# UNIVERSITY OF CENTRAL FLORIDA
## ORLANDO, FLORIDA

**NORTH AMERICAN EXCELLENCE AWARDS: WORKFLOW, MERIT**

EXECUTIVE SUMMARY

Orlando, site of the America's most popular tourist attraction, is also home to another technologically advanced institution, the University of Central Florida. Set among the nation's fastest-growing high-technology business region, UCF is consistently challenged to maintain its leadership in technology innovation. To do so, UCF itself must be a model of efficiency and change. By applying ViewStar workflow technology from Mosaix, Inc., UCF has dramatically improved how it serves students, faculty, administration and the state.

What's unique about UCF is not that it has achieved incredible benefits with workflow. Other universities have. What's novel is the pervasiveness of business process automation across the University, and how it has completely transformed student ("customer") service.

For example, UCF is among one of the many Florida-based universities experiencing an explosion in enrollment growth. The university receives more than 25,000 graduate applications annually with an average application consisting of 15 pages each. To provide its applicants with exceptional customer service, and to coordinate the application process from initial receipt to review, approval and notification, UCF implemented a ViewStar workflow management system from Mosaix, Inc. Since its inception, the ViewStar system has produced dramatic results for the university, including:

- Applicants can submit a paperless, online application that uses the Internet to enter information directly into the admissions workflow.

- Money previously wasted on filing costs now pays for better service through new full-time student advisors.

University employees can give instant, informed updates to persons looking to find out their application status. Shared, online access to applicant information allows UCF employees to process applications faster.

After the success of the initial ViewStar implementation in graduate admissions, UCF has since applied ViewStar technology to new applications including *student records, finance and accounting, financial aid* and *human resources*, making the university one of the most technologically advanced anywhere.

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INNOVATION

## *Admissions Department*

UCF is one of the fastest-growing campuses in the Florida State University system, with student enrollment over 26,000, and more than 35,000 students expected in 2000. With increasing numbers of students applying to all of Florida's institutions of higher learning, and because competition is fierce for highly qualified candidates, it is vitally important to process admissions quickly and properly. Since the university always prided itself on providing unsurpassed customer service, overhauling the admissions department was a challenge that needed to be met.

"We began looking into imaging as a way to improve our applicant service," said John Bush, director of admissions. "Many times a student would call inquiring on the status of their enrollment application and we could not give them an immediate answer because the document was in the process of being routed for approvals." In addition to student inquiries, other areas, such as financial aid, the housing office and academic advisors, required access to admissions documentation. "We had to find a system that would provide us with instantaneous access to information as well as expedite the entire approval process," said Bush.

In centralizing the admissions process, the university's administration recognized the need to provide rapid access to information, and to comply with all state regulations regarding records management. "For graduate admissions, we had to streamline our admissions process in order to keep up with the projected enrollment," said Bill Branch, UCF's director of computer services and telecommunications. "We wanted a system that could manage the increasing volume of enrollment documentation and improve service to our students and faculty," he added.

IMPLEMENTATION

Prior to installing the ViewStar system, admissions were handled through a completely manual process. Applications were received and copied, with one copy stored in the student's file and one sent to the graduate admissions department. Once reviewed by the admissions department, the application was forwarded, via fax or internal mail, to the appropriate college for approval.

The university began looking into imaging and workflow as a way to improve applicant service. A student inquiring on the status of an enrollment application frequently could not be given an immediate answer because the document was in the process of being routed for approval. In addition, other departments such as financial aid, housing and academic advisors also required access to the admissions documentation.

UCF selected a ViewStar system from Mosaix because of the LAN architecture and

interoperability of existing personal computers, the maturity of workflow software, the flexibility of designing applications with networks and rapid application design, development and deployment.

