

# MIDWESTERN UNIVERSITY CREATES BLUEPRINT FOR ENTERPRISE SUCCESS

John Carroll University finds an enterprise solution using the Hyland Cloud

JOHN CARROLL UNIVERSITY

Hyland®



# John Carroll UNIVERSITY

**Founded in 1886, John Carroll University (JCU)**, located in University Heights, Ohio, is a four-year Jesuit Catholic university. JCU offers programs of study in the areas of liberal arts, sciences and business at the undergraduate level, as well as master's level programs in selected areas. The university enrolls approximately 3,000 undergraduate students and 700 graduate students and has a 14:1 student-to-faculty ratio. The school is dedicated to developing students with both the knowledge and character to lead and serve.

**FUN FACT** 500 companies in Northeast Ohio are owned or operated by John Carroll alumni

# Why they chose OnBase

At John Carroll University (JCU), the academic petition is the single means by which students request and seek review of academic overrides and permissions — putting it at the heart of maintaining and managing student records.

Prior to implementing the OnBase enterprise information platform, the Registrar's Office at JCU relied on manual, low-visibility tasks in its academic petition process. The dated solution provided students with a form containing only a single text box and instructions. Staff had to decipher vague or unclear student requests and determine who to forward them on to. What's worse, the old custom-code solution suffered from poor visibility and reporting. Unless they knew exactly what request they were looking for, gathering information was very difficult. Instead of creating another solution to resolve its petitions dilemma and add another niche application to manage and support, JCU found OnBase by Hyland.

*The opportunity to invest in a single platform that could grow over time to solve challenges campus-wide, rather than continue to add multiple solutions to a disparate suite of technologies to manage, was a huge differentiator.*

Finding a secure, hosted deployment was an added bonus. Implementing solutions in the cloud means that faculty and staff reap the benefits of the process improvements without extensive training, and the university can invest more in professional development rather than installing software on each user's computer.

*"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  
JCU

# A foundation for the future

*The technology has enabled JCU faculty and staff to spend less time on administrative tasks and more time focusing on initiatives to improve the student experience.*

After seeing the flexibility and potential of OnBase in the Registrar's Office, JCU began efforts to deploy the solution across the institution. In just 10 short months, JCU's lean team of 1.5 OnBase administrators was able to release eight major solutions across the campus:

*(click on the solution name to learn more)*

- Undergraduate Academic Petitions
- Arts & Sciences Graduate Student Petitions
- Boler Graduate Student Petitions
- Transfer Course Review
- New Hire Evaluations
- Annual Employee Performance
- IT Change Management
- Core Curriculum Review

Not only has OnBase helped to solve process challenges across the campus, the technology has enabled JCU faculty and staff to spend less time on administrative tasks and more time focusing on initiatives to improve the student experience. By freeing up time and resources, the university is able to concentrate on recruiting, enrolling, retaining and graduating its student body — a main priority for the board over the past few years. The solutions are also strategic uses of technology to ensure excellence in all academic and administrative processes that align with institutional goals supported by advancing a culture of data-informed decision-making.

## The initial implementation

On January 4, 2016, JCU went live with its first OnBase solution, **Undergraduate Academic Petitions**. Now, students fill out more detailed petitions with drop-down options that identify specific requests — such as overriding a course prerequisite, repeating a course or registering for more than 18 credit hours. Once a student submits a petition, the review process begins. Whether it requires two stops or nine, OnBase knows exactly where to route it and automatically sends it on. What's more, utilizing auto-fill keyword sets and an integration with Banner® by Ellucian, the most up-to-date student data is automatically populated when a new petition form is created.

With OnBase, JCU takes advantage of easy-to-configure forms and an automated workflow that cuts manual steps and adds clarity to the process. The solution is flexible, so JCU staff are able to quickly adjust the routing process even after it kicks off. If a request affects more than one department or requires a second opinion, staff simply add another step so that the request routes to all necessary parties. The best part is, this can be done in seconds or minutes by JCU business users, with no need to involve the IT department or a third-party company to write code.

