



The Museum of Science, Boston, replaces its method of internal forms administration involving web developers and paper-based systems with a forms driven workflow system and reduces form development time by 600%



Situation

August 2007. For the past eight years, the Museum of Science has maintained a fairly complex Intranet website as an information and educational resource for all staff members. It is also used to store and access all of the Museum's internal HR and administrative forms. These forms were designed and deployed by web developers and programmed in ColdFusion and PHP.

In June 2006, a decision was made to move the responsibility of developing and administering these forms to the Information Systems department. The web development team would focus solely on the Museum's customer facing websites. In taking on this new responsibility, the IS department, which maintains all the organization's business systems, was faced with a number of issues with their existing method of forms administration.

Problems With Their Existing Forms Administration Procedures

- All the online forms had been developed by dedicated web developers, often interns, with a turnaround time of around three months. This meant that there was no real continuity in the form design process, with forms having many different styles and no real uniformity.
- This method of developing forms was relatively costly as each form could take up to six weeks of a developer's time to design and deploy.
- Most forms required routing around the organization for approvals, further form filling and completion. As these electronic forms had no routing capabilities, this was achieved by printing the forms, manually routing the paper copies and sending emails to staff to notify them that a form needed attention. This was proving inefficient, with forms getting lost in transit and taking a long time to move from one person to another resulting in lengthy end-to-end-process times. There was also the issue of transcribing handwriting where forms were filled out manually.
- It was very difficult for managers to keep track of these forms as there was no central facility for storing and tracking the status of each form. This resulted in valuable staff time being wasted in tracking forms to find out their status.
- There was no automated way of moving data between the online forms and their internal SQL databases. This was carried out manually, resulting in even more time and resources being wasted.

Solution

The IS department, headed by Steve Nichols, didn't have experience with ColdFusion or PHP programming and decided against employing more web developers to develop these workflow

Solution Overview

Customer Profile

The mission of the Museum is to stimulate interest in and further understanding of science and technology and their importance for individuals and for society.

Business Situation

Needed an electronic forms processing solution with workflow capabilities to replace their current mix of online forms programmed by web developers and manual paper-based systems.

Solution

Deployed the Quask WorkFlow system from Quask, which allowed them to easily automate their internal forms and processes without having to write a single line of code.

Benefits

- Designing and deploying workflow forms takes a fraction of the time it used to take their web developers.
- Able to develop forms without relying on programmers or web developers.
- Has saved them both time and money and has proven an incredibly cost effective way of automating their workflow forms and processes.
- Processes are more efficient and reliable and data is more accurate and consistent.
- Data is automatically transferred from the forms to their internal SQL databases.
- Staff are more likely to fill-out the forms as they are easy to access and user-friendly.
- Managers are able to manage processes better through the Web-Portal and Dashboard.
- Form designers enjoy using the software due to its immense ease of use.
- Now looking to automate many more workflow forms.

forms. Instead they decided to look for a packaged solution which should deliver on two major counts – it should be a relatively simple tool requiring no programming and it should offer easy integration with their SQL database systems. After downloading a demo, they chose the Quask WorkFlow software package from Quask which delivered on all their requirements.

Why did they Choose Quask WorkFlow?

- The main selling point was its strong integration capabilities which would allow them to easily read and write data between the workflow forms and their SQL databases.
- Its Web-based Portal which provided a central forms repository for storing and tracking all forms, provided the Museum with an excellent forms administration facility, allowing users to easily access their forms via their browsers from one central location, which they had never been able to do before.
- It was also easy to be a manager with this system as its Dashboard facility allowed managers to easily keep track of forms and find out at the click of button at what stage a form was at in any given process.

Getting the system up and running on their servers proved extremely straightforward, and training, which consisted of remote web sessions, followed shortly afterwards. In all the IS department took six sessions from Quask trainers, with seven staff being trained and four of these becoming workflow form designers. A few months later they had their first set of workflow forms fully deployed and being accessed by more than 600 staff members and volunteers.

