

Loyola University Maryland

Loyola University Maryland needed a process and content management and e-forms solution to support its Paperless University Initiative and chose to partner with Lexmark. With Lexmark solutions, the school has improved productivity and student service, enhanced data integrity and reduced costs.

Challenge

In 2008 to 2009, a cross-department committee at Loyola University Maryland convened to decide how the school could use technology to cut costs, reduce paper use, processing and storage, and be more environmentally responsible. The result was the creation of an ambitious campus-wide initiative: the Paperless University. Loyola chose to partner with Lexmark for process and content management.

The promise of paperless

"We visited a Lexmark university customer in Connecticut, and were blown away that their graduate admissions office was able to fully manage their document workflow single-handedly," said Louise Finn, Chief Information Officer at Loyola. "They operated in a very clean work environment, with absolutely no paper anywhere. It was very impressive."

The Loyola team recommended Lexmark as its Paperless Initiative partner based on this experience and myriad other factors, including integration with Colleague by Ellucian, the Perceptive TransForm online forms suite, compliance with Loyola's Information Security Policy, and scalability. "What really made [Lexmark] stand out was the flexibility and ease of use the solution provided to our end users," said Finn.

Solution

After rolling out Perceptive Content successfully in human resources and accounts payable, the Loyola team turned its attention to the student lifecycle in undergraduate and graduate admissions. The paper-intensive student records office was next, exploring how Perceptive TransForm—a full-featured online forms system—could integrate with Perceptive Content to improve student-focused processes.

Progressing from paper forms to electronic versions

After meeting with the student records office staff to assess their forms management needs, Pete Farrell, Senior Systems Engineer and Helen Aberle, Business Analyst—who as HRIS Director had helped implement Perceptive Content in HR—began converting a packet of four grading forms to electronic versions.

Meet Loyola University Maryland

Loyola University Maryland is a Jesuit, Catholic university located in Baltimore committed to the educational and spiritual traditions of the Society of Jesus and the development of the whole person.

- ▶ **Founded:** 1852
- ▶ **Campuses:** 4
- ▶ **Location:** Baltimore, Maryland
- ▶ **Enrollment:** 5,967

Products in use: Perceptive Content, Perceptive TransForm, Perceptive Workflow, Perceptive eForms

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Pete Farrell

Senior Systems Engineer, Loyola University Maryland

“The student records office team wanted to be able to provide faculty and students with better service, which is something we decided Perceptive TransForm could help with,” Farrell said.

Previously, a faculty member filled out a paper-based midterm deficiency report, failure report, incomplete report or change of grade report, and submitted it to the student records office. Some forms might then pass through a manual workflow and receive up to three signatures. Faculty members sometimes submitted incomplete forms, selected the wrong boxes or left fields blank. Once they submitted the form, there was no way to check its progress.

Results

Improving service to students, faculty and staff

Now, a faculty member logs into Loyola’s online faculty portal to access the e-form they need. Perceptive TransForm validates their user credentials against Active Directory and once they enter the student ID, uses this to pre-populate certain student information. This reduces the amount of user effort.

“We used to have a lot of data entry errors and forms with missing information or student ID numbers that didn’t match the student information,” Farrell said. “With Perceptive TransForm these issues go away, and as TransForm is compatible with any mobile device, browser and platform, faculty members can access and fill out forms from anywhere without paper.”

Once the faculty member completes all required fields and digitally signs the e-form, the Lexmark system sends it into Perceptive Workflow for immediate processing.

“The biggest plus with TransForm is the seamless integration with Perceptive Content,” Farrell said. “Grading forms are immediately added to workflow and are available in the student’s file. There’s no scanning, no linking and processing time is greatly reduced.”

Enhancing the grading process

In addition to sending e-forms to staff members and faculty, TransForm also conditionally routes certain forms to students, improving service and communication.

“With TransForm, we can dynamically determine who receives an email when a form is submitted,” Farrell said. “For example, if we didn’t want students to receive notification after their midterm grade is submitted, but do want them to receive their final grade, we can easily configure this. With the midterm deficiency report form, the workflow integration lets them know what they need to do to improve their performance immediately, instead of them waiting days or weeks.”

Perceptive TransForm is not just improving faculty-student communication, but also service to internal clients. The records office is happy that they can maintain control over form design and publishing.



"The feedback about TransForm has been all positive," Aberle said. "Faculty members like the ability to fill out forms from anywhere, and the administrative offices appreciate the time savings and no longer having to make copies for students, advisers and other departments."

Building for the future

Now that Loyola has seen the benefits of replacing paper-based forms with e-forms, they're exploring what other campus offices could benefit from TransForm.

"Perceptive TransForm is a great fit for any office that has a lot of published paper forms and is looking for a way to quickly make the move to electronic," Farrell said.

"Moving to e-forms in areas like HR can improve efficiencies, drastically increase customer service and keep our Paperless University project moving forward."

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Helen Aberle

Business Analyst, Loyola University Maryland

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