professionals to support, Baylor operates under a centralized IT office which services its users on main campus as well as satellite locations. The Information Technology Services department (ITS) is responsible for identifying, developing and supporting the University Technology Infrastructure to provide direct and indirect services for the entire University. Part of the charter for the ITS department is to provide planning, development and leadership, and to investigate new technologies. The ITS department is responsible for identifying technologies that will benefit the University and implementing them in the most appropriate and effective manner.

In line with its goals of identifying and implementing effective technologies, Baylor University has implemented a workflow and document management application with Integrify to centralize and streamline the data entry and approval of all departmental requests that impact budget, from hiring temporary personnel to requesting funding for a new building or new department.

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The Challenge

In Spring 2007, Pete Able, Manager of HR and Financial Systems at Baylor, and Nathan Atkinson, Senior Programmer, recognized the need to improve the workflow associated with requests. Up to that point Baylor had worked with a Project Management Software vendor to create a custom/proprietary solution to financial requests but that method was found to be limiting for a number of reasons. The existing system had a poor user interface for end users submitting or approving requests, making end user adoption difficult. Baylor was also incurring extremely high costs associated with customizing software not purpose-built for managing requests. In addition, ITS had limited ability to scale existing processes across departments or to easily re-use or modify processes once they had been automated.

In the University setting at Baylor, any activity that has financial impact must pass through a rigorous workflow, getting reviewed or approved by a varying set of stakeholders in academic or administrative positions. The ITS department set out to find a technology solution that would:

- Limit or completely replace manual and paper based processes currently in place for personnel actions.
- Centralize and streamline the review and approval process for requests that have a budget impact.
- Gain a clear and accurate understanding of the full impact of requests by involving all necessary areas such as Budget, Human Resources, and Facilities Services among others during the lifecycle of the request.

The Evaluation

Baylor formed a Process Improvement Project team to evaluate commercial software solutions for their needs. The project team consisted of three members from ITS, representatives from the budget office and key budget contacts from academic and administrative areas. The team held weekly meetings for process improvement and the evaluation of software solutions from multiple vendors. Baylor was evaluating across the following criteria:

- Training/Consulting costs
- Financial health of company (long term viability of product)
- Educational clients
- Simple user interface
- Simple design interface
- Cost compared to core functional objectives met/exceeded

In July 2007, Baylor selected Integrify as their workflow and approval process solution.

Activation Summary

Baylor installed a license of Integrify on their own on-site server., Baylor has hundreds of potential requestors and upwards of 100 defined “approvers”.

Baylor University went live with Integrify on March 1, 2008, nine months after the initial installation.

Baylor rolled out Integrify campus-wide, customizing their version as “BearQuest” with the Baylor logos. They have experienced resistance-free end user adoption.

Anyone on campus making a budget-related request does so through BearQuest. Baylor currently has 7 processes defined and will be adding 2 more processes before September 2008.

The Integrify Solution

Upon selection of Integrify, Baylor immediately began development in the new system. While Baylor had previously used a modified project management tool for the job, their goal with the Integrify solution was to build a process around a re-usable framework that would work for the first process and scale for additional processes down the road. When implementing their Integrify workflow solution, it was important for Baylor to design proper workflows depending on the type of request.

According to Pete Able, “We were defining process improvement at the same time as doing technical development, and in the beginning that made the project slow going.” While processes are being defined, Integrify generates a visual workflow diagram that illustrates the steps, branches, loops and milestones in a process. Using the workflow diagram was crucial for Baylor. In addition, Integrify stands apart among workflow tools in how easy it is for users to copy, version or modify a process. For customers like Baylor who are designing and improving their processes on the fly, this means that saving a copy from which to iterate and improve upon is only one click away.

With the rollout of Integrify, Baylor was able to simplify and in some cases reduce the need for human data entry, saving time and the potential for mistakes. Baylor integrated its proprietary .NET Employment Management System (EMS) with Integrify such that personnel changes initiated through Integrify used and validated against the EMS data. During the request process, Integrify will launch EMS and pull data from ERP systems. Once the requester submits the necessary data into the proprietary system, it then advances to the next step in the Integrify process flow. When the information has then been updated in the proprietary HR system, the data refreshes within Integrify.

The rollout of Integrify also allowed Baylor to evaluate how it was doing its approvals and optimize its automation accordingly. Integrify allows its users to select the proper request type such that a request for a high dollar value can initiate a complex flow with sign offs across a range of departments, while a request with little or no budget impact are accelerated and optimized with a collapsed approval flow requiring less data entry and fewer administrative departments involved in the review.