“With OnBase there is no coding or scripting needed for design. It's all point and click with one-click publishing,” said James Kohan, senior project manager at JCU. “This removes a number of steps that used to go into creating forms and lets us get changes live much faster.”

The solution allowed the academic petition process to be centralized in the Registrar's Office, which has greatly improved service to students and faculty, as well as the accuracy of the student record.



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**James Kohan**  
Senior Project Manager  
JCU

# The initial implementation

*(continued)*

*As of January 2017 — one year into implementation — 4,442 academic petitions have gone through the review process with no lost requests.*

OnBase also provides detailed reporting, which the JCU Registrar's Office never had access to before. At any moment, staff can see how many petitions are completed, how many petitions are in process, who petitions are assigned to, who they are waiting on and for how long, average processing time needed to complete a petition and more. Staff gain increased insight into their individual tasks as well. OnBase automatically notifies them via email when a new task appears in their queues, along with direct links for immediate access.

*"With this solution, we instantly changed how petitions are handled, provided visibility and reporting into the petition process, and as a result are able to move petitions through the system quicker, allowing the students to deal with unexpected issues that might prevent them from continuing on their degree path in a timely manner," Kohan said.*

By deploying OnBase in the Hyland Cloud, JCU eliminated the need to install the solution on every user's computer or device. Instead, they receive email notifications with links that open up in their chosen browser. "Because staff interaction with the solution is driven by email, required training is kept to a minimum and removes the need for any additional strain on the IT department," Kohan said.

As of January 2017 — one year into implementation — 4,442 academic petitions have gone through the review process with no lost requests. This makes for happy students who are able to stay on track with their graduation plan and happy faculty who don't have to search for missing requests or redo work.

Undergrad student petitions were so successful, JCU expanded with additional solutions for **Arts & Science Graduate Students and Bolser Graduate Students.**

