THE TEXAS A&M
UNIVERSITY SYSTEM

Delivering automated campus-wide processes

Pushback has always been the great destroyer of initiatives to institute campus-wide automation of administrative processes.

Until now.

Summary of Webinar hosted by the *Chronicle of Higher Education* **featuring:**

Judith Lewis, Senior IT Manager of IT Solutions and Support, Texas A&M University
Robert Hensz, Risk and Compliance Office Program Manager, Texas A&M AgriLIFE
Kristin Nace, Assistant Vice President for Fiscal Services & Budgets, Texas A&M Health Science Center
Don Barwick, HUB & Procurement Manager, Texas A&M University System

Run Smarter®

Laserfiche®

How does one of the largest university systems in the United States manage its documents?

Coordinating, managing and archiving documentation is a daunting challenge for a large, geographically distributed organization such as the Texas A&M University System.

A&M System is one of the largest systems of higher education in the United States. It's made up of 11 universities, seven state agencies and a comprehensive health science center. It has a physical offices in 250 of the state's 254 counties, educates more than 120,000 students each year and assists 22 million people throughout the state each year. With an annual budget of more than $780 million, it employs 28,000 faculty and staff.

During this Webinar, a panel of four Texas A&M experts explained how Laserfiche evolved from a point solution within one school to a shared service for the entire university system.

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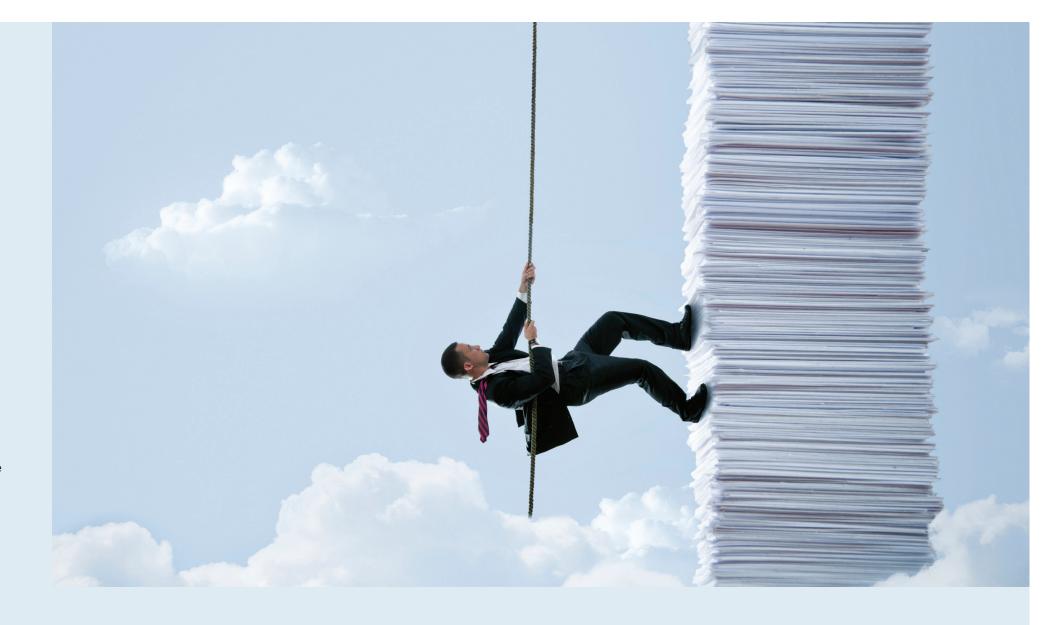
Texas A&M AgriLife

The College of Agriculture and Life Sciences at Texas A&M University, Texas A&M AgriLife Research and Texas A&M AgriLife Extension Services were the earliest adopters of Laserfiche. They recognized the need for an enterprise content management (ECM) system after a rain storm flooded one Texas A&M AgriLife document storage facility, a fire hit another Texas A&M AgriLife location, a roof collapsed at another and Hurricane Ike caused problems at some of Texas A&M AgriLife's county offices.

Texas A&M AgriLife started its RFP process for ECM in early 2005. The RFP team included representatives from the IT department, the purchasing department, college departments, an economist and agency personnel.

Once the team selected Laserfiche, they deployed it in three phases.

