

Document Locator®

Case Study > Research Facility & University



“We live in this highly digitized world, where everything is instantly accessible. Using Document Locator just made sense. It's night and day from where we were, and I'm very proud of it and very satisfied.”

Naya Kang
Financial Analyst
EP Graduate Program

Engineering for Professionals is an innovative, highly-ranked graduate program at a major East Coast research facility and university.

The course is called “Engineering for Professionals” (EP), and its objective is to prepare motivated working engineers (both regionally and around the world) with tools and experiences to bear a direct positive impact on their professional lives. Designed for students already in the workforce, EP is a part-time program. That said, it's also a rigorous one, and its administrators go out of their way to bring in top-flight instructors.

Their system for managing instructors' contracts needed improvement.

Before joining the EP finance team in 2011, Finance Analyst Naya Kang worked in the student services department at the same University, where records were managed electronically, accessible through the web and centrally updated.

At the time, EP was still conducting much of its business on paper. Three times a year (every trimester), the program renews contracts with about 400 instructors. With the system they had been using, each instructor would receive an envelope via USPS containing multiple pages: two contracts (one to sign and return, the other for their records), an update sheet and possibly other notices in addition. Meanwhile, the Finance Department would print a third copy of each contract for their records to serve as a master list, which they would reconcile with the signed contracts as they arrived via incoming mail, in order to track which contracts had yet to appear.

The human effort involved in this approach was intense. With 400 contracts to process three times each year, there were approximately 2,800 pages annually to print, copy, fold, mail, stamp, receive, open, process and file.

With human effort comes the possibility of human error. There was always a chance – rare but possible – that a letter could get lost in the mail, in which case there would be no way to detect the problem until much later. As for the time required, the task consumed the full attention of the Finance Department for 1-2 weeks per trimester. Calculated in human hours, that amounted to 370 hours annually.

Customer: Major East Coast Research Facility and University

Industry: Education

Critical Issue

Processing 1,200 instructor contracts annually by hand was consuming 370 human hours every year.

Solution

A custom interface to distribute appointment letters electronically, allowing instructors to approve or deny online, updating their appointment status centrally, instantaneously.

Results

Five to six weeks per year reclaimed within the Finance Department (representing 370 human hours combined). \$1,100 saved annually on postage. Printing costs reduced by 80-90%.

Software and Services

Document Locator

So the team pitched a new idea – making the contract system electronic.

The EP Finance Department believed there was a better way. They wanted to implement a program not only to eliminate the paper, but streamline workflow and recapture the many hours they were losing. Their idea? To make the entire appointment process electronic.

There were several technologies to choose from. Kang and her team considered developing a system in-house, but this was too time- and resource-intensive. They also considered a well-known content management system, but found it too costly.

Ultimately, they followed the recommendation from another department in the University, which had been using Document Locator by ColumbiaSoft to manage their own appointment contracts for a number of years prior. When Kang saw the solution's capability to streamline workflow, the possibility clicked. Immediately, the team saw how Document Locator could make their entire process more efficient, more effective.

When they brought in Document Locator, things began to change.

The EP Finance Department takes a unique approach in processing appointment letters; their needs were particular. ColumbiaSoft worked with Kang to design a custom interface for their deployment, then fine-tuned it several times based on feedback.

"The team at Document Locator was very insightful," Kang said, "and the customer service was superior. They were very innovative; they designed a whole new interface for us from scratch. I didn't have to explain over and over what our process is – they just got it. They were down here for two days, and they completely understood our process."

Today, instead of receiving physical appointment letters through the U.S. Postal Service and responding in kind, EP instructors simply confirm their contracts online. They receive a link from Document Locator, inviting them to view and approve their contract. When they click, they're prompted to log into a secure Document Locator website, where they can review the letter in PDF format and approve or deny and leave comments.

As a result, the hands-on tasks of printing, copying and folding are a thing of the past. The EP Finance Department no longer spends \$1,100 per year in postage. Their cost of printing dropped significantly as well, since Document Locator reduced their need to print by 80-90%.

More importantly, Document Locator made instructor contracts accessible electronically. Now the Finance Department no longer has to wait 2-4 weeks for the postal service to deliver an instructor's response: as soon as they approve, their status is updated in the system, and it's ready for payroll.

Leading-edge tools for a leading-edge University.

Given the digitized world in which we live, it only made sense for the Finance Department for EP – a rigorous, highly-ranked graduate program from a leading-edge University – to replace an outdated process with a user-friendly, centrally accessible data management system. In so doing, they reclaimed a significant amount of time per year, reduced ambiguity and hands-on effort, and increased both efficiency and effectiveness.

The Finance Department at EP has ongoing plans for Document Locator. For the moment, they use it exclusively to manage instructor contracts, but later the team would like to migrate other types of instructor information from their database to Document Locator, where they'll be able to manage all instructor data in one place. They're also collaborating with ColumbiaSoft on a rollout of Document Locator for other contracts as well, including annual appointments for program chairs, advisors, independent study and instructors developing online courses. Kang's goal is to integrate all of these types of data into Document Locator eventually.

"We needed an electronic contract management system," Kang said. "Implementing Document Locator changed everything."

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