Case Study
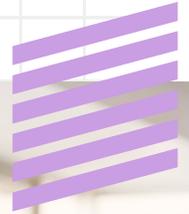
Ohio university enhances student services and improves back office processes using online forms.
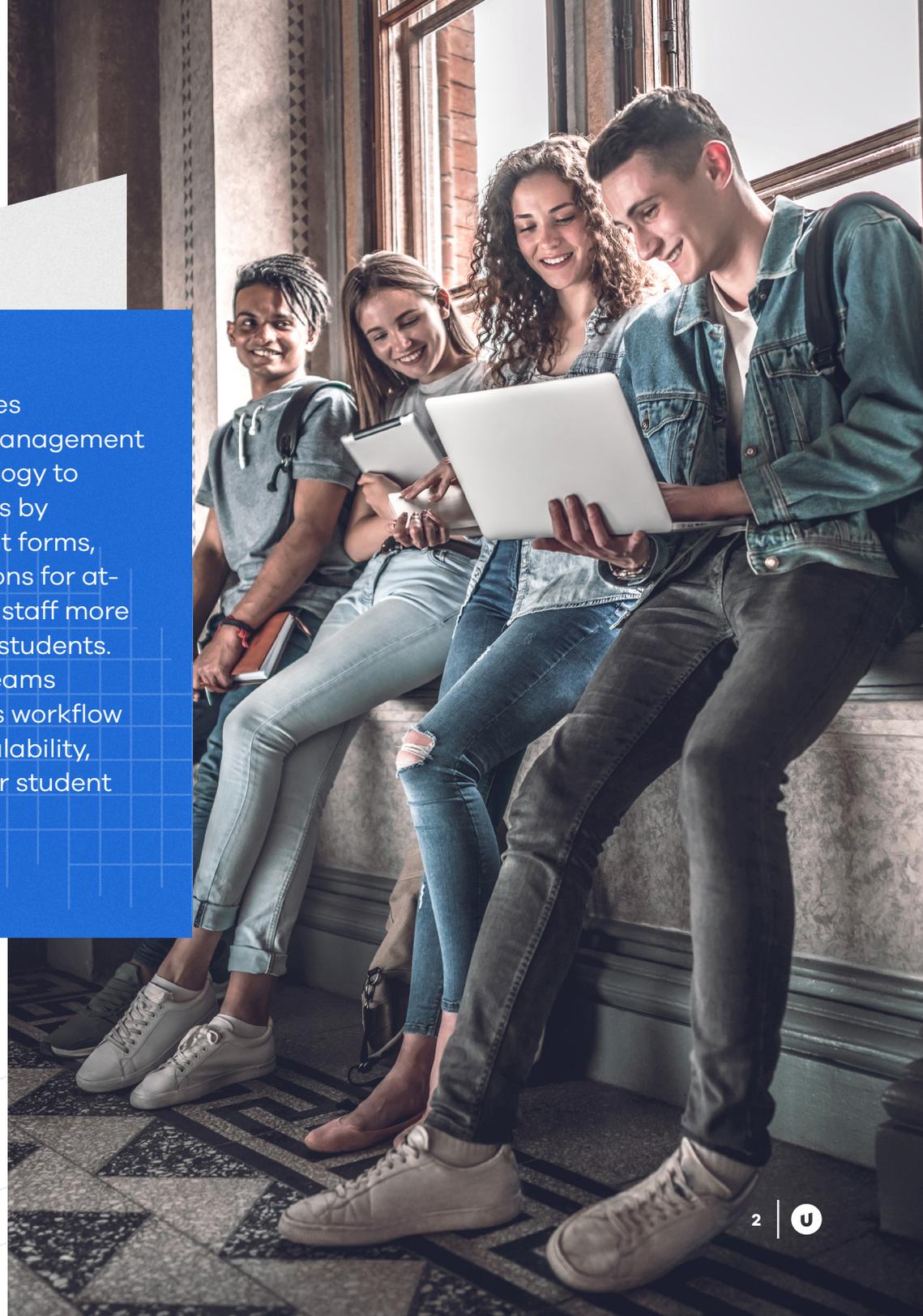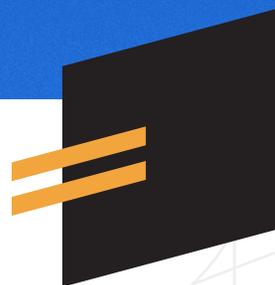
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Recognized as one of Ohio's best universities, Cedarville University is a private NCAA Division II school known for its rigorous academic programs, strong graduation and retention rates, as well as accredited professional and health science offerings and leading student satisfaction ratings.

