PerfectForms Success Story: Houston Community College

EXECUTIVE SUMMARY

CUSTOMER NAME
- Houston Community College

INDUSTRY
- Education

BUSINESS CHALLENGE
- Create new workflows to generate time and cost savings

- Eliminate paper-based processes

PERFECTFORMS SOLUTION
- Replaced paper-based process with PerfectForms

- Developed integration point with PeopleSoft to provide real-time access to HR and finance information

BUSINESS CHALLENGE

Houston Community College (HCC) has made it a priority to transition paper-based processes online to streamline workflows and remove redundant business processes. Central to this effort is HCC's use of online forms to eliminate the complicated workflows associated with the college's use of paper forms.

Traditionally, HCC has relied on paper-based processes to accomplish routine business tasks. As part of its effort to go paperless, HCC conducted an exhaustive audit and found that more than 200 paper forms were used to handle routine requests. The forms were symptomatic of the broader workflow challenges the college faced. Routine requests, such as budget adjustments and requests to transfer equipment from campus to campus, could take weeks to accomplish. The processes associated with filling out cumbersome paper forms, tracking down required signatories significantly hindered smooth college operations.

In September 2010, HCC evaluated several web-based workflow management tools that would enable them to create automated workflows that would deliver significant time and cost savings. HCC needed a solution that was intuitive and easy to use, as well as providing a breadth of functionality to address the multitude of business processes that required automation.

> **"Digitizing our paper forms forced us to examine the business processes associated with each form. PerfectForms enables us to automate our workflows, resulting in tremendous time and cost savings."**
> -Belinda Allison, Web Services Manager, Houston Community College

FORM AND WORKFLOW SOLUTION

Belinda Allison, Web Services Manager for Houston Community College, tested several technologies before deciding to use PerfectForms because of the product's extensive functionality, affordability and ease of use.

Using PerfectForms, Allison was able to quickly digitize several forms and associated processes, including budget adjustment request forms used by executive management. Using PerfectForms to digitize these forms, significantly reduced the time required to process requests from origination to final approval. HCC automated the workflow around the processes, notifying the requestor of form status in order to determine exactly where manual intervention was needed. Thus, expediting the processes and significantly decreasing time to approval.

In addition, Allison plans on continuing to leverage PerfectForms to automate workflows across campus. By the end of Q1 2011, HCC completely integrated PerfectForms with its PeopleSoft application to streamline the workflow around hiring part-time faculty. The integration enables the college to populate hiring forms with demographic information from the HR application, as well as budget information from the financial application, streamlining the on-boarding process. HCC plans to digitize more than 75 percent of its existing forms by Q4 2011.

BUSINESS RESULTS

While the PerfectForms implementation is still relatively new, Houston Community College has already seen excellent results:

- Digitizing paper forms enabled HCC to examine existing business processes and eliminate bottlenecks which prevented seamless business operations

- Easy form creation proved to be a significant time saver, empowering a select group of users with the ability to create and/or modify forms, independent of IT

- Integration with existing systems, like PeopleSoft, enables new hire forms to be populated with existing demographic and financial information, eliminating data entry processes that proved redundant.