

# Yale University



## Electronic Data Management Streamlines Document Tracking and Speeds Access to Information

**“Documentum gives us the capability to do document tracking along with indexing, all in one step. Finding and updating document tracking simultaneously will minimize the time we spend now on filing and tracking.”**

**Ernst Huff, Associate Vice President of Student Financial and Administrative Services**

### Benefits

- Interface enables document tracking with indexing, all in one step
- Timely processing and less handling of documents minimize loss

### Business Overview

Yale University is a large research university with a wide array of programs, departments, schools, centers, museums, and affiliated organizations. Approximately 11,250 students attend Yale.

### Challenges

University staff in the student center could readily access student data housed within their administrative system, SCT Banner®. However, staff members still needed to make a trip to the second floor of the student services center in order to view and retrieve hard-copy documents. The inability to immediately access these materials within the system reduced efficiency and meant that the staff could not focus on their primary goal—assisting students.

### Documentum Solution

Now, hard-copy documents are immediately accessible to staff from their desktops on the first floor. This solution is the outcome of a strong alliance between SCT, the market leader in technology and business solutions for higher education, and EMC Documentum. SCT Banner is the market-leading suite of software applications for student information, alumni development, human resources, financial aid, faculty and advisors, finance, and more. EMC Documentum® ApplicationXtender provides storage and indexing of scanned documents as well as a variety of other data types including reports, office documents, PDF files, audio, video, and many other files types. The comprehensive integration between the two software solutions includes data integration, event integration, and screen integration.

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## Business profile

### Yale University

A large research university with a wide array of programs, departments, schools, centers, museums, and affiliated organizations

### Industry

Education

### Geographies

Located in New Haven, Connecticut

### Business solution

Document management

### EMC Documentum products

ApplicationXtender, WebXtender

### Documentum partner

SCT

The new software allows authorized users to readily pull up all documents associated with a student's record. These can include financial aid worksheets and grant applications. "There are two pieces to information access," explained Ernst Huff, associate vice president of student financial and administrative services at Yale. "Banner gives us access to the electronic data housed within its database. ApplicationXtender provides us with the second piece—the ability to access hard copy documents from a user's desktop. Together, the solutions will give our service providers the tools for quick and immediate access to the information they need to answer students' questions."

## Automatic Tracking Improves Productivity

Immediate access is critical to providing students with quality service. Even more important, however, is the software's tracking capabilities, said Huff. The integration between Documentum ApplicationXtender and STC Banner allows the system to take advantage of Banner's tracking capabilities. As a result, when a scanned document is indexed to a student record, the software automatically and simultaneously updates the related document tracking record.

"The real value is from the interface," explained Huff. "It gives us the capability to do document tracking along with indexing, all in one step. Finding and updating document tracking simultaneously will minimize the time we spend now on filing and tracking. It also will minimize the possibility of loss. Financial aid deals with thousands of pieces of paper. During peak times, we rely on students and temporary help. Sometimes they don't all update the tracking file. Our hope is that the imaging solutions will minimize these issues. We'll have more timely processing and less handling of documents."

Huff added, "The integration is key. Without it, this solution would not have been as attractive to us. The interface is not something we would want to do ourselves."

## Summary

Yale is implementing the joint solution in the financial aid office first. However, Huff believes the entire university will eventually benefit from the solution. "We started with financial aid because they have the most to gain due to the large number of documents they process. But I can definitely see the potential for this application in other areas, like admissions. I'm definitely convinced it will improve processing."



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Produced in the USA. 12/04

Customer Profile  
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