



A Success Story in the Works

Document Imaging at USM

If you haven't yet heard the phrases "document imaging" or "document management," you probably soon will. If you're in the Office of Student Financial Aid at the University of Southern Maine, you already know these terms well.

The history: In 1983, 23 years ago, when Helen Parker came to the Office of Student Financial Aid at USM, she and 11 other staff members provided financial aid services for slightly fewer than 3,000 students. The office file room was filled with 14 vertical filing cabinets. Every filing cabinet was filled with financial aid records and materials, with more papers stacked on top of the files.

"Paper controlled us. It really did." Helen Parker, Director of Financial Aid Systems, USM

The office was inundated by paper. Helen remembers those days. "Paper controlled us. It really did. How we did our work, how we structured our days. Every morning we had a half-hour 'search and seizure' when we tried to find the pieces of paper we needed for the students who had appointments that day. We weren't serving our students as well as we could have."

Eleven years ago, things changed. The Financial Aid office acquired a scanner, a huge, flatbed scanner that took up half a desk. Now, those many pieces of paper in the office were scanned into the computer, and staff members could look at the material they needed to see on the computer screen. They still recall the excitement of not being immobilized by a single piece of paper, of being able to find a document without plowing through stacks of files.

Top five reasons to welcome document imaging to your office:

- 5. You can use student labor to scan documents.*
- 4. You can eliminate those pesky "file out" guides and misplaced file folders.*
- 3. You can stop wasting so much paper: save a tree.*
- 2. You can increase workplace safety: no more filing cabinets to tip over or open drawers to trip over.*
- 1. No more paper cuts!*

Fast forward to 2006. Today, the Student Financial Aid office in Gorham serves more than 8,000 students who receive financial aid services, still from three different physical locations, still with 12 staff members, but with no student documents stored in or atop vertical filing cabinets. Now, instead of a room full of file cabinets, the Financial Aid office has one file cabinet, and it's electronic.

"We changed how we did business," Helen says. "We thought that would be painful, and it was. People were stressed. There is always pain in changing old habits and ways of doing things. But the gains outweighed the pains."

It took time, of course, and employees developed trust in the new system at their own rates. One staff member just couldn't bear to part with a piece of paper she could hold in her hand. She sneaked a hard copy of each document she put into the imaging system. But after a few months of experience with the new system, she was ready to part—for good—with the paper copies she had hidden away in her bottom desk drawer.

"If we had to go back to file folders...well, I just couldn't do that to my colleagues. I'd be very afraid of their reaction." Helen Parker

Because Financial Aid at USM already had years of experience with document imaging and management, this office was the logical first choice for implementation of the new ImageNow document imaging software and hardware in the University of Maine System (funded by the 2004 state bond for IT efficiencies). Helen and others at USM welcomed this opportunity and challenge. **"There is no need to make this hard," she says. "Just jump in and realize the possibilities."**

The Scoop: an update

The Shared Processing Center

Plans are apace--here's what's new since the last issue of this newsletter.

- It now has an official name: **Shared Processing Center**.
- **Jonathan Henry**, subject matter expert for admissions at Project Enterprise and former Director of Admissions at The University of Maine, has been appointed interim director of the Center.
- The Center will be co-located with other UMS information technology services in Orono on The University of Maine campus.
- UMS and ACSUM are discussing the internal posting procedures to be used in filling COLT unit positions at the Center.
- The Center should be up and operational by August 1 in a limited capacity. Admissions applications for Spring 2007 will still be entered into ISIS by local campuses. Beginning August 1, applications for Summer and Fall 2007 will be entered into PeopleSoft by Shared Processing Center staff. Other student services processes will be phased into the Center over time (see "MVP" in "A Project Glossary," page 4).
- Planners are working closely with the System Office of Human Resources as well as local HR offices. Although no one can guarantee that there will be no impact on positions, all involved in planning both the campus one-stop centers and the Processing Center are committed to mitigating any perceived negative impact on employees.
- That said, employees **should** expect changes in the way work is performed in student services departments. These changes, of course, also create opportunities for employees to learn more about university operations and to help to grow a new service center that is ground-breaking within the University of Maine System.

Your thoughts



We asked and you answered. Thanks to all of you who took time to complete the post-Financial Management implementation on-line survey in January. It is generally expected that a survey conducted at only six months after implementation will result in a large number of negative comments, and our experience bears that out. However, many of you provided very thoughtful comments about your experience with Financial Management since go-live last summer. The teams at Project Enterprise greatly appreciate all of your observations, both negative and positive.

Here's a sample of the comments received:

- "Has created more work and I didn't have enough time to get my work done before it was implemented."
- "Training just did not prepare us for the actual work."
- "Has added a layer to everyone's work load."
- "Being at the bottom of the user chain, I felt left out of the process during the changeover."
- "Capabilities I previously utilized were taken out of my control, and this adversely affected my ability to do my job."
- "My job duties in regards to PeopleSoft are changing every week. Others give up on it and pass the buck to me."

But some comments were more positive, and some offered good advice:

- "Having a system that can grow with a business is very beneficial."
- "The web type interface is so much better than the CICS code-needing system."
- "I felt the training classes were the most important and most effective way to learn how to navigate the PeopleSoft Financials, especially when things went wrong."
- "Keep it simple. Most employees have so many priorities in their daily work and PeopleSoft is a time consuming, convoluted maze."
- "Take it slow and don't implement until absolutely ready!"
- "Listen carefully to users/potential users and field test your materials with them."
- "Training should be done in stages to verify effectiveness. Trainees should have more time to absorb various aspects of the system."

