

Pepperdine University Creates a Better User Experience

Overview

Pepperdine University has top-ranked programs for graduate and undergraduate studies, with separate schools dedicated to business, education and psychology, law, liberal arts, and public policy. Over 84% of students get hands-on experience through student employment, student teaching, and internships. Its stunning 830-acre Malibu campus is located 35 miles northwest of Los Angeles, along with five graduate campuses across Southern California.

Several years ago, Pepperdine University realized a need to modernize and migrate their old document management system to a new system. They already worked with an Ephesoft partner, Softdocs, for storing their documents. Softdocs specializes in helping higher education and school districts with their ECM platform, Etrieve, but they needed a better, faster way to onboard content into their platform. From there, these systems and the data connect to Oracle PeopleSoft.

As a university, Pepperdine has a large volume of transcripts, transfers and other admissions documents along with processing needs for checks and invoices in the finance department. Their Advancement department, which handles donors, donations and outreach for the university also worked with heavy volumes of forms and various documents.



Customer

Pepperdine University

Partner

Softdocs

Use Case

Admissions, Finance & Advancement

Industry

Higher Education

Results

- Improved efficiency and productivity
- Enhanced user experience
- Accelerated processes by about 95%
- Modernized and consolidated solutions

Digital Transformation

In 2018, the project started with Reyn Oyadomori, Manager, Institutional Support in the Information Technology, Client Services department, as the lead project manager, working in tandem with Ephesoft's Professional Services team to deploy. The existing configuration used Kofax, but it didn't have the functionality to do everything they needed: batch scan and store documents. Additionally, they wanted to only use one product with one contract for easier billing. They found out that Ephesoft could easily integrate with Etrieve document management system to have full functionality for their requirements.

With the new system of Ephesoft and Etrieve in place, each department can now scan their own documents into one centralized location within Ephesoft Transact. All of the documents are separated, classified and the data was extracted into Etrieve, which serves as their e-filing cabinet.

Results

“Our primary goal of the project was to have a simple, better user experience,” said Oyadomori. “We were also hoping for a seamless transition from our legacy system into our new Softdocs solution – Ephesoft and Etrieve – which is exactly what we got. I'm really happy with how it turned out.”

Pepperdine processes about 400 documents per month through the system. “The new system is much better than our previous system. Our Admissions department can have student workers operate Ephesoft with their scanners. Ephesoft's intelligent optical recognition capabilities, improved accuracy and reliability makes these tasks more ‘mainstream’ so student trainees can operate without continual managerial oversight,” explained Oyadomori.





The university has prioritized advancing their own technical automation and digital transformation improvements, which will continue to attract both employees and students. “We’ve seen great efficiency gains, increased productivity and time savings using Ephesoft. Scanning and document recognition automation has made this a faster process for our users. In the past, our Finance department had to photocopy checks, place them in batches with ‘divider’ sheets in between, and then scan them in. Once they were scanned, they had to assign the proper chart of accounts codes to each check copy. This was very labor intensive and time wasting – neither of which the Finance department has the extra resources to designate. What used to take about 4 hours now only takes about 10 minutes.”

Although Ephesoft has validation capabilities, several departments chose to validate each document manually for verification purposes. The Finance department, for instance, has procedures to look over every scanned check and invoice to verify accuracy.

Ephesoft has become a valuable document processing application for Pepperdine University. “The extensive configuration capabilities of the batch scan process in Ephesoft makes it a robust and powerful application for users. Our Application Development department has created complex use case configurations that fulfill diverse departmental needs. Another noteworthy feature that Pepperdine finds useful is the menu on the left allows users to jump from batch list to scanning quickly,” noted Oyadomori.

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–Reyn Oyadomori, Manager, Institutional Support, IT & Client Services



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