



Key Document Management System Features for Universities

September 21, 2022



Universities and educational institutions process a high volume of documents on a daily basis. Admissions offices especially face the challenges of keeping up with processing endless amounts of documents. Admissions applications usually require test scores, transcripts from previous educational institutions, essay prompt responses, letters of recommendation, financial assistance documents, and more. In order to process and manage all of these documents per applicant, universities rely on having a streamlined system to reduce staff stress and make the admissions process run efficiently and smoothly.

Documents and files come in all shapes and sizes from digital, paper, or both. Valuable time can be wasted if the right solutions and processes aren't implemented for the staff team to rely on. Searching for specific documents can eat away time fast. The admissions office, financial assistance department, student health center, and faculty can all benefit from a Document Management System for a multitude of reasons.

[Getting started with a document management solution](#) can seem like a large overhaul to start, but the long-term value comes almost instantaneously upon implementation. Both staff, faculty, and current and future students will see the positive impacts of a Document Management System (DMS). Throughout this blog, we will talk through the key DMS features for universities and how they can benefit your institution.

Workflows and Automation

Workflows can help assist and accelerate a variety of administrative processes. Every university has different processes and needs. Workflows are fully customizable to meet those needs. Whether your admissions office is sending applications to the admissions committee, sending financial assistance documents from a student's

course counselor to the financial assistance office, or sending documents to faculty, workflows can speed up these processes and eliminate the risk of human error. It is crucial to have the right documents in the right hands, at the right time.

Work and documents can be automatically distributed to the appropriate recipients through a DMS automation based on custom triggers and actions. Before an acceptance letter can be sent out to a prospective student, an application might have to be passed through multiple hands of university staff, committees, or departments. Eliminate staff members needing to manually email or deliver documents to the next recipient by using workflows. A document management system seamlessly moves appropriate documents such as letters of recommendations, health documents, and financial aid documents, through automation. The use cases are wide and flexible to meet the needs of any university department.

Eliminating the need to manually email or print crucial documents out can prevent human error, delays, and complications. Workflows ensure that human error is squashed and processes can flow easier and become more efficient. With the associated stress reduced, university staff can focus on providing a pleasant experience for staff, faculty, and students. Rule-based routing allows you to define and enforce business rules such as approval and reviews. This is crucial to reduce errors and problems before documents are moved forward. This could be exponentially beneficial to the admissions department in particular. Or, the student health center to make sure immunization records, allergy documents, and disability accommodation forms are filled out correctly before moving through the process.

With notifications based on certain criteria set up in your document management system, you can easily track the progress of a document's approval and review process. Bottlenecks can be quickly identified and addressed. When documents are ready to be reviewed

or have been reviewed, you can be instantly notified to keep moving forward in the document review process. This removes the need to send an email or print out a document and walk it over to the next reviewer.

Document Access

As a university with a variety of departments, there are many documents and records that must be stored and accessed at any given moment. Transcripts, applications, financial aid records, course curriculums, student information, the list is expansive. With a high volume of documents, if your university is still not on the road to [becoming paperless](#), now is the time. With a document management system, you are not only able to digitally house these documents in a secure location, you are also able to index them to simplify your organizational and retrieval processes.

A DMS can securely store crucial documents along with allowing staff to index them for easy access and quick retrieval. Additionally, you can use metadata to tag values such as a Student ID Number or other identifying information to make finding and retrieving documents easier than ever. Metadata is composed of notes and information about the file to help with tagging and organization. This helps to reduce the time wasted on finding documents so staff can focus on completing tasks.

A document management system can auto-generate the organization and categorization of documents, eliminating manual work. Organize faculty documents such as course syllabi, exams, coursework, and more to ease professors' loads for departmental organization and utilization. You can classify information through indexing. Indexing describes a digitized document and allows you to quickly search and retrieve the needed information.

Campus student health centers can utilize a DMS as well. They too need a way to process, organize, and store incoming students' immunization records along with other crucial health documents. A DMS could help smooth that process and relieve staff stress of managing and organizing critical data.

Document Security and Confidentiality

Many documents within a university database have extremely confidential information such as students' names, emails, addresses, Social Security numbers, financial information, etc. This information sitting in a filing cabinet is an accident waiting to happen. Many problems can occur if you are still relying on [paper-based documents](#) and you do not want to take that risk. A document management solution can ensure that you are compliant with regulatory requirements while also having the ability to securely access organized documents.

You have the option to set up access controls for specific documents. For example, a confidential document such as one with a student's Social Security number and personal information can be stored where only authorized people can access it. This ensures that not everyone in the department will be able to access that information, keeping sensitive information as safe as possible. Your current and incoming students are relying on you to keep their valuable and confidential information safe and secure. As a university, you want students, staff, and faculty to feel as secure and safe as possible.

For more information, read our blog on [The Impact of a DMS on Higher Education](#).

Get Started Today!

You understand how a document management solution will benefit your university, but where do you begin? It is crucial to begin looking for document management systems that align with your business process needs. [Finding the right document management system](#) is key, many different systems have various features and options you will have to consider. If you need any help figuring out how to pick the best solution for your company, [contact us](#) today and our specialists would be happy to discuss the right option for your university.