1 Basic installation/designing the file structure/imaging —or scanning—documents. The aim was just to get it operational, get the file structure right and the ability to do some basic imaging.

2 Automation by integrating Laserfiche with Texas A&M AgriLife's mainframe systems.

3 Business process automation (accounts payable, purchasing orders, payroll change forms, etc.) using Laserfiche Workflow.

Robert Hensz notes that, although they didn't press much into records management early on, they did take time to carefully establish the file structure that would encompass the documents as they came in.

A tangible return on investment

Texas A&M AgriLife has achieved a significant return on investment in its Laserfiche system. It currently handles more than 13 million pages of documents and has:

- Eliminated 58 overnight mail deliveries per week. At a time time when overnight mail was increasing in cost, Texas A&M AgriLife kept expenditures flat.

- Eliminated the need to make 23,335 copies per week.

- Freed up more than 1,350 square feet of space by removing file cabinets.

- Saved more than 8,000 hours a year on filing. In accounts payable alone, they were able to avoid rehiring two budgeted positions and four student worker positions.

- Eliminated the need to print 200,000 pages per year.

Texas A&M Health Science Center

As Texas A&M's Health Science Center (TAMHSC) prepared to build its 200-acre new central campus, it didn't plan on incorporating storage space or central files rooms in the design. According to Kristin Nace:

"We wanted to have research and classroom space."

The Center also wanted to improve document accessibility and rein in escalating shipping costs associated with moving documents back and forth between offices as far flung as Dallas and the Mexico border.

As a result, TAMHSC formed a committee with four main goals: "Implement a document management system at the HSC that is user-friendly, versatile and can meet the needs of our departments while remaining cost effective."

Laserfiche's track record within Texas A&M AgriLife led to its selection by TAMHSC. TAMHSC implemented the system in 2008.

Costly contract management inefficiencies

Nace reported that, previously, contracts were mailed from regional locations across Texas to the central contract office in College Station.

"Those came to us in paper, and we required a paper transmittal sheet to be attached to each one," she told the roundtable.

Upon arrival, each contract was physically routed through up to six different offices for review. This consumed time and increased courier costs.

After review, it was then physically routed for signature. Only then was it mailed to the other contracting party.

"Once it was returned from that contracting party, we were able to store it in a file cabinet in our contract management office," Nace said.

The entire process was averaging two to three weeks to get a contract processed and signed.

And, Nace added, auditors subsequently wanted each regional office to have a copy of each contract that affected them. That also added to costs.

"So we needed to fix this problem."

"We're continually looking to the future and looking for ways to use Laserfiche to increase efficiency not just in contracts management, but in all areas of the Health Science Center."

A significantly faster, more streamlined process

Nace says that Laserfiche has significantly streamlined the contract management process.

Contracts are now scanned in from the regional locations as either Word documents or TIFF files and dropped off in a Laserfiche folder.

"Instead of a transmittal form, we now have a metadata field that the department creates and completes to help with later storage of the contract."

The contracts office receives the contract through Laserfiche and uses Laserfiche Workflow to route it to up to six different offices for simultaneous review. Once everybody is in agreement with the contract, it's then electronically routed for signature.

"After it is electronically sent to the other contracting party, it is stored in a shared Laserfiche folder so that all parties involved at TAMHSC have access to it, thereby making the auditors happy."

TAMHSC is particularly pleased with the business process management (BPM) capabilities of the Laserfiche software suite. Nace says that average processing time for contracts is now down to just two days.

"We're continually looking to the future and looking for ways to use Laserfiche to increase efficiency not just in contracts management, but in all areas of the Health Science Center."

This includes looking at including trigger dates that will prompt an automatic e-mail to relevant people that a particular contract is about to expire.

Creating a Shared Service Offering for the Texas A&M University System

Don Barwick says the procurement office of the Texas A&M University System pushes shared services so that system members can piggyback on each other's efforts. By implementing shared services, the university system is able to consolidate IT functions from several system members to one location, reducing costs across the board. Laserfiche is a prime example of how the Texas A&M University System uses shared services to create economies of scale.

To that end, in 2009 a campus document management committee was assigned to identify a preferred vendor for all new document management implementations. There were several aims:

- Avoid hardware and software purchases at the department level.

- Reduce costs by eliminating redundant systems.

- Make it easier to share documents and workflows between schools and departments.

