

# How University of Wisconsin - Eau Claire Levelled Up Their Electronic Forms

**Frustrated by the limited functionality and high cost of Liquid Office, UW-Eau Claire made the switch to BP Logix's Process Director.**

UW-Eau Claire was founded in 1916 as the Eau Claire State Normal School, housed in a single building constructed on 12 acres of land. The institution evolved into a State Teachers College in 1927, the Wisconsin State College at Eau Claire in 1951 and attained university status in 1964.

In 1971, the university, along with other state-supported higher learning institutions, became a full partner in the new University of Wisconsin System. Named the University of Wisconsin – Eau Claire, it has continued to expand its mission of providing quality undergraduate programs in liberal arts and sciences, business, education, nursing, human sciences and services, and pre-professional programs.

UW-Eau Claire continues to build its national reputation based on the achievements of its students and faculty. As one of the Midwest's top public universities, UW-Eau Claire consistently has earned citations in U.S. News & World Report's "America's Best Colleges" guide, which recently ranked UW-Eau Claire No. 6 among the top public regional universities in the Midwest.

UW-Eau Claire is also one of only 22 institutions included in the master's institution category of the Fulbright Program, the list of colleges and universities that have produced the most U.S. Fulbright Fellows and the only Wisconsin institution on the list of top Fulbright producers.



The University of Wisconsin-Eau Claire graduates more students with bachelor's degrees in chemistry than most other colleges and universities in the country. UW-Eau Claire was ranked sixth nationally — the highest of any Wisconsin college or university — in the number of chemistry graduates among the 335 colleges and universities that offer ACS approved undergraduate chemistry programs.

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**- MIKE ECKHARDT**  
CIO, UW-EAU CLAIRE

### An expensive, and limited solution

UWEC is one of 13 state Universities in the University of Wisconsin system and Chip Eckardt is the CIO at UW-Eau Claire. Learning & Technology Services (LTS) is the name of the central information technology organization.

Mike Skarp is an Information Technology Server Specialist and the eForms Project Lead. Skarp is responsible for server administration of electronic forms, the lead developer and project team leader.

Donna Raleigh is a colleague of Skarp's, manager, cheerleader and project director responsible for sending out meeting agendas, hosting client meetings, developing policies and procedures, as well as oversight for best practices in designing a form and maintaining consistency from form to form. Chip, Mike and Donna are all part of the Learning & Technology Services group.



**Donna Raleigh & Mike Skarp**  
Information Technology Server Specialists

The Liquid Office product that the University had been using was licensed for a maximum of 150 users. In addition there was a per license cost for the editor. (If UW-Eau Claire wanted 20 people to be able to work on forms it needed 20 licenses.) Another challenge was that there were only certain people who could log in -- and there were some issues with the forms themselves.

For an academic institution that prides itself on cutting-edge programs and hands-on research, managing and tracking the documents that keep the university running smoothly is critical. Among those documents were the electronic forms that then existed in Liquid Office. LTS was asked by the then Vice Chancellor to look at Liquid Office -- and to find a way to either expand or replace it.

To upgrade to an unlimited license would cost UW-Eau Claire more than \$150,000 and, as importantly Liquid Office did not offer a good workflow. It was difficult to determine where a process was working or breaking down, who was holding a form and, to make matters even more challenging, the two support people who knew Liquid Office best retired. They either needed to be replaced or the product needed to be replaced.

Skarp and his team decided to look at other products and quickly determined that there were better products available and it was too expensive to continue with Liquid Office. From Raleigh's perspective, "Using software that was expensive and whose licenses to expand were prohibitive made no sense. In addition we had more people who wanted to use the system. Rather than invest more in Liquid Office with its limited functionality, we decided to find a different software solution."

### Cross compatibility, plus ease of use

Over the course of four months the team conducted its research and looked at alternatives. They looked at Microsoft SharePoint (and its eForm component.) To use that component and implement some of the forms they needed within a reasonable period of time, the staff decided they would need a team of developers -- something they were not able to obtain. Then, according to Skarp, they looked at every other electronic forms and workflow product available. The university's core criteria were:

- 1. Cross platform compatibility: The ability to run under different browsers/email clients (That, alone, Skarp said, limited choices very quickly.)**
- 2. Price**
- 3. Ease of development**
- 4. Ease of use**
- 5. No per seat licensing**
- 6. No barriers to development**
- 7. Better-than-average responsiveness and support**

In all, the team looked at 106 products -- from open source to proprietary products. After reviewing more than 100 products, Skarp's team short-listed three, among them BP Logix Process Director.



Over the course of two months, Skarp made a number of presentations and recommendations. Four months later funding was approved and BP Logix was selected.

According to Skarp, “What wowed me was the demo. When I called to schedule the demo, I was asked to send one of our forms. No one ever asked me that before. BP Logix asked me for a form, converted it quickly and demoed our form. They personalized the demo – and that was a huge wow!”

Eckardt had initially asked his team to look at the full BPM suite because the University has so many systems on campus – and many cases where the software products cannot communicate with each other. What he wanted feature-wise was the ability to have electronic signatures in the most legal format that could be used (A state law allows the University to work with proper legal representation) to search on key words, to see at what step in the process the form was located, to be able to send the form back for revisions and to be able to print it.

“What we replaced Liquid Office with does far more than just eForms. Process Director is a great product and BP Logix takes cross-compatibility more seriously than anyone. It was a clear choice,” he observed.

