

# University of California, Santa Barbara

## CLIENT SUCCESS

### SNAPSHOT



*UCSB is an R1 research institution and the 5th-largest university in the UC system. With annual financial activity nearing \$1 billion, managing procurement for thousands of user accounts is a considerable task. To streamline procurement processes, the university implemented an electronic procurement gateway based on the SciQuest procure-to-pay application. SciQuest is now poised to transform procurement activities for the university, with more than 28,000 people eligible to utilize the system from campus. Visus played a key role in the implementation by creating a Web-based authorization system called the Gateway Management Console that integrates with UCSB's existing identity management system.*

### ORGANIZATION

The University of California, Santa Barbara (UCSB) is a prominent teaching and research institution, with approximately 19,800 undergraduate and 3,050 graduate students and more than 6,100 employees

With a rigid 28-week implementation schedule, UCSB was on a tight timeframe to get the new procurement system up and running. They needed a technology partner that could design and build a web-based solution that would allow each department to set up roles and manage approval levels. After an intensive analysis process, the university engaged Visus LLC for the job.

### CHALLENGE

Extend the centralized authorization processes of a new eProcurement system to departments across campus.

“It was critical that we find a technology partner that could work closely with us and develop the functionality we needed very quickly,” says Doug Drury, Director of IT for Administrative Services at UCSB. Visus understood UCSB's requirements and knew how to create an operational system.

### STRATEGY

Create a Gateway Management Console that integrates with on-campus authentication systems to provide a campus-wide interface for eProcurement activities.

### The Importance of Proper Planning

In SciQuest, authorizing users is a central administrative function. Because UCSB uses a decentralized architecture, with identity management functionality distributed among many departments, IT leaders had to figure out how to extend responsibility for authorizations, role management, and workflow management to many campus departments. The technology experts at Visus quickly apprehended the university's needs.

### SOLUTION

A web-based gateway that allows purchasing managers and department heads to set up roles and manage approval levels for expenditures.

“We needed a team of great problem solvers, one that would quickly understand our business requirements and the applications we were trying to interface with.”

– Jacob Godfrey, Purchasing Manager and Project Manager for eProcurement at UCSB

### RESULTS

Roles, privileges, authorizations and spending levels can be easily established, modified and updated. The console can be reused as a gateway for other university applications.

To ensure that projects are successfully deployed on budget and on time, Visus always begins with proper planning. Its Architecture and Analysis process helps the project stakeholders to understand the vision, agree on the requirements, and translate those requirements into clear development specifications.

“The worst thing that could have happened to us in this situation would have been if outside consultants came in with a pre-conceived or canned solution that they tried to sell to us,” says Drury. The Visus team took the time to learn and understand what UCSB

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wanted, and then designed the solution accordingly.

Visus spent five weeks with Drury and his team of IT professionals discussing UCSB's objectives for its new procurement infrastructure. During these intensive Architecture and Analysis discussions, UCSB's concept for the solution evolved. The Visus team kept pace with that evolution and incorporated it into the design. They wire framed each page of the application and created a functional specifications document.

"We sought a firm that could turn our concept into reality," Drury notes. Throughout the analysis phase, Visus learned UCSB's authentication concept and then helped them evolve that concept into what they truly needed for the Gateway Management Console. The detailed analysis was critical to the success of their project.

**"Our eProcurement project could not have moved forward without a successful assessment phase. Visus helped us to conduct a thorough understanding of our needs up front."**

– Doug Drury, Director of IT for Administrative Services at UCSB

In addition to understanding the concept UCSB had for the solution and deriving the requirements necessary for implementing it, Visus also had to understand the university financial structure and the campus technology infrastructure so they could build the solution within those confines.

"In addition to an effective analysis process, we needed a firm that could quickly come up to speed on the technology problems, campus infrastructure, financial structure, and our business needs," says Jacob Godfrey, Purchasing Manager and Project Manager for eProcurement at UCSB.

### Rolling Out Authorization Tools for Today and Tomorrow

Visus rose to the challenge. The primary deliverable from the Architecture and Analysis phase was a detailed specifications document that defined the exact scope of

the implementation based on agreed upon project milestones. This document guided the implementation phase, during which Visus met with UCSB every week – managing the project, providing updates, and staying in constant communication.

Visus used Microsoft .NET, Microsoft SQL Server, and other Web technologies to create the Gateway Management Console. The Visus team refined and enhanced the solution and made adjustments to meet the requests and expectations of the university. Then the system underwent a month of quality assurance testing, including thorough usability and user interface testing.

"We needed a firm with impressive leadership and professionalism," Drury says, "one that would deliver on time, on budget and to our expectations."

Visus responded by providing the staff and expertise necessary for the job at hand.

Today, purchasing officers, departmental managers, and other users rely on the Gateway Management Console to create the organizational structure for roles, security, and user authorizations, which are always evolving and changing. UCSB plans to extend the Visus solution to work with other new applications as well. The Gateway Management Console was designed to not only support and manage the SciQuest application, but also to authorize users within any future applications that the university purchases or subscribes to. UCSB can build on it and leverage it for the entire campus. Soon UCSB will replace its entire mainframe-based financial system. All new financial applications will use the console for their authorization source.

"We needed a team that was very professional, responsive, communicative, and available," Godfrey summarizes. "We needed a collaborative project manager and lead engineers available to us every day to develop a custom solution perfectly suited to our needs."

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