



Fordham University

Archiving & Accessing Student Records

Business Challenges for Fordham University

Fordham, New York City's Jesuit University founded in 1841, prides itself on its tradition of intellectual rigor and personal attention. And it was that intellectual rigor and personal attention that prompted University officials to locate a technologically advanced solution to its growing storage and reference needs in order to provide the best possible customer service to its students.

With approximately 14,000 enrolled students, Fordham University required a solution that could manage its overwhelming number of student files and volumes of paper. The institution's goal was to improve its ability to serve its customer students, while enabling employees immediate access to all student records, regardless of their location.

"Accessing those archival files and documents was one of the greatest benefits of implementing Acorde Context, as what used to take days to locate a file now takes only seconds. We can now provide answers to our students and alumni much faster."

Gene Fein

Associate Director of Technology and Training
Fordham University Enrollment Group

The primary objective was the scanning and archiving of student records dating back to the school's inception in the 1800's. The documents, stored in rooms that lacked proper environmental control, were deteriorating and occupying space that could be used more productively.

Fordham's renewed commitment to streamline enrollment related transactions, such as student application submissions and financial aid processing combined with lower costs of technology and an enhanced information system infrastructure, prompted Fordham to take action.

Increasing Process Efficiency

Being legally bound to store any document that refers to student grades, Fordham Associate Director of Technology and Training Gene Fein and a committee turned to a system solutions

provider; to develop a document imaging and management system. They recommended Optika's imaging software (Acorde Context) to Fordham because of its scalability, ease of installation and ability to expand its use through other departments within the University system. Optika also provided a cost advantage to Fordham.

"Optika's solution provided a low cost of deployment and maintenance, which is very important to any academic institution," Fein stated. "The web infrastructure provides a centralized service to distribute, configure and maintain software on client servers, which helps keep our costs low."

Fein and his team occasionally used hammers and chisels to break into old, rusted and locked file cabinets to scan the more than 100,000 files containing 350,000+ documents, creating digital images and a microfilm archive.

"It was a very cathartic experience!" Fein admitted about the hammer and chisel event. But he also admitted that, "gaining access to those documents in a timely and efficient manner is one of the greatest benefits of implementing the new system. What used to take days to locate a file now takes only seconds. It is so easy to locate a student's files using Acorde."

The Acorde Context solution efficiently helps Fordham manage the storage and retrieval of important student records. It enables University personnel to provide grade-related reports, courses of study and/or transcripts, at the request of students, to other higher education institutions. Acorde helps them efficiently archive and make these timeless documents available electronically at a moment's notice.

SELECT OPTIKA HIGHER EDUCATION CUSTOMERS

Fordham University
Pepperdine University
University of Colorado
University of Connecticut
University of Idaho
University of Illinois
University of Northern
Florida
University of Notre
Dane
University of Oklahoma
Texas Woman's University
Washington State
University

QUANTIFYING THE PROBLEM:

- Storage space taking up valuable University space
- Inability to immediately access or locate student registration, admissions and financial aid applications and related documents
- The need for to meet legal requirements for storage of all grade-related student documents
- Capability for many different departments to update and have access to student files

Fordham University

Archiving & Accessing Student Records

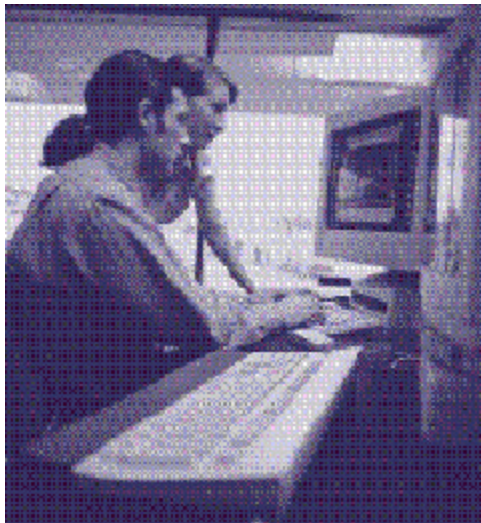
In addition to preserving the documents and expediting access to those documents, the implementation also allowed the University to free up valuable space at the campus. The former file storage space has been converted into a room for more student services.

Extending Acorde Throughout the University

The Optika solution was quickly extended into the Financial Services Department, as there was great need to be able to scan and index all the documents associated with a student's financial aid submission. University financial aid personnel want to be able to provide students with immediate information regarding the status of their loan process at any given time. In addition, these files may be routed to various financial aid representatives throughout the process; thus, they needed online access for quick retrieval. Financial aid folders can include up to 50

different documents such as the student's and parent's tax returns, loan forms, Social Security Cards, birth certificates, W-2s, Green Cards, passports, entrance interview documentation, and college scholarship service forms.

"Our goal is to expand Optika throughout the University in as many ways as possible," Fein stated.



Therefore, the Fordham Enrollment Group began the next large project of imaging student admission folders. Each folder contains approximately 20 pages of undergraduate applications, essays and documents which must be retained for at least two years, even if the student does not enroll in the University.

Once the student has enrolled, that folder is transferred to the Student Academic Dean and becomes the student's academic file throughout his tenure at Fordham.

The group is also experimenting using COLD (Computer Output to Laser Disk) storage to provide access to its faculty advisers and create randomly generated advising PINs (personal identification numbers) to students. Each semester, reports are run to provide those PINs to about 40 different departments. The Enrollment Group plans to store this report in Acorde and then allow the different departments' access via the web—saving reams of paper!

Future Plans for Acorde At Fordham

Fordham University is now looking to expand the Acorde imaging solution into the Academic Research department, the Finance department, the Law Campus and eventually into the Library, making historical and critical documents readily accessible to the academic and student populations. This will greatly enhance communication and productivity across the campus.

All of these initiatives have helped Fordham improve customer service to prospective and current students on all levels—from student registration and the financial aid process, all the way through from admission to graduation and beyond. In addition, the University has regained some valuable space from converted storage rooms and will save thousands of administrative resource hours due to the easy access of archival and academic data.

Optika Inc.
World Headquarters
7450 Campus Drive, 2nd Floor
Colorado Springs, CO 80920
United States

Optika Brasil
Optika Information Systems Ltda.
Av. Rio Branco 45-Sala 2502
Rio de Janeiro
CEP 20090-004 Brasil

Optika Europe/Middle East/Africa
Optika House
Theale Court, 11-13 High Street
Theale, Reading
Berkshire RG7 5AH

