



University of California Riverside

Centralized access, control, and security for critical budgeting and planning documents

Benefits

- Improved productivity and efficiency through speedy access and retrieval of information
- Enhanced security through multi-level access controls
- Reduced costs for storing paper documents
- Complete view of project history through unified storage of all key documents and access to previous document versions

Business overview

The University of California (UC) Riverside is a four-year public university within the University of California system, located in the city of Riverside about 50 miles east of Los Angeles. The 1,200 acre campus has a current enrollment of just under 17,000 students.

The university's office of Academic Planning and Budget (APB) oversees management and budgeting for all campus facilities and resources, including capital improvement projects. The APB organization includes budget and resource analysis, capital and physical planning, institutional planning, real estate services, and audit/advisory services.

Challenges

APB is a document-driven organization, relying on a wide range of critical documents to support budgeting and program activities for individual departments as well as campus-wide capital projects. Previously, these documents were stored in a variety of locations including individual users' hard drives and e-mail systems, as well as hard copies that were maintained in binders.

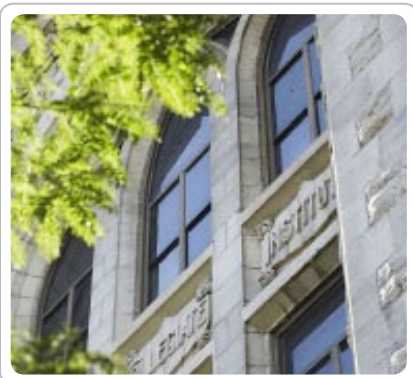
"As we focused on making our operations more productive and streamlining the processes for managing business-critical documents, we realized the need for a comprehensive system for storing information electronically in an easy-to-access, centralized location," said Bill Freire, manager of information technology, UC Riverside. "People were spending too much time searching for the information they needed, whether the documents existed electronically or in hard copy."

EMC solution

Working with Portford Solutions Group, Freire and his team customized the chancellor's EMC® Documentum® ApplicationXtender® implementation to meet the needs of the APB office. The result is a centralized repository for all approved budget and project documents, which enables easy access and retrieval for the APB staff.

Centralized document access

Users access the APB repository on a daily basis, including traveling employees who use the ApplicationXtender Web Access browser-based interface. Directors, managers, and other APB employees can search and retrieve documents according to a number of keyword attributes, from a single easy-to-use interface.



Business profile

University of California Riverside

Four-year university with 17,000 students

Industry

Education

Geographies

Main campus in Riverside, CA, 50 miles east of Los Angeles

Business solution

Document management

EMC products

EMC Documentum ApplicationXtender, EMC Documentum ApplicationXtender Web Access, and EMC Documentum ApplicationXtender Image Capture

Deployment summary

Enterprise repository for documents pertaining to budgeting and project management for university facilities and resources

EMC partner

Portford Solutions Group

The APB has designated a single person within each department that is responsible for retrieving all current documents and importing them into the system once they have been approved for distribution. Once a project has received funding, the project manager e-mails the supporting documents to the appointed document manager. Through an integration of ApplicationXtender with Microsoft Outlook, the document manager simply clicks on an item in the Outlook toolbar to export the project manager's e-mail message, together with its attached document, directly to the document repository. The system prompts the user to provide indexing information that will be attached to the document as metadata to facilitate later search and retrieval.

Enhanced productivity and security

According to Freire, the ApplicationXtender system has brought about significant productivity improvements in the APB office, because people spend much less time looking for the information they need. Often, once a project has gotten underway, there are questions about decisions that were made in the budgeting process. Before, the APB staff would have had to spend time figuring out who had worked on the budget and where the documents were located. Now, they can respond in a matter of minutes by retrieving and e-mailing the right documents to the person who requested them. Furthermore, staff members can retrieve the information themselves without having to wait for others to do it for them.

By placing critical documents under the control of a secure electronic repository, the APB office can manage access and ensure the documents' integrity. The system enables different security levels to be assigned to a document depending on a staff member's role; for instance, document owners are the only ones with "write-delete" access. All other staff members are given read-only access to ensure that documents are not inadvertently altered or deleted. Another class of highly sensitive documents is assigned a security category that allows only the Vice Chancellor of Academic Planning and Budget, and her staff, to view them.

“The ApplicationXtender system is a vital data repository and knowledge base, and has become critical to supporting our decision-making processes. In fact, many of our managers log into the system on a regular basis to remain current with activities that affect our departments and the campus.”

Bill Freire, Manager of Information Technology

No more paper storage

In addition to the current project documents, the APB uses ApplicationXtender to maintain archives of past project documentation that had previously been stored in hard copy, locked away in file boxes that had been inaccessible, and difficult to search through. The APB engaged Portford Solutions Group to scan and index more than 7,000 archival documents into ApplicationXtender using EMC Documentum ApplicationXtender Image Capture.

“Before we implemented ApplicationXtender, we needed one large room just to store the boxes of archived documents. Now, we've been able to convert that room into several offices,” said Freire.

A complete version history

An important feature of ApplicationXtender is its ability to attach an entire version history to a document stored in the repository. By accessing previous versions of a document, APB employees can gain an understanding of decisions that were made over the life of a project. “This is particularly useful for very complex projects, in which the parameters might change multiple times,” said Freire. “For example, APB might approve funding for construction of a new laboratory based on a certain set of parameters. If those parameters change—if the project is scaled up or down—then the project managers need to be able to understand what was changed and when, in case there are questions. The document versions provide an official record of the history of the project.”

Summary

By providing a central location for all budgeting and planning documents, EMC Documentum ApplicationXtender has delivered powerful benefits to the UC Riverside office of Academic Planning and Budget. With immediate desktop access, employees can locate the documents they need quickly and easily. For projects involving multiple persons and university departments, the system’s centralized repository and versioning capabilities provide a complete record of all decisions and input. “That’s a big improvement over our previous process, in which documentation might be scattered in multiple e-mail inboxes or network file systems and it was difficult to get a complete picture of the project,” said Freire.

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About Portford Solutions Group

Portford Solutions implements complete turnkey document and content management systems. Leveraging Portford’s experience can reduce the time, cost, and difficulty associated with document processes. Portford can maximize an organization’s investment in document management by providing comprehensive solutions ranging from scanning services to document workflow creation and integration. Achieving the highest Return on Investment (ROI) for a content management system can require more than just a solid technical and operational understanding of the product. Portford’s exclusive service and solution delivery methodology called Idea to Implementation (i2i) provides a refined set of tools and processes in order to deliver well-structured, highly-scalable content management solutions and processes. For more information on Portford Solutions, visit www.portfordsolutions.com.

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