COMPANION
DATA SERVICES®

A CELERIAN GROUP COMPANY

CONNECTING CAMPUSES WITH THEIR DOCUMENTS & DATA.

HIGHER
EDUCATION
SOLUTIONS
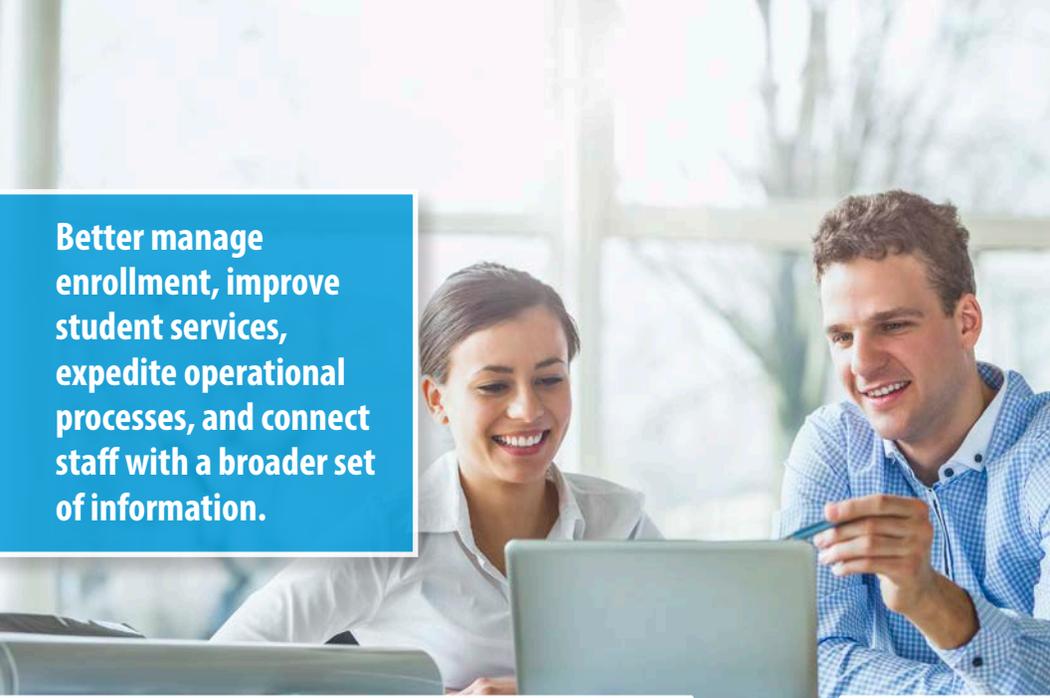
What to Expect with ECM

Whether at a public or private university, a community or junior college, or a technical or parochial school, the challenge is the same: make the most of tuitions and fees while keeping responsiveness up and operating expenses down. You can achieve all three by using DocFinity to automate, standardize, simplify, and expedite the flow of information and task-completion across the institution. At the same time, you'll better control your information, prevent redundancy and errors, and leverage the information stored in your other systems and software.

DocFinity electronically captures, stores, indexes, retrieves, and manages text and non-text documents and files of all formats — even images, voicemails, and faxes — making them accessible from any Web browser. So, admissions applications, financial aid forms, correspondence, tuition statements, transcripts, and almost anything you might need or imagine can be accessed quickly and securely.

## The benefits of installing DocFinity campus-wide include:

Cost-savings:
Instant, shared access to information; a decreased need for storage space; and automated processing and workflow will positively affect the bottom line in every department.

Scalability:
You can start using DocFinity in one department, then extend it to other departments as you're ready.

Connecting Silos and Systems:
Because DocFinity integrates with your other applications, you'll optimize your existing systems investments, even as you achieve greater efficiencies across the institution.

OFFICES OF
ADMISSIONS
RECORDS
FINANCIAL
AID

Simplifying Admissions

Admissions offices face constant challenges in processing applications and returning decision letters in a timely manner. Incoming materials and supporting documentation are received in various formats, creating inefficiencies that impede turnaround and discourage student interest.

DocFinity automates the assimilation of comprehensive student records, even if materials are submitted at different times, in different media. Student information is secure, centralized, and available instantly. BPM/Workflow lets staff members push routine tasks to the appropriate people for timely action. Records are no longer lost or misplaced; and student and parent inquiries are answered immediately. Secure Web access enables communication between departments and campuses, expediting decisions and eliminating the costs associated with paper and shipping.

