

Tulane University

Computerworld Honors Program Laureate Award



INTRODUCTION

Founded in 1834, Tulane is one of the most highly regarded and selective independent universities in the United States. The University's Document Services Center serves more than 11,000 students and 4,000 faculty and staff across two campuses and two research centers. In 2005, about two thirds of its main campus flooded when Hurricane Katrina hit. The University experienced significant infrastructure damage. As one of the largest private employers in Louisiana, Tulane faced a significant task in getting its staff and facilities fully operational and resuming its momentum as an academic leader.

In a business climate where controlling costs while improving your level of service is key to weathering the storm, Tulane's project shows how you can leverage your existing infrastructure to do more and illustrates the role document management plays on the bottom line.

CASE STUDY SNAPSHOT

The Challenge

- After Hurricane Katrina, Tulane faced a significant task in getting its staff and facilities fully operational and resuming its momentum as an academic leader.
- The Document Services Center had to rebuild and do more with less to spur recovery and growth.
- As an example of its document-intensive workload, the Accounts Payable (AP) department processed 200,000 requests annually and spent 80% of time managing information.

The Solution

- Across the university, deploy universal print driver and distributed scanning to include more staff and faculty in digitization.
- Enhance the ECM system, Xerox® DocuShare®, with an electronic forms (eForms) workflow solution.
- Phase the rollout across the Document Services Center, AP and Academic Advising departments.

The Results

- In Document Services, 25 to 30% less time on support calls, and 95% of jobs completed faster.
- In the AP team, initial savings from scanning documents for storage and easy retrieval was an estimated \$80,000; continued savings equals one staff member's time.
- Advisors spend less time managing information, with more time fostering student relationships.
- After the hurricane, digital management of documentation to help Tulane gain insurance and Federal Emergency Management Association (FEMA) relief funding.

THE IMPORTANCE OF TECHNOLOGY

The right technology mix was critical to the success of Tulane's project. The University saw an opportunity to build on its use of DocuShare, Xerox's content management system, to make forms processing an intelligent workflow instead of a bottle neck. By working with Autonomy, Cardiff Liquid Office software with DocuShare, employees can now use Adobe Acrobat electronic forms that intelligently extract information from the form and auto-populate fields like "title" or "deadline to submit" to an appropriate DocuShare folder for approval or archival. That same form could also be more quickly retrieved from DocuShare using content rules that speed processing by pulling the form based on meaningful data points. Three critical forms have been automated.

- **Mail Transmittal** – People fill this out when they are shipping outside the university, e.g. by Fedex, UPS
- **Interoffice Mail** – People fill out to send campus mail
- **Major Declaration** – Students fill out to declare a major

For example, academic advisors can send an electronic form to students to fill out when switching majors. The advisor previously would have to sift through their folder to quickly access the form they need, can now easily sort and pull batch information by student name, major or date.

BENEFITS

- Academic advisors are able to spend less time processing hard copy administrative paperwork and more time focused on providing guidance to students.
- Accounts Payable employees no longer need to physically track down paperwork upon each request and go through the mailing / faxing distribution process—it's all done electronically. Retrieving and distributing information is considerably faster, and overall response times have dramatically improved.



- 1,500 to 2,000 sets (1- 100 pages) of documents are scanned and archived in the enterprise content management system each week.
- In the AP department, 60 percent of the department's forms processing is expected to be automated.
- Both staff in multiple locations and external auditors can now access and store the information they need most within one minute.
- In Academic Advising, more than 600,000 to a million pages will be converted to digital.

Foundations Built on Hurricane Katrina Recovery Efforts – After Hurricane Katrina, Tulane had to reorganize under diminished resources. It was putting an ECM system, DocuShare, in place to manage documentation related to helping the University gain relief funding from the FEMA and insurance carriers that first showed the University the power of converting documents to digital files and automating workflows. The University's recovery experience positioned them to thrive in today's challenging business climate, where controlling costs while improving your level of service is key to weathering the storm.



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