



Success story

Leading Institute of Higher Education

Industry

- Education

Solutions

- OpenText™ Employee File Management for SAP® Solutions
- OpenText™ Capture Center

University transforms HR document management and initiates ECM rollout

Advancing access to employee and student files and adding content management efficiencies with OpenText technologies integrated with SAP

Results



Centralized, secure HR **digital document management**



Cost- and time-savings related to efficiency, space savings



Simplified compliance

"As we continue to strive for greater efficiency and higher levels of productivity, using digital and online tools will be key to meeting our goals."

University's Director of Compensation and Employee Records



This leading state university is a land-grant institution founded in the 1800s. Today, the university has more than 27,000 students and over 12,000 full-time employees.

Ready to learn

The university's Human Resources (HR) department had already faced disappointment after three failed attempts at implementing new document management systems.

"There was some concern that we might never be able to actually get an Enterprise Content Management (ECM) system in as a truly enterprise-level application," said the university's ECM team lead. The university wanted to move to a paperless system and implement an integrated framework for stronger document management across multiple business functions. Executives developed a vision for an enterprise-wide ECM solution that included connecting to SAP® (their enterprise resource planning (ERP) system), improving compliance and control, and realizing time and cost savings.

Like many large institutions, the university's HR department struggled to manage content growth. The HR team was processing more than 310,000 employee record documents and close to 37,000 personnel action requests annually. As they matured in their SAP implementation, it became clear they were successfully managing, sharing and disseminating structured data, but there was a lot of unstructured data that needed to be addressed.

Close to 700 HR staff members conducted work from the central HR office as well as locations across the university's more than 800 acre campus. Among other challenges, the central HR office was running out

of room as they had almost reached the threshold for physical space in their building. With square footage being fairly expensive, they needed to maximize productive space compared to administrative support space.

The university wanted to go beyond a simple point solution and, instead, implement an all-encompassing ability to manage employee documents as digital corporate records and a 360-degree view for authorized users. In sum, it needed a solution to securely store and retrieve records, support auditing processes and manage employee files.

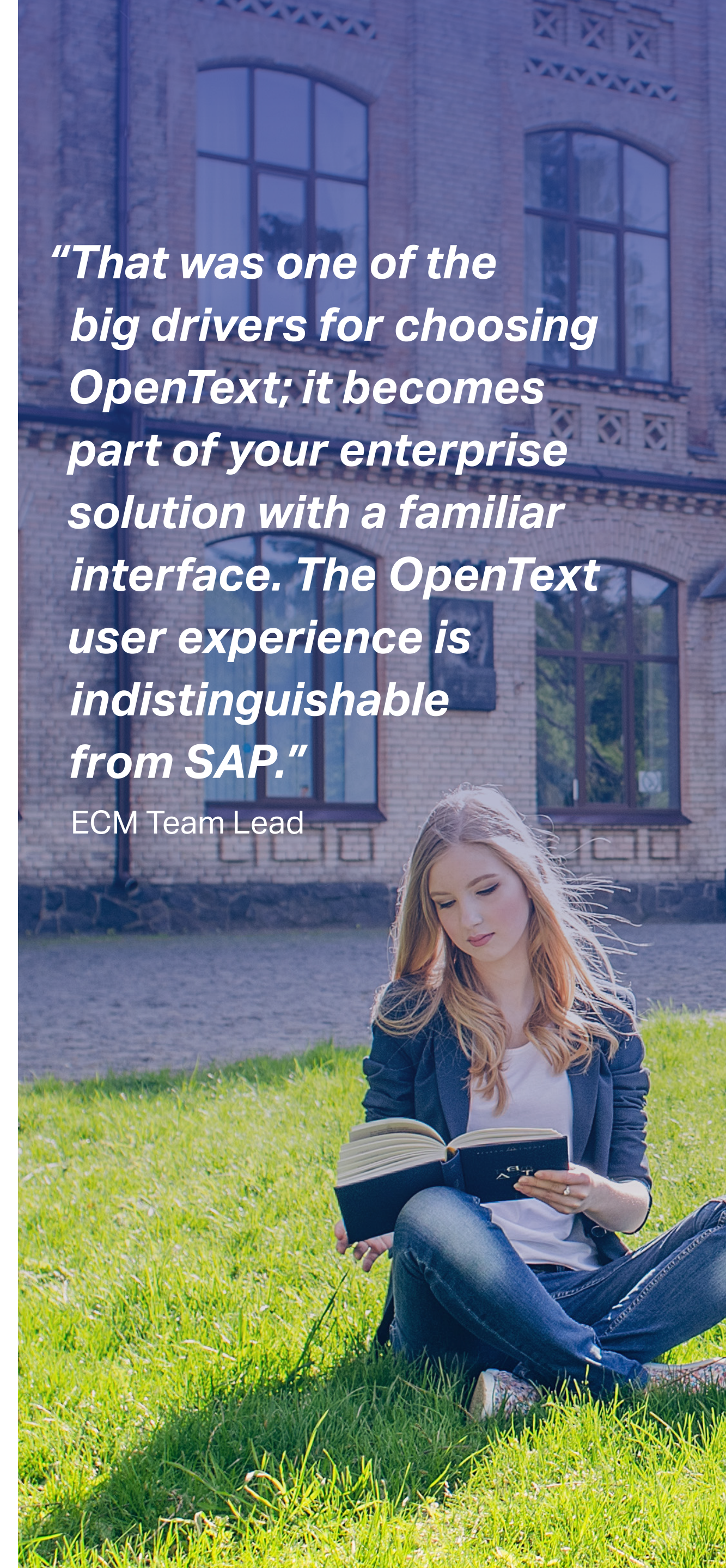
Convenient and agile HR service delivery

