Salient Process uses IBM BAW to migrate and modernize an energy company's forms.

THE CLIENT

A large rural-sector energy company in the mid-west

THE CHALLENGE

This energy company relied on FileNet workflow to manage many of its business processes. As the life e-forms component was at end-of-life, they needed an alternate solution and needed it fast. Existing applications span multiple lines of business, including Accounts Payable and Supply Chain Contracts/Procurement, both of which are mission-critical applications. A lot of business logic was embedded in the scripts that were driving these forms. The systems had grown organically over the years, and the ECM experts were faced with increasing difficulty in keeping up with changes in maintaining the processes.

THE SOLUTION

The energy company zeroed in on IBM Business Automation Workflow as the replacement. They wanted to make the change to BAW as seamless as possible. Existing e-Forms workflow focused on a single tabbed form (document), so a Coach View was created to mimic the look and content of the previous form with UI improvements. Similarly, the processes were migrated to replicate the form data throughout all the manual steps.

SEAMLESS TRANSITION

The existing application has the provision for attaching contracts and supporting documents to the flow, which is an out-of-the-box feature. (While BAW has similar capabilities with the embedded ECM server, at installation time, it was decided not to either install the embedded ECM server nor specify their existing ECM server as the "embedded" server. This was partly due to their sizable application infrastructure built around the existing ECM system. However, in retrospect, we should have investigated adding it as the embedded system.) The new BAW application was required to attach files, update properties, check out/in/version documents hosted in an external ECM server, and manage the workflow.

SALIENT RESULTS

Solution One

Process Designer was able to replicate the FileNet workflow, however, with significant changes to the process flow due to the different natures of the design application. FileNet workflows can be closer to a state machine implementation than the BAW interface defines. However, the resulting solution ensured that the steps took place in the same sequence as the existing application. Integrations with PeopleSoft for contract management were handily accomplished via existing stored procedures and web services interactions.

Solution Two

The e-forms were reproduced faithfully as BAW client-side human services. Since work was done as a browser client instead of a PDF-like document, some efficiencies were introduced with positive results from the end-user community. Re-use of existing SQL queries to populate fields was also quite seamless

Solution Three

All required application migrations took place within the timeline specified by the customer, although the first application took significantly longer due to some installation issues and the changing requirements mentioned above. The following applications were completed in a shorter time window than anticipated.

Solution Four

The only significant technological roadblock came about over differences in how FileNet and BAW handle tasks. This required some end-user education.