

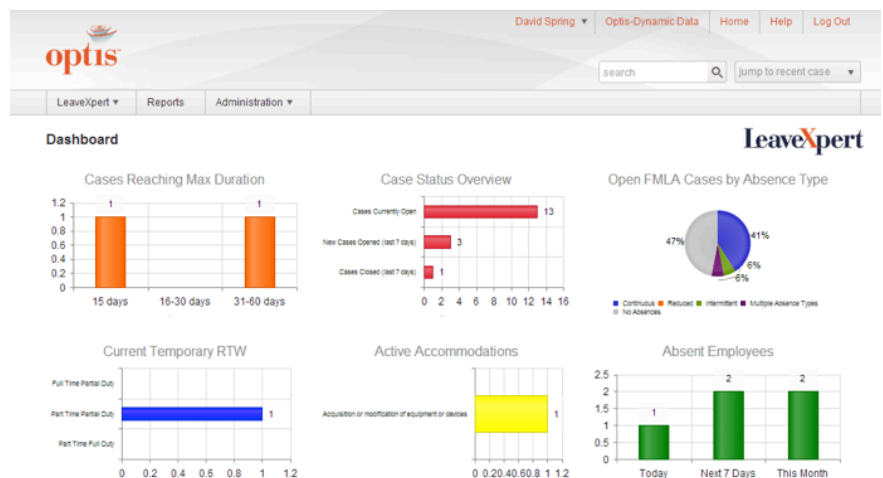
Optis Flagship Application Elevated to the Cloud





For the past six years, Optis has served customers in the HR segment with its LeaveXpert® software, helping businesses manage personnel leaves and absences. However, the application, while valuable to customers, wasn't proving to be cost effective to support and maintain as Optis' client list grew. Each customer was a large enterprise that required a custom implementation of the application, and for small-to-medium businesses, custom implementation came at a cost that was out of reach, thus reducing Optis' potential customer opportunities.

Optis called on AIM Consulting to help unify the product on a single, multitenant platform to improve and simplify the implementation process and make it feasible to offer the same value and benefits to small and medium-sized customers. AIM Consulting not only provided Optis with a solution for LeaveXpert in the form of SaaS-based cloud technology, but also guided Optis in a complete transformation of its in-house development model. Optis now has a streamlined product for a greatly expanded customer base, an Agile development process, and a platform to build upon for the next several years.





Optis is a leading provider of people data services. Since 1984, the company has provided cutting-edge data management and software services in the areas of human resources, employee benefits and risk management. Its flagship leave-management software product, LeaveXpert, began six years ago as a custom Application Service Provider (ASP) application and was productized as LeaveXpert 1.0 in 2011.

Industry Leading Application

LeaveXpert chronicles the events associated with managing and monitoring employees who are out on leaves of absence, including family or medical leaves, military leaves, company discretionary leaves, and more. The software guides human resource managers through every aspect of the leave, including follow-up and return to work.

Optis compiles the legal requirements associated with all regulatory leaves of absence, including FMLA, USERRA, and state mandated family, medical, or military leaves and simplifies ensuring organizations stay compliant.



Operational Inefficiency

Leading the pack, however, has come at a price. Targeted for large businesses, LeaveXpert 1.0 required Optis to configure each new client separately, a process lasting a minimum of four weeks. Because of the complexity of the client environments, each of these customer solutions required a separate database and server implementation at a datacenter owned and maintained by Optis.

In addition, any comprehensive changes to LeaveXpert 1.0 needed to be applied to each client instance, causing operational inefficiencies and extended timelines for new product enhancements. At Optis, the Waterfall development model in use required extensive time for developing new products and for addressing reliability and stability issues that arose with LeaveXpert.

Desire to Standardize

All of these issues combined were a heavy hit to Optis' internal resources and a rising cost center for the company. Optis wanted to standardize LeaveXpert on a single platform, which would provide more stability and reliability while lowering development and maintenance costs. Standardizing the platform would also enable the company to target the small/medium business market, for which LeaveXpert was too costly at the time. Optis knew a transformation for LeaveXpert was necessary, but recognized an even greater opportunity to evolve the entire enterprise to a new model.

“We had to find somebody who could help us rebuild the product and design the platform but also allow for a very smooth transition for our people, so that our internal development team could completely support everything that was built.”

