BYU-Idaho Automates Onboarding, Financial Aid Process with iPaaS

TeamDynamix

> ## " During the offboarding workflow, the system can also remove the user from MS Teams."

Automate Onboarding

From the ability to automate onboarding new employees to financial aid notifications, the staff at Brigham Young University – Idaho are finding creative ways to automate and integrate processes outside of IT. "We're doing a lot (with iPaaS) in HR with onboarding flows, and there are a lot of other groups around campus that want to use the onboarding flows to onboard an employee from the beginning, all the way to getting their equipment sent out and getting them into Active Directory," Nepal Plummer, Director of Product and Service Management, said. "And we haven't even opened up the floodgates yet."

Integration Platform as a Service (iPaaS) is gaining in popularity as more organizations, in all industries, are looking to modernize legacy systems and automate processes to save on time and resources while delivering exceptional service.

More specifically, iPaaS allows for the integration of enterprise data and automation of a variety of tasks through an organization. By using iPaaS as the ultimate foundational layer,

departments can pull data together from siloed systems (ERP, CRM, SIS, LOB point solutions…) and get a holistic view of the organization; automate time-consuming, manual processes; and securely shore up the growing number of APIs in use throughout an organization.

No-code iPaaS Takes Action

For BYU-Idaho, the low code/no code structure of iPaaS has been extremely beneficial and allowed the group to build out workflows without the need for IT resources.

"It's one of the reasons we went with iPaaS," Kevin Cook, Application System Engineer, said. "We wanted to be able to get the tool into the hands of non-engineers and see what they could do."

TeamDynamix' iPaaS uses drag and drop functionality to build out workflows – there's no coding necessary, but for those who do enjoy code they can hop in and build with that too. The tool is versatile enough to cater to both programmers and non-programmers alike.

As a result, the team's been able to build out some extremely beneficial workflows.

Outcomes

- ✓ **Streamlined** employee and student onboarding
- ✓ **Faster delivery** of financial aid notifications
- ✓ **Improved data integrity** and cleansing

Streamlining Financial Aid Awards

For instance, counselors wanted a better way to track and notify of financial aid awards for students. Before iPaaS they were doing a mail merge and sending out award letters to students through Outlook, but there was no way to track those emails. Karl Karstad, Systems and Relationship Manager, said the financial aid office approached his group and asked if they could create individual tickets for each award letter sent out so counselors can go in and see the content of the award letter and better help students who had questions.

Within a week, Karstad and his team, using iPaaS, built a workflow to automate and track the tickets. "First it does a mass, Excel upload, of all of the students who have received an award and the amount of the award for each session," Karl said explaining the workflow. "That gets uploaded to TeamDynamix (their ITSM solution) and automatically creates each ticket for each student award. iPaaS then formats the letter that gets sent out to the student informing them of their financial aid award, and it sends the letter and closes the ticket saying, 'the letter has been sent on this date.'"

Karstad said the process of building the flow was great and they didn't need an engineering resource to do it, "We didn't need to add it to the list of IT projects. We did it ourselves and got it done quickly so the counselors were able to get all the information they needed and see the letters were sent out correctly."

Onboarding & Offboarding Workflows

Because iPaaS is low code/no code, there isn't a need to go through IT channels to automate different processes throughout the campus, "We can do even more this way, and really maximize the number of customizations that can happen," Cook said.

In addition to the financial aid workflow, BYU-Idaho is working on onboarding and offboarding workflows to help anyone bringing on a new employee, or offboarding a former employee. Automating these two complex processes is especially helpful as departments all over campus regularly hire student employees.

"In IT, for example, if you're hiring a student they are going to need a lot of access to different tools and programs," Cook said. Using iPaaS they can securely automate the process and grant the access needed while keeping that information protected and secure. And if the student's permissions change, using the workflow, they can shut off access. During offboarding, the workflow can also remove the student from Microsoft Teams and other programs.

Faster Onboarding
Connecting enterprise systems and building automation has created faster onboarding.

Improved Data Integrity
Transform and cleanse data between multiple enterprise systems.

Powerful Enterprise Connectivity

With a single integration hub and pre-built connectors, you can easily build automations and workflow across the ecosystem.

"Allowing us to simplify the onboarding and offboarding of students, which happens constantly, is huge," Cook said.

Improving Data Integrity

Another creative flow is the "Oops" flow, as Cook and his team call it. With this flow, iPaaS can recall and restore deleted data in tickets. "We had 2500 tickets that didn't have a value because that choice was accidentally deleted. So, we were able to use iPaaS to go out and grab a report with those tickets and update them to put that value back on the tickets," He explained.

Enterprise Deployment

BYU-Idaho is just dipping their toes into what's possible with iPaaS at the university. "We already have other departments that are just chomping at the bit to use iPaaS," he said. "Our purchasing department is really eager to use it, as are a lot of our support departments."

Interest has been so high that Plummer, Cook and Karstad haven't needed to go out and evangelize the product to get other departments interested.

"We haven't really gone out there to talk about it much because everyone we do talk to about it has a bunch of requests for workflows – even if we've only talked to them about it for a few minutes," Plummer said. "We're going to be expanding iPaaS incredibly fast and fortunately TeamDynamix will be able to keep up with it."