

## **Electronic Document Management and Information Technology Support Systems for Student Organization Administration**

**Shontarius Aikens**  
**Texas A&M University**  
**Department of Student Activities**

**Shawn Smith**  
**Texas A&M University**  
**Department of Student Activities**

**Kelly Pampel**  
**Texas A&M University**  
**Department of Student Activities**

## **Abstract**

*The Department of Student Activities at Texas A&M University serves over 800 student organizations. Because of the large number of student organizations, this organization had to determine a support system that would enable it to maintain an archive of documentation and records over time. Two initiatives (Electronic document management system and Online documentation system) were created to accomplish this task. Details on the design process, implementation measures, and realized benefits of these initiatives are discussed.*

### **Introduction of the Organization**

The Department of Student Activities is one of 14 departments within the Division of Student Affairs at Texas A&M University. The organization is comprised of nine operational areas: Computer support, Student Organization Finance Center (SOFC), Accounting/Payroll, Office Administration, Risk Management, Leadership Education and Student Involvement, Extended Orientation/Leadership and Administrative Services, Student Government, and Choral Activities. The department employs approximately 57 employees (14 professional staff-exempt, 11 administrative support non-exempt staff, 7 graduate assistants, and 25 part-time student workers). Through its services, Student Activities strives to create and foster leadership and involvement opportunities that enhance personal, interpersonal, and organizational development for students involved in the 800+ student organizations on the Texas A&M University campus.

### **Statement of the Problem/Initiative**

The main problem facing the organization was determining the best way to maintain, archive, and retrieve data records for a large number of student organizations. The specific data and records to be maintained pertain to the student organization recognition process and financial transactions conducted by student organizations.

Each student organization seeking recognition status from Texas A&M University is required to complete an annual recognition process consisting of attending required training seminars and submitting required documentation. It is the responsibility of the Department of Student Activities to track these seminar attendance requirements and to archive the documentation generated as a result of the process. On average, each organization will submit about 15 pages of documents each year, consisting of records such as the organization's constitution and bylaws and organization contact information.

As a condition of being recognized, each student organization is required to use the on-campus banking center for financial transactions. It is the responsibility of the Department of Student Activities to maintain records of all financial transactions that occur through the banking center. This task can be daunting considering the fact that the on-campus banking center processes approximately 25,000 financial transactions per year totaling nearly \$13 million dollars in student organization financial activity.

Based on the above, our initiative was to design a data management system that would have the capacity to process, store, and allow central access to documentation records for over 800 student organizations.

### **Design**

A variety of factors were considered during the design process of our data management system. Below is a series of questions that were considered during the design phase:

- How many documents and how much information will the system need to support?
- How quickly would documents and information need to be retrieved?
- How long would documents and information be stored in the system?
- How often (on a daily basis) would the system be used to access documents and information?
- Would the IT support system contain documents with sensitive information?
- Would the IT support system be used by one department or multiple departments?
- How much money is available for the initial purchase/design and yearly maintenance needs?
- Are the primary users of the IT support system comfortable with using technology?
- What processes (if any) need to be created to support the primary system?

The result of the design process led to the creation of two IT initiatives: Electronic Document Management System and an Online Documentation System.

#### Electronic document management system

The electronic document management system electronically captures, files, stores and routes documents, emails, and other digital media. The system is composed of three different products: Two software programs (Kofax Ascent Capture 6.0 and Hyland OnBase 3.6), two scanners (one for each scanning station), and one server. The system was designed to allow unlimited virtual storage space, multiple user access to documents (up to 6 users at one time), print and email capabilities, and the ability to generate statistical reports. The initial cost of the system was \$56,000, which included the scanners, a server, software, and a 1 year maintenance contract and associated training. The yearly costs are \$11,124, which includes software and scanner licensing and maintenance.

#### Online documentation system

Through online documentation, student leaders and advisors have online access to documentation forms required for the student organization recognition process and for the on-campus banking center. For the student organization recognition process, student organizations are assigned a password and account number. When accessing their account, the computer generates the documentation forms applicable to that specific organization. The documentation forms have been formatted as writable PDF files, enabling students and advisors to type in information before printing. For the on-campus banking center, organizations can access online the forms needed to conduct financial transactions. The financial documents have been formatted as writable PDF files as well. The IT tools used to create this initiative were Microsoft Access, Internet Explorer, and Adobe Acrobat Full version. With the exception of the Adobe

Acrobat Full version, the other IT software items are usually available on most computers at no additional cost.

