

**CENTER OF TECHNOLOGY MANAGEMENT
AT WASHINGTON UNIVERSITY IN ST. LOUIS
SIMPLIFIES THE EXCHANGE
OF INFORMATION.**

“Xerox was offering something ahead of its time... the best solution for our hardware needs, plus added functionality that would make us more efficient.”

*Dr. Andrew Neighbour
Director of Technology
Management*

**XEROX DOCUSHARE AND
XEROX FLOWPORT**

**Center of Technology Management
at Washington University in St. Louis**



DIGITAL
THE DOCUMENT COMPANY
XEROX

THE ENVIRONMENT:

- Higher Education and Research

THE CHALLENGES:

- Improve on current paper document management processes
- Streamline flow of information internally and externally

THE XEROX SOLUTION:

- Xerox DocuShare
- Xerox FlowPort
- One Xerox Document Centre 332 and one Xerox Document Centre 230

THE RESULTS:

- Ability to easily transfer documents electronically enhances communication internally, with the public, and with customers
- An easier, freer, means of exchanging ideas, information and best practices
- Collaborative work processes and sharing of best practices improves document content
- Electronic document management alleviates logistical problems of paper document management, and provides easier access to and amendment of documents



CLIENT PROFILE CENTER OF TECHNOLOGY MANAGEMENT

Institutions of higher education are often among the first to adopt new technology and, therefore, become models for businesses in other industries to emulate. Such is the case for the Center of Technology Management (CTM) at Washington University in St. Louis, Missouri.

Spending Time Wisely

The Center of Technology Management deals in managing intellectual assets. And with Washington University's annual research budget of \$330 million, it is safe to say there are plenty of assets to manage. For each new invention, the CTM needs to analyze the content, decide whether the University should "adopt" it, then patent it, and disseminate the information to the public. Dr. Neighbour, Director of Technology Management, estimates that the CTM deals with 100 - 150 new inventions per year—an extremely paper-intensive task.

With each invention, there are disclosure statements, patent forms, contracts, invoices, and several other paper documents that must be kept on record for up to 25 years.

In the past, these documents would be stored in 25 large filing cabinets in the CTM office. Neighbour explained that there were a number of challenges to this method:

- The 25 file cabinets took up too much space in the office, were an eyesore, and made for "clumsy" document retrieval/management.
- Maintaining the integrity of all those paper documents was difficult. If just one document was misfiled or misplaced, the consequences were severe.
- There was a need for a better organizational infrastructure because there wasn't anything that truly grouped documents together. Even with the Oracle relational database created for the CTM, paper documents were still difficult to link.
- Each project had upwards of 10 people competing for access to the same files. With only one set of originals, this caused frequent logistical problems.

And while none of these challenges were insurmountable in and of themselves, Dr. Neighbour knew there had to be a better way.

He found it with Xerox.

Implementing Solutions

In mid-1998, the CTM needed a networked fax machine and they wanted to upgrade their Xerox analog copier to a digital device. They decided on a Xerox Document Centre 230, which satisfied all their hardware needs (and more) with just one device. Dr. Neighbour recalls that, “during the product demonstration, Xerox explained how the Document Centre’s scanning capabilities could be used for document management”—a feature that would be of great use to the CTM. Neighbour continues, “Xerox was offering something ahead of its time. Xerox offered the best solution for our hardware needs, plus the added functionality that would make us more efficient.”

Since the implementation of the Document Centre 230, the CTM has added another Document Centre 332, DocuShare and FlowPort. With the new hardware/software technology, work processes have improved significantly.

Xerox FlowPort involves a cover sheet that is scanned along with a document. With the mere check of a box on the cover sheet, the Document Centre scans the document and sends the electronic file to a server, which will know whether to print, Internet fax, e-mail, and/or store the document based on the selections checked on the cover sheet.

“We’re working toward a paperless office,” Neighbour explains. Now, when disclosure statements and other documents come into the office, they are scanned using FlowPort software and the Document Centre 230 and 332. Document originals are sent to an off-site storage facility.

Once the document has been scanned into the system, Xerox DocuShare is put to use.

With DocuShare, documents are managed on the Web, where authorized users have instant access for viewing, downloading and editing, printing, or posting revisions—from anywhere, at anytime.

Neighbour describes one of the key benefits of DocuShare: “Access to documents stored in DocuShare is virtually instantaneous, which is extremely important to us, as many of the documents we deal with need to be retrieved, reviewed, and amended on a regular basis... and on short notice.”

“Access to documents stored in DocuShare is virtually instantaneous.”

*Dr. Andrew Neighbour
Director of Technology Management*



There are a number of methods used to access documents using DocuShare. CTM employees can double click on a hyperlink extension in their Oracle database, and they are sent directly to the document stored in DocuShare. Or they can use DocuShare’s full text search engine to retrieve their desired files. CTM staff can then e-mail customers the entire document or simply give them the URL where the file resides for simple, real-time access.

Strict security features ensure only authorized users can retrieve specified documents.

Significant Improvements

The impact of the FlowPort-DocuShare-Document Centre solution has been immediate and extensive. There are several areas in the CTM's everyday workflow that have seen dramatic improvement:

Enhanced communication with customers / quick document retrieval

Before their partnership with Xerox, CTM employees would have to find the document in the filing cabinet, make a copy, and get back in touch with the customer. After the issue was resolved over the phone, CTM staff would often follow up by faxing or mailing the relevant sections of the document to a customer. Now, however, CTM employees simply access the document instantly on the DocuShare website, and if desired, e-mail the relevant sections to the customer or give the customer the URL where the document can be found—a faster, easier, and less expensive way of sharing information.

Improved document content

DocuShare allows people to work together, which helps to ensure the very best, most up-to-date content.

Users upload a document to a website where any authorized colleagues, no matter where they are located, can view the document, share ideas, and post revisions. These documents benefit from collaboration and the sharing of best practices.

Enhanced internal communication

FlowPort streamlines the flow of information within the CTM group. For instance, if CTM employees need to share a document with an off-site colleague, they don't have to print and fax the documents or send them via overnight delivery. Instead, they simply scan the documents on a Document Centre and, using a FlowPort cover sheet, upload the files directly to DocuShare. The off-site colleague may then retrieve the document on line. No delays and no overnight delivery/faxing costs.

Enhanced communication with the public

DocuShare's full text search capability make it easy for people to find exactly what they are looking for on the CTM website. As content is amended, CTM employees have drag-and-drop ability to add or subtract their own files, ensuring content is always up to date. Previously, this process had to be performed by a trained programmer, which made it time- and cost-prohibitive.

Improved document management

Perhaps the most prominent benefit of the new solution is the reduction in overall effort required to effectively manage information. Digital management reduces the number of logistical problems associated with paper document management—there is no misfiling, no damaged or lost documents, and an unlimited number of people can access the same document simultaneously. And to the delight of the CTM staff, there is no longer a need for the 25 large filing cabinets that have loomed in the CTM hallway for so many years. In fact, the CTM will be moving locations, and 20 of the filing cabinets will not be making the move.

Thanks to the FlowPort-DocuShare-Document Center solution, Dr. Neighbour insists they will not be missed in the least.

KEEP THE CONVERSATION GOING.

SHARE THE KNOWLEDGE.



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