

# STREAMLINING THE ACCOUNT REQUEST PROCESS AT OLD DOMINION UNIVERSITY

## From a 3-Day to a 1-Day Turnaround: Account Request Processes Now Run 3 Times Faster

"Streamlining our account request process means we are less reliant on manual paper-based work. We have achieved our goal of having an electronic, online account request process." – Natalie Metzger, Middleware Developer, Old Dominion University

### About the University

Old Dominion University (ODU) has been a public research university in Norfolk, Virginia for over 80 years, and is one of the nation's largest providers of online distance learning courses.

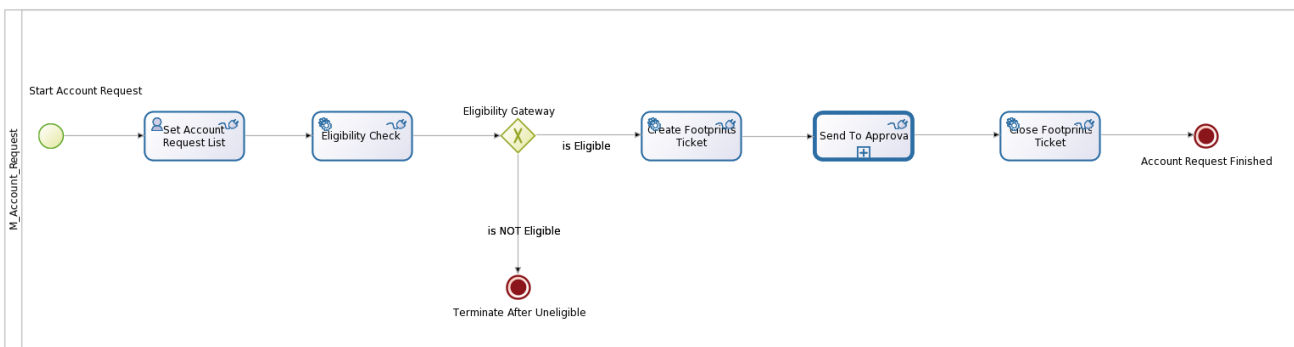
It comprises over 24,000 students and over 1,200 teachers. Old Dominion University offers 70 bachelors, 60 masters and 36 doctoral degree programs and 2 educational specialist degrees. ODU's eminent scholarship and innovative and engaging teaching foster nationally recognized programs. Additionally, ODU prides itself in providing cutting-edge research and strategic partnerships with government, business, industry, organizations, and the arts.

### Business Needs and the Process to be Automated

With such a large number of students, staff and faculty, Old Dominion University handles an immense amount of data, and has a complex matrixed organization structure. ODU's account request process handles user data from different systems throughout the university. Accounts include access to simple services like email, LAN, UNIX accounts, file shares and other sensitive data. New faculty or staff, as well as student workers, would request these accounts through a manual paper process.

The project goal was to automate all of these account requests to result in a fully electronic online system that would eliminate the need for manual, paper-based processing. A Business Process Management solution was needed to streamline the request, approval and account creation process. More specifically, a system was needed to extend ODU's identity management system and its database. The system would need to include a workflow engine for streamlining the account request process.

The actual process is straightforward. The request is started through the home-grown identity management system, Monarch Identification and Authorization System (MIDAS) and includes a multitude of different requests that can all be processed with one workflow. Once the process is started, an eligibility check is performed to determine if the user is actually allowed to request certain types of accounts. If he or she is eligible, the request is recorded in FootPrints, a tool for tracking requests and problem reports. Bonita Open Solution then sends the account request to the approvers and to account creation. The process map below shows a high level overview of the account request process. It is not shown here, but the workflow has five different sub-processes that handle all the approval and account creation tasks.



**Process Map of Old Dominion's Email Request Workflow**

An account may need supervisor, budget unit director, data owner, system owner approval or any combination of the above. Some requests might only need supervisor approval while others require data and/or system owner approval. Included in the approval chain is also a system for delegation in case an approver is not available to perform the task in a certain amount of time. Delegation is handled individually, i.e. each approver can set multiple delegates and assign them different delegation times, if needed. The task for each approver can include a list of accounts for the user that needs approval, and they can be approved or disapproved. Only upon approval is the request list sent to account creation. This may be a sub-list of the originally requested accounts.

Each task is also logged within FootPrints for record-keeping and also for the user to be able to track the account creation progress.

In addition to the request process, a separate process sends out reminders every morning to all users that have an open task in their inbox.

### The Choice for Bonita Open Solution

To choose a BPM solution, Old Dominion University evaluated Apache Activiti, JBPM, and Bonita Open Solution. With connectivity to other systems and easily accessible support as primary criteria for selecting of a BPM tool, ODU ultimately chose Bonita Open Solution to support their need for a flexible Business Process Management Solution to connect to their ERP and Identity Management systems.

Connectivity to other systems was a key criterion in ODU's search for a BPM tool. Although they were using the workflow capabilities within their ERP system, much of the data for account requests did not reside in their ERP, so a tool was needed to connect the process flow, the data, and identity management.

They were able to plug in their own front end interface with their home-grown Identity Management system, which is integrated with Bonita Open Solution via a REST interface. It also connected easily to their backend ERP database, Banner ERP System.

ODU began their BPM automation project with the Open Source version of Bonita Open Solution, but decided to upgrade to the Subscription Pack version of Bonita Open Solution in June 2012 to take advantage of the bundled professional support for their critical applications and training. ODU's Middleware Development team also received several hours of Professional Services mentoring, and are still taking advantage of the 24 hour online support when problems with the system arise. They chose to upgrade to the Subscription Pack version 5.7.3 of Bonita Open Solution in June 2012.

### Key Results

Before deploying their BPM solution, Old Dominion University's account request process was completed on paper and on various disconnected systems. After deploying the automated processes, the University has seen a significant increase in the speed of account request handling (three times as fast).

About 15% of ODU's daily account requests are processed online, and this percentage is constantly growing. The school has reduced its turnaround time from three days to one day for those requests completed online.

In addition to the account request process, ODU automated their audit process, which now runs much smoother. There are over 300,000 audit "rights" stored in their ERP which their BPM processes are currently connected to and can make decisions based on. Also, Bonita Open Solution is used in one of the password reset process and ODU will shortly install a new process to deal with Account Terminations. Given their positive experience with Bonita Open Solution, Old Dominion University plans to extend their use of this BPM solution to other areas and for other purposes.