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Cedarville University uses FileBound's document management and online forms technology to enhance student services by offering online enrollment forms, improving communications for at-risk students, and giving staff more time to focus on helping students. The IT and Admissions teams selected FileBound for its workflow capabilities, security, scalability, and integration with their student information system (SIS).

How can a busy university improve document processes using one product?

Cedarville University staff were drowning in paperwork.

Administrative staff at this university were using an unscalable, homegrown document management solution and needed an upgrade. They wanted technology that provided online forms and robust automation capabilities to make entire department lifecycles more efficient. They needed to eliminate manual, cumbersome processes that involved printing and storing over 22,000 pages of paper annually. Staff also needed to ensure compliant practices and minimize storage, since some documents such as degree justifications have a permanent retention policy. Some staff members' offices were piled high with paper records. It was time for a change, and they turned to FileBound.

Online forms saved the day.

Using FileBound, the IT team created, built, and implemented solutions for student onboarding and maintenance (admissions, financial aid, registrar, and Student CARE), back-office solutions (human resources, employee advancement, and payroll), and the School of Pharmacy. Altogether, they have replaced over 20 different paper-based processes with online forms and automation, and there are many more items on the to-do list.

> *"The real value is how FileBound allows students to fill out required forms at their convenience, whether lounging in their dorm room at 2:00 a.m., standing in line for their coffee on their smartphones, or planning classes in their advisor's office. We no longer need to schedule meetings with students just to get a form signed."*
>
> **– Becky Dufresne**
> Associate Registrar for Records & Registration
> Cedarville University

Cedarville University eliminated busy work while improving the student experience.

FileBound fit right into Cedarville's student information system.

FileBound's online forms and automated workflow allowed IT staff to quickly and easily set up routing and retention requirements for every online form and document type to improve efficiency and processes in many key areas.

Even better, FileBound integrated directly with Cedarville's existing SIS so that student data and documents automatically sync into the correct student file and can be automatically pulled into other processes.

"Various departments all use the same data—basic information like name, ID Number, and major to help identify students. By putting these secure forms online with FileBound, we now know exactly who is filling out the form and can automatically populate that information for them," said IT Specialist Ryan Bowen. "It might sound simple, but it's a better user experience because we don't need to ask the student again and again for information that we already have."

There is more change on the horizon.

Cedarville University continues to uncover processes and departmental tasks to improve, including:

- Student major and advisor change requests

- Class change requests including substitutions and transfers

- Organization of students' donor-funded scholarships and university donor gifts

- Identifying and helping at-risk students via Student CARE project

- Storing and classifying financial aid documents

- Managing requests for changes/additions to any internal position

- Storage, search, and retrieval of tax documentation for employees

"Using the FileBound API, we were able to populate a 'Student Snapshot' with information from both systems so that our Registrar's office could have all the information they need while staying in one system. This type of integration has been key in improving efficiencies surrounding the rollout of FileBound."

– Michael McCoy
Information Technology, Cedarville University

Upland FileBound delivers document and workflow automation applications that improve the operation of any organization by connecting users with the information they need to work more efficiently and effectively. With FileBound, customers can build automated workflow processes and centrally manage documents to improve compliance, collaboration, and access to information.