A major global consulting firm, headquartered in New York, with more than 150 offices and close to 15,000 employees, helps public and private clients plan, develop, design, operate, and maintain critical infrastructure projects. They also harness the power of information with OpenText MBPM to drive value, reduce overhead, and improve collaboration and innovation efforts.

Unify processes, reduce complexity and improve information access

Each contracting firm is responsible for preparing and submitting their own reports, many historically using manual data collection and entry, e.g. spread sheets, causing delays and inconsistencies in the early days of the project.

The consulting firm set out to use their experience of information management in complex project environments. Their strategic goal: eliminate the use of spread sheets, ad hoc forms, paper and email using business process management (BPM).

OpenText selected for rapid deployment capability, process fit and as platform for the future

The company set out to remove the barriers to greater process automation in a paper intensive environment, with data keyed directly into the solution. Their design was for the BPM solution to handle transaction data with a separate database for business data. In the event of component failure, recovery would only involve one element.

“We originally looked at a number of options in the market, and after a false start with a solution that failed to deliver, we turned to OpenText who proposed the OpenText MBPM solution (formerly Metastorm BPM)*, said the Enterprise Architecture & Systems Support Manager at the global consulting firm.

Benefits

- Process compliance assured with consistent and enforceable processes
- Improved change management agility with quick rollout of changes
- Real-time management reporting and dash boarding with reliable business intelligence
- Reduction in operational overhead and costs
- Collaboration with contractors
“With the OpenText solution, between 10 and 25 percent of the time of those responsible for reporting in the 400 strong project management team has been freed up from manual reporting”

firm. “The OpenText solution works seamlessly with our architectural standards, provides rapid deployment and is clearly a platform that can grow with us.”

Everyone should be looking at the same, up to date data - one version of the truth. Using process automation, information flow would be considerably improved, providing senior management to the CEO with accurate, reliable, current reporting – project wide.

Intuitive, straightforward processes that guide users – the key to success

Manual data capture and paper reporting does not lend itself to enforcing processes. By moving to OpenText MBPM, processes guide users through what is required. Changes or updates to processes can be instantly implemented.

“Once the initial selection of OpenText MBPM had been made, a formal proof of concept was undertaken and within three weeks the business was fully on board with the selection”, added the Enterprise Architecture and Systems Support Manager.

Working with OpenText consultants, staff were quickly educated on installation, configuration and support. The project team defined processes and implemented them with the business: health and safety incident reporting, contract management, quality assurance etc. The approach was to define and build each process in short timeframes, experience showing that longer design cycles lead to debate and delays.

Providing a mobile workforce the tools they need

The site of the power station is so large; users are effectively remote, many having no centralized office, desktop computers or network infrastructure. The OpenText solution is delivered via a web browser and despite poor network bandwidth, users have widely adopted the system making use of its capabilities across the site.

With a total, trained user population of over 1,250, the system is now seeing in excess of 150 unique user logins each week. Many users access the system infrequently and it’s testament to the simplicity and intuitive user interface that they are able to do this.

User feedback has been largely positive, especially in defect reporting, where delays have been greatly reduced. Accurate, online reporting of health, safety and environmental incidents has also been well received and accepted including facilities for logging defects and incidents on mobile handheld units.

“By capturing data directly into the system, we’ve improved security as well as process compliance. Already many of the spreadsheet sheets that were regularly used have been eliminated, helping us to reduce the spreadsheet anarchy that we suffered previously”, added the Enterprise Architecture and Systems Support Manager of the consulting firm.

Learning from experience and the best practices

The consulting firm has an enviable track record and experience in delivering complex projects. However, looking back at the OpenText MBPM project, a number of factors stand out as being crucial to the success.

“By involving the process owners from the outset during the definition phases and during configuration, testing and go live, has undoubtedly boosted user acceptance and adoption”, added the Enterprise Architecture and Systems Support Manager.

“Dialogue was both maintained and constructive throughout by taking this approach.”

With a short timeframe between agreeing a design and implementation, change requests are dealt with post go-live, particularly for reporting. Users define their own reports and dashboards; accessing them from anywhere with internet access, securely and safely. Previously the project team spent an enormous amount of time manipulating data and preparing reports. “With the OpenText solution, between 10 and 25 per cent of the time of those responsible for reporting in the 400 strong project management team has been freed up from manual reporting”, added the Enterprise Architecture and Systems Support Manager.

A solid platform, built for the future with scope to broaden usage

With a number of quick win processes implemented and adoption rates running high, thoughts now turn to expanding use of OpenText MBPM. Network bandwidth remains an issue for many and more efficient mobile devices are now being planned, with interface simplification and efficient data transfer.

Other business processes are being modelled and planned for roll-out. With construction set to continue into 2015, commissioning and on-going operation and maintenance well beyond that, the consulting firm will continue to look for ways to leverage the investment in OpenText.