

CASE STUDY



BPM IN UNIVERSITY & EDUCATION

Proof-of-Concept to Deployment in Just 12 Weeks

TABLE OF CONTENTS

BonitaSoft democratizes business process management (BPM) by bringing powerful, easy-to-integrate, and user-friendly, open source BPM to organizations of all sizes and industries. With Bonita Open Solution, organizations can model, automate and optimize process workflows in Finance, Human Resources, Sales, Marketing, Supply Chain, E-Government, and more. The fastest-growing BPM provider, BonitaSoft has more than 1,500,000 downloads, 400 customers and 15,000 community members.



1. BUSINESS CONTEXT	3
2. BUSINESS GOALS	4
3. EVALUATION OF PRODUCTS.....	5
4. KEY RESULTS	5



1. BUSINESS CONTEXT

One of the worlds' leading research and teaching institution has deployed Bonita Open Solution to automate their complicated grant invoicing process.

With a few thousand students and several hundred faculty members, this well-known university has created ground-breaking technologies that have influenced numerous fields and disciplines. The school is almost a century old and has the goal of solving technological problems on a global scale.

This university initially contacted VivánTech, a partner of BonitaSoft and advisor on software implementations for higher education institutions, to determine the best solution to automate their manual process of grant allocation and payments to their faculty and staff members. VivánTech then implemented Bonita Open Solution for this private institution. In all, more than 200 faculty and an additional 300+ staff are now using Bonita Open Solution to automate their grant invoicing process.

The university first asked VivánTech to evaluate available paperless workflow systems that would be cost effective for automating department sized paperwork processes. They already had enterprise solutions, but these proved to be too complicated to be a good fit for departmental needs, with their high cost and long implementation times. VivánTech short listed four top solutions for comparison.

These "top four" were compared on 34 specific criteria in the categories of User Experience, Functionality, Ease of Development and Technology & Architecture. Bonita Open Solution (BOS) was the clear winner, particularly for ease of development and robust functionality requirements.

As a final test, a proof of concept was attempted under a tight timeline using the top two products. Using the BOS tools, a complete application was developed, while the runner-up technology was not able to produce a viable application in the allotted time. Based on these clear findings, the university selected Bonita Open Solution as the toolset to invest in. Based on the quality of the proof of concept, this academic client also selected VivánTech to develop the workflow automation system.



2. BUSINESS GOALS

Research universities pay their research faculty in part with money from research grants. For each researcher, the percentage of pay that comes from the grant is based on the percentage of time they work on research vs. teaching. This formula is further complicated as many researchers work on multiple research projects simultaneously.

Research universities have long relied on manual systems to calculate the monthly pay of each researcher. It is not unusual for grant administrators and payroll staff to use time-consuming paper-based processes combined with complex calculations and number crunching when figuring out how much of their salary will be supplemented with funds from grants.

VivánTech was under considerable time constraints to meet the needs of this institution of higher learning; important dates were set by the academic calendar and could not be moved. This left only a small window of opportunity to make procedural changes.

The business problem was even more challenging considering the fact that end-users are busy faculty members. These are users whose patience is limited if the tool is not intuitive and easy to use. The university needed a flexible Business Process Management (BPM) solution with robust capabilities at the back-end and a rich graphical user interface that lends itself to intuitive use by non-technical end users.

The technical requirements included the ability to interface with their Enterprise Resource Planning (ERP) system and their financial backend system. The BPM tool needed a flexible backend integration capability to integrate with existing campus systems. The tool would also need to have a powerful workflow system that was able to enforce business rules and route the paperwork between various users (grant administrators, faculty, payroll and management) for approvals. The end application would completely automate the data reporting and payment calculations for these users, replacing the current process, which was labor intensive and done manually with a calculator.



3. EVALUATION OF PRODUCTS

VivánTech looked at multiple BPM solutions to cut down on the time faculty members spent invoicing grants. In all, VivánTech considered solutions from BonitaSoft, jBPM, ProcessMaker 2.0 and Intalio, ultimately settling on Bonita Open Solution as the BPM solution best suited for the project.

In 12 weeks, a four-person development team at VivánTech took the project from proof-of-concept all the way to final deployment.

The development team at VivánTech found Bonita Open Solution robust and easy to work with given the suite's completely open, Java-based back end. This capability ensured that Bonita Open Solution was able to integrate with many of the existing software investments. What's more, Bonita Open Solution's open standards meant that the user interface was "skinned" to include the university's own brand and identity.

Another selling point was Bonita Open Solution's affordability given tightening academic budgets.

4. KEY RESULTS

Before deploying Bonita Open Solution, the university spent a considerable amount of labor-hours processing grant invoices for almost 600 faculty and staff members.

After deploying Bonita Open Solution, this time was significantly reduced, and has saved the school a large amount of money by greatly increasing staff efficiency.

"Bonita Open Solution was an integral part of the success of this project. After deployment, our client was delighted that we were able to completely automate the complex payroll calculations, as well as shorten the amount of time required to fill out all the forms and eliminate the need to walk paper forms around the campus," said Dustin Henson, Development Manager at VivánTech. "Bonita Open Solution was the only BPM solution that was able to meet our client's requirements around flexibility, ease of use, and speed of development."

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