### System Configuration

*   Workflow System: ViewStar Version 4.2.2

*   Network Operating System: Novell 3.1.2

*   Client Hardware: 486/66s and Pentiums

*   Number of workstations: 150

*   Number of Users: 300

*   Server Hardware: Compaq Proliant 5000s

*   Types of Servers: Fax server, gateway server, and workflow server

*   Scanner hardware: Fujitsu 3097's (10)

*   Optical hardware: Sony Jukebox

*   Database: Microsoft NT SQL Server

*   Pages processed annually:
    Approximately 25,000 applications per year at 15 pages each for graduate admissions

*   Images/Pages Stored On-line:
    10 million records at 20 pages each

IMPACT

### Savings

*   Microfiche costs of $25,000 annually have been eliminated.

*   Paper costs of $30,000 annually have been eliminated.

*   Cycles time for application processing has been slashed in half.

*   Paper processing has been cut 90 percent. University workers are now freed from wasting time opening cumbersome applications.

*   Storage and manual filing costs have been reduced 90 percent.

*   The problem of lost or misfiled documents has been virtually eliminated.

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- Productivity has increased 75 percent as employees find and process files instantly.

- The $80,000 spent annually on student assistants to file records has been reallocated to hire full-time student advisors.

The primary benefit to UCF is improved service to students and faculty, resulting from an exploding rate of productivity through use of the ViewStar system. Graduate admissions applications are now shared electronically, enabling simultaneous review of student information. Response time to applicants has been cut from three or four weeks to immediate access.

Today, applications for admission can now be done electronically over the Internet and downloaded directly into the ViewStar System for processing. There is no paper whatsoever in the process, no documents getting lost in the mail and transmission is instantaneous. Applicants that previously had to wait one to three days to obtain the status of their enrollment now get that information instantly.

### Improved Workflow

Prior to installing the ViewStar System, graduate admissions were handled through a completely manual process. Applications were received and copied, with one copy stored in the student's file and one sent to the graduate admissions department. Once reviewed by the admissions department, the application was forwarded, via fax or internal mail, to the appropriate college for approval.

With ViewStar, all admissions documents are now routed electronically. At any point in the cycle, representatives can obtain the status of an application simply by pulling up the documents on their workstation. The application process begins in the admissions office where clerical personnel sort, batch and scan documents, with barcode cover sheets used to direct the document to the correct routing. Data entry personnel key-in appropriate information from the enrollment form (i.e. name, address, social security number, etc.), and route the application to data verification stations.

Once verified, the documents are forwarded to the Director of Admissions, who receives and reviews applications electronically. The Director of Admissions then forwards the documents to the various schools within the university for approval.

### Implementation Process

Key elements in the university's decision to move ahead with several ViewStar applications included the rising rate of applicants to the university, the emergence of client/server technology, and the need to take advantage of business process automation. The need to speed processing, conserve space, and realize tremendous cost savings was also critical.

# EXCELLENCE IN  PRACTICE

Viewing this system overhaul as a fundamental change for the university as it nears the year 2000, the team endeavored to identify key issues such as type of technology, budget, timeline, and the effects of the new technology upon university personnel. Once those core concerns were addressed, a master plan was circulated for review among departments affected by the changes. Input was solicited and the plan was refined. Graduate admissions were to be the first implementation of the automation technology. Given its success, the other applications have since rolled out smoothly.

ENTERPRISE WORKFLOW: INNOVATION, IMPLEMENTATION, IMPACT

After the implementation of the graduate admissions workflow application, the university turned its attention to automating other core functions such as student records (graduate and undergraduate), finance, accounting and personnel, making the campus a model for other universities across the country.

In assessing the task of bringing enterprise computing to the campus, UCF IT experts found:

- Client/Server challenges, including configuration-related complexities associated with implementing and maintaining them

- Environment diversity challenges, including attempting to provide users with the ultimate in flexibility and choices when faced with an array of vendors, components and technologies, in an era of a lack of true "plug-and-play" alternatives

- Cost of maintenance and support

- Lack of trained personnel

- Lack of unified network infrastructure

Faced with these challenges, Dick Hamann, Coordinator for Image Processing in the Division of Computer Sciences at UCF, assembled a team of technology experts, department heads, and administration leaders and prepared a vision for enterprise workflow that included these functional and operational mandates:

- Process Modeling: the system must support modeling and automation of business processes across multiple process categories that included structured and unstructured workflows

- Process Distribution: the system must support the automation of distributed business processes, including physically distributed processes spanning multiple locations, and logically distributed processes that cross multiple lines of business

- Process Interoperability: the system must support communication and interoperability between separate workflow applications

- Document and Data Management: the system must manage, manipulate and create

persistent, mission-critical business documents and data, providing security and control mechanisms

- Infrastructure Leverage: the system must provide complete and seamless support for existing IT network infrastructures, leveraging all available system services and complying wherever possible with the existing standards, policies and procedures of the enterprise.

