



## CLEMSON UNIVERSITY

### Clemson University's Campus-Wide ECM Vision

The goal of Clemson University is to be one of the top 20 public universities in the nation, and it has received numerous accolades for the accomplishments of its staff, students and programs. However, attracting and retaining leading educators and top-ranked students is no easy task when faced with constraints on human and financial resources. To meet the ongoing challenge of providing services to about 17,000 students and more than 4,500 employees, Clemson is streamlining administrative processes and creating a more agile infrastructure. A major factor in this solution is OnBase enterprise content management (ECM) software from Hyland Software, Inc.

Paper-intensive processes posed a number of challenges for Clemson. In addition to process inefficiencies, storage of physical records became burdensome. Relying on hard copies of documents not only increased the amount of time necessary to locate information, it also made it harder to share information between various locations on campus as well as the nine extension offices and research centers scattered across South Carolina.

### Human Resources Tests the OnBase/ PeopleSoft Integration

Clemson's Human Resources (HR) Department was the initial area where document imaging was implemented. In addition to maintaining the records for thousands of active and former employees and about 2,000 student employees, the HR Department is responsible for retirement documents and all other permanent employee records accumulated at the century-old university. Growing stacks of HR files threatened to overrun the entire department, and accessing them was becoming increasingly difficult.

Some documents were being archived on microfilm, but by the mid-90s, this solution was becoming increasingly problematic. A camera purchased in 1975 was becoming increasingly unreliable and hard to maintain. When the film came back from being developed, employees would have to verify that all of the images were clear and re-shoot those that weren't. Regardless of whether the documents were on

microfilm or paper, retrieving them based on requests from employees or administrators took unacceptably long.

When the HR department was moved to a smaller location in the late 1990s, the situation became critical as employees were literally running out of room to work. "After the move, our records room was two-thirds the size I thought it would be, and all we could keep in the room were active files," recalls Lucy Arthur, Director of Database and Records Management in Clemson's HR Department. "We were running out of space really fast and our files were really full. We had no room to put any more file cabinets. We wanted to be able to image all documents into a single personnel file, sort them any way we wanted to, and not have to wade through files anymore."

A committee composed of key employees in HR, Sponsored Program Accounting and Administration, Accounts Payable (AP), and the head business office was formed to evaluate vendors. "We wanted a standalone system that could work with our existing hardware and was within our budget," says Ms. Arthur. Among the requirements were a GUI (graphical user interface) in a Microsoft® Windows environment and a tight integration with Clemson's PeopleSoft HR application. During the vendor evaluation, systems integrator and certified OnBase reseller KeyMark, Inc. was chosen to oversee the project based on its experience and ability to meet those requirements. "Many of the solutions we looked at that did link with PeopleSoft were much more expensive and would have been useless if we had decided not to use PeopleSoft in the future," says Ms. Arthur.

Using the solution KeyMark designed, HR documents are scanned using a Kodak 2500 document scanner and an employee completes indexing information (such as name and Social Security number). The scanned documents are managed by OnBase, which allows HR employees to enter queries about files using the indexed terms and retrieve them in seconds without leaving their desks. The system was initially deployed to manage inactive files and will gradually be expanded to manage active employee files as well.

Electronic reports produced in PeopleSoft, such as one replacing the four-inch thick bi-weekly

(continued)

### AT A GLANCE

Prestigious Clemson University is controlling costs and increasing efficiencies by using OnBase® enterprise content management software. The success of an initial implementation in the Human Resources Department has prompted the university to evaluate how OnBase can be used campus-wide.

### BENEFITS

- Increased productivity to offset financial challenges
- Supports secure shared access of documents to users across campus and at satellite locations
- Saved valuable physical resources by reducing the need to store paper or produce microfilm
- Reduced cycle times for various business processes, such as recruiting
- Improved service to employees and students

### APPLICATIONS

- Human Resources
- Graduate School
- Financial Aid
- Sponsored Program Accounting and Administration

### ONBASE SOFTWARE

- COLD/ERM
- Document Imaging
- Application Enabler
- E-Forms
- Virtual Print Driver
- Workflow

### COMPLEMENTARY PRODUCT INTEGRATIONS

- PeopleSoft® Human Resources and financial applications running in an Oracle® environment
- Eastman Kodak® 2500-series and i260 document scanners
- Kofax Image Products, Inc. Ascent® Capture document capture software
- AnyDoc™ Software OCR for AnyDoc forms processing
- Existing student information system running in a mainframe environment

payroll register, are pulled into OnBase using the COLD/ERM module, thus making the reports accessible and searchable while eliminating the need to distribute them. In addition to scanned documents and reports, in the future correspondence and other documents will be captured and automatically imported into OnBase through use of the Virtual Print Driver module. If, for instance, the HR Department must send a letter to an employee, that letter doesn't have to be printed and scanned to be stored in OnBase. After a letter is written, the employee can choose OnBase as the print option, and a TIFF image of the letter is saved for future reference. Employees can use the Virtual Print Driver to create OnBase documents from any application that supports printing.