Rene Gates
VP of Client Services
Optis



The Right Partner

Optis lacked sufficient internal resources for the LeaveXpert project, so partnering with a technology consulting vendor was in order. However, vendor trust was a significant issue. Rene Gates, Vice President of Client Services at Optis, noted: “We were concerned because we’ve partnered with technical vendors in the past that weren’t able to achieve our platform or product expectations.”

After a cautious and lengthy vetting process, Optis partnered with AIM Consulting to develop a roadmap for LeaveXpert’s future. Optis felt confident in the choice in part because AIM came recommended by a personal contact familiar with the company.

Transformation to the Cloud

AIM Consulting performed an exhaustive analysis of the state of LeaveXpert, other Optis products and the development environment at Optis. From a deep history of work on software transformation projects, AIM recommended that the best option for Optis would be to transform LeaveXpert’s model from ASP to SaaS, leveraging the immense opportunity of cloud computing, while also providing a stable platform and processes for future Optis products and services.

A transformation of this size represented monumental challenges and a big leap of faith for Optis. Standardization of LeaveXpert on a single version of the product would mean all customers would be required to conform to one version. An intricate business-process review would need to be performed in order to satisfy as many customer needs as possible.

A crystal-clear roadmap would be required to set the complex path from ASP to SaaS. Planning would not only need to include the technology path, but also the education and training of Optis developers in Agile Methodology. To become immersed in Agile, Optis developers would work alongside AIM’s developers to gain experience with the latest Agile development techniques and processes.

A Tight Timeline

A final hurdle involved a tight timeframe. Optis needed to complete the transformation in time to unveil the new LeaveXpert product at the Society of Human Resources Management Annual Conference in June 2013, only nine months away.

“We were happy about meeting specific timelines, because that’s always a question with many projects. Optis was happy with our approach. We introduced new technologies—tracking tools, build server, test framework... and it all went great. The switch from Waterfall to Agile methodology went really well.”

Danielle Arink
Solution Architect
AIM Consulting



Partnering closely, AIM Consulting and Optis planned the project in four phases, each of them involving Optis technical staff to ensure their growth as the endeavor progressed.

Phase 1

Strategy

The first phase saw the development of a concrete roadmap, detailing the complex business requirements and solution architecture.

Phase 2

Framework

In the next phase, AIM Consulting set in place the fundamentals and core plumbing of the SaaS architecture on Amazon Web Services (AWS) EC2, while introducing Agile Methodology to Optis with Microsoft Team Foundation Server (TFS) 2012.

Phase 3

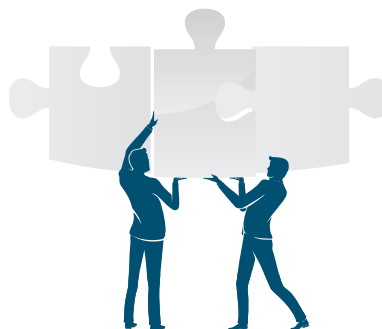
Core Component Development

The third phase focused on sharing development with the Optis team. Working side-by-side with Optis, the combined Optis/ AIM Consulting team built out the core functionality of the application, based on the specifications laid out in the roadmap.

Phase 4

Feature Development

The final phase saw continued feature development and completion of the project, with AIM Consulting stepping back for Optis staff to drive development and produce the finishing touches on their own. By this time, AIM had guided Optis in completely transforming its software platform and development model from old to new.





The resulting SaaS application, LeaveXpert 2.0, utilizes the latest technologies:

UI

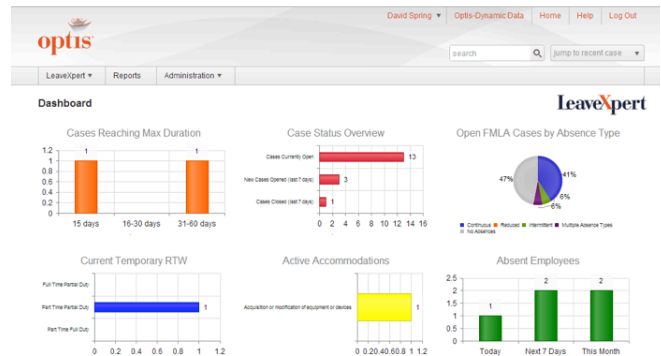
A slick, cutting-edge user interface features the Kendo UI framework, ASP.NET MVC4 Web API, Razor view engine, HTML5, CSS3, and jQuery and Knockout JavaScript libraries. Kendo lends the UI a clean, modern feel, with grids and graphs that appear uncluttered on a page and a unified, professional theme throughout the site. The UI has received extremely positive customer reviews.