The result was that, in 2010, the committee selected Laserfiche as the Texas A&M University System's preferred ECM vendor. Just a few of the benefits include:

- Consistent framework to support compliance.

- Risk mitigation through disaster recovery capabilities.

- Ability for different departments and system members to leverage the cumulative accomplishments of their colleagues.

According to Judith Lewis, "By providing a feature-rich implementation at an affordable price point, Texas A&M is able to make available economies of scale and document sharing that individual departments could not approach by themselves. This is value delivery at its best."

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The benefits of a shared ECM service

Barwick says that implementing Laserfiche as a shared service has allowed the university system to consolidate IT functions from several system members to one location. This reduces costs across the board.

This is just one of many substantial system-wide improvements.

He says that other improvements include reduced printing, reduced physical paperwork and reduced requirement for physical file space.

"We're looking at savings across the board," he says. "One particular system member... we've seen reports [of savings of] about 5,746 pages of AP printing alone."

Barwick says file management is a big plus. Laserfiche automatically classifies reports and the contents of that information. This enables users to search through the keywords in those reports—a function unavailable in the legacy software.

Account processing is faster, as is purchasing processing. Records management is more efficient, as it allows Texas A&M to adhere more closely to state processes and institutional procedures, particularly for payment terms and conditions.

"The quicker we can get the information filed and checked, the quicker we can get the vendors paid and not be charged late penalties," Barwick says.

A Windows-based system gives staff both internal and external access to electronic documents. That means staff who are traveling, or who are in offices that are geographically far-flung, can instantly pull up a document that is almost certainly housed somewhere else.

Compliance with records retention requirements is better. Laserfiche stores and allows for disposal of records without having to buy more shredders or call in paper shredder companies.

Barwick says they can now set specific access to folders in specific places. They no longer worry about open filing cabinets and having people looking through folders and seeing confidential data and documents.

The IT department benefits because institutional data is managed from a single, shared source. Safety and security is better, yet it also allows system-wide commonality of processes. One of the current shared service initiatives is to consolidate IT functions from several system members into a single location. This eliminates redundancy, lowers costs and reduces maintenance.

End users also benefit. Productivity is higher: they can pull up electronic files immediately, rather than search through file cabinets. This allows for quick resolution of issues.

"The university has built a Website specifically devoted to the Laserfiche shared service offering: laserfiche.TAMU.edu."

The Texas A&M University System's Collaborative Approach

As project manager for the Laserfiche shared service offering, Lewis appreciates the way that existing Laserfiche implementation managers at various schools have shared their experiences with Texas A&M University's central IT department.

She said, "In addition to the legacy Laserfiche talent, our IT department brings a broad skill base to support a shared services offering. From application development and administration, risk and policy assessment and project management to networking and infrastructure services, our IT department is able to provide the level of support that an enterprise shared service demands."

In addition to Central IT, there are two campus-wide communities that are intimately involved with the Laserfiche shared service offering:

- **A steering committee** comprised of senior management representatives from across the system. The committee evaluates and promotes best practices and appropriate conventions for Laserfiche, providing departments with consistent practices that will save them time in the long run. This committee provides input to the central IT department and also serves to channel information about Laserfiche out to the entire university system.

- **A user community of practice** that provides input and training for the end user community. This training is in addition to the basic end user training provided through the Texas A&M employee and organizational development department.

The university has built a Website specifically devoted to the Laserfiche shared service offering: Laserfiche.TAMU.edu, which provides public pages that outline the benefits of using Laserfiche as a shared service, FAQs and system governance.

The Website also contains protected pages that provide online training videos. The Website is intended to be the central go-to-place for information about the Laserfiche shared service offering.

Lewis explained that her department works hard to build on previous successes, include new departments incrementally and continuously review its processes. "We are dedicated to incorporating best practices, lessons learned and training resources from many sources in order to provide the best support for our customers."

To find out more...

We hope you enjoyed this case summary on the practical application of Laserfiche in the Texas A&M University System. If you would like to learn more about Laserfiche's potential application, we recommend a Best Practice Briefing.

This structured 40-minute conference call will give you a clearer idea of how enterprise content management works for colleges and universities, the clear control and cost advantages it offers and how it could conceivably work for your institution.

Just call +1 800 985 8533 to arrange yours today.

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