Cedarville University Provides Top-Notch Customer Service to its Students by Automating 20 Business Processes with FileBound by Upland Software

The workflow automation and document management solution by FileBound enhances the student experience by digitizing enrollment forms, identifying and helping at-risk students, and streamlining internal communication to allow staff to spend more time working with and counseling students.

CEDARVILLE
U N I V E R S I T Y ®

INDUSTRY:	Higher Education
LOCATION:	Cedarville, OH
WEBSITE:	cedarville.edu

At a Glance

Challenges

• Inefficient document storage processes

• Manual routing of students' applications

• Difficulty accessing student-related information

Benefits

• Instant access to student-related information

• Increased level of customer service to students

• Improved efficiency for Human Resources position requisition process

Market background

Across the higher education industry, colleges and universities are struggling with budget cuts and staffing inefficiencies, yet students' expectations from their college experiences have continued to increase. Additionally, demands on IT departments to integrate and maintain multiple systems to accommodate the daily needs of students, faculty and staff are rising. Traditionally, the higher education industry has relied on paper-based forms to conduct everyday processes. This antiquated system has become inconvenient and problematic due to quantity, turn-around time, and retention requirements.

Recognized as one of Ohio's best universities, Cedarville University, a private NCAA Division II school, is home to a diverse student body attracting more than 3,700 students from 49 states and 33 countries. Cedarville University is known for its rigorous academic programs, strong graduation and retention rates, accredited professional and health science offerings, and leading student satisfaction ratings. In an effort to increase productivity in the Admissions office with student applications, while at the same time meeting and exceeding the needs of their prospective and current students, Cedarville University needed a more efficient way to maintain their home-grown document management solution.

Challenge

In 2011 Cedarville University set out to find a solution to more efficiently store students' documents electronically and that offered the ability to automatically route those documents for process improvement. Administrators wanted to eliminate the manual, cumbersome processes that involved printing and storing over 22,000 pages of paper every year. Cedarville University's existing document management solution, a room with 12 full size filing cabinets, did not allow for intuitive search and retrieval, not to mention the large amount of space they took up. As the institution grew year after year, so did their problem. Some paper records, like degree justification which have a permanent retention policy, were eventually filling every corner of some staff members' office space.

FileBound
by upland

The FileBound by Upland Solution

With needs ranging from document management and online form creation to behind the scenes workflow capabilities and integration with their student information system, the university's IT staff alongside their Admissions team considered a number of choices, but ultimately selected Upland Software's FileBound product because of its workflow capabilities, security, and price.

What initially started in the Admissions department as a tool to allow students to electronically complete and submit their applications for review and processing, has now grown into a much larger application across eight departments. Cedarville's IT team, led by Ryan Bowen and Michael McCoy, have created, built, and implemented solutions for Admissions, Registrar, Human Resources, Financial Aid, Advancement, Payroll, Student Care and the School of Pharmacy. Altogether, Cedarville University has replaced 14 different paper-based forms with FileBound electronic forms, with many more on the list to do in the future.

"The real value is how FileBound allows students to fill out required forms at their convenience, whether lounging in their dorm room on their laptops at 2:00 a.m., standing in line waiting for their coffee on their smartphones, or planning classes in their advisor's office. We no longer need to schedule meetings with students just to get a form signed," said Becky Dufresne, associate registrar for Records & Registration.

Not only was the Cedarville University IT team able to provide efficiency and process improvements for these key departments, they also provided a seamless solution by integrating FileBound into their student information system. This was imperative so that student data and documents stored in FileBound automatically synced with Cedarville University's system of record and vice versa.

"Using the FileBound API, we were able to populate an e-form in FileBound called our 'Student Snapshot,' that gave the Registrar's office the ability to see student academic information without having to switch back and forth between FileBound and our student information system. This type of integration has been key in improving efficiencies surrounding the rollout of FileBound," said Michael McCoy, programmer/analyst, Information Technology at Cedarville University.

"Various departments have a need for the same data, which used to require students to write out the same information over and over again. Each time a student fills out a paper form, we needed to ask for basic information like name, ID Number, and major to help identify them. By putting these forms online with FileBound, behind a secure area, we now know exactly who is filling out the form. Therefore, we don't need to ask the student again and again for information that we already have," said Ryan Bowen, senior analyst, Information Technology at Cedarville University.

Cedarville University automates more than 20 business processes across their various departments, including:

- **Student major & advisor change requests**
- **Class change requests including substitutions and transfers**
- **Organization of students' donor funded scholarships and university donor gifts**
- **Identifying and helping at-risk students via Student CARE project**
- **Storing and classifying financial aid documents**
- **Request for changes/additions to any internal position**
- **Storage, search and retrieval of tax documentation for employees**

Benefits

Cedarville University's first project and primary indicator for success was the optimization of the student application process. "The application process for admission is a student's first real interaction with the university, a first impression. We need that process to show the same quality that is inherent in our academic programs. In higher education, we are selling a student experience; and that experience starts with the application process. FileBound helps us provide the online, efficient experience that the student expects," said Bowen.

"The most rewarding aspect of our investment in FileBound is the degree of service we can offer our students. Everything they need–whether they're looking to change a major, change an advisor, or get approval for a course substitution–it can all be done anywhere, any time, on any device. And we can rest easy knowing its being routed immediately to the people who need to approve it."

— Ryan Bowen, Senior Analyst, IT, Cedarville University

By digitizing the application and automating the process, Cedarville University has saved on printing 22,000 pages per year, cleared an entire room of file cabinets and most importantly, enhanced the student experience. Not only that, but since the student's record was now already created, the Admissions office has benefited as well, specifically seeing a reduction in their printing costs since they now no longer needed to print 1,000 student files, saving upwards of 70,000 pages per year.

Cedarville University's Human Resources department most recently implemented FileBound into their position requisition process and is seeing dramatic results right out of the gate. With a focus on process improvement and enhanced internal communication, the once dim process is now saving leadership and the University valuable resources.

"I believe the new system allows improved efficiency, accountability, and transparency within the approval process. The processing time for these requests has been cut by at least 70 percent, if not more," said Lydia Gaddis, associate vice president for University Human Resources at Cedarville University. "Previously, requisitions took anywhere from three to four weeks if the paperwork did not get lost. Now we are seeing the approval process take two to three days once the appropriate supporting materials are provided. This is a huge improvement!" said Gaddis. University Human Resources can now focus their efforts on better serving the needs of the campus versus being bogged down with paperwork.

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About FileBound

Upland's FileBound delivers document and workflow automation applications that improve the operation of any organization by connecting users with the information they need to work more efficiently and effectively. With FileBound, customers can build automated workflow processes and centrally manage documents to improve compliance, collaboration and access to information.

About Upland

Upland Software provides Cloud Solutions across the enterprise enabling amazing customer outcomes in:

+ PROJECT & IT MANAGEMENT
+ WORKFLOW AUTOMATION
+ DIGITAL ENGAGEMENT

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