Working with Optima ECM Consulting, an OpenText integration partner, the university implemented OpenText™ Employee File Management for SAP® Solutions (EFM), a digital personnel-filing system with scanning, web access, secure archival and other capabilities, including integration of SAP documents and retrieval through the SAP Human Capital Management (HCM) interface. EFM includes portals and other technologies that extend the value of the SAP® Business Suite. In addition to EFM, the university's rollout also included OpenText™ Capture Center to extract document data with advanced recognition.

HR professionals across the university campus now have concurrent digital access to documents throughout the entire employee lifecycle. This includes compensation classifications for job positions, performance evaluations, I-9 Employment Eligibility Verification forms and other official university files for faculty and staff. To the user, OpenText integration is essentially hidden. ***"That was one of the big drivers for choosing OpenText; it becomes part of your enterprise solution with a familiar interface. The OpenText user experience is indistinguishable from SAP,"*** said the university's ECM Team Lead.

"That was one of the big drivers for choosing OpenText; it becomes part of your enterprise solution with a familiar interface. The OpenText user experience is indistinguishable from SAP."

ECM Team Lead



EFM enables searching by name, number or other attributes and archives documents according to legal regulations. It is designed to be adaptable and configurable according to specific, and even changing, needs. For example, an important feature of the implemented solution is its flexible folder structure. ***“We wanted the folder structure to be based on the way we do business. We didn’t want to be dictated to by following a set of transactions that are already hard-coded,”*** said the ECM Team Lead.

The university’s full ECM roadmap affects eight business units and multiple content flows within each unit. The entire implementation timetable was 18 months, with 16 weeks planned for EFM deployment. ***“We’re fortunate with our partnership in Optima because they spent quite a bit of time with us at our request to ensure we truly understood how to run the system. We didn’t want to be dependent on someone else to run the system as we need to own it and understand it thoroughly,”*** said the university’s ECM Team Lead.

Time- and cost-efficiencies drive ECM progression

The EFM solution has changed the way HR does business at the university. Instead of spending hours per day manually creating and updating files, HR staff and other employees centrally access and manage information based on user-defined rights and authorizations in the SAP HCM application. ***“For our large user base of 12,000 employees, we’ve reduced calls, pulling files and other manual steps HR used to follow to answer requests and produce a file,”*** said the ECM Team Lead.

