Laserfiche®

Case Study:
Building Top Of The Class Agility
For Higher Education

Oklahoma Christian University's modest size offers big innovation: the private liberal arts college with 2,200 students and more than 60 degree programs is a visionary leader in advanced teaching and learning methods. Each incoming student receives a laptop and an iPhone for integrated activities in classroom instruction, and Oklahoma Christian (OC) consistently ranks as one of the top colleges in the West.

This prestige has driven a greater enrollment rate at OC in recent years. However, the influx of students strained the school's technology infrastructure as many departments struggled to maintain back-end processes related to student services, such as billing, financial aid award processing and records retention.

"The irony is that we've been a pioneer in educational technology, but our business operations were behind the curve," says John Hermes, OC's Vice President for Information Technology. "We are a very digital campus, yet very analog in our administrative processes."

Historically, Hermes' IT department controlled new technology projects to address campus infrastructure needs. Although Hermes had explored enterprise content management (ECM) systems in the past, investing in a new technology system was a hard sell to an administration looking to consolidate IT costs.

"I watched the paper records and operational inefficiencies conflate on campus, but we had no way to manage these problems without ECM," notes Hermes.

ORGANIZATION PROFILE:

Located in northeast Oklahoma City, Oklahoma Christian is a comprehensive Christian university serving almost 2,500 students.

CHALLENGE:

An influx of students strained the school's IT infrastructure. Many departments like the financial aid office struggled to maintain back-end processes.

SOLUTION:

The university used Laserfiche enterprise content management (ECM) software to digitize and automate the financial aid process.

RESULTS:

- The financial aid office is more responsive to students, providing financial aid awards more quickly and reducing the workload of financial counselors.

- Students gain real-time access to documents and instant online feedback about their application status.

- The IT department can manage the servers without becoming involved in departmental processes.

- Integration with Colleague® by Ellucian simplifies information access for financial aid counselors.

- Projected ROI was $23,000 over four years; actual ROI was $31,000 in less than two years.

Scripting an ECM Syllabus

When the university's president visited the offices of BMI Systems, OC's copier dealer, the company's impressive paperless environment convinced him that ECM could optimize OC's resources, too. With the president's support, Hermes began developing criteria for a solution that could provide:

- A quick, easy learning curve for administrators and students.

- Integrations with existing line-of-business applications.

- Methods for reducing paper records and incoming mail.

- The flexibility to manage data for many departments while still maintaining secure records.

Although the university considered other ECM solutions, it was Laserfiche's scalable architecture and integrations with existing applications, like the school's ERP software, that assured administrators the system could easily cut costs and build a platform for shared services on campus.

More importantly, Laserfiche's flexibility provided OC the opportunity to apply its innovative spirit to business process improvements.

To implement ECM, Hermes led a new model of shared IT governance, a strategy that positions the IT department as a project consultant and gives individual departments autonomy over how they access documents with ECM technology.

Although OC envisioned bringing the whole campus onto Laserfiche, Hermes first needed to prove that ECM and the shared governance model produced real results. His approach centered on three strategies:

1. Choosing a department for initial implementation that could quickly demonstrate the value of ECM.

2. Creating a cost analysis of current business processes.

3. Leveraging a knowledgeable vendor for a quick implementation.

Accelerating Financial Aid

To achieve these objectives, Hermes collaborated with Clint LaRue, OC's Director of Student Financial Services, to develop an initial Laserfiche project for Student Financial Services in 2010.

"Customer service issues were very apparent when we evaluated the existing system," says Hermes.

"Starting small with an office we knew was struggling helped us show a quick return on investment to other departments and gain support throughout the university."

Hermes and LaRue calculated current expenditures, like file storage size, mailing, personnel and time costs, and conservatively projected a savings of $23,000 over the next four years with Laserfiche.