Just three months after initial rollout, Baylor has met all of the initial goals. The project was on an accelerated schedule and ITS had to work hard to stick to its project calendar. According to Able, “Even with some of the process improvements already defined, the project lasted about a year and that was an aggressive time frame. We went live during an important time for budget requests, adding pressure to have a successful launch of the new system.”

The Benefits

Three months after going live, Baylor has already experienced operational benefits.

For departments making the request, Integrify provides real-time and 360 degree visibility into the project life cycle for the request. From the time they launch their browser to enter the request data requesters can see the visual representation of what steps are involved in getting their approval. When they log in to Integrify they can see where their request is in the process, and the email notifications they receive are a constant update into their status.

Both department and institution budgeting processes have become better managed with reporting and real-time visibility. For any given project, the budget impact and the timing of the budget items is immediately available in Integrify. Reports can be run directly from Integrify or can be exported for further manipulation and analysis into Baylor’s reporting package. According to Pete Able, “It was possible to link Integrify to Crystal Web Enterprise so that the functional users in Budget, HR and Payroll offices can access the data from Integrify along with their department-specific needs and run more detailed reports. “

Everyone within the institution has a better understanding of how to submit a request that has budget impact. The rigor that Baylor applied when defining its processes in Integrify, and the time they took to iterate on the processes until they were exceptional, has paid off. Not only do requests get entered and responded to in a timely manner, now everyone who considers making a change, from hiring a new resource to re-organizing their department, can see the full budget impact of their request before the request is completed and approved. When a user goes into the system they can see their open items and a complete view of their request history. In the past, once they had submitted a request, it was hard for requesters to determine the status of their request. Automatic indicators in the form of emails did not occur, nor were the request status statements appearing on the requester's desktop when opening the application as they are now. Unless someone in the approval cycle had a comment or a question, the requester had to search through layers of the application to see if they were on their way to having their request approved or headed for a brick wall.

"Before moving to the Integrify solution, there was a lot of confusion on the back end of the budget process – we're geographically and operationally distributed with different schools and deans all needing to make and manage requests. From the smallest academic request for a new faculty position to a major capital request for a new building, there is associated financial request data to be reviewed on the administrative side," said Pete Able. "Often the people making the request didn't know who to contact or how to proceed. We needed a system that would help the administrators by giving them visibility into all the request data, but even more so, something that would help the requesters follow the right practice while making a request. In the past, we have had to reject requests because the person making the request skipped a step, failed to supply all the pertinent information and the like. Now with Integrify and its easy-to-use, 100% web-based interface, we have greatly reduced these problems."

Baylor has a separate track for its capital requests where a different set of approvers, including Facilities must review all requests. Using Integrify, Baylor has managed to route the different kinds of requests to the right audience by having the end users select the type of request from a pull-down menu. Integrify interprets the data and routes the request based on the request type.

ROI

Once BearQuest has been live for a year, Baylor will be able to track the amount of time it takes to move any request through the system and measure that against historical data. Even in the early stages of deployment, Baylor is seeing measurable results.

Three months after rolling Integrify out, Baylor is already receiving high marks on customer satisfaction. Academic departments have all adopted the application. They have been happy with the user interface, and the streamlined process flows. ITS has heard end users describe their satisfaction across the board, including everything from the intuitiveness of the application to the fact that the Integrify email updates include information pertinent to the request and a live link for giving an approval within the closed loop system.

Administrative departments agree that Integrify makes it almost impossible for requests to fall through the cracks. Anyone with a request or an approval pending is notified via the system. Requests are being submitted correctly, no steps are being missed; therefore decisions that carry a budget impact are happening in a more timely fashion and with 100% visibility.

Budget shortfalls and unexpected available budget have been reduced. As the fiscal year progresses, the institution continues to make better, timelier decisions about budgets across the board.

Conclusion

Baylor University and the ITS department knew that automated request management was the best way to help the University with its requests that had budget impact. They had already gone so far as to try to extend the functionality of other software to meet its needs. However, Baylor also recognized that the best way to succeed with process automation is to use a system designed for managing requests, yet flexible enough to meet the specific needs of the institution.

With less than a year to accomplish their goals, Baylor brought in Integrify, a solution purpose-built for managing requests and simultaneously defined the processes that it wanted to automate. Integrify's approachable development tools and the Integrify framework that easily lets administrators modify, copy or version a process made it possible for Baylor to meet the aggressive timetable it had laid out and exceed end user expectations.



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