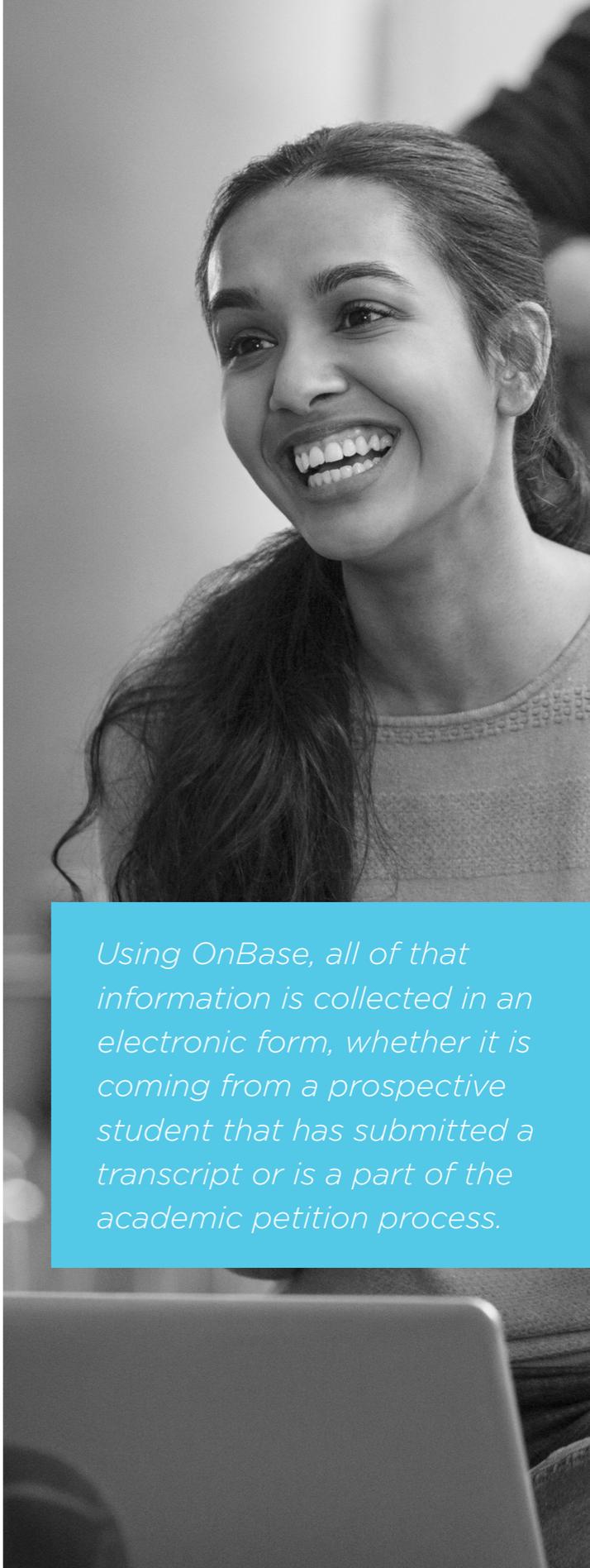
# Transfer course review

Once JCU solved their academic petition process using an OnBase solution, they decided to tackle another piece of the petition process puzzle: **transfer course review (TCR)**. At the time, the process for a student to submit a request to either take a course somewhere else or transfer a course to JCU that did not already have an articulation was email-based.

“Someone in the Registrar’s Office would manually create an email with information about a course at a different institution, send it off for review and wait,” Kohan shared.

Now, using OnBase, all of that information is collected in an electronic form, whether it is coming from a prospective student that has submitted a transcript or is a part of the academic petition process. For example, if a student wants to study abroad in Ireland, he will fill out an academic petition stating that he’d like to take courses at an Irish university that semester. OnBase integrates with Banner to check which courses have already been articulated. If an articulation exists, the TCR process does not get kicked off and the student will receive credit pending the completion of the course.

But, if the course or the school is brand new to the JCU system, then the TCR process will automatically kick off behind the scenes. OnBase takes all of the information entered in the petition, copies it to a TCR form in OnBase, and automatically routes it — typically to a department chair, a dean and possibly a curriculum director. Once the review process is completed, OnBase routes the form back to the Registrar’s Office where Banner is updated. If another student wants to take the same course — in two days, two weeks or two years — it is now a known course. If the transcript in question was part of the academic petition process, the petition is now automatically brought back to life and the routing continues to complete the petition process.



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## New hire evaluations and annual employee performance

In the human resources (HR) department, the first solutions put in place managed the **new hire and annual evaluations processes**. At JCU, roughly 400 staff members are subject to annual evaluations. Before OnBase, these processes were paper-based and very manual. A nine-page evaluation form was printed, collated, distributed, collected and manually filed for every employee. Because the process was so tedious, a large number of evaluations were not completed by the due date.

Now, with OnBase, staff simply click a link to start their evaluation. Personal information is automatically populated. All they need to do is fill out answers to the evaluation questions and hit a single submit button. OnBase routes the forms to the necessary reviewers.

“In the first six months of using the new evaluation process, over 73 percent of the annual evaluations are already completed — all the way through the seven layers of review, meetings and so forth are done and filed,” Kohan said. “Another 10 percent have gone through several steps in the review process, meaning over 83 percent of the reviews are on their way to completion — a phenomenal increase from last year.”

Kohan believes this is the institution’s greatest OnBase success story so far. “We’ve definitely seen the most quantitative ROI in this area,” he said. “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.”

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**James Kohan**

Senior Project Manager  
JCU

# IT change management

JCU receives about five to 10 IT change requests per month, with users wanting to upgrade software, replace network hardware and so forth. Before OnBase, there was no solution to manage the **IT Change Management** process beyond notifying a supervisor and saying, “I would like to do this.” The process lacked visibility and communication.

“Part of the process was also contacting the people who might be involved or affected, and quite often, that part of the process was dropped,” said Ken Brownlie, Banner web developer at JCU. “So, suddenly a department may have been without some software or functionality for a day and wondered what was going on.”

After finding success in other areas with OnBase, the IT department saw how much positive impact building a solution for the IT change management process would have. Now, if someone wants to place an IT change request, they fill out an OnBase form with the details of the desired project — including what they want to change or upgrade, the purpose, the expected outcome, the required steps and timeframe, the plan if something goes wrong during the change/upgrade and who needs to be notified of the change. The form is then routed to the appropriate manager (based on the system being worked on) for approval.

