

CUSTOMER PROFILE



NATIONAL INSTITUTE OF MENTAL HEALTH RELIES ON BP LOGIX AS IT AUTOMATES WORKFLOW PROCESSES AND FORMS



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The National Institute of Mental Health (NIMH) is the largest scientific organization in the world dedicated to research focused on the understanding, treatment, and prevention of mental disorders and the promotion of mental health. The mission of NIMH is to transform the understanding and treatment of mental illnesses through basic and clinical research, paving the way for prevention, recovery and cure.



JOHN S. HARRIS
CHIEF INFORMATION OFFICER

For the Institute to fulfill this vital public health mission, it must foster innovative thinking – and ensure that a full array of novel scientific perspectives are used to further discovery in the evolving science of brain, behavior, and experience. In this way, breakthroughs in science can become breakthroughs for all people with mental illnesses.

In support of this mission, NIMH generates research and promotes research training to fulfill the objectives of 1) Promoting discovery in the brain and behavioral sciences to fuel research on the causes of mental disorders, 2) Charting mental illness trajectories to determine when, where, and how to intervene; 3) Developing new and better interventions that incorporate the diverse needs and circumstances of people with mental illnesses and 4) Strengthening the public health impact of NIMH-supported research.

A NEED TO EXPEDITE AND STREAMLINE PROCESSES

John S. Harris is the Chief Information Officer at NIMH, responsible for Extramural IT infrastructure and IT services. His department of 50 supports 1300 users across the Institute. One of his IT team's responsibilities was to automate the Institute's key management and administrative business processes – and the forms, approvals and documents associated with those processes.

Effectively handling the sheer number of forms that keep a research organization moving efficiently is difficult. And as the organization grew, tracking and managing those forms became an administrative challenge that needed to be addressed.



Harris recognized that NIMH's manual process incorporated critical forms that traversed the organization — from Grants Management and Operations to Finance, Ethics, and Procurement. He also accepted that there were multiple approvals required for each form and that automating and gaining control over the forms and workflow processes was a priority. After previous attempts to provide the workflow processes were unsuccessful, Harris took the initiative to find a solution that could automate, streamline and accelerate NIMH processes.

Faced with time constraints and a need to streamline and automate its processes quickly, Harris identified the key features and capabilities NIMH required. Understanding the business processes associated with those workflows, Harris selected six companies with products he could compare and evaluate.

ASSESSING AN ADMINISTRATIVE CHALLENGE

Harris developed a matrix of the capabilities, needs and wants that NIMH required for its electronic forms and workflow processes. Primary among them were functionality, simplicity and price. After developing this matrix, Harris short-listed three companies and began a comparative analysis. His users were supportive of implementing a new solution; their primary request was that it be as intuitive as possible and reflect the way they currently worked. In addition, the system selected also had to help users gain a better understanding of where the forms and approvals were in the process – as the Institute needed for them to be more accountable.

“We were looking for a product that could handle our complex database lookups, conditional workflow branching and the dynamic nature of some of the workflows we have to produce. We also needed to find one with an interface to other systems that would be acceptable,” Harris commented.

ADDRESSING BUSINESS ISSUES

NIMH, as is true of many other government and commercial organizations, began by looking at the Federal mandate dictating a broader use of a teleworker program. That program permits agencies to designate employees who may perform their job duties away from their central workplace, in accordance with their same performance expectations and other approved or agreed-upon terms.

As a result of the National Institutes of Health Pilot Project on Teleworking, it was determined that a telework initiative could be deployed across NIH organizations, enabling individuals and their workgroups to continue to function with a minimum of disruption while maintaining functionality and productivity. “We recognized that the solution we chose needed to automate, streamline and accelerate NIMH processes, including the teleworker application process which involved substantial review and oversight,” remarked Harris.

Structuring responsibilities so as to maintain work group integrity, communications, and contingency-planning are considerations for all telework agreements. A successful telework program relies heavily on uniform solutions and support.

“Our goal, like other agencies, was to designate employees who could work at alternate work locations for all or part of the workweek in order to promote general work efficiencies. What

we and others have discovered is that, in some cases, telework has actually driven process improvements in workgroups – and resulted in enhancing overall productivity. As importantly NIH determined that having teleworking in place would enable its mission-related work to continue should an emergency arise,” Harris observed.