Upload and search for documents, and complete admissions processes on the go!

With these capabilities DocFinity allows you to:

- Intelligently image documents to automate the indexing process for proper storage, access, and flow of applications, transcripts, letters of recommendation, faxes, photos, and other files.
- Standardize and automate undergraduate, graduate and doctoral student admissions processes to improve turnaround time and decision-making.
- Create checklists so that evaluations are initiated only when fulfilled; and inquiries are automatically sent to prospective students when information is missing.
- Retrieve complete student packets electronically from within your student information system (SIS), enabling faster acceptance decisions and improved services.
- Enable real-time updates for students and parents.
- Simultaneously access multiple documents for review.

Help for the Registrar

The registrar's ability to create schedules, audit degrees, process applications for majors and minors, and manage retention of transcripts is vital to the efficient conduct of the institution's business, as well as to its students. That's why DocFinity enables registrars to:

- Automate transcript indexing, retention, and data extraction with intelligent capture.
- Standardize processes including grade changes, adds/drops, graduation applications, and more.
- Create a secure, central repository of student records integrated with the student information system.
- Apply retention rules to all records.
- Offer students and institutional colleagues self-service capabilities that enhance information sharing and collaboration, reduce administrative costs, and reduce data entry such as making student-information changes; processing transcripts, grade changes, withdrawals; and other attendant processes.

DocFinity's workflow capabilities also integrate with electronic forms and other applications to automate standard processes — creating a complete, streamlined, process management system. Activities that involve multiple parties or require approvals, signatures, or other actions can be completed in a fraction of the time required with multiple software applications or paper.

Because your ability to attract and retain academically qualified applicants depends on quick turnaround — and immediate, secure access to and management of financial aid documents — DocFinity keeps you connected to applications and supporting files, making them accessible from within your SIS and other core systems. Workflow allows you to process applications on receipt of a complete package, streamlining the processing of approvals, denials, and signatures.

DocFinity enables you to:

- Intelligently capture documents, pulling needed data to launch routine tasks, such as initiating standardized letters or calls for additional information; or to be used for decision making.
- Expedite award decisions by decreasing backlogs — even during peak periods.
- Process more verifications with current resources, or enable outsourcing of financial aid verification with access only to the information needed for decision making.
- Give status updates to applicants and other stakeholders at any time during the verification process.
- Prevent delays, reduce wait times, enhance services, and decrease the cost per application.

Financial Aid

When students consider transferring to your institution, the quality of information and speed of service you provide can make a difference in their confidence in your institution and their decision to attend. DocFinity improves the processes associated with transfer students by:

- Enabling Admissions and Registrar offices to intelligently scan transcripts upon receipt to pull data to use for indexing, automating retention, attaching documents to student records, and initiating processes.

- Lowering costs by enhancing efficiency and reducing the physical space needed for storage.

- Boosting productivity by providing instant access for those who are authorized to access, view, or act on student records, transcripts, test scores, and other materials from within your SIS.

- Automating routine transfer processes and improving student acceptance turnaround time, even during peak processing times.

Alumni Relations

Given their importance to the financial health of your institution, as well as to its public relations efforts, your Development and Alumni Relations offices have to process and manage their data effectively. DocFinity affords easy access to donor records. It also integrates with the relations management tools you might already be using, as well as with donor, prospect, and event management systems.

Pledge cards and checks are automatically scanned and stored electronically, triggering a workflow to send thank you notes and tax forms to contributors. Workflow also triggers any other standard procedures, enabling you to respond to inquiries about the status of donations and check deposits immediately, at any time during the process. In addition, DocFinity effectively monitors donor files, letting you update personal information about any alumnus via the Web. Other pertinent alumnus information can also be stored electronically for easy access and retrieval, simplifying gift processing and records management.

Expediting Transfers

Flexible Business Process Management (BPM) and Dashboard reporting tools make it easy to see who's viewed materials and approved, signed, or taken other actions on student records.

