



Fortis for Higher Education

Learning the Value of Document Management

The financial crisis has created new challenges for higher education, forcing budget cuts on public universities and shrinking the endowments of many private colleges. These institutions are also struggling to find the balance between stabilizing tuition costs and the increased demand for financial aid, while working with limited resources. In response to the need for strategic cost-cutting measures, more schools turn to technology to save money by improving their own business services and processes. **Fortis** document management software enables process redesigns to simultaneously reduce costs and improve services to students, faculty, alumni and staff.

Higher education institutions are still competing for the best students; they need to efficiently manage applicant pools in fixed time frames. To be responsive to applicants and attract the top students, admissions and financial aid offices can use **Fortis** to facilitate applicant paper flows, efficient sharing and routing of applicant files, and movement of student files from the admissions office into the financial aid and registrar's systems.

Play by the Rules

Federal (FERPA) and state records management rules mandate that college and university systems keep student records, such as transcripts and vital correspondence, virtually indefinitely. These rules require the institution to maintain student privacy and confidentiality. They also require the schools to make these records accessible to the student or parent on request.

This record-keeping requirement creates both a space and staffing burden. **Fortis** document management software enables colleges and universities to save space and store student records securely. At the same time, **Fortis** has proven to be a competitive advantage by automating processes in other business areas such as human resources, accounts payable, grant administration and facilities management.

Document management should be a part of every college and university's enterprise business continuity and disaster recovery strategy. Business continuity can be defined as the ability to restore business and academic services as quickly as possible if disaster strikes. There are many risks to being unprepared for an unplanned disruption including damage to the institution's reputation, loss of students data and the money and time spent restoring systems retroactively.



Fortis in Action

	Challenges	Solution	Return on Investment
Carnegie Mellon University Location: Pittsburgh, PA Research university: 11,000 students, 4,000 faculty and staff	<ul style="list-style-type: none"> - 1,500 on-going projects - Facilitate compliance with government regulations - Enforce retention policies 	<ul style="list-style-type: none"> - Fortis manages documents for research grant life cycle <ul style="list-style-type: none"> - Pre-award and contracts administration - Research compliance - Post-award administration - Licensing and business creation 	<ul style="list-style-type: none"> - Online document access facilitates compliance with government regulations - Improves interdepartmental collaboration - Addresses legal issues including intellectual property protection - Creates multiple levels of security
University of Houston – Downtown Location: Houston, TX 12,000 students; 1,000 faculty and staff	<ul style="list-style-type: none"> - Extreme space constraints - Slow paper-based processes - Compliance with record-keeping regulations - Processing financial aid applications 	<ul style="list-style-type: none"> - Moved files into Fortis repository for secure storage, rapid query and retrieval, and space savings 	<ul style="list-style-type: none"> - Meeting FERPA and Texas Public Information Act Regulation Requirements - Handling more financial transactions without increasing staff - Created central repository for staff to access student records - Reduced need for storage space
Appalachian State University Location: Boone, NC Part of University of North Carolina system; 17,000 students, 2,900 faculty and staff	<ul style="list-style-type: none"> - Preserve paper transcripts and academic records dating from 1899 - Need system to index, store and retrieve historic and current documents and transcripts - Collaboration between Admissions, the Registrar’s Office and Financial Aid - Put HR documents including medical forms and performance appraisals in electronic format 	<ul style="list-style-type: none"> - Implemented Fortis in Registrar’s Office, Admissions, Financial Aid, and HR 	<ul style="list-style-type: none"> - Improved efficiency in storing, indexing and retrieving student records - Improved ability to share records between Admissions and Registrar’s Office - Reduced storage space for state-mandated record retention - Customized to meet needs and security requirements of multiple departments

Departments that use Fortis

Student Admissions

With large applicant pools, colleges need to capture applications, allowing shared access to admission files. Retrieval and routing tools speed up the process. **Fortis** also allows extranet portal access to applicants to review their files.

Financial Aid

This paper-intensive process is time sensitive and involves confidential, financial information. **Fortis** effectively manages award letters, loan forms, income verification forms and correspondence. Automated workflow distributes documents to the appropriate counselor’s electronic in-basket.

Student Records

Fortis provides a secure repository for historical and current student records. Moved into an electronic archive, they are secure, searchable, and FERPA compliant.

Public Records

The **Fortis** repository houses and provides access to public records as required by state legislation and FERPA.

Finance, Grants and Procurement

Fortis automates capturing invoices, shipping receipts, and other business documents, linking them to financial systems. Accounts payable and receivables have a high return on investment with **Fortis**.

Human Resources

Many colleges use **Fortis** to securely store, archive, and allow permission-based access to HR records. It also reduces lost documents and helps process resumes and faculty credentials.

Payroll

Retrieve related documents including time sheets, W-2 forms and pay authorizations from payroll systems by integrating with **Fortis**.

Facility Management

To manage costs and keep facilities safe and in compliance, **Fortis** keeps facility records up to date and “as built.”



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