

F2

**BUILT FOR
GOVERNMENT**



**PARTNERING FOR
TRANSFORMATION**
WORKING WITH
USERS TO CREATE
DIGITAL SERVICES

cBrain worked with the University of Bristol to create a shared digital case management service

CUSTOMER PROFILE

Customer Name

University of Bristol

Sector

Higher Education

Service Provided

F2 Case Management

Time to Implement

5 months

Benefits Achieved

Replacing multiple systems with one platform

Avoiding re-typing information across systems

Automated document production

Better overview of case progress

“The implementation of F2 not only improved the systems our team uses, it provided an opportunity for teams across the university to examine and understand processes which had been built organically over many years. In collaboration with cBrain this allowed us to identify and action opportunities for improvement that were then integrated into the configuration of F2. By engaging end-users early and often, the end result reflected actual working practices rather than idealised versions of the truth.”

Tom Morgan, F2 Service Owner
at University of Bristol

THE CHALLENGE

The University of Bristol (UoB) were looking for a more effective way to manage cases for the Research and Enterprise Development (RED) organisation and for the University Secretary's Office (SecO).

The RED Department works with academics, researchers, students and entrepreneur communities within and outside of UoB to bid for research and enterprise-related grants and contracts, and to manage contractual negotiations. RED and Finance Services needed to effectively and efficiently manage detailed contractual negotiations and related communications throughout the pre-award lifecycle from application to award, covering areas such as: the terms and conditions of the scheme; ethical governance implications; and managing the process of contract negotiations with funders and research and enterprise partners.

The University Secretary's Office (SecO) provides a wide range of advice and support on legal and compliance issues to all academic and professional departments of the University. The Office's responsibilities include work in the areas of property and commercial law, employment law, intellectual property, insurance, risk management, data protection, freedom of information, staff and student mediation and dispute resolution, appeals and discipline. SecO needed to manage their case load in all these areas, as well as to provide management information for the team to support workload management and internal reporting requirements.

THE SOLUTION

cBrain worked with the University of Bristol to provide a shared solution that could address the issues users were facing with the current systems.

The F2 platform provides automated email integration, so users were able to store correspondence records and attachments in a single place, replacing the previous approach of using Outlook, shared network drives, and printing paper copies. The project team worked with users to configure case templates and checklists to manage the end to end process. The checklists also include additional data fields to capture specific research related information, and this data is merged into document and communications templates automatically. The platform logs all actions in the case history, making it easier to establish an audit trail of email correspondence, document history and decisions made.

The project used an agile approach, working with University 'super users' to create initial prototypes, and then refine them based on feedback. This meant that the solution created was directly driven by the service users, who became experts on using the system before going live.

The University's IT services team managed the overall project, and supported integration with university authentication systems, mail systems. They also used the platform's REST APIs to integrate student and academic data into the platform.

THE BENEFITS

Users in RED now have one place to go to find information relating to research contracts. Correspondence and documents are automatically added to each case, and data is available for reporting and progress tracking. There is a reduction of administrative burden that was previously incurred through re-entering data and saving documents and emails in triplicate.

The University has increased confidence in legal compliance and data security by providing a secure system and clear audit trail.