From there, the project goes into the Change Management calendar so everyone can see what projects are planned, the proposed solution to any challenge and whether or not the project is completed.

*“It’s working out very well so far. OnBase is solving a lot of the, ‘Oops, this didn’t work out, what do we do now?’ kind of situations,” Brownlie said.*

An additional benefit is the intelligence collected both at the front and back ends of each project. The form asks questions such as, “How are you going to recover if there is an issue during the upgrade process?” and, “How are you going to test once the upgrade is complete to ensure that it works as expected?” This forces requestors to think upfront about possible challenges and solutions. Once a project concludes, JCU collects information about how the project went, what challenges arose and how long the upgrade took. So now, over time, the IT department will know, for example, that the average time for an OnBase upgrade is two hours, so that they can report on it and inform people in the future.

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## Core curriculum review

The newest OnBase solution at JCU, [Core Curriculum Review](#), is used by faculty members who want to add a course to the school's catalog. Prior to OnBase, this process was facilitated by a PDF form, which was routed via email. The main challenge was that if you saved the form, you could not continue — you lost everything that you had written.

With OnBase, a faculty member simply opens a form and notes which course they would like to teach and which graduation requirements it will count toward. Supporting documents (assignment lists, course syllabus, etc.) can be attached as needed. Once finalized and submitted, the form is then automatically routed to the department chair to make sure they are aware of the request and will support offering that course. From there, it is routed to the appropriate curriculum sub-committee, who reviews it and gives a recommendation on whether or not it should be added to the course catalog before sending it on to the full curriculum committee for final approval. At any time during the review process, the reviewers can send the form back to the faculty member for clarification or additional information.

*With OnBase, a faculty member simply opens a form and notes which course they would like to teach and which graduation requirements it will count toward.*

## The year ahead

In 2017, JCU expects to add a similar number of OnBase solutions to its enterprise portfolio. Plans include a Summer Hires solution — a combination of HR and business office processes, that will manage the hiring of students for summer work from requisition, to the interview process, through onboarding and setting them up to get paid.

They also plan to work on the second major OnBase integration — this time with Slate®, a comprehensive customer relationship management (CRM) platform for admissions — that will pull the documents students submit during the admissions process and put them in OnBase as part of a student file management solution.

*Having a single, digital student record will allow faculty and staff to access a student's most current information, whether they are in HR, the Registrar's Office, the Student Advising Office or anywhere else on campus.*

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## A vision for empowerment

At JCU, Kohan and Brownlie hope to get to a point where business users can make changes and updates to workflows and processes all on their own. To achieve this, Kohan has been tasked with implementing an OnBase training program. “Because of the point-and-click configurability, both in terms of forms and workflow, when HR needs to update the 90-day evaluation process, the chief human resources officer (CHRO) will be able to do that. When the undergraduate academic petition or transfer credit review processes change, our associate registrar will be able to do that,” Kohan said. “This is possible because we can lock down OnBase so that certain people in certain areas are the only ones to have access to their information.”

Plus, with no custom coding or custom scripting required, super-users will be able to modify their own processes as business needs change, without extensive training — empowering faculty and staff to dedicate more time to serving students. The training will happen mostly on campus, but JCU also plans to take advantage of the training opportunities that Hyland offers, such as TechQuest and CommunityLive, or potentially even having Hyland’s Education Services team come host a small private training on campus.

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# YEAR ONE:

## Eight OnBase solutions across the university

### SENIOR ADMINISTRATION

- Core curriculum review process

### ENROLLMENT MANAGEMENT

- Undergraduate academic petitions
- Graduate program academic petitions
- Business school academic petitions
- Transfer course review

