



Enterprise Content Management (ECM) Project Update

Project Definition

Enterprise Content Management (ECM) is the technology used to capture, manage, store, preserve, and deliver content and documents related to organizational processes. ECM tools and strategies provide a method for the management of an organization's unstructured information, wherever that information exists.

Project Budget

Category	Financial Info
Capital Investment	\$605,000 over 4 years (FY09-FY12)
Maintenance Savings	\$65,000-\$70,000 annually after existing imaging systems are shut down (beginning in FY11)
Return on Investment Plan	3-5 years based on 1%-2% process efficiency gains

Benefits Identified During Needs Analysis

Intra Office	Inter Office	Broader Institutional Impact
Process improvements & efficiencies	Improved information collaboration & sharing	Annual operational savings
Enhanced management of records/paperwork	Common language & transferable skills	Support Green Initiatives
Increased records security & protection		
Reduction in physical storage space requirements		

Current Deployments & Benefits over the Previous Solution or Process

Enterprise

- Users - Over 400 faculty & staff members have access to the DocFinity product.
- Where metrics are calculated, we are averaging about 80% improvement.
- Total annual effort savings of over 5000 hours.
- Reduced annual maintenance costs of \$4200 and one time scanner purchase savings of over \$3000.
- Improved clarity of scanned images.

Financial Aid – Live 02/2009

- Faster/easier access to images, (Integration w/ PeopleSoft) for 92% improvement in document retrieval time; saving 100 hours annually.
- Utilization of the enhanced document security and annotation functionality within the system.
- Financial aid documents available for counselor and student use 3 days earlier.

Enrollment Operations – Live 02/2009

- Improved and enhanced document scanning and indexing process resulting in an annual effort savings of 800 hours.
- Use of business integration has reduced the number of operator keystrokes and use of workflow processing has increased accuracy of data resulting in an annual effort savings of 425 hours.



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- Process re-engineering made possible by improved technology has reduced processing time from date of document receipt to date document available for counselor's review by 3 days.
- Eliminated the occurrences of data transmission errors called internet batch transfer failures due to DocFinity being hosted locally.
- Transcript tracking workflow has reduced the amount of time required to exchange electronic documents the between departments at different campuses.
- Eliminated the need to transport documents between offices at different campuses with remote document capture. Documents now available on an average of 4 work days earlier.
- Automated the manual recording of productivity metrics.

Advancement (PCI Compliance Only) – Live 07/2009

- Personal financial donor data from Chase is being systematically retrieved, redacted and stored for use in conjunction with Payment Card Industry compliance regulations.
- Incoming documentation for processing is available to staff at beginning of day rather than after late morning FedEx delivery, reducing down time of staff. Availability improvement of 3 hours per day.
- Improved tracking and control of documents via online retrieval queries for images affecting 500 file requests and resulting in an annual effort savings of over 40 hours.
- Use of direct integration with the Advance System ensures greater accuracy of data.
- Eliminated the need to prepare file folders, photo-copy remittance advice documents, and prepare inter-office mailings for distribution of priority donation information to select staff resulting in an annual effort savings of 500 hours.
- Reduction of Fed-Ex charges for delivery of hardcopy bank receipts from Chase Bank to Loyola and elimination of cost for CD-ROM back-ups of data for prior bank process; annual savings of \$2500.

Undergraduate Admissions – Live 08/2009

- Utilization of new functionality including enhanced security document for transcripts, improved customized searches, the ability to email images, school "hit list" optimization and image viewing scrolling improvements.
- Financial aid documents available for counselor and student use 3 days earlier.

Graduate and Professional Enrollment Management – Live 10/2009

- Decreased overall document scanning and indexing time by an average of over 55% resulting in an annual processing time savings of over 2000 hours.
- Improved data integrity through index validation and workflow processing.
- Transcript workflow processing has improved document exchange times by 90% reducing the process time down to 1 minute.
- Overall improved communication and customer service within the graduate schools.

Digital Media Services – Live 11/2009

- Reduction in student worker document processing time of equipment check-out contracts will result in annual savings of over 1500 hours.

Active Engagements

Accounts Payable, Advising, Child Law and Registration & Records