University of Missouri System

When the University of Missouri System needed a better way to manage millions of documents across four campus locations, they turned to Lexmark to eliminate manual tasks and paperwork, improve access to information and support security and compliance initiatives.

Challenge

The University of Missouri System is one of the nation's largest higher education institutions, with more than 77,000 students and 32,000 faculty and staff across campuses in Columbia, Kansas City, St. Louis and Rolla. In such a large institution, streamlining administrative processes institution-wide can create a significant impact on employee productivity, student service and the bottom line.

When staff at the various student financial aid offices became overloaded with paperwork and other departments joined in to request a document management solution, the university decided to implement one, system-wide document management solution to simplify administrative processes.

University of Missouri considered Perceptive Content enterprise document management, imaging and workflow software from Lexmark because of its successful track record in higher education and proven integration capabilities with PeopleSoft. Rapid deployment and affordability made Perceptive stand out as the right choice.

"Lexmark came in lower than the next competitor and had the shortest implementation timeline, and that's very attractive," said Linda Valentine, IT systems administrator for the University of Missouri System.

Perceptive Content is implemented in 78 departments across four campuses and the university hospital and clinics. With more than 23,000 user accounts and 6,160 active users, more than 48 million imaged pages in the system and nearly a half-million pages in workflow, Perceptive Content has made a significant impact on the daily business of University of Missouri.

Meet University of Missouri System

The University of Missouri has provided teaching, research and service to Missouri since 1839. The four campus system is the only public research and doctoral-level institution in the state, it is also one of Missouri's largest companies, with total revenues of $3.2 billion.

- **Campus locations:** Columbia, Kansas City, Rolla and St. Louis
- **Students:** 77,000
- **Faculty and staff:** 32,000

Products in use: Perceptive Content

Integration: PeopleSoft

Lexmark™

Solution

Universal integration

University of Missouri first implemented Perceptive Content in the financial aid offices at the Columbia, Kansas City and St. Louis campuses, as well as in the benefits and human resources departments at the system level. Patented LearnMode™ technology allows Perceptive Content to integrate document management functionality into any application, regardless of version or vendor. Integration creates a link between the business systems and the documents associated with the transaction record, allowing users to retrieve and route documents with a single click from their PeopleSoft screens. This rapid integration technology enabled Lexmark to complete the university's first on-site implementations in less than a week.

"Integration not only provides consistency of data, but also makes end users more productive because they have a one-stop shop for information," says systems administrator Cathryn Friel. "They can go into the application, click on the Perceptive Content icon, and the documents they need are there."

Results

Day-to-day time and cost savings

The accounts payable and payroll departments in Columbia saw one of the most dramatic improvements in business processes after implementing Perceptive Content. Paper-intensive tasks that once took days are now completed in minutes. Invoices are immediately scanned into a processor's workflow queue to complete data entry from the document image. Approvals and problem invoices are sent through Perceptive Workflow to department heads, removing the time and expense of transporting documents physically. Lexmark solutions further expedite invoice processing by automatically indexing and routing faxed invoices to the proper workflow queue, eliminating steps required to scan paper copies.

University of Missouri used to spend thousands of dollars a year to ship daily packages of paper documents from its bank in Kansas City to Columbia, where processors would sort through the documents and distribute them for manual processing. Now the bank sends a daily electronic feed of the previous day's transactions along with a file that allows the university to automatically index the documents and import them into Perceptive Content as PDF files. The content arrives ready for viewing—renamed, indexed and linked to the appropriate transaction record in PeopleSoft without anyone touching them along the way.

"With Perceptive Content, not only is there a huge cost savings in transporting paper documents daily, but now payroll completes what was a five-day process in less than a day," Friel says.

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Cathryn Friel
System Administrator,
University of Missouri System

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Linda Valentine
Systems Administrator,
University of Missouri System

Alumni development efficiencies

A single alumni donation is often associated with more than one person, which required the alumni development staff to make copies of the paperwork for each associated donor and manually file it away in multiple folders, creating a mountain of duplicate records in the process.

"Perceptive Content saves us a lot on paper, storage space and our employees' time in alumni development because now we don't have to make multiple paper copies of donations," Valentine says.

Perceptive Content eliminates the need to photocopy documents by generating and automatically indexing digital copies of the documents for each donor based on information from the alumni office's business systems. The necessary documents are then instantly available from each individual's record and employees no longer spend valuable time photocopying stacks of receipts, filing multiple copies of the same forms or searching for files.

More time, more space, more compliant

In a large institution with multiple campuses, keeping track of human resources documents can quickly become overwhelming. When employees transferred from one campus to another, documents were mailed to the new campus and manually filed in the new location. The time required to pull files and transport them to a new location once took up to five days, but Perceptive Content shortens the process to minutes and eliminates the cost of postage and the risk of loss.

Regardless of where an employee works, HR members have immediate, electronic access to every document in the employee file without having to search through a filing cabinet for documents. In fact, filing cabinets are scarce in the office.

"The HR department in Columbia has reclaimed their filing room," Friel says. "They now have an extra 400 square feet of office space."

Maintaining compliance with federal and state regulations was challenging under a paper-based system. Documents containing confidential employee information came into various payroll offices and were manually routed to the central office without a reliable system to ensure confidentiality of records. Now, documents are scanned into Perceptive Content when they arrive and are available electronically only to authorized users. This secured access provides peace of mind to both employees and payroll administrators.

Serving students more effectively

In addition to the administrative benefits Perceptive Content provides, Friel believes the impact on student services has been just as significant. Whether in the office of student financial aid, admissions or registrar, when information is instantly available, student service is improved.

"The more people have access to the information within a department, the greater the chances of getting someone on the phone who can answer your question the first time, and that really creates better customer service," Friel says.

Peace of mind

The implementation of Perceptive Content has resulted in increased productivity, time and cost savings, improved security and service, and streamlined business processes at University of Missouri. According to Valentine and Friel, among the greatest benefits of Perceptive Content has been the protection of records from fire, flood or other natural disasters.

"We're discovering we have a disaster recovery plan where none existed before," Valentine says. "As soon as the image hits the Perceptive server, we have a copy in the production warehouse and off-site data center, so if something should happen to one or the other, we still have the data. That is a huge relief for the managers."

Ease and convenience matter most

The impact of Perceptive Content on University of Missouri continues to grow as Valentine and Friel expand the system to new departments, but for all its sophisticated capabilities, Valentine and Friel say it is ease-of-use and convenience that make users adapt to Lexmark solutions so quickly.

"More than anything, people appreciate the fact that they don't have to go look for their documents," Friel says. "They know they can be anywhere and get to a document they need. They don't even have to be in the office to process paperwork."

Partnering for the future

Friel and Valentine intend to maximize the potential of Perceptive Content as they keep rolling out the solution to more departments. The knowledge transfer between Lexmark and the university allows the team to manage the expansions closely, keeping professional services fees to a minimum and the total cost of ownership low. The ability to independently tailor the system for each area provides continued value, and the team considers Lexmark a partner in their efforts.

"Lexmark is very customer-oriented. They truly take to heart what customers say they want and need in the product, and they work with you to try to fulfill it," Friel says.

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