Although Hermes drove the overall IT vision, LaRue leveraged the expertise of Laserfiche reseller +ImageNet Consulting to begin achieving those savings. Together, they positioned Laserfiche as integrative middleware that streamlines the financial aid award process for both students and administrators.
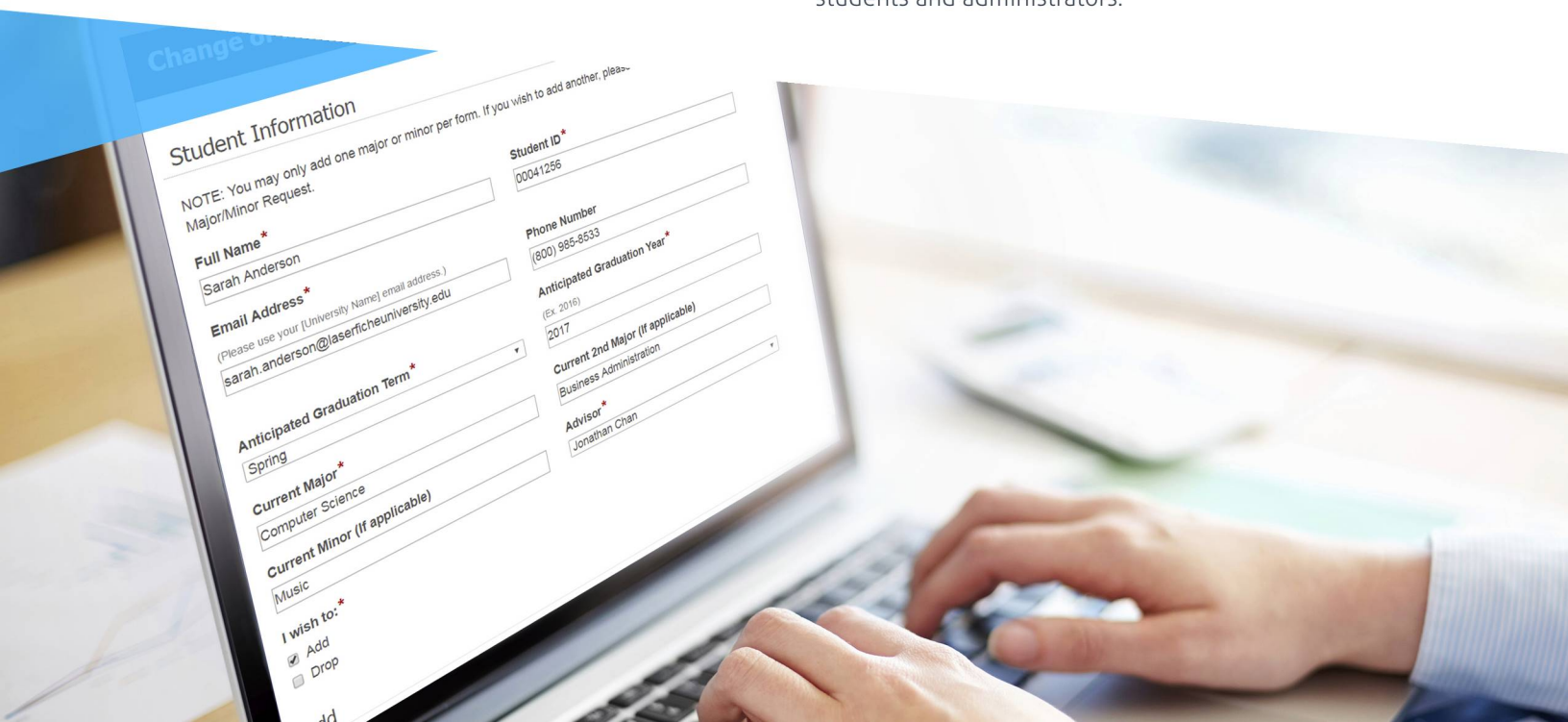
Streamlined Financial Aid Process

Before, submission forms entered the office via paper mail from students all around the world. Now, an integration between Laserfiche, LincDoc (the department's eForms tool), Microsoft SharePoint and Colleague® by Ellucian, enables students to submit this information electronically:

- Staff generates and uploads a number of forms to the campus' myOC portal, an online website based on Microsoft SharePoint.

- Students log onto their myOC accounts. By clicking on the "Missing Documents" section of the site, students may view and complete the financial aid documents they still need to submit.

- Once the student and/or parent signs and submits the form, Laserfiche Workflow automatically classifies the document and routes it to a financial aid counselor based on fields on the form.

Once documents have been submitted online, the integration also allows the counselors to access both submitted documents and old student records by sourcing information from other systems within a familiar Colleague® by Ellucian environment:

- A Laserfiche Quick Fields session runs multiple times a day and processes incoming documents by looking up the student ID number on the document along with the name of a financial aid counselor, who is automatically assigned student files based on students' last names.

