Loyola University seeks more efficient enterprise content management system

LOYOLA UNIVERSITY CHICAGO

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Loyola University Chicago is one the premier institutions of higher education in a region rich with academic institutions. The school, founded by Catholic Jesuits in the late 1800s, has consistently ranked among the top national universities in the annual U.S. News and World Report ranking of U.S. colleges, and in the 2010 survey was ranked as a "best value" for students. The school has a total enrollment of nearly 16,000 students spread out over four campuses—four in and around Chicago, plus a campus in Rome.

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Business Needs

Managing the paperwork for a large and highly dispersed student body is a challenge for any school. For years, Loyola had used a hosted solution to handle documents ranging from high school transcripts for incoming freshman to human resources paperwork for school employees. The school was very satisfied with the Fujitsu scanning hardware used in the system, but the backend software component was limited in its ability to provide quick, broad access to documents scattered across many departments.

> "There was a growing desire across the university to take another look at possible technology solutions that could deliver an enterprise-wide approach to our content and document management needs," says Jim Sibenaller, IT Director at Loyola. "Following input from a variety of departments, a needs analysis revealed that people across the university wanted a more collaborative approach to document management."

The school identified a number of different reasons to update and enhance its document management system. These included making core processes faster and more efficient; streamlining how paperwork is stored and managed; improving information sharing and collaboration; enhancing security to protect confidential information contained in documents; and bringing the school closer to its "green" initiatives by reducing the use of paper.

Solution

Loyola conducted an extensive evaluation of potential enterprise content management solutions. It began with 17 different vendors and culled those down to four finalists, including the company that provided the school's legacy hosted system. In the end, Loyola chose DocFinity, a document management solution from Optical Image Technology. The school would run the solution on Fujitsu scanners.

"We felt strongly about our commitment to the Fujitsu scanning equipment," says Sibenaller. "We have Fujitsu scanners that date back to the year 2000, and they're still running.

We participated in the Fujitsu ScanCare service program, which we feel is critical for equipment that has so many moving parts and is used so heavily. The service technicians really know what they are doing and are easy to deal with. We decided to stay with this line of hardware because of the dependability and value delivered by Fujitsu."

The school is deploying its new document management solution over the course of five years, beginning with the document-intensive processes within the Sullivan Center for Student Services at the university's Lake Shore campus. As of early 2011 Loyola had 17 departments using the system across the university, which relies on nearly two dozen Fujitsu scanners, including workgroup, production, department, and network models.

The scanners include programmable one-touch buttons that automatically help to route documents to the right locations on the network. For example, a school employee can take a student's paper-based registration, scan it, and touch a button labeled "Registration and Records" to have the digitized document sent automatically to the appropriate folder on the DocFinity server.

> "This is an important feature, especially at locations like the Student Service Center, where school employees can be so busy that they don't have time to log into a system and figure out where exactly to send a document," says Sibenaller. "They simply press the button and the document is scanned and routed."

An important phase of the implementation is putting the school's human resources department online, a project scheduled for 2011. Sibenaller says the project team will quickly follow by deploying the solution to other departments that are actively requesting use of the system. "We haven't really done any marketing of this solution across the university. But the system's reputation has spread quickly, and we're getting enormous demand to bring other departments online," says Sibenaller, who laughs as he adds: "It's a good problem to have."

Benefits

Although Loyola does not expect full deployment of the solution until 2014, it is already experiencing significant cost, process, security, and environmental benefits. For example:

- *In the school's Enrollment Operations, the time needed to exchange electronic images of transcripts between departments at different campuses has been reduced from an average of 10 minutes per document to 1 minute, an improvement of 90 percent.*

- *Employees working in the Financial Aid department can, on average, access document images in about 10 seconds, a 90 percent improvement from the previous 2-minute-long process.*

- *The overall time needed to scan enrollment documents for graduate and professional students has been cut by about 70 percent, taking less than 6 minutes instead of the 20 minutes or longer it took in the past.*

- *In the Registration and Records Department, the elimination of most paper documentation and the DocFinity workflow has reduced the time it takes to process a student service request to about 2 hours, down from 15 hours in the past, an 86 percent improvement.*

- *Single click document access and integration with Loyola's student information system makes scanned documents available in seconds rather than minutes.*

"We are seeing benefits across the board," says Sibenaller. "Along with very clear, tangible benefits in workflow processes, we are also reducing the amount of paper we consume, which helps support Loyola's green initiatives and is freeing up space that used to be taken up by filing cabinets. We've also improved the security of documents. Instead of all those paper documents floating around, we can now more carefully manage and monitor who is viewing and printing documents."