

Concordia University



Streamlining Access to Faculty Dossiers to Save Time and Money

Business profile

Customer Name

Concordia University

Industry

Education

Geographies

Montreal, Canada

Business Focus

EDM

EMC Documentum Products

Documentum ECM Platform

Deployment Summary

Originally deployed in 1998 for the Faculty of Arts and Science (400 faculty members), expanded to the Library (40 librarians), to the Faculty of Engineering and Computer Science (130 faculty members), and to the Admissions Office

EMC Documentum Partner

Xerox Global Services

Business overview

Located in Montreal, Canada, Concordia University is a large urban university serving 28,000 undergraduate and graduate students from across Canada and around the world. Created in 1974 following the merger of Loyola College and Sir George Williams University, Concordia University offers a wide range of programs in the areas of arts, science, engineering, commerce and fine arts. Concordia's mission is to prepare its students to live as informed and responsible citizens committed to learning and to the spirit of enquiry.

Challenges

The dean's office at Concordia University stores a significant amount of information about its faculty, including annual workload letters, contracts, performance reviews, and changes to curriculum vitae (CV). With more than one million pages in the dossiers of its 350 members, the dean's office of Concordia University's faculty of Arts and Sciences was being overwhelmed by paper.

Retrieving dossiers and then searching within these folders — each of which holds hundreds of pages — for the exact documents required to resolve inquiries about everything from tenure starting dates to required workloads took more than 1500 man hours per year and was also subject to human errors. The time expended on simple information retrieval and filing was so great that staff members had little time to complete their other tasks.

Documents Scattered Over Numerous Locations

Adding to the complexity of the document retrieval process was the fact that faculty personnel records were often scattered across multiple offices, including the dean's office, the faculty personnel office, and the university human resources office. With no comprehensive central repository for faculty documents, staff members at each of these offices did not always know where to look first for the documents they needed or if the document they had was the most current. This had a severe impact on productivity.

Benefits

- Creates paperless environment
- Enables fast access and supports attribute-based queries
- Organizes information intuitively in a logical folder structure

Multiple Versions of Same Document

Document retrieval was further complicated by duplication of content within each dossier. “Every time a faculty member applies for a promotion, gets tenure, receives a new contract, or completes some significant research, that person must submit another CV to update their dossier,” explains Aaron Brauer, Concordia’s assistant director, academic technology. “This resulted in multiple copies of documents in each dossier. We had, for example, more than 10 CVs in some dossiers — and even more for some faculty members who have been with the university for as long as 35 years.”

Because of this duplication, staff members spent even more time after retrieving information from the dossier, reviewing every document to ensure it was the most current version. The result? Further lost productivity.

Storing and Retrieving Documents by Attributes

The dean of the Arts and Sciences faculty realized that the volume of dossiers and the number of documents in each dossier would only increase with time — as would the complexity of filing and retrieving documents and resolving inquiries. To streamline these processes while freeing up staff members to perform their other assigned tasks more effectively, Concordia University decided they needed a way to store documents centrally and electronically and file them by name and document type.



“Our new Documentum-based content management system not only reduces our document retrieval time, it also improves information access and content reliability. What used to take hours or days, now occurs in minutes and we know the information is always accurate.”

Andrew McAusland, Executive Director, IITS and Director Academic Technology, Concordia University

“In our paper-based system, if we wanted to review workload letters that detailed each faculty member’s required output for the year, we had to pull them one by one, retrieving each individual’s dossier and then searching for that specific document,” explains Brauer, “What we wanted to do is simply specify the document type and automatically retrieve all the documents of that type for any specific department within our faculty.”

With documents stored electronically and filed with attributes such as name and document type (including workload letter, contract, CV, tenure letter or general correspondence), Concordia would also be able to streamline the retrieval of specific documents in any individual faculty member’s dossier. “What we envisioned,” Brauer says, “is the ability to instantly gain access to the specific piece of information we needed to resolve an inquiry in seconds, rather than the hours or days it took in a paper-based environment.”

EMC Documentum/Xerox Global Services Solution

Recognizing that the university did not have the technical expertise to design and implement an enterprise content management solution, Concordia University turned for help to Xerox Global Services, a Documentum partner.

“We contracted with Xerox Global Services because we had no experience in electronic document management and they were the acknowledged leader in this field, with strong historical ties to EMC Documentum®.” says Andrew McAusland, director, academic technology, Concordia University. “We felt they brought to the project a vast array of experience in dealing with document management in general and with Documentum EDM in particular. Xerox designed and implemented a system whereby we could convert paper to electronic form and then deposit this content into a Documentum repository that could easily be queried.”

“Concordia realized that paper was merely a temporary storage medium for copies of documents that should exist in electronic form,” explains Mel Thompson, vice president and general manager, Xerox Global Services Canada. “Xerox built on this awareness and helped Concordia deploy a scalable document management solution based on the Documentum ECM platform that increased knowledge sharing efficiencies and reduced tedious administrative functions.”

Paperless Environment

With its Documentum/Xerox solution fully implemented, Concordia University’s faculty of Arts and Sciences no longer relies on paper records. “Even though we generate paper, once the paper gets scanned, it is immediately archived offsite,” Brauer says. “So any time a document is required, it is accessed electronically. Even faculty members who want to review their own dossiers get their information from the Documentum repository, accessing it from desktop PCs in our offices.”

Why is Concordia still generating paper at all? “We’ve found that most people still prefer to fill out paper-based forms rather than electronic PDF versions of those same forms,” Brauer says. “We understand this preference and just scan paper forms into Documentum, a relatively efficient process that still allows faculty to use paper forms while saving significant costs in storage and retrieval.”

Fast Access, Attribute-Based Queries

The key benefits of Concordia University’s enterprise content management solution from Documentum include fast access to documents and the ability to query the repository on the basis of file attributes. Instead of taking hours to figure out where a file is stored, then hours more to find the dossier in file cabinets, then hours more to isolate the specific document being searched, the entire process is now completed in seconds with a few mouse clicks.

Complex searches are further simplified because all documents are filed by attribute. Because contract date is an attribute, for example, it is now a simple matter to access all contracts issued between, say, 1999 and 2001.

“We recently had a faculty member who needed to know the year he received tenure,” comments Brauer. “In seconds we had that professor’s tenure letter in hand and were able to give him the answer right then on the phone. Under our old paper-based system, it might have taken days to get that information.

“What it comes down to is this,” Brauer continues. “Our new Documentum-based content management system not only reduces our document retrieval time, it also improves information access and content reliability. What used to take hours or days, now occurs in minutes and we know the information is always accurate.”

Summary

Faced with the challenge of managing over one million sheets of paper in over 300 dossiers for its faculty members, the faculty of Arts and Sciences at Concordia University could have hired more staff, an expensive proposition that would have gotten more costly over time and would have done little to speed information retrieval. They realized that a far more efficient and cost-effective solution was to implement a content management system and chose Xerox Global Services as their systems integrator and Documentum as their content management platform. Now any document in any dossier can be accessed in seconds or minutes rather than the hours or days it used to take.

The project's success is winning over other departments at Concordia University including the faculty of Engineering and Computer Sciences, which is also implementing Documentum. In addition, documents associated with the admissions process are now also stored in a Documentum repository, a move that streamlines the admissions approval process.



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