- Laserfiche Workflow then routes the document to the financial aid counselor responsible for this student.
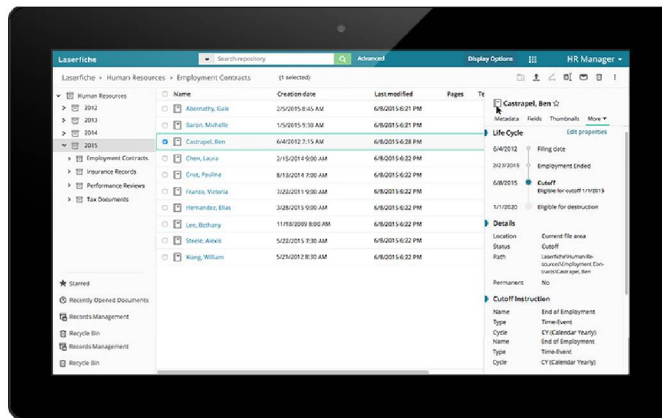
Secure and centralized document repository for easy information access on the go.

- The counselor can then open Colleague® by Ellucian and click on a binoculars icon that pulls up any documents associated with that student from Laserfiche, such as transcripts, character recommendations and financial aid paperwork.

- The financial aid counselor then opens the submitted form in Laserfiche and reviews it to make sure everything has been filled out correctly. A Laserfiche Quick Fields session allows staff to populate additional template fields and approve the document within Colleague® by Ellucian.

- With the click of a button in Colleague® by Ellucian, the record is archived in Laserfiche and automatically updated on the student's my OC portal.

- Giving students real-time access to documents and quick online feedback about their application status is "invaluable," according to LaRue. "We've eliminated the perception of lost documents, and can retrieve them much easier," he says.

> " If I needed to send out a big batch of award letters before, they were printed, copied, mailed and filed. When I understood that Laserfiche could **send those letters to the students' electronic files with the click of a button**, that was a big 'aha' moment for me. "
>
> **Clint LaRue**
> Director of Student Financial Services, Oklahoma Christian University

Benefits

With Laserfiche, the office is more responsive to students, providing financial aid awards more quickly and reducing the workload of financial counselors, who quickly learned how to use the Laserfiche features.

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From an IT perspective, having an entire office up and running proficiently on Laserfiche in just two days without a single support call was "an ideal implementation," according to Hermes. The IT department can manage the servers without becoming involved in mission-critical processes, allowing the Financial Aid Office to retain secure control over its own data and preserve records according to Department of Education guidelines.

How did the project stack up upon final examination? The quick implementation aced the projected ROI—instead of saving $23,000 over four years, the financial aid department saved $31,000 in hard costs in less than two years.

Applying Shared Services Campus-Wide

Exceeding the initial ROI and gaining LaRue's support convinced other departments to adopt ECM. Says Hermes: "By having a Laserfiche champion outside the IT department, we demonstrated Laserfiche is a great cost-saving measure for other units, too."

LaRue echoed that perspective. "Others will get on board if the leadership is confident in the right product," he says. "Go for it and don't hold onto paper when there are clearly better processes."

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>
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> Vice President for Information Technology, Oklahoma Christian University

Their enthusiasm was contagious, and additional administrators began their own ECM projects after hearing about Laserfiche's ease of use and flexibility. Hermes will soon roll out ECM to departments including Accounts Payable, Admissions, the Registrar's Office and the Office of Student Life.

To enable the successful implementation of ECM across campus, OC has established an IT governance committee. Comprised of multiple administrators from different departments, the group convenes quarterly to discuss file structures, compliance concerns and integration details across the university. Now, IT no longer manages competing demands; rather, the committee addresses campus-wide initiatives and prioritizes projects in a democratic, diverse forum as enrollment grows.

This interdependent IT governance model provides a well-defined path for the university's goal of bringing every department onto ECM. By using Laserfiche as a foundation for shared services, OC can optimize resources, cut costs and ultimately create a better student experience.

Hermes emphasizes, "We can show others that Laserfiche is something you really need in your office. This will help you in your daily process. This will improve employee morale. Laserfiche will help you in everything you are trying to do for students."

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