UNLOCKING THE VALUE OF CONTENT SERVICES:

A strategic guide to campus transformation

Hyland®

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Introduction

In today's fast-paced and competitive environment, higher education institutions are often overwhelmed by the sheer volume of documents, inbound information and unstructured data. Controlling such content chaos while dealing with process bottlenecks and internal roadblocks are major pain points affecting the efficiencies and decision-making processes across the campus.

As information enters and exits higher education institutions at high rates, the only way to eliminate those challenges and gain a competitive advantage is **by transforming the way your institution manages information.**

A holistic solution not only helps institutions manage their content but also improves operational practices that make it easier and faster to find the right information, collaborate with peers, comply with regulations and complete critical work.

One such solution that fits the bill is **content services**. While most institutions are familiar with the term enterprise content management (ECM), not many realize that the content services platform is a more evolved and comprehensive extension of ECM. What's the difference? Well, ECM focuses on how you manage content, whereas content services is a modern approach that emphasizes how you use the content and what you can leverage from it.

Unfortunately, institutions that have invested in ECM or migrated to content services solutions are missing out on its true value. These institutions are only using the platforms as a digital filing cabinet without realizing its full potential and capacity for more.

Research shows that fewer than one in five institutions believe their ECM technology is being used to its full capacity.

– ACCRAO 2016 Research Findings

In this ebook, we will explore the full range of capabilities that content services platforms offer and discover how implementing those solutions on campus can help you leverage the most value from your investment.

Part 1:

BEYOND DIGITIZING DOCUMENTS

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We've definitely seen the most quantitative ROI in this area. Just think of how many pieces of paper were used, how much HR was paying the copy center to print and collate, the amount of time spent distributing, recollecting and filing. We've eliminated all of that.

James Kohan
Senior Project Manager, John Carroll University

Many institutions have yet to use the wide spectrum of content services functionalities available to their advantage. According to an AACRAO report, "Since most institutions do not use all of the advanced functionality offered in most ECMs, much of the available process efficiency improvement is untapped."[1]

IT IS TIME TO TAKE A STEP BACK AND DO A GUT CHECK:

"Are you truly capitalizing your return on investment?"

ARE YOU MAKING USE OF THE FULL SUITE OF CAPABILITIES OF YOUR CONTENT SERVICES SOLUTIONS?

CAPTURE
How quickly and accurately can you process the unstructured data your institution receives?

- Are incoming transcripts processed automatically or manually keyed?
- Do attachments go into a central repository regardless of capture method?
- Can prospects see the status of documents they've submitted?

CONTENT MANAGEMENT
How effectively does your institution manage the influx of documents and applications?

- Are your faculty members able to locate key documents quickly?
- Are documents worked on digitally or manually?
- Do users have access to the most current version of documents?

PROCESS AUTOMATION
How efficiently does your institution optimize processes and ensure accountability?

- Are the application forms paper-based or electronic?
- Do task owners get notifications for reviews and approvals promptly?
- Are tasks and documents routed automatically to where it needs to go?

CASE MANAGEMENT
How successful is your institution in managing cases from start to finish while driving value?

- Do you have a 360-degree view of all related information?
- Are you using systems that require custom coding or a point-and-click configurable platform?
- Do you have access to complete information to make informed decisions on admissions and awards?

COLLABORATION
How securely does the institution manage file-sharing and collaborations across campus?

- Do you have complete control over shared information?
- Do your faculty members collaborate on transcripts and applications over a cloud-based platform or insecure personal drives?
- Are you able to track the content movements within and outside your institution?

CUSTOMER COMMUNICATIONS MANAGEMENT (CCM)
How consistent is the content delivery across communication channels for students?

- Is the information accessed by students accurate and available on all channels?
- Are new documents updated individually into each system or automatically captured?
- Does the staff need to switch between systems to retrieve data instead of a centralized repository?

REPORTING AND ANALYTICS
How visible are the operational processes and academic systems at the institution?

- Do you have a transparent view of approval flow and work status?
- Are you able to analyze problem areas in your processes and identify compliance risk effectively?
- Do the audit trails provide an accurate picture of all content activities?

SEARCH
How efficient is your institution in retrieving key data and preserving confidential information?

- Are you able to eliminate information breach or do you rely on manual intervention?
- Do your information searches produce fast, accurate and relevant results?
- Can your knowledge workers access information instantly when responding to student queries?

RETENTION AND RECORDS MANAGEMENT (RRM)
How reliable or risky is the content lifecycle management at the institution?