Multitenancy

AIM architected LeaveXpert with a multitenant database structure to enable the single application to support multiple customers. Strict data boundaries prevent bleeding of information between clients. Additionally, a parent company that oversees companies in the same organization can see data from the lower-level companies, but the lower companies cannot see their siblings' data or data from higher-level organizations. For larger customers with significant data needs, Optis has the ability to provide a separate server as well, making this architecture simply multi-tenant with a single tenant.

“Moving to the cloud really made a huge difference in terms of operating costs as well as operating efficiencies, now and in the future. That was a really big change.”

Rene Gates
VP of Client Services
Optis



Security

Because of the ongoing threat of potential hackers, LeaveXpert 2.0 needed to be wrapped in a highly secure environment. The system was designed to eliminate security threats before they begin. Much of the UI is rendered on the backend, along with database services; therefore, all of these services are not exposed to public IPs. Additionally, system-wide security was implemented using MVC authorization and tokenized messaging in a separate Web API service with support for multi-factor authentication. Security tokens are assigned when a user logs in to the system, and only users with those tokens are allowed past certain checkpoints. AIM Consulting recommended an external security audit, and Optis identified a well-known third-party vendor to perform a penetration test on LeaveXpert 2.0. The application was found to meet or exceed all industry security standards.



Cloud Foundation

AWS EC2 as a new direction allows Optis to spin up entire environments rapidly at a very reasonable cost. The solution leverages AWS's Elastic Compute Cloud, Virtual Private Cloud, Simple SMTP Services, and EBS/S3 for storage. With the SaaS platform, Optis has experienced far easier maintenance, greater efficiency and reliability, enhanced disaster recovery, and a very flexible and scalable platform where availability can be increased immediately on demand. Optis was able to scale up capacity for a projected surge in usage at the June 2013 SHRM conference and then scale it down afterward.

Name	Instance	AMI ID	Root Device
D-APP01	i-4408cc3a	ami-6cb90605	ebs
D-DB01	i-2ab17f54	ami-6cb90605	ebs
D-DC01	i-6f01c5f8	ami-6cb90605	ebs
D-DW01	i-a6e89ece	ami-b5bcd2dc	ebs
P-APP01	i-1a611f77	ami-0b59a62	ebs
P-APP02	i-20c2904e	ami-0b59a62	ebs
P-D-DC01	i-c3a07ba3	ami-671d5b0e	ebs
P-DB01	i-6f81600d	ami-49147e20	ebs
P-DB02	i-6f1a9900	ami-b5bcd2dc	ebs
P-DC01	i-88632a0d	ami-591c6a30	ebs
P-DW01	i-226a85b8	ami-90c4b8f9	ebs
P-RG01	i-c8521a5	ami-4df59a24	ebs
P-UTIL01	i-4a134626	ami-b5bcd2dc	ebs
T-APP01	i-6a77601d	ami-6a70e303	ebs

Stellar Reporting

With dashboard reports utilizing the Kendo UI as well as normal SQL Server Reporting Services functionality, LeaveXpert offers very in-depth reporting capabilities. Users can now define their own set of reports for their organization. Reporting is dynamic and role-based: The user can only view the level of information for which she/he has permissions. Also, with the technology in place, Optis will soon be able to offer the capability of delivering subscription-based reports to users.

Changes in Federal and State/Local Laws

The solution includes the capability to implement changes to the database very quickly as FMLA and other regulations change. The product owner can do this now, whereas before it required a developer. Because this is an easy process, Optis is working now to implement LeaveXpert with a Canadian client, as configuring the database to include foreign regulations is relatively simple. This shows that a well-thought-out architecture can allow businesses to enter new markets rapidly.

Agile Development

Based on the Microsoft TFS environment, development at Optis today is far more streamlined and centralized, with a new approach to code management. With a shared development environment, test environment and full production capabilities, Optis' technical staff has experienced a substantial uptick in work-management efficiency. With the TFS toolset, Optis has the ability to make incremental updates to LeaveXpert, and do so in a fashion that adds value to all of its customers by quickly responding to market needs. Continuous Integration is implemented when developers check in code, resulting in quality assurance through automated unit testing. Results are then immediately published to the development environment so stakeholders can collaborate to determine whether features meet their needs.

