Image One Case Study: July 2014

Document capture is first step toward Business Process Automation

I. Introduction

Over the last ten years, it has become an accepted fact that automated business practices can lead to greater efficiency and savings within a workplace environment. Originally tagged on to the popular concept of a paperless society, the benefits of automation have extended far beyond the need to reduce the amount of paper being used, especially within organizations that have relied heavily upon traditional forms of documentation and storage.

Image One's goal is to provide technology solutions to solve business problems pertaining to information management within government, education and corporate organizations. Our solutions provide efficient ways of capturing, utilizing and retaining business information. We strive to provide value to our customers by helping them increase productivity, improve customer service, maintain compliance and provide a path for green initiatives.

With that in mind, this case study will examine how Image One was able to introduce workflow solutions into the business practices of a leading university in Florida. Originally intended to be a basic document capture and storage solution exercise, it evolved over a period of time into a dedicated automated process that is solving a number of business-related problems that had been identified within various campus departments.

II. The Challenge

Located in Lakeland, Florida, Southeastern University provides further education for around 3,100 students every year, with the focus of learning being predominantly faith-based. Offering a variety of traditional teaching methods and access to online study, campus staff became aware from 2003 onwards that working practices were overly reliant on paper

storage and filing systems, with the digitalization of student and financial aid files deemed to be a priority.

With a number of departments expected to move into new buildings over the next few years, Image One was approached to provide software that could capture and archive files in the Registrar's Office, Financial Aid and Accounting. The situation was further complicated after an internal audit revealed that some departments were storing paper copies of the same files. Because the University was using a labor intensive, manual filing system it was just easier for some departments to keep copies of the same files in order to handle requests.

"We were trying to be more efficient, that is what it boils down to," said Linda Kelso, who has been Registrar at the university for two years. "Our goal - which we haven't reached yet - is to route the information in a workflow process from the time it arrives on campus digitally to all the different departments that need it. We will be able to trigger simple answers, share information between departments - we won't have to wait for a paper file being marched across campus."

III. The Solution

Once the problem had been identified, consultants from Image One were brought on board to scan and convert files into a digital format. Southeastern maintains its own data servers and the EMC ApplicationXtender system was installed to begin the process.

As archiving was deemed a priority by the existing office staff, this document management solution was used to scan the entire backfile system, with the end result being that student files (especially ones that related to financial aid) could be accessed from multiple locations. This was seen by university leaders to be the first step toward a more dedicated automated process, a scenario that Kelso admits took some older members of staff a while to get accustomed to.

"My generation is attached to paper, so it is hard to make that transition," she said. "But our campus is trying to be on the cutting edge of everything, so it is an attitude that everyone has been asked to accept. It is just about being willing to change, that is the name of the game."

IV. The Results

While the success of the backfile conversion was attributed to the installation of EMC's ApplicationXtender Suite, it was felt that the university needed to address the issue of burdensome business practices in other areas.

There had already been some interest on campus in not only the digital transmission of student transcripts, but also in reducing the amount of time and money spent in the hiring of faculty and adjunct staff. This led to a decision by senior members of the faculty to automate the workflow processes associated with these tasks, and after a ten-year relationship, Image One was a popular choice.

"The workflow is important to use as a means of reducing the burden we were having with staff workload," said Andrew Miller, Executive Director of Institutional Effectiveness and Extended Education. "In the past, the process that we were trying to automate was being done by numerous people across the campus. There was a bad business process in play, with too many people touching a step and so we started by making it more clear."

According to Miller, the streamlining of these processes was critical to the future success of the university in sourcing and recruiting the right people at the right time. With mobile technology evolving over the years, it was important to install software that could handle remote applications and deliver contracts that could be signed electronically and returned.

The installation of the EMC ApplicationXtender by Image One staff had already proved a success in terms of digital storage, but it's capabilities for workflow and business process automation ensured that the university was able to send out 250 contracts in one go - with Miller reporting that 50 percent of these documents were returned by email within 7 days.

"We are on the edge of what could be possible here," he notes. "Because of our relationship with Image One, Southeastern is on the leading edge, because we use our software well."

V. Summary

Recent research has shown that the business process automation market could reach as much as $180.26 billion by 2020, a significant figure that many believe could provide the catalyst for an actual - as opposed to theorized - paperless office. However, while this may one day be an achievable goal, understanding how automation can reduce the potential for human error, increase productivity and, ultimately, restructure labor requirements remains rooted firmly in the present day.

However, the BPA experience and expertise that Image One can supply is not a one-way street. Automating working processes is a logical path to take in this digital world, but identifying what needs to change through internal housekeeping must always be the first step.

"Before you start with a technical process, you need to go through your business processes," says Miller. "You understand what you are trying to accomplish, then you look at technology. That's a mistake that will determine the success of any project. Technology itself will not fix a bad process, it just won't."

For the staff members and faculty leadership of Southeastern University, this was the prime reason for working with Image One in 2003 - the desire to fix the process. This relationship has lasted over ten years, while integrating systems and procedures that will make the institution more efficient, save money and, ultimately, ensure that it reaches a digital end goal.

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Sources

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