- Are documents destructed automatically or is it manually deleted?
- Is student records management automated or manually maintained?
- Do documents get stored with an auditable tracking system?

If you are using your platform solution solely for compiling electronic documents and files, you may not have optimized the way you manage information and you are not getting the full return on your content services investment. There is more to content services than just digitizing documents and file rooms. Here are the common drivers with content services solution:

1. ELIMINATING PAPER AND STORAGE SPACE CONSUMPTION ISSUES

Generally, paper — whether in the form of application forms, bills, receipts, resumes, invoices, work orders and others — is used across campus. Almost all areas of business operations — admissions, financial aid, registrar, human resources, accounts payables and facilities management — are affected by the way paper is handled, not to mention the physical space it consumes.

Research shows that "U.S. businesses spend $350 billion on computer printouts annually. Paper copies cost

between 6 and 12 cents per page (though 130 billion of the 350 billion copies per year are not needed)."
– Orfal, Harkey & Edwards in Essential Client/Server Survival Guide[2]

Content services solutions help reduce paper consumption and regain valuable office space that once housed paper. No matter how much information enters your institution, content services enable you to capture and digitize all types of content with its multi-channel capture capabilities. You can automatically classify, extract and validate critical incoming information, and manage all related documents together in one centralized system.

2. TACKLING TIME THIEVES AND PRODUCTIVITY KILLERS

Slow processing, difficulties retrieving files, incomplete information and duplicated work often takes up most of your staff's time, affecting their productivity levels. These are some of the reasons to implement a content services solution.

According to statistics, "U.S.-based companies spend $25 to $35 billion in processing (filing, storing and retrieving) paper. Management of documents over their life cycle pushes that figure up to $100 billion per year."
– IDC

A solution with content management capabilities can help you organize, manage and optimize critical content regardless of where it originates, providing your staff a complete view of the information they need when they need it. Thus, successfully eliminating those wasteful, time-consuming, low-value tasks, giving your employees back time in their day. With this extra time, they can now focus on higher-value tasks like improving student interactions.
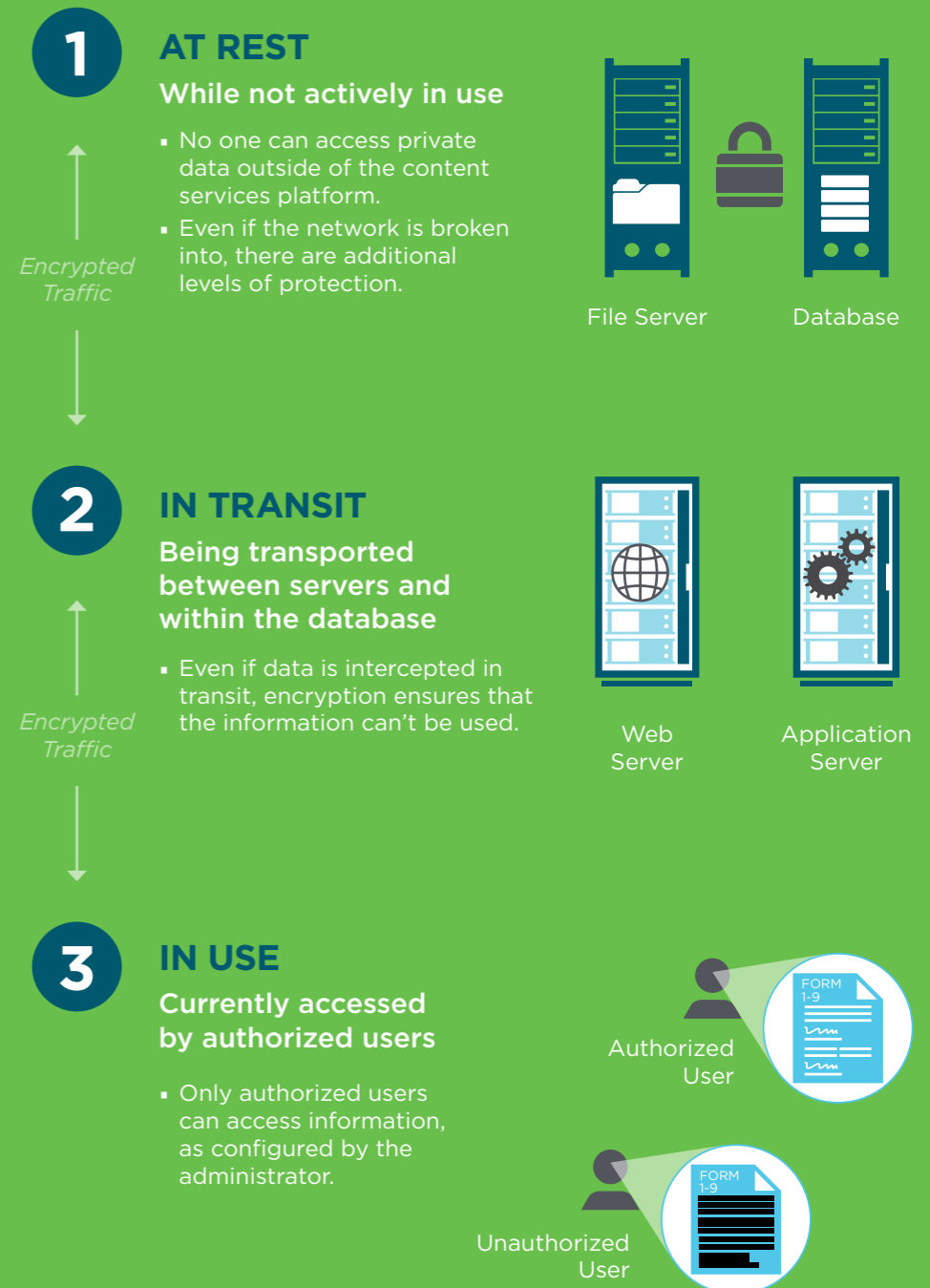
3. IMPROVING DATA ACCURACY AND REDUCING SECURITY RISKS

