



Vorsite Streamlines Pharmaceutical Firm's Grant Disbursement Process

Overview

The world's largest pharmaceutical company needed to streamline its grant approval and disbursement process in order to stay competitive. Each year, millions of dollars in research grants and physician stipends must be managed for optimal response time while ensuring that all related documentation was properly tracked and archived in accordance with government regulations.

Solving this problem was not easy. Information had been stored using disparate systems and processes. Employee and financial information was stored in SAP. Documentum was used for document management and most end-user groups employed SharePoint to store request justification documents and execute other collaboration activities. Simply obtaining a disbursement of funds required the use of three completely different systems.

For a solution to be acceptable to the company, it had to:

- › Be familiar and easy to use
- › Leverage a return on previous technology investments
- › Be rapidly deployed

The client had previously deployed an EMC Documentum only solution, which required employees to learn and use Documentum for their collaboration activities. As a result this solution was roundly rejected. Their Microsoft SharePoint only solution could not satisfy the requirements because of its limited workflow capabilities. Additionally, the company needed to leverage its investment in the workflows it had developed in Documentum.

To reduce the cost of training and ensure end-user acceptance, the client needed a solution that would enable users to submit and track requests in the approval process from a single application that users already knew.

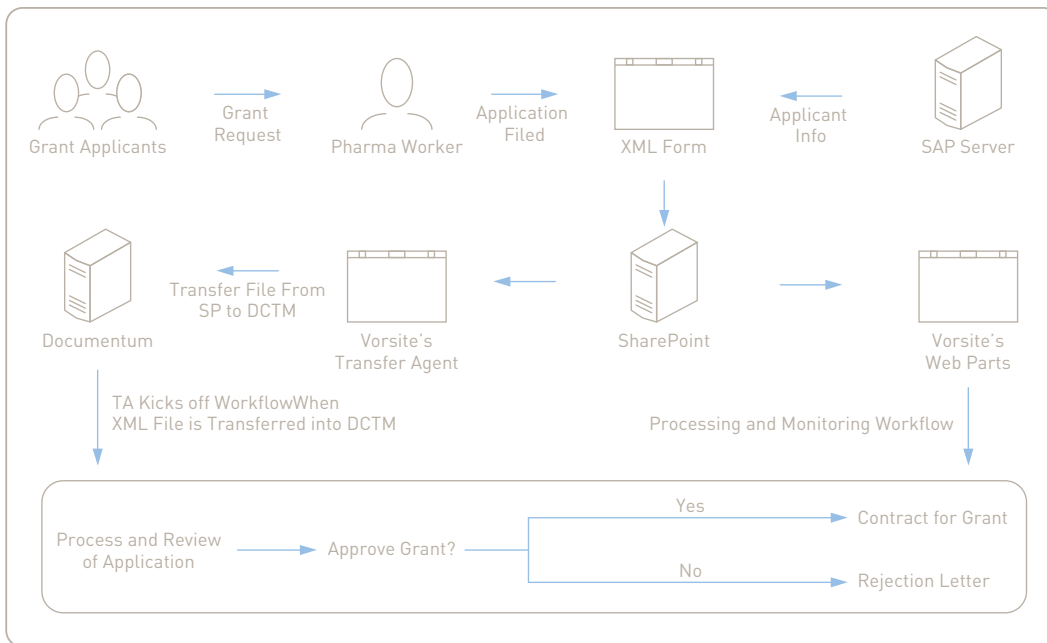
The Solution

Using Vorsite's two products; Transfer Agent and Web Parts, the company bridged the gap between the diverging technologies.

Researchers and research organizations apply to pharmaceutical companies for grants and stipends. An employee completes the application using an InfoPath form, retrieving financial data from their SAP system. The completed form is stored in a SharePoint library. Based on business logic, the Vorsite Transfer Agent recognizes the completed application and transfers the form automatically to Documentum, while kicking off a workflow enabling qualified employees to track the completion of the grant application. The key to this solution was a zero code integration that meets the needs of end users through SharePoint and utilizes the workflow features of Documentum while leveraging the company's investment in both technologies.

Through the Vorsite Documentum Workflow and Vorsite Documentum Inbox Web Parts, people from the review board can monitor the progress of the application or perform actions required of the Documentum workflow from the SharePoint interface. An employee in charge of granting acceptance

of the application will be able to work with the application from the Vorsite Documentum Inbox Web Part, allowing the grant to be accepted or rejected in a matter of clicks through one interface. The applications can be routed to the secretary's inbox for printing of a contract or rejection letter. In short, an employee can perform their job in Documentum but through the usability of SharePoint.



Benefits

By deploying a solution which uses Vorsite's products to integrate the capabilities of EMC Documentum Server and Microsoft's SharePoint technology, the company gained significant new efficiencies.

Streamline Disbursement Process

Utilizing the Vorsite Web Parts, Transfer Agent technologies and a custom Web Part to integrate with SAP, users could conclude the grant request and monitor the approval process from their SharePoint site. And because the approving authorities also work in the same familiar environment, the time from request to approval and payment of disbursements is significantly reduced.

Leveraged Technology Investment

It was extremely important to preserve the investment the company had in EMC Documentum and leverage what had already been developed. The Vorsite Inbox Web Part for Documentum made it possible for users to interact with the workflows already existing in Documentum. They view tasks assigned to them and take action directly from the Web Part. All this from the familiar SharePoint environment deployed throughout the company for collaboration.

Reduced Development Cost

The ability of the Vorsite Transfer Agent technology to process InfoPath XML forms data and initialize an XML application in EMC Documentum significantly reduced the development cost of the solution. It enabled processing continuity between the SAP, SharePoint and Documentum without the need to develop code to transfer data from SharePoint to Documentum.

For more
information

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