

York College

Case Study



Outstanding College and Document Management Solution

York College, a regional college in North Yorkshire with 13,000 students, implemented DocuWare and digitized 150,000 documents in order to reduce physical document storage space and simplify their move to one central campus. As a result of installing the electronic document management solution the college has sped-up document retrieval time, improved document storage and security and created transparent workflows that allow the college to easily share information between departments and better serve their students.

York College, serves 13,000 students and is North Yorkshire's largest provider of education and training for 16 -19 year olds, offering a wide range of academic and vocational programs. In December 2013, Ofsted, a national inspection body, graded the College as 'Outstanding' because of its success rates for students studying at all levels, as well as student progression into higher-level study and employment.

In 2007, York College moved from 5 buildings to one central campus on Sim Balk Lane. The landmark £60 million campus was, at the time, one of the largest building projects of its kind in the U.K. giving the College 29,350 square meters of floor space over 4 floors. The new site had many advantages, but document storage space was not one of them. The College recognized their inefficiency of handling paper records and knew a document management solution was essential to install before moving to a new campus. Additionally, the College needed to meet legal document storage requirements, advance the transparency of their workflow, and improve ways to share information.

York College

Industry: Education

Location: York, UK

Application: Finance, Human Resources and Student Records

Document Types: invoices, purchase orders, application forms, pay slips, evaluations and student exams



Requirements

The College evaluated several document management solutions. They needed a solution that would provide tamper-free records storage, automatic workflow processes, and reduce document searching and processing times. DocuWare was chosen because it met all of the College's requirements and for its ease-of-use, flexibility and price point.

The Tasks

- Eliminate the need to physically store documents
- Implement secure, tamper-free electronic document storage
- Reduce document search and retrieval time

Solution

Finance and Human Resources were the first departments to implement DocuWare because of their large volume of records. The Finance department had thousands of invoices and purchase orders of all different sizes. Today, when a purchase invoice is received, a barcoded sticker containing a unique Purchase Invoice number is placed on the document and invoices are batch scanned into DocuWare. The barcode and other text fields are read from the document and used as index entries. Additional index information is automatically filled in by pulling data from the external accounting database. Once the barcoded number is added to the accounting data record, the information is completely synchronized with DocuWare and the accounting system.

Human Resource documents such as application forms, hand written notes, pay slips and evaluations are indexed with a series of select lists linked to external databases, ensuring accurate index data and efficient document storage and retrieval. The HR department utilizes the solution's document security features to ensure only staff with specific access rights can view confidential information, conforming to the strict UK Data Protection Act.

The Student Records department uses DocuWare to store student records and exams. Exams are indexed with barcoded stickers similar to the financial documents, only this time DocuWare is linked to a third party student record system, UNIT-e, to fully index and automatically store the documents. Any exceptions are tracked in DocuWare and dealt with accordingly.

Applied Modules

- Active Import
- Recognition



Benefits

Implementing DocuWare helped York College dramatically reduce their document storage needs and made the move to a new campus much easier. One year before the move, the College began back scanning records and was able to digitize 150,000 documents between the Finance, HR and Student Records departments.

Automatic indexing features such as barcoded numbers and links to 3rd party systems, have ensured accurate automatic indexing with minimal staff involvement and the ability to efficiently manage exceptions.

Document retrieval has improved exponentially. Retrieval time has gone from hours of looking through paper files and still not finding exactly what was needed to only seconds to bring up the exact document in DocuWare. Thanks to quick retrieval times the College has more efficient work processes and is better able to serve their students.

The Benefits

- Reduced physical document storage space needs and made the move to their new campus easier
- Automatic document indexing provided consistency and improved document accessibility
- Sped up document retrieval time
- Improved document storage and document security
- Saved time and energy - more efficient



Conclusion

After the initial push to digitize the backlog of documents was complete, the staff started to see the long term benefits of document management and how quick document retrieval simplified their workload.

Currently DocuWare is used for all aspects of HR, Finance and Student Records. In the future the College is looking to expand the system to other departments, as well as introduce it to students for self-serve access to their records and class notes.



“Once we moved our documents into DocuWare, we had a massive reduction in our physical document storage requirements which made our move and continued residence in our new campus work brilliantly. The storage and retrieval of documents is so painless and has really streamlined our workflow.”

Azhar Iqbal, ITSS Manager, York College



Document Management Technology Ltd

3 The Pavilions Bridge Hall Lane
Bury
BL9 7NX
Lancashire

+44(0)161 667 3390
+44(0)161 667 3399
<http://www.doctech.co.uk>

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