WorkFlow Forms Automated

- Name and Address Change
- Employment Authorization Request
- Staff Expertise Entry
- Staff Location Entry
- Security Key Request
- Garage Fee Discount Request
- Garage Access Request
- Employee Recognition Form

Most of these processes involve fairly simple routing of forms to at least one or two people in the organization. For example, the Name and Address Change form gets routed simultaneously to staff in the HR and the Payroll departments who check the change in employee details and then press a button to write the new details into their HR and Payroll databases respectively.

The Staff Expertise and Staff Location forms capture details on the physical office location of staff and their areas of expertise. This information is written automatically from the forms to their HR system and the details can then be accessed from their Intranet enabling people to easily find each other and also find staff with specialized skill sets. The Garage Access form also writes data directly to one of their SQL databases and when new employees apply for access, their information is automatically written to the database and, on approval, their account is activated.

Benefits

Explains Steve Nichols, Director of Information Systems, “Quask WorkFlow has enabled us to develop and deploy all of our workflow forms without the need for any web programming expertise whatsoever. We have therefore been able to utilize the skill set of our existing staff

“Our workflow form designers actually enjoy using the software as it’s so easy to use and they can produce really good looking forms complete with all the workflow logic in a fraction of the time that it used to take our web developers. On average, it takes less than five days to design, develop and deploy a workflow form whereas before it could take up to six weeks!”

Steve Nichols
Director of Information Systems
Museum of Science

within the IS department without having to go to outside programmers and web developers. This has saved us both time and money and has been an incredibly cost effective way of automating our workflow forms and processes.”

“Now a lot more of our internal administrative processes are carried out online instead of on paper which is saving us valuable staff time and resources and is making our processes more efficient and reliable. Information is no longer getting lost on bits of paper, and data is more accurate and consistent. We no longer have to spend time deciphering handwriting and manually entering data into our databases as data is automatically captured electronically and automatically transferred to our internal SQL databases.”

“We’re also finding that staff are more likely to fill out forms that can be accessed quickly through their browsers and are easy to fill out. And managers can oversee their processes because they have instant access to all forms through the Portal and Dashboard facilities and can easily find out the status of a form and how long each process is taking to complete.”

“What’s more, our workflow form designers actually enjoy using the software as it’s so easy to use and they can produce really good looking forms complete with all the workflow logic in a fraction of the time that it used to take our web developers. On average, it takes less than five days to design, develop and deploy a workflow form whereas before it could take up to six weeks! As a result, we’re currently looking to automate more internal processes across several departments.”

“Quask WorkFlow has enabled us to develop and deploy all of our workflow forms without the need for any web programming expertise whatsoever. We have therefore been able to utilize the skill set of our existing staff without having to go to outside programmers and web developers. This has saved us both time and money and has been an incredibly cost effective way of automating our workflow forms and processes.”

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Future

The next step for the IS department is to update any of the remaining forms that were developed in ColdFusion and PHP and add some new forms. They include:

- **Financial** - Check Request Form, Purchase Order Form, Direct Deposit Request, Accounts Receivable Funding Request.
- **Human Resources** – Outside Employment Disclosure, Internal Job Application, Personnel Actions, Personnel Folder Release Request, Refer a Friend for a Job, Volunteer Service League Grant Application, Volunteer Request Form.
- **Marketing** - Media Relations Event Coverage Request, Media Relations Press Release Request, Function Space Request, In-House Need Sheet for an Event, Publications Project Request.
- **Other** - Research Project Request Form, Overnight Parking Request, Audio/Video Request Form, Request an ASL Interpreter.

With regards the Financial Forms, these will require more complex workflow logic to be built into the forms for multi-level approvals and complex routing to many individuals and departments, as well as relatively complex data exchange between the forms and their internal HR and Financial SQL databases. Before purchasing Quask WorkFlow, they were looking to buy a dedicated Purchase Management System for this, but have since decided that the ease with which forms can be developed in Quask WorkFlow accompanied by the flexibility of the system and strong integration facilities lends itself perfectly to administering and managing these processes.

For More Information

For more information about Quask's products and services, please contact:

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For more information about the Museum of Science, visit their website at mos.org