Departments relying on paper-based processes and manual interventions often face information loss and errors, which leads to financial penalties on incidents of non-compliance. Content services solutions like content management and intelligent capture enable information to be captured in high accuracy, leaving minimal room for errors.

Content services solutions also come with built-in security features like configurable password policies, rights management and security keywords that enable administrators to restrict or authorize access. Plus, there are other security enhancements like encrypted keywords to protect data directly at the database, and digital signatures that alert users to unauthorized document modifications.

CRITICAL INFORMATION SECURE AT EVERY DATA STATE:

Information is natively secured and can be encrypted

1 **AT REST**
While not actively in use
- No one can access private data outside of the content services platform.
- Even if the network is broken into, there are additional levels of protection.

File Server   Database

Encrypted Traffic

2 **IN TRANSIT**
Being transported between servers and within the database
- Even if data is intercepted in transit, encryption ensures that the information can't be used.

Web Server   Application Server

Encrypted Traffic

3 **IN USE**
Currently accessed by authorized users
- Only authorized users can access information, as configured by the administrator.

Authorized User

Unauthorized User

Part 2:

THE TRUE POWER OF CONTENT SERVICES

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In the past, John Carroll has struggled with the support challenges of one-off, dated and difficult-to-use workflows. Through our partnership with Hyland and the strength of the OnBase platform, we have quickly developed multiple, easy-to-use campus-wide solutions without significantly increasing our support efforts.

Mike Bestul
Chief Information Officer, John Carroll University

For institutions to find higher value in their content services solutions, they must rethink their technology approaches. Instead of just focusing on digitizing their filing cabinets, they should focus on data management by leveraging electronic forms (eforms) and workflow automation capabilities for starters. Part of the challenge for most institutions is changing the way departments think about what is possible.

1. MAKE YOUR CONTENT WORK FOR YOU

Most times, institutions are overwhelmed with the deluge of content that comes their way from various sources. There is too much data and information, and finding what you need to be working on can be frustrating.

A content services solution with eforms and workflow capabilities can eliminate wasteful, unproductive steps from your operational and administrative processes. With such capabilities, information can find you, so you do not lose any of the work buried on your desk. In fact, you end up getting higher value tasks done because eforms and workflow can capture and automate tedious tasks that your staff may have to do otherwise.

"Fifty to 100 percent plus productivity increases for implementations focused on process improvements. Staff savings are primarily professional. Whereas, 30 percent productivity increase common for simple workflow-enabled document management. Staff savings are primarily clerical."

– Workflow Management Coalition

2. FEATURES AND FUNCTIONALITIES

The eforms and workflow capabilities comprise various features and functionalities designed to maximize the capacity of existing processes and systems.

The eforms component offers a lot of different options. From initially capturing a student when they sign in to the portal, to attaching read-only documents, all the way to capturing their signature. It is all done with point-click configurable tools. There is no scripting or coding knowledge necessary.