Workflow enables you to automatically push tasks through the process for quicker communication and approval. And appropriate parties can be notified of hang-ups. If a student decides to transfer from your institution to another, this same data integrity and processing efficiency are ensured.
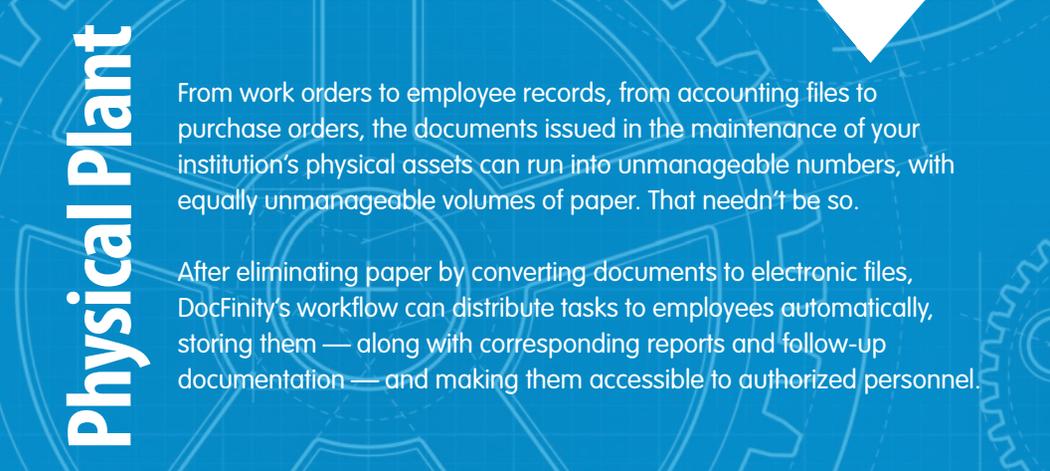
Physical Plant

From work orders to employee records, from accounting files to purchase orders, the documents issued in the maintenance of your institution's physical assets can run into unmanageable numbers, with equally unmanageable volumes of paper. That needn't be so.

After eliminating paper by converting documents to electronic files, DocFinity's workflow can distribute tasks to employees automatically, storing them — along with corresponding reports and follow-up documentation — and making them accessible to authorized personnel.

Lending to Library Services

Library services include much more than stacking shelves with books. Managing the history of the university, libraries are tasked with overseeing campus, faculty, and student generated and owned media, as well as years of archives — including paper and digital records, books, film, video, audio recordings, photographs, architectural plans, maps, artifacts, and more. And the restrictions as to who among students, alumni, the community, and faculty can access information, and how, only adds to the challenge.

- Records management schedules the retention and disposal of records stored both electronically and in paper format.
- DocFinity allows libraries to secure access of items as well as track the viewing and lending of resources.
- BPM enables late returns to launch automated action — a letter or invoice to the borrower — and can integrate with library, accounting, and registrar systems to ensure that returns and payments are received prior to graduation.

Granting Efficiency to Research

If library record-keeping is a challenge, keeping track of all the documentation attendant to academic research and government grants for research projects can be a overwhelming. Ensuring that information is stored, up to date, and accessible — reliably, accurately, and completely — saves time and opportunity. With DocFinity, research and retrieval that used to take days and weeks can be reduced to minutes and seconds. That's because DocFinity has electronic forms, imaging capabilities, and enterprise search tools to store and index paper, photos, images, faxes, emails, and more in searchable formats. So, it can automate and standardize research and grant processes by centralizing, storing, and accessing all research documents and sources, as well as grant applications and their supporting documentation.

Beyond that, DocFinity automates the notification of grant application deadlines, renewed grant opportunities, report deadlines, and other important updates. BPM tools ensure that documents are pushed through the hierarchy for needed signatures, approvals, and decisions. Instead of searching off-site for important research, you can access information in an instant — from remote campuses or anywhere in the world, via the Web.

Other Campus Departments
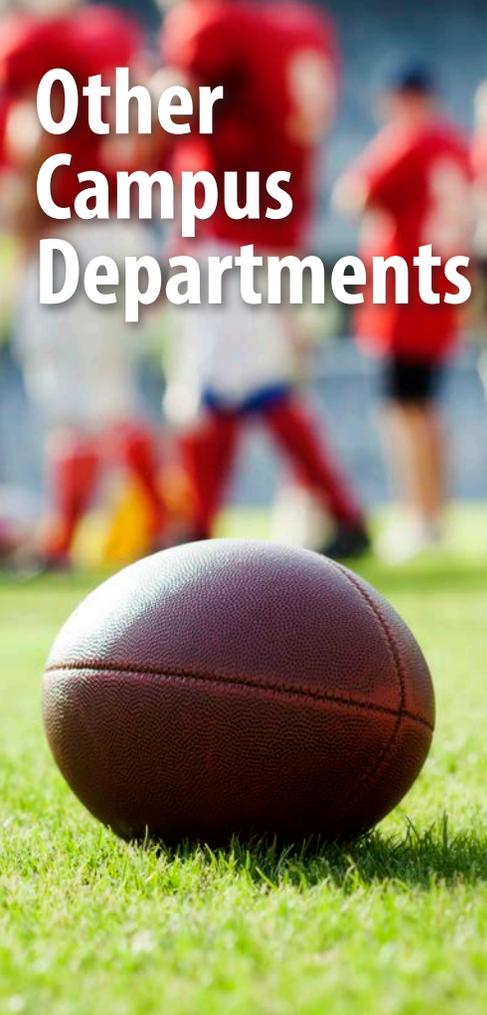
- **Athletics** can integrate with recruitment management and other systems to help manage eligibility requirements of student-athletes: managing status requirements for the NCAA, the NAIA, and the NJCAA; expediting audits; sharing information with other departments and agencies; and streamlining approval processes with electronic signatures.

