

CUSTOMER PROFILE



THE UNIVERSITY OF TEXAS AT EL PASO AUTOMATES WORKFLOWS AND FORMS AND IMPROVES REVIEW AND APPROVAL OF KEY DOCUMENTS WITH PROCESS DIRECTOR



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The University of Texas at El Paso (UTEP) is a public coeducational university and part of the University of Texas System. The school was founded in 1914 as The Texas State School of Mines and Metallurgy and a mineshaft still exists on the mountainous, desert campus. It became Texas Western College in 1949 and The University of Texas at El Paso in 1967. The enrollment in the fall of 2010 was 22,106.



JESUS MENA
Supervisor for Enterprise Operations
and Document Management

UTEP offers 81 undergraduate degrees, 65 master's-level degrees and 16 doctoral degrees. The university ranked second in federal research spending among UT System academic institutions in 2006, and in fiscal year 2006 reported \$45.7 million in total research spending.

The National Science Foundation has designated UTEP as a Model Institution for Excellence, one of only six in the country. UTEP is also one of only 11 universities nationwide to receive a \$5,000,000 'Teachers for a New Era' research grant from the Carnegie Corporation.

THE EARTH DAY PAPER REDUCTION INITIATIVE

Jesus Mena is the Supervisor for Enterprise Operations and Document Management. He and his team support users in 70+ departments across the campus. Two years ago after reviewing UTEP policies and paper consumption, the IT department decided to 'Go Green.' Its goal was to eliminate the use of paper wherever possible throughout the



university. With thousands of forms (including hundreds for the HR department alone) Mena recognized that if they did not create paper forms, they would not have to scan or store them. If users could, instead, rely on electronic documents they could eliminate a lot of paper, rather than having to search for new ways and places to store documents.

At the same time the Earth Day Initiative was launched, the IT department acquired a workflow software product it hoped would assist in handling the soon-to-be automated forms and documents. Vendor support (both before and after that product was acquired) made working with the product challenging. As a result the Enterprise Operations team decided to look, once again, at software that would automate workflows, create electronic forms (including electronic signatures) and efficiently accommodate the review and approval of all documents.

Users from different departments (Student Enrollment, HR, Business Affairs, Auditing etc.), as well as department heads who expressed an interest in defining what they wanted – and needed – in the new product, were enlisted to become part of a task force. Mena led that task force to create an initial list of features the new product needed to embrace. He posted it on the UTEP wiki, asked department heads for feedback, then ranked and weighted all items on the list.

According to Mena, “We developed a list of 30 items, then searched the web to find products and get recommendations. We started comparing against our list of ‘must haves’ and came up with five semi-finalists. From there we short-listed three, including BP Logix Process Director.”

WEIGHTING AND RANKING OF KEY CRITERIA

The top five features most highly requested by employees included: 1) The ability to move documents across campus via electronic workflows, 2) Enabling the review and approval of electronic documents via email, 3) The ability to have dashboards that allowed users to edit, view and receive messages regarding activities and tasks as well as to retrieve reports, forms and notifications, 4) Having electronic records signed via a digitized image of a signature and 5) Being able to populate a series of form fields by extracting information from a database instead of requiring users to input that data.



Other features that were requested (which were important but did not make the 'top 5') ranged from the ability to kick off another form's workflow, being able to dynamically route workflows when escalation was required, providing authentication for users outside of UTEP and the ability for users to receive message notifications of pending actions.

In addition to this list there was a mandate that was part of a records retention program required by the Texas State Library. "Documents needed to be available as TIFFs. The

TIFF is recognized as an official document by the State Library system and has eliminated the need for paper documents. Our system was certified 18 months ago," Mena stated.

Initially Mena thought users wanted a workflow solution; what they, and the task force discovered, was that workflow was what they truly needed – and a lot more. IT wanted its users to be able to develop and edit electronic forms whose foundation was a workflow back-end. After reviewing its list of 'must have' features

along with the 'nice to haves' the task force chose BP Logix Process Director.

NEWLY IN PRODUCTION AND GOING SMOOTHLY

With the previous product UTEP users were frustrated that workflows from any report were kept in one cell by that product - and they could not report on them at all. They also had undeliverable (email) messages that caused missed deadlines and frustration. Mena's users hoped and expected that Process Director would eliminate those issues – and it has.

After a week's worth of training in March, the team began working on its first workflow and electronic form, the Conflict of Interest process/form. That form is now being sent to all Directors and administrative staff and is well received. The next form and workflow will be UTEP's Address Grade Change form, followed by the Direct Deposit form.

UTEP users report that Process Director is easy to use, making modifications is simple (the other workflow product was 'impossible to make changes') and Process Director was easy to install. Users in the Office of Research and Sponsored Projects are excited about the product and helping IT to develop additional forms.

"We just got trained in March and were in production already by April," declared Mena. The team has already started interfacing with SQL and Oracle – and is making plans to integrate Process Director with SunGard's Banner product. They are also looking forward to integrating with UT Austin's system called 'Define' and looking further ahead to integration with PeopleSoft within the next two years.

"BP Logix has excellent people who are easy to work with and very knowledgeable. Working in Purchasing over the years I have talked to millions of vendors. With BP Logix I didn't feel like I was being 'sold.' The product is great, the people super friendly and we are on our way to a successful launch," Mena concluded.