Your institution can gain from the many aspects of digitalized processes, from dynamically asking questions to updating information behind the scenes, all of which are configured without coding.

From the workflow perspective, there are various capabilities available. Workflow allows you to see all the tasks at the top for your attention with options to approve, return or reroute it to where it needs to go. You can work on documents using familiar interfaces, such as your phone, tablet, desktop, PC or Mac, which you can gain access to from your email.
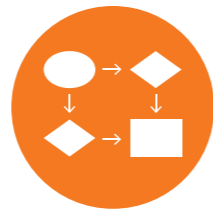
The highlight of workflow is the ability to see the overall process from the dashboard. The interactive dashboard allows you to:

| Add and drop forms to process | See trends, like why students drop out of class | Drill down to who owns a document and how long it takes for them to process it | Individual turnaround time and average days in queues |

Workflows enable you to automatically route documents in a sequential or parallel fashion to wherever they need to go. The system also captures signatures on the approval path, where everything will be tracked in the audit trail related to the workflow, making that information work for you.

The overall features and functions for eforms and workflows:

EFORMS
- **Field validation**
- **Form validation**
- **Dynamic questions**
- **Attachments**
- **Portal integration**
- **Esignatures**
- **Submission confirmation**
- **Checklist update**
- **No manual data entry**
- **Secure transmission and storage**
- **Configuration without coding**

WORKFLOWS
- **Sequential or parallel**
- **Automated routing**
- **E-signatures**
- **Audit trail**
- **Exception management**
- **Notifications**
- **Proactive workload management**
- **Configuration without coding**

3. ELIMINATE PAIN POINTS AND ENHANCE DELIVERABLES

Eforms and workflows are your one-stop access to data management. They are designed to allow you to leverage the most from your information.

For example, when a student submits a form, they expect instantaneous information. The faster you can get approval to them, the better their experience is going to be.

Ultimately, the happier the student, the higher the retention and graduation rates.

HERE ARE **SIX THINGS YOU CAN DRIVE DOWN OR REDUCE** WITH EFORMS AND WORKFLOWS:

1. Data entry time
2. Duplication
3. Processing time
4. Delays in sharing information
5. Response time for status inquiries
6. Lost or unmatched information

HERE ARE **FIVE THINGS YOU CAN DRIVE UP OR IMPROVE** WITH EFORMS AND WORKFLOWS:

1. Data quality
2. Collaboration
3. Speed of decision making
4. Identifying exceptions and bottlenecks
5. Analytical reporting

A content services platform gives you all the information right at your fingertips and enables you to quickly make decisions. Not only does this drive additional time for high-value work, but you will also not be inundated with menial work anymore.

Part 3:

DIGITAL CONNECTIVITY ACROSS CAMPUS

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We also find a return on investment in ways that we can't put a dollar amount on — improved customer service, better image on campus and happier staff.

Mike Seeley
Associate Director of Undergraduate Admissions, University of Notre Dame

FOR EXAMPLE

The University of North Texas System evolved from a "digital filing cabinet" for three departments to leveraging their content services solution in **over 40 departments across five campuses** in the course of 10 years to:

Higher education institutions need digital campuses that reflect the way users create and interact with information. Instead of managing dozens of niche solutions that only help a few departments, leverage a single, secure platform that connects departments across campus. With a robust digital ecosystem, you will be able to enhance campus experience for not only your students, but also your faculty and staff.

INCREASE EFFICIENCY

1. Fixing more than one department
Higher education institutions often stop capitalizing on their content services investments after fixing the problem in one or two departments. What they do not realize is that they have only just begun to tap into the full potential of their content services solutions.

CREATE BETTER INTERACTIONS THROUGHOUT THE STUDENT LIFE CYCLE

ALLOW STAFF AND FACULTY TO FOCUS ON HIGHER-VALUE TASKS

Instead of managing dozens of niche solutions that can only help a few departments or processes, the institution now has a single, secure platform used for digital transformation across campus.

2. USE CASES ACROSS DEPARTMENTS ON CAMPUS

ADMISSIONS

- Capture and store all data and content associated with a prospect's application.
- Create a digital review/selection process and digitally manage documents across student offices as needed.
- Speed up the decision-making process for admissions review.
- Increase accountability through an auditable access history.

REGISTRAR'S OFFICE

- Manage a comprehensive digital student record with supporting content from all the offices that service the student to improve advising and speed up transcript processing.
- Automate transcript data capture and review to eliminate manual data entry with Brainware for Transcript (BFT) and Transfer Course Evaluation (TCE).
- Search for course equivalencies accepted by the institution automatically and push any matches to the student information system (SIS).

