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Case Study: A Workflow to Learn By: Loyola University harnesses the power of ECM



Enterprise content management (ECM) solutions provide organizations with an effective way to manage information—which is often sensitive, proprietary, and redundant. The amount of data sent and received from any organization is intimidating; ECM solutions are available to aid this process, allowing adopters to leverage the technology in favor of the organization's customers.

Loyola University Chicago successfully emerged from a barrage of paper and content and is now utilizing the power of controlled content. Chicago, IL-based Loyola, a private university founded in 1870 as St. Ignatius College, is the largest Jesuit, Catholic University in the U.S., with an enrollment of more than 15,000 students.

Background

Process efficiency, and ultimately better student service, are important to the university, and were the primary reasons Loyola turned to ECM. "One of the biggest challenges we faced was multiple, siloed solutions across the campus that did not interface with enterprise systems and thus, limited capability and convenience for users—not an uncommon scenario in higher education," says Jim Sibenaller, director, enterprise architecture & PMO, Information Technology Services, Loyola University Chicago. "One advantage at Loyola is that we've spent considerable time and effort centralizing enterprise technology solutions and we knew it was time to integrate a single ECM solution into our architecture. The siloed systems didn't talk to each other very well. The languages and technology were different. There was a huge need for further integration of structured and unstructured student data," he adds.

"In the end there were some services that we could just turn around faster if we took advantage of more automated workflow processing. People get confused when you talk about ECM or imaging systems. They often think of imaging as just scanning and retrieval, but it is so much more. Loyola recognized the value of

integrating data and efficiency gains from improved workflow and wanted to take advantage of it," explains Sibenaller.

Finding a Fit

A formal Request for Proposal (RFP) process that started with a needs analysis helped Loyola settle on the right ECM vendor. "Attempts to justify an enterprise ECM solution had stalled at Loyola three times prior in five years for various reasons. The timing was right to revisit this space and we wanted to be sure our recommendation was rock-solid," states Sibenaller.

He adds, "This is no small investment for the university. The whole needs analysis/RFP process took a full year from start to contract signing." The RFP—with over 200 requirements—was sent to 17 different vendors. Loyola sought the aid of Gartner, Inc., a technology and research advisory company and IMERGE Consulting, an unbiased ECM and business process consulting company, to attain a list of vendors.

Loyola chose DocFinity, an integrated, Web-based suite of ECM software that manages information throughout the document lifecycle, with products to capture, index, archive, retrieve, and manage information.

Student records and financial documents contain social security numbers and other private information that Loyola must keep secure. "The DocFinity security modules are pretty tight, with role-based permissions, group-based permissions, and redaction down to the document level and folder level. It is also very flexible. We can control who can see what. It was one of the functional areas that DocFinity did very well on when we scored their response to our RFP," notes Sibenaller.

A combination of functionality and value made DocFinity the right fit. "We are also impressed with their services area—not only their knowledge, but also their people skills. At this time our organizations are openly collaborating and working well together with several implementations underway," says Sibenaller.



A contract was signed in July 2008. Enrollment Operations and Financial Assistance were the first areas to go live, in February 2009.

A portion of Advancement followed in the summer making the total number of registered users 62, and Sibenaller estimates that the user count is now nearing 200.

Loyola laid out training plans with the software for year one in the contract. "We start with introductory training and then we split off into a couple of technical tracks so that more technical staff can understand some of the overarching issue like integration and security. On the user side, there's DocFinity 101 training. On top of that we conduct hands-on training for items like scanners," Sibenaller explains.

ECM Benefits

Speed increases and efficiency are the biggest benefits Loyola sees with ECM. "Pre-ECM we experienced quite a delay regarding how long it took from the time student documents were received at the university to the time they could be used. It was days. It's now hours,"

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- Jim Sibenaller
Loyola University Chicago

says Sibenaller. "We have certain processes that have improved by 50 and 75 percent. And we conservatively planned our process improvement metrics/savings for two percent."

Offering great service to students across institutional functions is key to Loyola's goals. "Documents are just available much sooner, and this directly influences the student experience in positive ways," says Sibenaller. "That's what it's all about."

Before implementing DocFinity in the Financial Assistance department processing time was slower. "We had another scanning system in place, but there was room for improvement. DocFinity cut our processing time by about 60 percent from when mail arrives at the university to when it is available to us," says Amanda Fijal, associate director, Financial Assistance, Loyola University Chicago.

Fijal says that the annotation and printing functions are much easier to use than the previous scanning system. She also notes that the DocFinity workflows reduced the amount of paper moving around the office, because everything is maintained electronically. "Notifications are emailed to staff when a document arrives, rather than a document being physically routed to them," she adds.

"Loyola's IT department also made some great enhancements that link our student information system with DocFinity. That solution alone has cut down tremendously on lost time. It really makes our processes a lot faster," says Fijal.

"Financial Assistance folks need to have information available as soon as possible so there is no delay in student discussions, especially now, given the economic times. Students and parents want to talk about, 'How am I going to pay for this?' Now our students have that information faster because our Financial Assistance counselors have it sooner," states Sibenaller.

Savings in Enrollment:
2500+ man-hours a year in scanning and indexing.

The DocFinity implementation effort is active in the Accounts Payable, Undergraduate Admissions, and the Graduate and Professional Enrollment Management areas. Loyola is working on applying it to Student Advising as well. "These areas are extremely student-centric. So, we're really focusing on where we can we make the biggest impact on student services. Of course it's more efficient for the administrative staff, but that directly affects how we are able to help our students too," says Sibenaller.

He adds, "Once we get most of the administrative areas up and running, we're going to look at opportunities for faculty to streamline some student interactions. As the students progress in their academic careers, they may change majors, and there are a lot of things that happen there via forms and paperwork. Automating some of the workflow and structure behind required changes when students switch majors is a real improvement opportunity," he adds.

Four departments are active right now with DocFinity implementation efforts. "A three-year plan will roll it out to over 20 departments eventually. It's truly going to be part of our enterprise architecture," notes Sibenaller. "We had strong support to fund this project and this early momentum is energizing the teams."

The appropriate ECM Solution, such as DocFinity for Loyola University, make efficiency and productivity a possibility. Ultimately, client services—whether it is customers, students, insured, or patients—are improved."