### **Implementation**

The following sections contain pertinent information concerning implementation steps for each initiative.

#### Electronic document management system

In November 2002, the Department of Student Activities purchased the components needed for the electronic document management system. After the purchase, the chief IT staff member attended a week long initial training session on the software. Shortly after the software and hardware had been configured, the chief IT staff member conducted a question and answer training session for all staff members.

Starting in 2003, staff members (specifically those involved with student organization recognition and the on-campus banking center) begin using the system on a regular basis. A major initiative began in 2004 when significant steps were taken to import all documents into the imaging system. All hard copies of organizational records were manually scanned into the system. Once the files were verified to be successfully imported into the system, hard copies of documents for the year were filed as a backup. All other older paper versions of the documents were shredded.

Over the past few years, staff members have begun to shift from a storage-oriented philosophy to a work process efficiency-oriented philosophy when using the system. For example, instead of using the system to simply store and retrieve documents, staff members are creating ways to use the system to route documents that need to be reviewed by multiple individuals or departments within an established protocol.

### Online documentation system

In April 2005, the Department of Student Activities implemented the online documentation system. Prior to this, recognition documents were distributed to student organizations during seminars, and students were required to complete them by hand. Data from assessments indicated that students and advisors desired an option to complete required documentation via a computer rather than only by hand. Approximately five months prior to the implementation date, the following steps were taken:

1. All forms were updated as needed and formatted.
2. Documents were converted to a writable PDF file.
3. The website interface was re-designed so that when student organizations log in to their account, a link to documentation forms would be listed.
4. By providing a listing of student organizations, their account numbers, and their classification, the chief IT staff member configured the system so that specific account numbers would generate a specific set of forms appropriate to the organization upon successful login.
5. After successful testing, an instruction booklet was created for student organizations to use when completing the documents. The instruction booklet contained written step-by-step instructions along with computer screen image shots.

After the initial April 2005 launch of the system, several system glitches were identified. These glitches were corrected during the period of May to July of 2005.

### **Benefits**

As a result of these initiatives, the Department of Student Activities has received nine major benefits. The first benefit is the compatibility of the system. Most student activity forms contain barcodes on them, which allows for easy importing into the electronic document management system. For documents or electronic data that contain no barcodes, the electronic document management system can import these documents as well and can be assigned certain labels for future retrieval. The second benefit is an increase in document access and viewing. A physical file folder system only allows one user access to a document at one time. With our system, multiple users can retrieve, access, and view documents simultaneously. The third benefit is document security and quality control. Once imported into the system, documents cannot be deleted from the system, except by an authorized IT administrator or user. The system maintains a history record for all documents listing the names of those who have accessed a document and any modifications made. In addition, the system has the capacity to designate authorized users and to customize a user's security privileges to prevent unauthorized access to documents. The fourth benefit is an increase in available office space. Prior to the implementation of this system, all documentation records were kept in six large filing cabinets. Now that all records are imported into the system, there are only 2 large filing cabinets in use. The system has allowed us to be more efficient in archiving documents. For example, as of August 22, 2006, our electronic document management system stores approximately 93696 documents (the equivalent to 653,525 pages of information). Because of our responsibility to archive these records, the number of student organization records will increase annually. If these documents were archived in physical file folders each year, the file cabinet office space would have to accommodate the growth. By filing them electronically, office space devoted to file storage usages is not affected. The sixth benefit is an increase in document legibility. By

providing users with writable PDF files, users are encouraged to type documents rather than complete them by hand. This is especially beneficial to the staff in the on-campus banking center when they process financial transactions. The seventh benefit is a decrease in incurred printing and copying costs associated with paper, printer cartridges, and toner ink. As a result of our initiatives, these costs have been shifted from the Department of Student Activities to the student organizations. The eighth benefit is the amount of time saved in retrieving and disseminating documents. Under the physical file folder system, past practice required a staff member to manually retrieve documents from multiple physical locations, determine the most current version, photocopy the document, and disseminate it as needed. This process was even more cumbersome when certain documents were stored in three different physical locations. The digital imaging system allows for all documents to be stored electronically within the same account (sorted according to date) thus reducing the time needed for searching. In addition, our department has the option to print and mail the document or to email the document to the end user. Under the physical file folder system, a document retrieval and dissemination task could take hours and sometimes days to complete. By utilizing the digital imaging system, the same task can be completed within minutes. The final benefit is department recognition. Since the implementation of the imaging system, our department has received inquiries from other universities about our system.