



Customer Success Story | Higher Education

# University of Notre Dame

## OnBase case management elevates advising at the University of Notre Dame

### The Challenge

The University of Notre Dame works to maintain productive relationships with students from day one – and effectively managing student information is a big part of that initiative.

However, the university's First Year of Studies (FYS) was plagued by paper and information silos. Advisors managed key student data in 18 separate Access databases and stored related content in spreadsheets, folders and physical file cabinets. Unsurprisingly, these methods impacted service, visibility and data integrity.

Already using OnBase by Hyland to digitize admissions, Notre Dame turned to an OnBase case management solution to improve advising and better manage first-year student information.

### The Solution

With OnBase, advisors access all first-year student information and related content in a digital student file solution, including admissions documents and real-time data pulled from the Banner® by Ellucian student information system (SIS). With this complete view of each student, OnBase equips advisors to provide better service and maintain more relevant relationships with students.

"Advisors now have one place to go for all student information," said Tracy Weber, manager of digital document management. "While students are in the waiting room, advisors can pull up their electronic files, see their pictures and view details like FERPA status, academic schedules, grades and pending course drops. They also have access to all related documents – giving them a quick synopsis of each student."



#### CUSTOMER

University of Notre Dame

#### SIZE

11,931 students

1430 full-time faculty

#### LOCATION

Notre Dame, Indiana

#### DEPARTMENTS USING ONBASE

Undergraduate Admissions

Financial Aid

Graduate School

Facilities, Design & Operations

President's Office

First Year of Studies


General Counsel

#### ONBASE INTEGRATIONS

Banner® by Ellucian

One platform **Unlimited potential**

**OnBase**  
by Hyland



**“There’s so much more to OnBase than making the documents electronic. The solution has provided so many opportunities for us, and the reporting mechanism has been fabulous.”**

– Elly Brenner, assistant dean of First Year Studies, University of Notre Dame

From the same interface, advisors add visit notes, attach supporting documents, email professors and manage change of intent and declaration of program events. Additionally, they easily see assigned tasks and upcoming appointments, allowing them to better manage and prioritize their work. Native security controls protect advising notes and sensitive student information, while an audit trail of all interactions with files supports the security and integrity of student files.

On top of providing advisors with all the information they need, the data-driven solution also offers significant dean-level visibility.

“There’s so much more to OnBase than making our documents electronic,” said Elly Brenner, assistant dean of First Year Studies. “The solution provides so many opportunities for us and the reporting mechanism has been fabulous.”

With robust reporting functionality and dashboard views, Brenner uses real-time information to better manage advisor workloads, assign appropriate advisors to students and respond to any pressing issues. OnBase also offers insight into trends like frequent drops for a particular course, equipping the department to take action to protect the critical first-year student experience.

This added visibility brings notable process enhancements. “We finished processing course drops three days earlier than we have in the past, so it’s a huge increase in efficiency,” said Brenner. Overall, while driving many new improvements, the solution helps the university support long-standing objectives: a focus on the students and maintaining its high retention rate.

“One of the real hallmarks of success from the advisors’ perspective is that work continues as normal,” Brenner said. “OnBase didn’t change the core of what we do – all it did was make it better.”

### **The Difference**

**Improves advising with a complete view:** Advisors have a 360-degree view of all student information, from visit notes to admissions documents to a history of dropped courses to real-time data from Banner.

**Facilitates better student service:** “Advisors don’t have to spend as much time on back office paperwork or keeping track of data – OnBase is really providing that information to them,” Weber said. “They have more time to spend on truly important advising activities and providing guidance the students need.”

**Increases visibility:** “Our dean, sitting in her office, can see who’s in the waiting room, who’s coming in today and why students are coming in,” Weber said. “That information enables her that same day to have a sense of what is going on with students and help other advisors.”

**Saves time and minimizes the paper trail:** Before OnBase, advisors spent weeks preparing paper files for transfer to various colleges. Now that information stays in OnBase throughout a student’s academic career, offering timely access to complete electronic files.

**Provides rapid value without custom code:** With OnBase, Notre Dame quickly created a solution without time-consuming custom development. Notre Dame plans to scale the success of the FYS solution by building additional applications on OnBase – including solutions for college dean-level advisors and graduate programs.

Learn more at [OnBase.com/HigherEd](https://OnBase.com/HigherEd) »