As existing files are scanned into the imaging system, office space is being freed up and retrieval of documents has become much quicker. "Once we decided how we wanted to index the files, the set up was easy, and the entire system fit on a single table, which was all the room we had." The basic system required only a scanner and the OnBase software. Employees in the HR department required very little training to use the imaging system, and no full-time staff members are dedicated to running it.

Recently, the HR Department expanded its use of the OnBase solution to include the employment application process. By scanning the application packages (which can include as many as 42 documents each), administrators hope to reduce the time to hire and increase data visibility. By developing lookup tables to line-of-business applications and using data capture tools to automatically capture certain fields, Clemson plans to gradually reduce the amount of data entry necessary.

The system currently supports collaboration by providing remote access for authorized employees via the OnBase Web Server, virtually eliminating the need to circulate paper as part of the hiring process. In the future, Clemson plans to add automated workflow and electronic forms to route employment applications through the approval process.

### **Sponsored Programs, Financial Aid, Graduate School Sign Up for ECM**

What originated as an effective HR solution is quickly becoming an enterprise-wide solution, a strategy that is supported by OnBase's modular architecture. One of the other areas where OnBase has been implemented at Clemson is Sponsored Programs Accounting and Administration (SPAA), the department responsible for administering research grants. Using OnBase, the department has created a

virtual folder for each grant. Because various people in multiple departments and locations need access to pre- and post-award documents and contracts, granting secure access via the Web ensures that all interested parties can access them on a timely basis.

In addition to scanned documents, SPAA imports documents from a custom application that manages transactional data and reports. Using DIP functionality, SPAA imports new grant award documentation into OnBase on an hourly basis. These documents are then made available to researchers.

SPAA has decreased the need for data entry by using OCR for AnyDoc (then OCR for Forms) from AnyDoc Software. This application automatically captures certain fields on a structured form (i.e. one that always looks the same). This data is then used to provide the indexing values for use in OnBase.

As finances become an issue for students and the university, Clemson's Financial Aid Office is also using document management to address space and efficiency issues. The majority of documents currently archived and retrieved are frequently accessed Loan Worksheets, which are now available for information query. The Financial Aid Office is also evaluating how Workflow can be used to automate various processes.

When reorganization at Clemson's Graduate School resulted in the creation of three separate entities, the benefits of maintaining electronic files become very clear. Instead of the complexities and inefficiencies of checking student files in and out, employees in the Graduate School, Records/Registration and Admissions offices can share files and view them concurrently. These groups are also testing the "sticky note" functionality of OnBase to make annotations on various documents and have been pleased so far with how easy it is to make these notes and their usefulness in retrieving documents.

By developing lookup tables from the student information system using Kofax Ascent Capture functionality, the Graduate School has reduced the amount of data entry necessary to complete a student file.

The collaborative benefits of OnBase may eventually be extended to specific academic departments and even faculty members in the future. For instance, the files of a student pursuing a graduate degree in physics could be made available to the College of Engineering and Science as well as his/her advisor.

The initial goal of the OnBase implementation at the Graduate School is to streamline processes and reduce data entry errors. Ultimately, it will interact with the student information system that operates on the university's mainframe, the faculty activity system and a custom Web initiative. Labor associated with certain processes may be reduced through Workflow.

### **More Departments Researching ECM Benefits**

The success of ECM has gained the attention of other organizations at Clemson, and several are actively investigating how they will use OnBase. Project Manager Logan Rice has been assigned to develop and oversee a long-range vision for implementing OnBase throughout the enterprise. Ms. Rice also oversaw the implementation of Clemson's PeopleSoft application and is evaluating the areas in which it makes sense to expand the integration of that product with OnBase.

The university's Redfern Health Center is evaluating the use of OnBase for maintaining student records and automating processes through Workflow. Clemson's Facilities Department is developing a strategy for archiving drawings and other information and making them available on the Web. There has also been a discussion in AP to use OnBase to manage invoices.

According to Ms. Rice, there are two factors that contribute to the successful transition of OnBase from a relatively small departmental solution to one that promises to serve as the foundation for an enterprise-wide information infrastructure. The first is the flexible OnBase architecture that allows users to begin with basic functionality and gradually add modules to support additional processes. This allows purchase of additional capability and/or volume as funds become available. It also minimizes the impact on end users by avoiding abrupt and overwhelming changes in daily routines.

The second factor is the support of an experienced systems integrator. "KeyMark is helping us make OnBase an enterprise solution," comments Ms. Rice. "As we move through the process of redesigning our infrastructure, they have supplied us with the skills, knowledge and tools to support the transition."

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