

# Technology@Loyola

Information Technology Services

Loyola University Chicago

## Enterprise Content Management Needs Analysis and Deployment Planning

### Framing & Scope of ECM

- Enterprise Content Management (ECM) is the technologies used to **capture, manage, store, preserve, and deliver** content and documents related to organizational processes.
- ECM tools and strategies allow the management of an organization's **unstructured information**, wherever that information exists.

Align your needs to something you value

### Findings/Value Summary

- Intra Office**
  - Process improvements & efficiencies
  - Enhanced management of records/paperwork
  - Increased **records security** & protection
  - Reduction in physical storage space requirements
- Inter Office**
  - Improved **information collaboration** & sharing
  - Common language & transferable skills
- Broader Institutional Impact**
  - Annual operational savings
  - Support Green Initiatives

Measure what you value!

### ECM Metrics

Area	Result/Metric	Live Date	Baseline Effort	Current Effort	Timing	Effort Imprv.	Percent Imprv.	Annual Quantity of Occurrences	Annual Effort Imprv. (hours)	Earlier Document Access (hours)	
Financial Aid	Using the enhanced document security features to control document access. Faster access to Financial Aid images using LOCUS/DocFinity integration (New DocFinity icon on LOCUS screens to display DocFinity "file list").	2/9/2009									
Financial Aid	Improved speed of availability of images. Documents are available 3 days earlier. (See enrollment ops)	2/9/2009	120 seconds	10 seconds	per image retrieval	110 seconds	91.7%	3,267 retrievals	100		
Enrollment Ops	Ability to separate scanning and indexing processes to two or more workstations has increased productivity by allowing simultaneous scanning and indexing. This metric measure the affect on scanning. Use of business system screen scrape process has reduced the number of operator keystrokes and increased accuracy of index values.	2/9/2009	11 seconds	3 seconds	per page	8 seconds	73.0%	369,000 pages	800		
Enrollment Ops	Process re-engineering, made possible by improved technology, has reduced overall processing time from date of document receipt to date document available for counselor's review by a minimum of 3 days.	2/9/2009	26 seconds	14 seconds	per document	12 seconds	46.0%	127,590 documents	425		
Enterprise-wide	allowed for the indexing of all external academic transcripts into a single centralized scheme without regard to campus location or department record. Makes all external academic transcripts available to staff (with access) through a single search query.	8/3/2009									
									80.0%	Annual Totals One Time	5,354 439

Define your scope clearly!

### Needs & Product Selection Process

- Started in July 2007
- Research: best practices, peer and aspiring school usage.
- Engaged 3<sup>rd</sup> party expert (IMERGE Consulting) to assist.
- Needs analysis - Face to face interviews with 10 Core Departments to determine institutional needs.
- Request For Information & Proposal process including on site reviews and customer reference checks.
- Detailed analysis & scoring of 3 finalists.
- Result: Recommendation of the enterprise use of the DocFinity product from Optical Image Technology (OIT) for LUC.
- Final approval in April 2008 - 9 months
- Contract signed - July 2008

Plan plenty of time for detailed analysis

Pick a great partner!



### Implementation Stages/Maturity

Based on Dept. Readiness & Skills

**Stage 0 - Business Process Review**  
Analysis & Readiness Assessment

#### Stage 1 - Convert & Continue

- Training & Awareness
- Storage/Security Design
- Conversion
- Imaging continuation (applies to apples) - existing docs

#### Stage 4 - Tools Integration

- Bar Codes
- Email Integration
- Facsimile Integration
- eForms Processing

#### Stage 2 - Systems Integration

- Integration/database lookup
  - PeopleSoft
  - R+
  - Lawson (screen scrape)

#### Stage 5 - Workflow

- Multiple Processes Identified

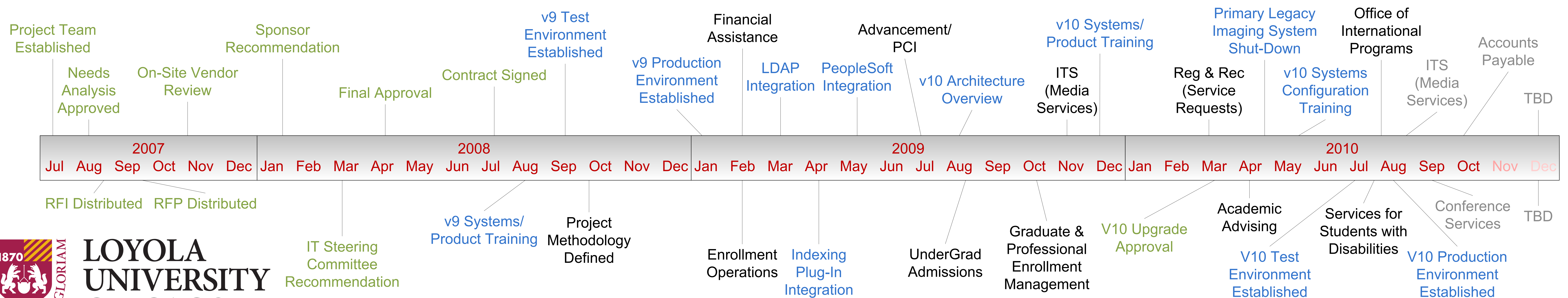
#### Stage 6 - Full ECM

- Full ECM - (scanning, workflow, some eForms, fax, email & systems integration)

#### Stage 3 - Imaging of New Docs

- Multiple Documents Identified

Modify your implementation to match the readiness of your customer



Legend: Needs Analysis, Systems/Technical, Client v9 Install, Client v10 Install (planned)



Preparing people to lead extraordinary lives

Jim Sibenaller & Tom Mathewson - July 2010