- **Police Services** can bridge relationships between campus, local, and state police departments with communication, collaboration, and the ability to keep track of incident reports and other confidential information. DocFinity lets campus police departments upload and retrieve records instantly from remote locations, access information in unstructured and non-text documents, store files electronically in a secure repository for instant access, automate and standardize routine processes, and provide better service to constituents.

- **Residential life** departments can make housing management information accessible to authorized personnel from within your SIS. Workflow can initiate notification letters automatically, improving housing allocations and expediting student services.

- **Health services** departments can manage and securely view complete student health records by including correspondence, billing info, email messages, and other information pertaining to medical history. DocFinity integrates with EMRs/EHRs, decreases lab turnaround times, improves accuracy, and automates administrative processes.

- **The Bursar's office** can auto-generate customized notification letters and integrate with automated call systems to inform students of past due accounts. You'll connect departments to place holds on controllable services. With immediate access to student transaction histories, DocFinity allows institutions to provide immediate answers regarding the billing cycle.

Campus-wide Initiatives

Integration with SIS and ERP Systems:

Your student information system (SIS) is indispensable to your institution's ability to manage student data. From enrollment to bursar to alumni services, your SIS system ensures that student records are accurate, up to date, and easily accessible. DocFinity allows you to collect a check-list of documents from an applicant and make them available within your SIS interface, deliver data from these to other systems, and automate notification processes to students, parents, faculty and staff.

Ask us how DocFinity integrates with your institution's SIS, including:

- **PeopleSoft**
- **Banner by Ellucian**
- **Jenzabar**
- **Colleague by Ellucian**
- **Homegrown Systems**

DocFinity also enhances all of your other core applications. Integrate DocFinity imaging and workflow functionality with your core accounting system for quicker approval of faculty and staff requests and payments to vendors. Manage the retention and renewal processes around staff benefits and faculty credentials. The possibilities are endless.

Compliance:

Regardless of the department, DocFinity can help you comply with FERPA, HIPAA, SOX, and other regulations with electronic document/lifecycle management, workflow, and auditable transparency. You can define and enforce privacy and accountability measures. You can see who has accessed which files, the times of access, and the actions taken. You can give management and regulatory bodies secure access to information to demonstrate your compliance.

Records Management:

DocFinity's seamless approach to records management automatically applies retention and disposal rules based on the declared document type, taking the responsibility off the shoulders of your staff. Records management prevents unauthorized access, manipulation, and inadvertent destruction of files; helps mitigate or prevent litigation; helps comply with campus and government policies; and ensures consistency.

Image Management:

With thousands of documents — student records, transcript requests, applications, administrative reports, internal paperwork, and more — image management has to encompass more than scanning documents to your server. Utilizing Intelligent Capture, you can automate indexing, update fields in other applications, and trigger workflows without manual intervention. And since DocFinity integrates with your SIS and other applications, you can securely access and view documentation associated with student records or purchases with the click of a button.

Gathering Info with eForms:

Creating, storing, distributing, and managing forms electronically helps streamline admissions, registrar, HR, operations, and other processes — improving turnaround times, communications, efficiency, and accuracy. By placing forms on your portal, you'll gather information on prospective students and process applications more efficiently, reducing processing errors and diminishing manual keying. You'll enable students, faculty, and staff to retrieve needed information and launch workflow processes. In addition, eForms can be utilized to pull and display information from other systems so that staff can decrease time spent searching for imperative data.

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ECM, AUTOMATION, CAPTURE & RETENTION SOLUTIONS

Companion Data Services
2401 Faraway Drive
Columbia, SC 29219

800.678.3241
www.docfinity.com/companiondataservices

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