

# Trinity College Does More with Less Using an OpenText Solution

Document management improves services and reduces costs with fewer resources

## Industry

Higher Education

## Customer



## Business Challenges

- Respond to increasing demands for information by parents, students, alumni, and auditors
- Provide better stewardship of limited resources
- Reduce volume of paper records
- Ensure readily accessible storage
- Enable record access for remote locations

## Business Solution

OpenText Document Management, eDOCS Edition

## Business Benefits

- Remote locations have instantaneous access to documents
- Records retrieval reduced from minutes and days to seconds
- Misfiling virtually eliminated by integration with the ERP system
- Improved audit-ability and internal controls
- Parents and students receive better service

One of the United States' oldest colleges, Trinity College, has an undergraduate class of more than 2,300 and enrolls about 575 additional students per year. With such a large yearly enrollment and rigid audit requirements, the college needed to improve services to students, parents, regulators, and alumni while expending fewer resources. The deployment of OpenText Document Management, eDOCS Edition (eDOCS DM) has greatly improved the services Trinity can offer to its students as documents can be easily located and electronically retrieved.

Founded in 1823, Trinity maintains a long history of excellence and innovation and is consistently ranked as one of the nation's top private undergraduate institutions. Its 100-acre campus is located in the center of Hartford, Connecticut, and its 256-acre facility in Ashford, CT is dedicated to natural sciences and a wide range of environmental education endeavors.

With each year, as new students submit applications, financial aid requests, insurance, and other documents, the volume of paper documents at the college is growing at a linear rate. Transcripts and student progress and activities documents are stored and updated as the student progresses in their collegiate career, and then the documents are used after graduation. Additionally, invoices, receipts, gifts, pledges, and other reports are processed and generated daily while Alumni relations and correspondence are maintained.

When Trinity maintained physical documents, the most current records were stored onsite for quick access while older records were stored offsite. Requests for information often required a returned phone call due to the length of time it took to locate and retrieve information from a physical document, creating inefficiencies and limiting the effectiveness of Trinity administrators.

## Easy set-up and maintenance

To improve efficiency without having to increase resources, Trinity chose eDOCS DM—a flexible system that allows users to create custom summary and search profiles in addition to enabling easy document access from a central electronic repository. Trinity uses this flexibility to separate their documents into over 80 distinct document types, each of which has a profile tailored to make search and retrieval most effective.

"The system has been extremely stable and trouble free," says Kristopher Arenius, Systems Manager at Trinity College. "Maintenance requires less than 5 percent of one system administrator's time. The implementation was extremely easy and didn't require significant consulting dollars."





***“In the four years we have been live with the OpenText solution, there hasn’t been a single document we couldn’t quickly reproduce in response to audit requests.”***

Kristopher Arenius, Systems Manager, Trinity College

Trinity now has extreme flexibility in configuring document profiles for easy storage and retrieval. With more than 80 document types with unique data fields and search criteria, setting up new document types in response to staff needs generally takes between one and three hours.

### **Virtually eliminated errors and misfiling**

Trinity College is now realizing productivity and cost improvements in several departments as a result of the implementation. For example, the Student Accounts Office, which manages student-related financial information, now resolves requests in the initial phone call instead of having to take a request and return a call after locating a document. “When using the old paper-based system, these calls usually required research to find the document, often resulting in tedious searches of files that were stored offsite,” says Arenius. “Now the student accounts staff scans and stores over 30 different types of documents from billing statements to vehicle registrations. These documents are maintained on the document server for easy electronic retrieval.”

Thanks to the OpenText solution, Trinity staff is able to retrieve loan, insurance, scholarship, and other documents in seconds. Additionally, summary data (document metadata) is populated via a look-up to the college’s Enterprise Resource Planning (ERP) database. “Due to this edit checking and lookup capability, errors have been minimized,” says Arenius.

Trinity is also able to pull paper-based files to add information more efficiently. “With the old process, files were pulled to add information—the searches often included staff’s desks and cabinets, making information retrieval inefficient and confusing,” adds Arenius. “Now that the filing process is electronic, misfiling has been eliminated.”

Student ID numbers are the metadata most used in the student accounts office to identify documents. “Using this number automates the record update process, slashing the time needed to make updates by looking for it in the ERP database. This makes the process of scanning and updating the automated system even faster than the manual process of filing records,” says Arenius.

### **Quick response to audit requests**

The Business Office is responsible for processing financial information for Trinity College. With the OpenText solution, there is now an unprecedented ease of use and access to invoices, receipts, and employee-related source documents. Information security and confidentiality have been improved by using eDOCS DM, and with this increase in security and internal controls, access to financial documents has greatly improved for the authorized users. Another added benefit is that the electronic documents do not degrade and become unreadable over time as they would in a paper-based system.

“Since implementing the DM solution, Trinity College has been able to produce every source document requested by auditors without exception—a feat for any institution of higher education,” says Arenius. “In the four years we have been live, there hasn’t been a single document we couldn’t quickly reproduce in response to audit requests.”

Much like the Students Accounts Office, the Business Office’s documents are tied to records in Trinity’s ERP database. When an invoice is scanned, a voucher number is entered that ties the document to metadata in the ERP database, allowing the other metadata to be automatically populated. For example, entering the voucher ID populates the vendor information from the ERP database.



### Instantaneous file access

The Registrar's Office is also realizing great gains in accessibility and efficiency. All new records are maintained electronically reducing space demands.

Degree verification has been greatly simplified. A yearly automated process creates imaged files for transcripts from the student ERP system. Since the OpenText solution pulls information from the ERP system, misfiling and confusion that may have been caused by name changes is virtually eliminated. "When it's necessary to keep paper documents, the Registrar uses low-cost offsite storage for the physical documents because staff has instantaneous access to the electronic documents in their office," says Arenius.

The Development Office uses the solution to improve alumni and donor services. Multi-year pledges and pledge plan forms are searchable by various criteria such as date, amount, and donor. "The system has enabled the four Development Office locations to have quick access to the records needed to perform their job," says Arenius. "Searches that took at least 15 minutes for records onsite to days from other locations can now be accessed in less than 30 seconds."

Additional donor information as well as articles related to alumni in college or other publications and financial reports are also available from the eDOCS DM.

### The future: Architectural drawings management

The culture at Trinity College has changed from a paper-based environment to a paperless one. Each office has embraced the opportunity to expand the number of document types accessed



via the DM solution. In the future, Trinity plans to include architectural drawings with Computer-Aided Drawing (CAD) in the system, which can be stored in native formats and printed from eDOCS DM without opening the CAD application.

Providing improved service is a major goal at Trinity—self-service capabilities are being considered to allow parents, faculty, and students access to their records via a web interface. Trinity College is using OpenText technology to take its level of service to even higher standards.

**[www.opentext.com](http://www.opentext.com)**

[sales@opentext.com](mailto:sales@opentext.com)

800 499 6544

