



## CASE STUDY

# University of Michigan Solves Paper Chase Problem with Alchemy

*"Prior to Alchemy, the system was labor-intensive and frustrating."—professor of sociology*

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| <b>Industry</b>  | Education, Universities  |
| <b>Challenge</b> | Gathering research from scattered paper documents  |
| <b>Solution</b>  | Captaris Alchemy Document Management solution  |
| <b>Results</b>   | Saved three months on a single evaluation project; provided efficient data gathering for researchers; reduced storage costs and file cabinets. |

## BACKGROUND

Large organizations require access to information on a timely and organized basis to track the efficiency of their internal processes, to understand their performance and to stay aware of any external environment changes that may impact their business. Unfortunately, this information tends to be located in diverse places, reflecting the fact that the requisite information is usually embedded in a wide range of files, documents and other "hard copy" sources. Gaining access to and organizing this information can be difficult—but it doesn't have to be this way. The University of Michigan School of Social Work is a model of how an enterprise can streamline back end processes and save their business time and money.

The School of Social Work (SSW) is part of the research university in Ann Arbor, Michigan, and was ranked number one for its master's program by US News & World Report (2004). The school has been serving the community for eighty years and is the home of a world-class interdisciplinary Ph.D. program in Social Work and Social Science. The management team of the latter program was particularly concerned about improving its operation due to its complex nature; students study in Social Work and five different social sciences: anthropology, economics, political science, psychology and sociology.

## THE CHALLENGE

SSW keeps track of more than 400 master degree students and over eighty Ph.D. students at any given time, and needs to generate reports for internal and external reviews, annual reports, research grants and various other activities. The federal government routinely asks for data on students and student performances, and providing this data is key to keeping the university functioning and core to maintaining their academic record of excellence. Also, SSW reports key metrics to the university on an annual basis and regularly to external constituent groups. Critical, accurate, record and data management is integral to their success.

Like most schools, SSW used a hard copy filing system and tracked their records manually. Staff members would dig up a file, scour through it for desired information such as student test results, and return it to its filing place, a process that made it difficult to extract data from documents efficiently. "It was labor-intensive and frustrating," said Dr. David Tucker, director of the joint program in social work and social science and professor of social work and adjunct professor of sociology.

## THE SOLUTION

A year ago, SSW invested in the Alchemy Document Management solution and it is utilized school-wide by dozens of employees in distributed locations, for example the Dean's Office, the registrar's office and the office of student services. Student files, committee minutes and other types of information are scanned into the Alchemy repository, that currently holds around 60,000 records. This quick process consolidates data and makes it available for easy retrieval. The various offices can access the repository simultaneously while the confidentiality of the records is strictly maintained.

The grant application process for the National Institute of Mental Health is an example of how Alchemy has improved SSW operations. During this process, SSW may need to provide data on alumni, such as how many alumni graduated in various areas of specialization. Prior to deploying Alchemy, records would have been manually collected by employees from filing cabinets, where it would then be organized so that specific information could be compiled for reports. That information would then have to be entered into a spreadsheet or other consolidated document or copies of individual records would need to be copied, collated, and mailed to complete the applications. The old process was manual, expensive, and time-consuming to maintain which added to the approval and acceptance time of University grants. Staff members are able to simply access the secure data repository, and a quick search reveals the desired data. SSW can then copy the data onto a CD and ship it to the foundation, or alternatively email or print out and send the information by hard copy.

## THE RESULTS

Here are some of the benefits SSW has seen:

**Efficiency/ease-of-use in gathering data** For instance, a grant may require data on how long it takes students to finish the Ph.D. program, and rather than one person searching through many hard-copy files, multiple employees can access this information simultaneously, within in minutes, and it is accessible any time, including weekends and evenings. Plus, the school is converting all past files from microfiche to Alchemy where it is accessible over the Internet.

**Time savings** It takes minutes rather than days or weeks to access data. Over the past year, SSW conducted a comprehensive evaluation of the Ph.D. program. SSW obtained and used data resulting in a much more in-depth assessment that would have been much more difficult without Alchemy. Dr. Tucker estimates Alchemy saved three months of data gathering time, and without Alchemy, SSW would have been faced with a manual and therefore less reliable review of files.

**Space savings** SSW has not purchased an additional filing cabinet during the year and has been able to recycle freed-up cabinets for other uses that would have required new purchases, such as the filing cabinets used by Ph.D. students in storing their papers in the doctoral students' computer room.

**Enhanced security** For obvious reasons, the university doesn't want hard copies of files floating around various offices. Alchemy's required access via password makes the records more secure. Plus, Alchemy acts as a built-in backup system.

Other departments at the university are following SSW's example discovering many ways to leverage their investment in the document management system. For example, one department is planning to use Alchemy in new faculty hires. Rather than tracking and circulating confidential files among committee members, members would simply access files stored on the Alchemy server while sitting in their own offices. Costs of reproducing files by photocopying would be eliminated, and because faculty members can view files simultaneously, Dr. Tucker predicts the efficiency gains may encourage more faculty members to serve on such committees.

## FOR MORE INFORMATION

Captaris Business Information Delivery solutions help organizations of all sizes automate the information and document flow throughout the information lifecycle (capture, process, deliver, manage and archive). With a comprehensive suite of software and services, Captaris helps organizations to grow revenues and increase profits while meeting compliance goals. Through a global distribution network of leading enterprise technology partners, Captaris has installed more than 90,000 systems in 95 countries in companies of all sizes, including the entire Fortune 100. For more information, visit [www.captaris.com](http://www.captaris.com) or call 1.800.443.0806.

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