A RAPID DEPLOYMENT

Concluding the evaluation process, NIMH decided that BP Logix Process Director offered exactly what the Institute needed in terms of workflow automation, smart forms and customization capabilities. “It was the best fit for our needs in terms of capabilities and rapid time to deployment,” remarked Harris.

BP Logix Process Director is award-winning workflow software that empowers organizations to rapidly build and deploy robust workflow-driven apps and rich, interactive smart forms. Enterprise organizations like NIMH use Process Director’s business process management (BPM) platform to create highly customized, flexible workflow solutions that address a number of business challenges.

“We engaged BP Logix to provide web-based training for our staff. That training enabled our team to ramp up quickly — and we found the graphical user interface, configuration and Visual Studio capabilities and the graphical rules and condition builder made the product highly usable for non-technical users as well. Within two months of acquiring Process Director, the IT team deployed an initial set of workflows and database connectors that integrated with our backend systems. Subsequently the team developed teleworker authorization and remote access forms, travel requests, waiver process/security exception requests, budgetary funds request and IT purchase requests.”

A NEW MANDATE

Harris discovered that his expectations as to what Process Director could do were met. “Time to completion for various workflows and forms which had previously taken days and weeks now take hours and days. The telework application program has been automated: what used to be a lengthy process is now streamlined and highly efficient. With the increased accountability and reporting that Process Director provides, our review and oversight processes are painless compared to the unwieldy processes we had before,” he observed.

There is also a critical need within the government to manage IT procurements - to ensure compliance with organizational and governmental standards, secure appropriate reviews

and approvals for all such procurements, and account for procurements and expenditures.

The goal of NIMH was two-fold: 1) To streamline the IT acquisition process and 2) Account for every expenditure and threshold. The Institute achieved this by developing a comprehensive, automated process that embraced the required workflow and signatures needed for each investment. Making that process consistent, accountable, timely, and efficient was essential to achieving the objective.



According to Harris, “The development of processes for managing IT procurements extended beyond the initial idea of ‘just’ automating current business processes. New processes were developed to address requirements and oversight of the IT procurements that were not in place previously.”

Centralization and automation of IT procurement presented challenges to the business community. The biggest concern was not being able to order what they wanted, and not having those orders processed in a timely manner. NIMH IT was able to help these requesters address their needs by standardizing the IT procurement process and implementing an automated, fully accountable business process.

RESULTS THAT COUNT

This new approach to IT procurement enabled the IT organization to bring IT procurement into compliance with standards, reduce unnecessary purchases, and eliminate wasteful purchases overall, while reducing the time required to account for purchases, as well as the time required to process purchase requests.

Cost savings included reduction of non-standard equipment and software procurements by 95%, reductions of non-required equipment reduced costs by 20% while cost to account for IT procurements to support government reporting and data calls were reduced by 50%. Time savings of 50% were reported based on time to review and process IT Procurement requests. As importantly, the reduction of non-standard equipment and software was reduced by 95% while support calls, reporting and time to review and process requests were reduced by 50%.

“Process Director has made a substantive contribution to NIMH’s ability to review, approve, and account for IT procurements. Compliance with standards in terms of the technologies themselves, as well as procurement and property regulations is now very high, and the Institute can now demonstrate that it is in compliance, is fully accountable and auditable,” declared Harris.

DELIVERING RESULTS

As a result of these initial implementations, Harris’ team has gone on to develop more than 60 workflows and smart forms. Most workflow routing is data-driven with dynamic routing based on request type, thresholds and other criteria. The areas of automation within NIMH include: Employee and Ethics, Grants and Funding, Intramural Research, Property and Equipment Management and Acquisition, Telework and Remote Access, Waiver Requests and Travel.

Harris is also very pleased with the efficiency that Process Director provides NIMH and the responsiveness of BP Logix to his needs. “The scalability and customization capabilities make the product highly usable for nontechnical users as well. By using APIs and web services, NIMH is able to integrate Process Director with other third party applications. The processes we currently have in place include both form-based (initiated by form submission) and workflow-based processes (or Knowledge View-based, which the workflow starts then attaches the form). The process functionalities we have utilized include sequential, parallel, parent-child, conditional, looping and customized,” he concluded.

“ We wanted a product developed to address business requirements like ours – one that offered an intuitive interface, was not overly complex and was competitively priced. ”