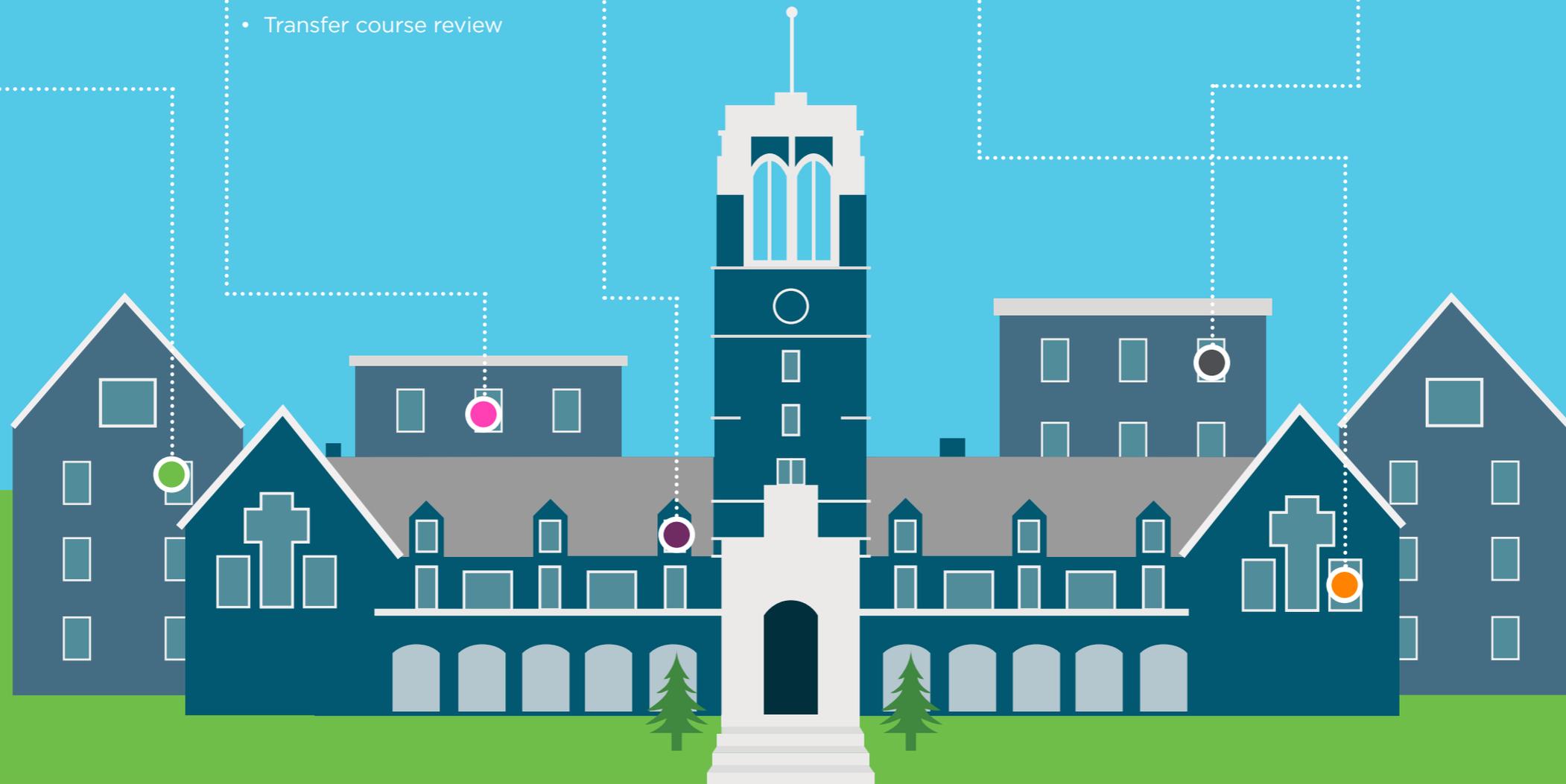
### BUSINESS OFFICE

### INFORMATION TECHNOLOGY

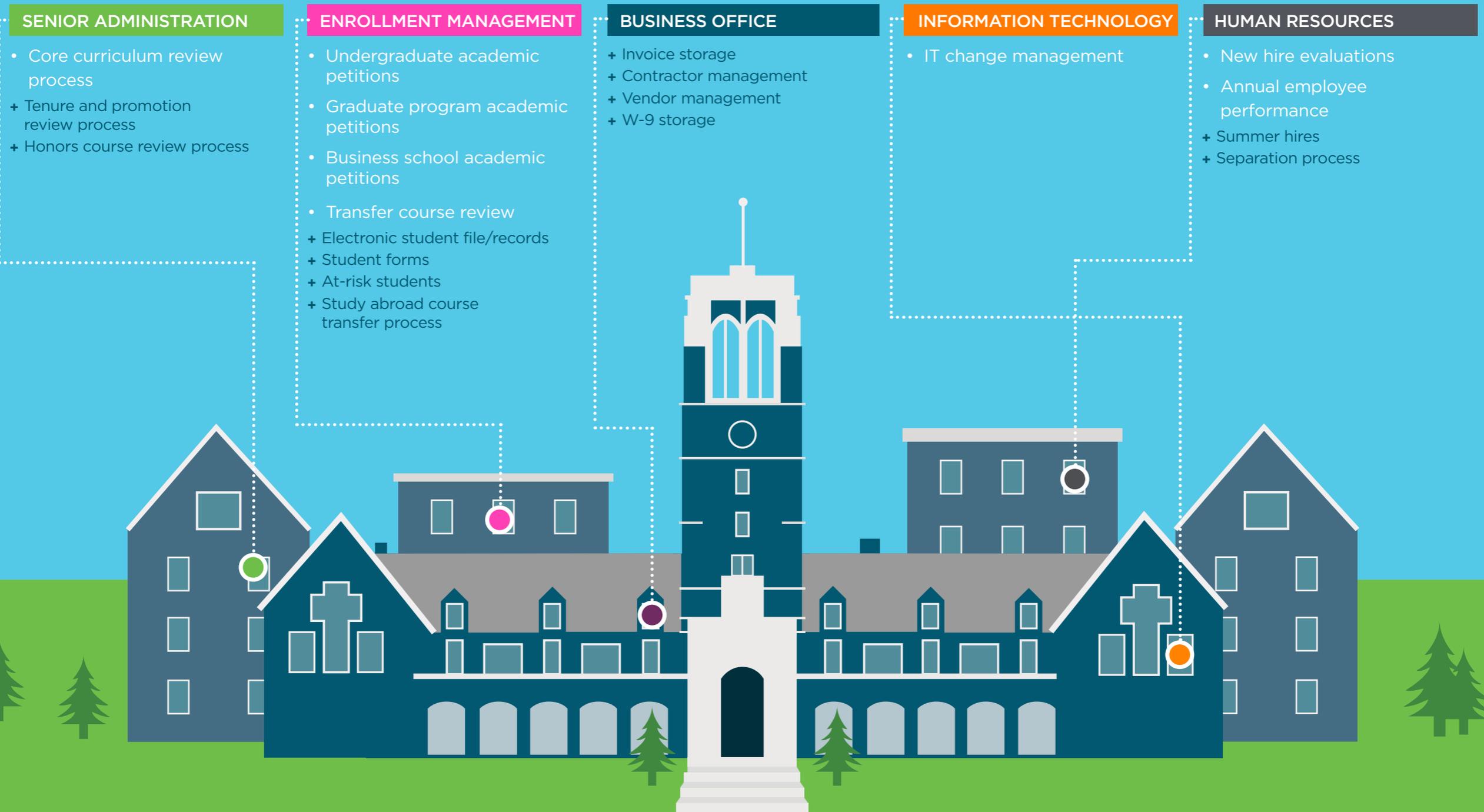
- IT change management

### HUMAN RESOURCES

- New hire evaluations
- Annual employee performance



# YEAR TWO: 20 OnBase solutions across the university



# A strategic investment

JCU's rapid deployment of solutions proves that institutions of any size can harness the power of OnBase to make a large impact across campus. With OnBase, JCU was able to find an enterprise solution, built on one platform, with unlimited potential for expansion across the entire campus. By making a strategic investment in OnBase, JCU has enabled faculty and staff to work more accurately and efficiently, and can devote more time to better serving students — facilitating higher graduation rates and ultimately, student success.

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Learn more at [Hyland.com/HigherEducation](https://www.hyland.com/highereducation)