In its first year of deployment, the university realized impressive results using EFM:

- Improved HR business process efficiency by up to 50 percent: HR staff members spend less time searching for or filing paper documents.

- Reduced HR operational expenses by up to 20 percent: University reduced the need and cost for rising towers of paper and storage cabinets or off-site storage—on campus, the space will soon be available for more productive uses.
- Reduced legal and compliance risk by up to 70 percent: Electronic, searchable records ensures defense against legal actions, with the documentation to back it up.

The university sees these gains accelerating as they continue to bring more users and processes on board. Continued digital evolution supports the university’s initiatives. ***“As we continue to strive for greater efficiency and higher levels of productivity, using digital and online tools will be key to meeting our goals,”*** said the university’s Director of Compensation and Employee Records. ***“Our HR team will help lead the university’s effort to bring virtually all aspects of the hiring and performance management process online, in a way that will make these processes simpler and easier to manage for everyone at the university.”***

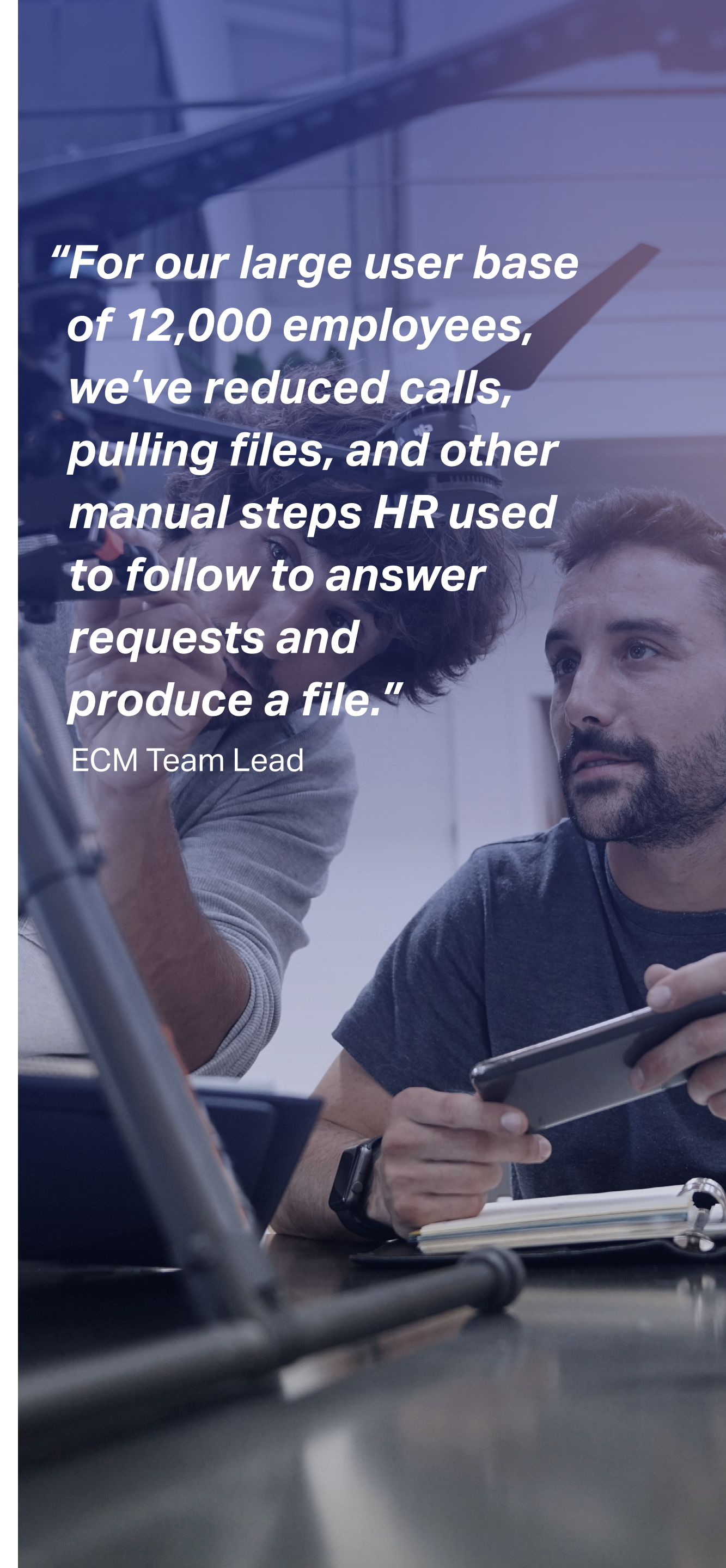
In searching for a file management system, the university maintained a firm commitment to adding value to processes. With EFM, the university is enabling management and frontline employees to make better decisions, improve collaboration and produce faster workflow processes. Other key criteria and initial benefits of the digital file system relate to favorable total cost of ownership, smooth integration and ease of use.