- Distributed System Support: the system must support the creation of enterprise-scale solutions

- Internet and Messaging-Based Interaction: the system must support the use of the Internet and standard store-and-forward messaging services as a primary transport mechanism

- Document Import/Export: the system must support seamless, high-capacity import/export services with enterprise document repositories, using such repositories as sources and links for documents entering and exiting the workflow

To accomplish all of the above, the Division of Computer Sciences surveyed user needs, evaluated vendors' products and lobbied the university administration and state officials for the budget and go-ahead to make UCF the first university in the state to employ enterprise-wide business process automation. By demonstrating the success of the initial system, and the cost, time and customer service benefits of the proposed applications, Hamann's group was endeavored with rolling out four new workflow applications across UCF. The results are impressive.

### Finance and Accounting

The University of Central Florida is the archetype for state reengineering efforts in Florida. UCF's accounts payable interaction with the State of Florida's central accounts payable function is handled electronically. Previously, when a voucher came in for payment, two paper copies were made: one for UCF and one for the state. The state controller's office would then determine payment and shred the original invoice.

Today, when a voucher comes into UCF for payment, it is scanned and then sent electronically to the state's central payment center for review and processing. If approved, a check is then automatically cut and mailed.

- Productivity has rocketed 300 percent for finance and account state controllers office

- There is no more paper archiving

- Double payment errors are eliminated through electronic cross-checking

- Inquiries are tracked instantly

- Prompt payment discounts are leveraged.

# EXCELLENCE IN  PRACTICE

Soon, all mainframe information will migrate to the ViewStar System using APIs, so that checks can be generated without waiting to download files. Financial reports of all types are generated daily, weekly and monthly from the university mainframe. Using a COLD application:

- The use of microfiche has been 100 percent eliminated

- Paper has been reduced 90 percent

- Records are accessed instantly

- Productivity in the payroll department has zoomed more than 50 percent.

UCF has wired a special mile-long fiber-optic connection to a building nearby the campus center, where the new COLD and voucher operation are housed, allowing compete integration with the host ViewStar system at the university and the state financial office in Tallahassee.

### Student Records

With a student body of 26,000 persons, with thousands more applying or in transition between undergraduate and graduate programs, maintaining control and access to student records are vital. Florida State law demands that all records, even those of unsuccessful candidates, be retained for a minimum of one year. These huge amounts of paper documents previously filled scores of file cabinets, which are now completely unnecessary and have been removed.

In addition to processing all records through the system, the ViewStar System now accepts fax admissions into UCF from the state's junior colleges, eliminating any paper handling. Furthermore, data from undergraduate students seeking admission to UCF graduate school is accessed automatically, negating any need to locate or re-create existing information, thereby speeding the process.

### Human Resources

The Human Resources Department at UCF now uses ViewStar workflow technology to screen and process all job applicant applications and records, employee benefit forms, correspondence, and other functions.

### Financial Aid

At UCF, all financial aid requests are now automatically processed electronically with the state, speeding responses and putting badly-needed educational funds in the hands of those students who need them most. Inquiries are electronically matched according to need and resources available, and routed to the appropriate clerk for review.

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### *Staff, Student Impact*

The effect of the modernization of equipment and processing has been uplifting for the staff as their jobs are made more fulfilling, more productive and easier through technology. Customer service to students had improved dramatically.

In addition, UCF has become an example to the other universities and numerous state agencies that regularly visit the campus to learn about the technology that is changing education.