Possibly, the greatest return on investment for Optis is reuse. LeaveXpert is based on the AWS platform and associated technologies, which can serve as the basis for all current and future Optis technology solutions. Authentication and authorization were also set up separately so they could be used in other projects. AIM Consulting ensured these factors were integral parts of the solution, so Optis can keep adding value to the LeaveXpert product and to all its offerings.



Completed On Schedule

All of the work in this project, including the complete transformation of the LeaveXpert ASP application to SaaS, as well as the metamorphosis of Optis IT from Waterfall to Agile development, was completed within the nine-month timeframe. Optis presented the LeaveXpert 2.0 SaaS product to a global audience at the Society of Human Resources Management Annual Conference in June 2013.

Differentiated Product

Today, LeaveXpert 2.0 is the only pure SaaS-based leave management application available to customers, ensuring that Optis will continue to lead the industry. Customer feedback on the product has been extremely positive, as customers enjoy a more streamlined and responsive LeaveXpert with a highly intuitive and user-friendly UI.

Positioned for Future Growth

With a modern and highly flexible technology base, Optis looks to the future with competitive offerings both inside and outside of the leave management space. This initial SaaS solution represents far more than just an upgrade of the flagship product as Optis already has plans to convert all of its data management services to SaaS over time, including its data warehouse and business intelligence products.

“We went into this as a product development project,” said Rene Gates, VP of Client Services at Optis, “and came out with not only a product but also a complete new way of operating the technical portion of our business. It’s a huge change, but it’s a leap forward that we definitely needed to make. The Optis team is really excited about it.”

Optis can now pursue a much larger customer base in the SMB market. Attracting customers is made easier with the additional capability of LeaveXpert’s trial version — customers can sign up at www.optis.com and use the full version of the product free for 30 days. No Optis competitor offers this capability. The

ability of new customers to sign up and begin to use LeaveXpert functionality immediately is a huge win over the minimum four weeks required to configure new customers in the past.

Long-Term Partnership

Finally, Optis’ issue of vendor trust was solved with AIM Consulting’s hands-on approach to partnership. Gates said: “It was a bit of a leap of faith that AIM would bring in people who would be able to do the knowledge transfer so that, at the end of this, we could be just as adept at the technology as the people they brought in. It definitely was a partnership and continues to be.”

“People with a mix of outstanding technical skills, business acumen, and the ability to communicate effectively can be hard to find – AIM Consulting has a way of finding them. The resources they brought to our project were great at not only working with our technical team and making sure they were up to speed on what was happening, but were also excellent at ensuring the technology decisions were going to align with our business needs and strategy.”

Rene Gates
VP of Client Services
Optis



The AIM Difference

AIM Consulting strives to provide a hands-on approach with every client and every technology solution. This approach vastly differs from every other vendor Optis has had in the past. Being highly skilled in SaaS-based enterprise applications with deep industry knowledge and experience, AIM offered strategic options to Optis without pressure. With hands-on collaboration, AIM Consulting not only helped Optis build a new solution, but ensured that a new platform is in place at Optis for years to come.

“We helped them not only to deliver a product, but also to help mature their organization and processes to the next level,” said Kevin Rooney, AIM Solution Director and project leader. “That’s as much of what I’m proud of as the actual application.”

And the partnership will continue. “We kept a retainer in place,” Gates said, “but beyond the retainer AIM still checks in with us and makes sure everything is going well. I feel very confident that if something came up that we needed them for, they’d be right there, which isn’t what we’ve experienced with some of our vendor relationships in the past. They’re tremendously easy to work with and they’re excellent partners.”

About AIM Consulting

AIM Consulting is a rapidly growing, nationally recognized leader in technology solutions and services. We have the people, processes, and tools to provide companies with strategic guidance on business-critical initiatives and deliver end-to-end solutions. We meet the highest standard of excellence in technology, for better value than other consulting companies, because we are 100% focused on forging long-term relationships with deeply experienced consultants and building high-performance, service-oriented teams that produce results.

Ready for a solution?

We’re experts at what we do and work together to bring success to your organization.

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