

Box Hill Institute eases course approvals and staff recruitment processes with Microsoft SharePoint

Box Hill Institute

industry:

Education Sector

country:

Australia

business challenge:

Speeding up approval for new courses, maintaining regulatory requirements and giving managers greater control

solution:

Converting accreditation forms into electronic format and routing them using workflows, to cut file rework, accelerate the time frames in which new courses could be approved, and ensured that new courses would be ready to teach on time

services:

- Accreditation forms were converted into electronic format using Microsoft's InfoPath Form Services. K2 blackpearl was used to devise workflows that routed forms between stakeholders
- Planning, deployment and integration of Microsoft Office SharePoint Server 2007 and InfoPath Form Services into existing processes and workflows
- Deployment of the K2 blackpearl application to help non-technical staff design their own workflows without professional assistance

results:

- Centralised directory to streamline access control and management
- Centralised control of the environment enabling standardisation in policies
- A platform that facilitates access and integration of new employees in the fast-growing bank

Executive Summary

The courses taught by Box Hill Institute need to be **accredited by the Victorian Registration and Qualifications Authority** - a complex process involving many departments and other stakeholders.

By converting accreditation forms into electronic format and routing them using workflows, Dimension Data helped to cut file rework, accelerate the time frames in which new courses could be approved, and ensured that new courses would be ready to teach on time.

Client Overview

Part of the Australian technical and further education (TAFE) network, Box Hill Institute is a leading provider of vocational education in Victoria. Established as the Box Hill Technical

School in 1924, the institute now has four campuses close to Melbourne's CBD.

The institute provides around 400 full- and part-time courses, over a wide range of vocational disciplines. It has 35,000 enrolments each year, and has gained the accolade of leading TAFE establishment in Victoria twice in the last five years.

Business Challenge

Each course taught at Box Hill Institute is audited internally for quality and then accredited by the Victorian Registration and Qualifications Authority. This is a complex process involving many stakeholders. However, until the accreditation process is fully completed, a course cannot be taught.

The accreditation process was frustrating for Box Hill Institute's 15 teaching centres, which were responsible for coordinating the accreditation, marketing and provisioning of new courses. The process required files containing hand-written forms to transit via internal mail between numerous stakeholders in different key departments.

"There were legibility issues,"

said Simeon Amor, IT Project Manager, Box Hill Institute.

"And if there were any errors in a particular form, then it would have to be returned to be reprocessed because accreditation has to conform to strict Australian Qualification Framework standards."

Because accreditation files spent so much time in internal mail, their progress was slow and difficult to track. A file might be misdirected, or sent to a staff member who was on extended leave. A teaching centre might assume that it was ready to deliver a course, but with very little visibility on the process, the danger was that students would sign up to a course, and only then discover that the teaching centre did not have clearance to teach it.

Solution Delivered

In 2008, Box Hill Institute began to examine its course accreditation processes and its core approval requirements. The objective was to re-engineer these processes to eliminate bottlenecks and increase transparency. In December 2008, Dimension Data staff showed the institute's managers how workflows in the document management system, Microsoft Office SharePoint Server 2007, could be used to control, direct and keep track of files during the accreditation process.

“The Dimension Data engineers who worked on the project **were excellent**. They easily translated our processes into workflows.

Simeon Amor, IT Project Manager, Box Hill Institute

Box Hill managers decided that the solution met the institute's objectives and engaged Dimension Data to handle the deployment. Dimension Data transposed all the course accreditation forms into electronic format using Infopath Form Services, so that they could be emailed between faculties and modified at every stage. The forms were designed with special data validation fields, which means the form can not be forwarded unless the requisite information at every stage is typed in correctly.

In addition, Dimension Data introduced Box Hill Institute to independent software vendor K2, whose K2 blackpearl application helps non-technically skilled staff design their own workflows without professional assistance.

“You can do a lot more with K2 blackpearl; it builds on the basic SharePoint capability,

says Brendan Barry, Technical Consultant, Dimension Data.

“It's particularly good if tracking workflows is important because the K2 blackpearl ViewFlow functionality, means you can see where forms are at any particular point.”

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Simeon Amor, IT Project Manager, Box Hill Institute

How We Delivered

Starting in January 2009, Dimension Data helped Box Hill Institute turn its business process requirements into a series of precise processes. These described the steps that needed to be completed for successful accreditation, and were used to develop workflows that automatically route the Infopath forms from one input source or stakeholder to the next.

“It was quite tricky,” says Barry.

“There were a large number of faculties and departments that needed to be connected with the workflows.”

Dimension Data also helped the institute map the recruitment process and transposed it into Infopath workflows created within K2 blackpearl. As a result, clearances to recruit, contracts, IT logons and accounts are generated automatically, or are prompted from colleagues at the appropriate moment.

“Some of the forms contain sensitive material,” says Barry. “However, we can configure the InfoPath forms so that not all the information is seen by all departments.”

Both the accreditation and recruitment modules were completed by the end of March and rolled out to staff in the institute's teaching centres.

“The Dimension Data engineers who worked on the project were excellent,” says Amor. “They had a wealth of knowledge and easily translated our process into workflows.

“It just goes to show that a good solution architect can work with the customer to deliver a solution that works well.”

Value Derived

By using electronic forms and email workflows to help automate the accreditation process, Box Hill Institute has reduced its administrative workload, given teaching centre staff greater control over the accreditation process and cut the time taken to register new courses.

Using electronic forms with data validation fields is expected to reduce accreditation workload by 20 percent.

“Paperwork is legible to begin with, so there is little need for rework,” says Amor.

“Having validation fields mean that most form-filling errors are avoided, and less time is wasted sending the file back and forth through the internal mail. This saves administration staff two to three hours per week.”

Microsoft Office SharePoint 2007 also improves file processing because the teaching centre managers who sponsor new courses can determine the progress of each file in the accreditation process.

“Staff use the K2 ViewFlow within Microsoft SharePoint 2007 to view the current status of every accreditation,” says Amor.

“The system tells them whose ‘inbox’ the file is sitting in, and they can see if no action has been taken for several days. As a result, they always know who to contact to get the accreditation process moving.”

The K2 blackpearl platform also allows teaching centre staff to adapt and change workflows, giving them the opportunity to streamline business processes. And because the accreditation process is faster and more predictable, training centre staff have greater assurance that courses will be ready on time. This removes potential sources of conflict between the marketing and admissions departments.

“It’s all about making sure that the right people know when the course is ready,” says Amor.

“We have largely removed the danger that a student will apply for a course that has been advertised only to discover that it is not yet available.”

The solution also provides staff with confidence that every course is up to scratch. The accreditation process, as defined in the workflows and Infopath, conforms exactly to the Australian Quality Training Framework.

“It also leaves a complete audit trail so we can prove that regulations have been observed,” says Amor. The solution’s ability to manage complex processes has encouraged the institute to use it to manage the recruitment of new staff.

“Recruitment is subject to strict internal governance rules,” says Amor.

“These are very stringent in Victoria, and we have to meet certain criteria. These rules are configured into Infopath forms, and there is a strict sign-off process, which ensures that we adhere to these regulations.”

Workflows also assist with gaining clearance to hire new staff, arranging contracts and establishing new systems accounts for staff. This will cut the time it takes to recruit staff by 50 percent.

“There are two main benefits to recruiting in this way,” say Amor. “Firstly, training centre managers have greater visibility over the accreditation process, and are confident that sign-offs happen on time.

“Secondly, the institute is assured that no matter how familiar staff are with the recruitment guidelines, the correct procedures will be followed, and we will not be at risk of failing to comply with state regulations.”