FINANCIAL AID

- Create electronic forms and workflows to simplify and automate any process that currently involves paper forms and approvals — including satisfactory academic progress, professional judgment appeals, permanent withdrawal, leave of absence and more.
- Automate collection and review of data and content to support faster award decisions.
- Speed up verification processing and simplify the annual audit.

STUDENT AFFAIRS

- Route student files and notifications to the appropriate advisor(s).
- Gain a holistic view of students' progression, easily identify at-risk students and document steps needed to help them succeed.
- Records management and tight security ensure that documents are only accessible to those who need them and are retained in accordance with compliance standards.

HUMAN RESOURCES

- Effectively and securely manage a comprehensive digital employee file.
- Automate policies and procedures, and accelerate critical business processes, like onboarding and offboarding, by integrating with your HCM system.

BUSINESS OFFICE

- For AP and purchasing processes, automate approvals and notifications, from invoice processing to reconciliation, and from requisition to purchase order.
- Reduce administrative overhead and bill-to-payment turnaround time.

SENIOR ADMINISTRATION

- Eliminate paper-intensive submissions, reviews and approval processes on curriculum changes, new or eliminated programs, faculty tenure and promotion materials.
- Automate rules-based approval, routing and escalation tasks to quickly create and securely manage contracts.

3. REIMAGINE WAYS TO DELIVER BETTER SERVICE

In the digital age, conventional methods no longer meet the demands of an increasingly tech-savvy community. You need to reimagine ways to deliver better service across campus by utilizing the available digital tools.

A robust content services solution enables institutions like yours to enhance interactions with students as well as faculty and staff in several areas. Here is a snapshot of what your institution could be doing for your students, faculty and staff:

What you could be doing for your...

STUDENTS

1. Provide a simple, secure way to submit information to prevent errors and delays
2. Eliminate process bottlenecks that cause frustration
3. Share status updates to avoid stress and confusion
4. Collaborate across campus to provide better student service
5. Provide frictionless student experience

FACULTY AND STAFF

1. Eliminate internal roadblocks
2. Create analytical reporting for enrolment insights and workload balance
3. Develop proactive policy improvements
4. Focus on training and development
5. Provide better work-life balance

CONCLUSION

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With the unlimited number of solutions we can build on campus [with Hyland], there is so much opportunity to positively impact people's work, make people's lives better and help them gain efficiency.

Brad Skiles
OnBase System Administrator, University of Texas, Dallas

Your digital campus transformation does not have to happen immediately. It can take place at a measured pace that meets your budget and resource constraints. It does, however, require you to act on decisions that keep you from moving forward into becoming a truly digital campus.

Technology like content services solutions can be as simple or as complicated as you make it. With the right software, it is about how you can make your content solutions work for you, helping you grow and make informed decisions on crucial matters.

Hyland's enterprise information platforms — **OnBase and Perceptive Content** — provide the robust solutions your institution needs to capitalize on your content services investment. By using a single, secure platform, you can efficiently manage all your data, automate your processes, and, ultimately, expand your content services solutions across the enterprise.

10 WAYS TO IMPROVE YOUR PROCESSES WITH CONTENT SERVICES

With outdated processes and challenges: **With OnBase/Perceptive Content in place:**

1 Items are manually routed for review and approval ⟶ Use eforms and workflows

2 Data is manually keyed in into multiple systems ⟶ Use capture, workflows and integration

3 Departments tend to compile and keep their own copies of documents ⟶ Use workflows, records management

4 Delay in responding to students' call for status updates ⟶ Use automated workflow and notifications

5 Users switching between applications to complete a task ⟶ Use integration and workflows

6 Users can only do work at the office ⟶ Use cloud or mobile access

7 Information is kept just in case it is needed ⟶ Use document retention and records management

8 Managers have limited view into work processes ⟶ Use automated workflows and reporting dashboards for analysis

9 Focus more on administrative tasks rather than strategic tasks ⟶ Use automation and workflows

10 No time for change or development because everyone is at capacity ⟶ Use Hyland Global Services and training to get help on how to fully leverage content services

Whether you are just beginning your content management journey or have already established control of your information, you can leverage Hyland content services solutions to maximize the return on your tech investment.

Hyland®

Learn more at **Hyland.com/HigherEducation**

SOURCES
1. The AACRAO: The impact of ECM system ownership on student records management, 2015-2016. Aacrao.org
2. Shocking document imaging statistics. Naviant.com