Optimizing student file management

With the success of Employee File Management for SAP Solutions, the university used the system as a template to build its own Student File Management solution. ***“The model seemed to fit well, so we’re using it to help with our admissions and student records processes,”*** noted

“For our large user base of 12,000 employees, we’ve reduced calls, pulling files, and other manual steps HR used to follow to answer requests and produce a file.”

ECM Team Lead



the ECM Team Lead. ***“We use the SAP module, Student Life Cycle Management (SLCM), and we wanted a way to better manage the files associated with those processes.”***

The university uses Optical Character Recognition (OCR) functionality from the Capture Center solution to enter electronic data from incoming transcripts for student transfer requests. Previously the task of entering that data was manual and resulted in a lot of overtime during peak cycles.

The new optimized process is set up so that student files enter the system electronically, stay in electronic form and can be shared and archived accordingly. Once the admitted student begins attending class, it becomes part of the student record. In the Office of the Registrar, those records need to be retained permanently and so having rules attached to this type of information is very important. ***“The changes introduced by our Student File Management solution affect how the university admits students and manages their records. The overall impact cannot be overstated and the solution will be leveraged in the future for other student content solutions, such as scholarships, financial aid, account services and the graduate school,”*** said the ECM Team Lead.

Conclusion

The rollout of OpenText solutions at the university has so far impacted several departments including Human Resources, Office of the Treasurer, Enrollment Management, the University Budget Office and the Physical Plant Division. This is the culmination of an integral ECM strategy exercise, run by Optima ECM Consulting, which identified close to 42 potential

business areas that will leverage OpenText solutions for SAP. ***“Helping our customers unveil the potential of ECM and clearly identify areas of opportunity with an overarching strategy is always a pleasure. The opportunity to work with this forward-thinking university to roadmap their ECM journey longterm and share their experiences with other customers has truly been unique”***, concluded Jaime Gutierrez, Chief Architect Officer, Optima Consulting.

In the near future, the university plans to add OpenText™ Extended ECM for SAP® Solutions, which unites ERP and ECM with additional management and collaboration capabilities.

About Optima ECM Consulting

Optima ECM Consulting has global experience in implementing leading-edge SAP solutions across multiple industries. With unparalleled expertise and experience in strategy, design, implementation and management of SAP Solutions by OpenText, their consultants and founders are uniquely suited to ensure business’s rapidly recognize expected ROI and drive immediate value across their organization while leveraging their investment in SAP. For more information, please visit optimaecm.com



About OpenText

OpenText, The Information Company, enables organizations to gain insight through market leading information management solutions, on-premises or in the cloud. For more information about OpenText (NASDAQ: OTEX, TSX: OTEX) visit opentext.com.

[Customer stories](#) 

opentext.com/contact

[Twitter](#) | [LinkedIn](#)

Copyright © 2018 Open Text. All Rights Reserved. Trademarks owned by Open Text. For more information, visit: <https://www.opentext.com/about/copyright-information> 09486B.22EN