We do understand the challenges of learning a new system...we have to learn it too, and we understand how difficult it is to try to master this new "convoluted maze" while keeping up with daily business. But know that we are trying to learn from previous implementations; we'll keep trying to do better.

Help us choose a new name! Please.

We need a name to replace “PeopleSoft” in our lexicon.

PeopleSoft was the name of the company from which we purchased our administrative software system (the company’s name is now Oracle).

We would like to replace the PeopleSoft term in our minds and on our websites with something completely different: a name that de-emphasizes the source of the on-line product AND connects the software to the users—us—the University of Maine System, Maine’s Public Universities.

We’d appreciate some help coming up with a new name for this on-line system that we use. The only guidelines for the name are: it must be positive, not too cumbersome, and in some way reflective of our organization. An acronym is not necessary.

If you come up with the perfect name for us please send it to meisner@maine.edu or heaton@maine.edu. If the name you propose is chosen (the Project Enterprise Steering Committee will make the final selection), you will receive a gift certificate for something good.



Deadline for submissions: May 1, 2006.

Here are some examples of names that other universities use for their employee and student on-line access. Maybe they’ll help to get your creative juices flowing.

Cyberbear (University of Montana)
CuConnect (University of Colorado-Boulder)
Digital Harvard (obvious)
MyUFL (University of Florida)
Infolinc (Lincoln University)
jhuniverse (Johns Hopkins)
CNet (University of Chicago)
UD&me (University of Delaware)
iCampus (Illinois State)
PipelineMT (Middle Tennessee State)

A final note: yes, we know just how difficult it is to change a name that has been widely used for several years. We’re going to try it anyway.



Dear Project Enterprise:

Sometimes PeopleSoft (like in Financial Management, for example) is not user-friendly. Why don’t you let those of us who use it ALL THE TIME help to design the system?

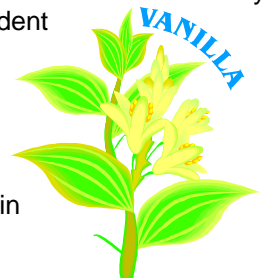
Signed, Still Frustrated

Dear SF:

We understand your frustration! However, we here at Project Enterprise aren’t designing the new software.

Back in March of 2002, we purchased an ERP (Enterprise Resource Planning) system from PeopleSoft (now Oracle). This occurred only after a long search for software that would meet the administrative needs of a university system as complex as ours. In the late 1990s, three or four ERP systems that included a Student Administration component (as well as Human Resources and Financial Management) were considered, and PeopleSoft was chosen as the best fit for the University of Maine System.

We spend a great deal of time preparing the system for implementation but we don’t design it. In fact, one of the guiding principles of our project is to deliver the system “vanilla” – unmodified. This is important: we have to be sure that we can upgrade and maintain the system going forward. If we have tinkered with it, the manufacturer’s upgrades won’t fit.



We call upon experts from each campus and the System Office in each area of the project (HR, Financials, Student). These colleagues of yours work hard to learn the software, determine how best to set it up for the way we do business here in our university environment, test it, and where necessary recommend changes in how we do business—changes that are based on best practices in higher education.

Hope this has answered your question. If not, please write again. ☺

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New UMS website live on April 5
 You'll see a whole new look on www.maine.edu beginning April 5.
 Updates to www.maine.edu/peoplesoft are likely to be slow in appearing. If you have accessed this newsletter prior to April 5, be sure to print it out, as it may not be available on the new site for a few weeks.



Looking for a colleague in the University System? Have you tried the Faculty/Staff Search link on the UMS website? Visit www.maine.edu and click on Faculty/Staff.

The People Behind the Project



Helen Parker (left), Director of Financial Aid Systems at the University of Southern Maine, has overseen the transition from paper files to electronic document imaging in her office during the past 11 years (see page 1). This has simplified her life so much that now she occasionally has enough time to relax and read the newspaper. "I do have a life outside of the office...and I work hard at preserving it," Helen says.

A quilter for more than a decade, Helen regularly donates quilts to Project Linus, which provides handmade comfort to children who are seriously ill, traumatized, or otherwise in need. She also serves as the Assistant District Administrator for 9-12 year-olds' softball in Maine District 6 and assigns umpires for district tournaments.

A PROJECT GLOSSARY

Webapp: On-line application, used by prospective students to apply to institutions of the University of Maine System.

MVP: "Most viable process" for inclusion in a back-office shared processing center. Examples of MVPs include admissions application data entry, imaging, indexing and document disposition; archiving of historical documents; loan management and collections.

Document imaging and document management: Managing paper documents by imaging (scanning) them into an electronic system, then indexing and filing the electronic versions for future use and retrieval (stored in an electronic filing cabinet), and then appropriately disposing of the paper documents.

For more of "A Project Glossary," visit <http://www.maine.edu/peoplesoft>

Employee Update is published by Project Enterprise in the University of Maine System.
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 Your comments are welcome.

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IN THIS ISSUE

Document imaging at USM.....	1
The Scoop: an update	2
Your thoughts	2
Help us choose a new name	3
Dear Project Enterprise	3
The People Behind the Project	4
A Project Glossary	4