### Understanding existing processes

The IT team was up and starting with Process Director in less than a week. Clear direction, quick set up, point and click made the start up easy. “We met with clients, had them look at the forms they had, what was and was not working and what needed to be changed, After we received their changes we started,” explained Raleigh.

The IT staff was really good at analyzing problems – they would look to see who was involved, who info was routed to and who drives which forms. What they also discovered was that they had to understand the process and root cause of the forms. This decision was something UW-Eau Claire decided to do rather than something mandated by the UW system.

What they also discovered as they started to put the workflows together and show them to users (since the Liquid Office forms had not been looked at for many years) was that they turned light bulbs on and the users began to ask questions about the forms. As a result, the IT team had to document processes to find out what was working and what was not.



Skarp started with 10 critical HR forms that UW Eau Claire had to recreate.

In addition the state of Wisconsin mandate that the University switch to a new HRS system, PeopleSoft. Candidate Assessment forms, inter-institutional hiring, changes to current contacts, justification of candidate selection, overload payment, Personnel Acquisition Request form, Request to Recruit, Search Conclusion Report and Summer Session hire constituted the first group of forms needing to transition to Process Director.

Of those, the Personnel Acquisition Request form, ePARF, was the most critical – and the first one implemented.

Once the process was agreed on, the team was ‘up and running’ within one week. The BP Logix documentation was helpful – and, when there was a question, their phone calls were answered by a real person with real answers.

## Accountability and outstanding support

The IT team found both Process Director and BP Logix support to be outstanding. According to Eckardt, “With our manual process there were four forms and the forms kept getting lost. Now if someone is holding up on an approval process we can contact them. If someone is sick or on vacation, we can now work around that. Some forms need to go through at a faster pace than others. Now we can tell, instantly, the location of a form within the process.”

Skarp believes there is another key benefit:

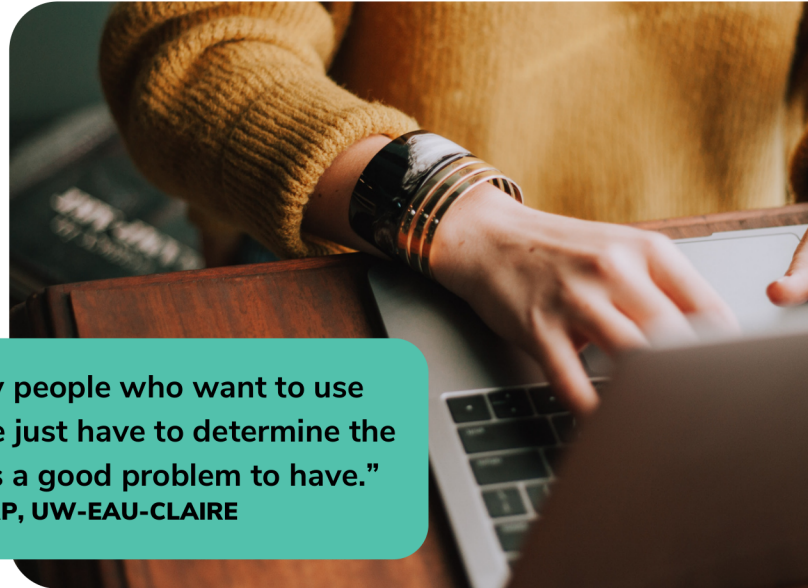
**“There are so many people who want to use Process Director - we just have to determine the priorities. And that’s a good problem to have.”**  
**- MIKE SKARP, UW-EAU-CLAIRE**

“What also makes Process Director attractive is that we can have dependencies. We have a data confidentiality form, for example, that we want all employees to sign. Currently it’s a paper-based form. With an electronic version we can put links to explain parts of the form, then to see who has signed or not signed it, and have a button for further questions (so that someone can contact us.) That form will be used as a learning tool. By understanding it, students will do a better job of complying with the policy.”

Raleigh has another perspective, on how to train people on the product: “Guided by a colleague on the eForms team, Beth Kranz, a student produced a short video on how to get into the eForm system - and get into the form. People are finding Process Director very easy to use. They are finding that if they can get into the URL, they need no help filling out the form: Process Director is very intuitive.”

There is now a queue for forms wanting to be automated.

HR has about 80 forms they would like to implement; the team is currently working on the travel authorization and reimbursement forms, and is collaborating with the Facilities Management Department to begin moving their forms into Process Director, beginning with the fleet vehicle reservation and key authorization forms.



## In production with happy users

The IT team is completing final testing on a number of forms, including forms for the Office of Research and Projects, Security and the Library. The data confidence and security authorization forms are ready for production. Facilities department forms will be next. Skarp indicated that more than 200 users are using the product now and that most are very happy. They consider it easier to use than Liquid Office. All can use it, and they like the cross compatibility as well as the fact that it works under multiple browsers from Google Chrome and Firefox to IE and Safari.

And Raleigh finds that users like the idea that they can start in Word to create eForms since most people know Word – and that they can see the progress of the forms. She finds that the workflows are easy to develop. “I don’t think we are very sophisticated users yet - and believe that there are functionalities we may not even know about. We are excited about learning how to derive even more benefits from Process Director.”

A new challenge for the IT team? “We need to figure out the budget. There are so many people who want to use Process Director – we just have to determine the priorities. And that’s a good problem to have,” concluded Eckardt.