Prestigious Catholic High School Graduates to Document Management Software with High Honors in Capture Automation!

As part of the Diocese of Arlington, Saint John Paul the Great Catholic High School is a college prep school and the only high school in the United States to offer a 4-year bioethics curriculum in additional to religious services. With three levels of courses including academic, advanced, and honors/AP, each and every class at Saint John Paul is designed to ensure students are truly ready for college level learning.

The Catholic High School's 40-acre campus in Potomac Shores, Virginia, is an impressive state-of-the-art facility which opened in 2008. With students grades 9-12, every day at Saint John Paul is different, yet behind the scenes, the high school operates with all the functions of any other type of business with departments including finance, human resources, administration, IT and more.

As the newest school in the district, Saint John Paul took an innovative approach towards the way they manage records and information. The high school stores every piece of paperwork a student must provide in order to attend. This includes applications, medical records, birth certificates, transcripts, and anything else that's required as part of the submission process. With so many current students, and new applications arriving daily, Saint John Paul decided to transform paper documents into digital data with document management software.

The school was looking for a software that was flexible in terms of integration with the desktop, and the applications they currently use, including PowerSchool. They looked at a few options but after the elementary school in their district implemented GlobalSearch from Square 9, they knew it would be a great fit for the high school as well.

Before Saint John Paul implemented the award-winning GlobalSearch software, all of the paperwork across every department was stored in folders in different cabinets, which were already running out of space, despite the school's young age. It was a no-brainer for the team at Saint John Paul to start digitizing their information. So, they decided to start in Finance.

Before GlobalSearch, every check was written out, laid out on the copier, scanned and filed before approved for payment. It was a very time-consuming process to manage every purchase order and vendor invoice that was in paper form. Even the technology team experience lags. Whenever they needed to pull a bill from the previous year to review the numbers, they'd have to go to the Finance department, wait for them to go through the cabinets and sift through to find the one copy. Then the IT staff has to take the copy, review it, keep it safe, and bring it back for refilling. All this just to pull a quick piece of information. They quickly got on board with document management software.

The Finance team has easily saved a hundred hours in administrative time alone. Now they have desktop scanners where they can scan each document, triggering GlobalCapture's automated workflows to index the data

Snapshot

Industry:
Education

Departments Impacted:
Finance, Human Resources, Administration, Registration, Medical, IT

Featured Products:
GlobalSearch, GlobalCapture

Objectives:
Implement a digital document solution that integrates with PowerSchool while automatically capturing and indexing key document data.

and securely store each file. Saint John Paul has logic built into the scanning process so that each document will be automatically OCR'd based on document zones to separate stacks of documents and prefill main index fields.

Both Admissions and Registration departments followed suit. They started by scanning 100,000 archived documents from the first seven years of operation into the document management system. The documents were automatically indexed using Square 9's GlobalCapture document capture solution. Between filing, storing, and accessing documents alone, staff has saved over 200 hours across departments and has increased productivity by at least 10%. Now, if a staff member is working with a record in PowerSchool, they can easily pull up all matching student records in GlobalSearch.

Over 200 Hours Saved

The school nurse and athletic trainer both deal with student medical records and need access to different records at any given time, whether it's a medical history report or over the counter authorization form. However, they are located on different sides of the building and work different hours, making file collaboration difficult. Now, either one can get to that information as soon as they need it, from wherever they are.

Thanks to Square 9's solutions, the majority of the school's documents have been digitized and shredded. Having easy and immediate access to important information across departments is helping the Catholic high school operate like an enterprise. They've started the year as a truly paperless organization and look forward to expanding their document management capabilities with intuitive workflow routing and web forms management. They are well on their way to meeting their goal of having all student records scanned, indexed and ready to go for the new year.

To learn more about Saint John Paul the Great Catholic High School, please visit www.jpthegreat.org.

Interview: David Morales

Director of Technology, Saint John Paul the Great
Catholic High School

Q. What criteria did you have in mind when searching for a Document Management solution?

David Morales: We're pretty young, only 10 years old, and I've been in other organizations where they've waiting longer to tackle paper-based inefficiencies. There's too many copies floating around or they run out of space or cabinets and have trouble going through them or can't procure more. So, before we got to that point I said, "Let's do this". A couple elementary schools near us had gone the same route, with the same software and the same vendor so we thought it was a good time to move.

We were looking for a software that was flexible in terms of integration with the desktop. We also use PowerSchool - so having an integrated solution was important to us. We looked at a few other vendors but other schools in our district in our same diocese were using Square 9, so we thought it made sense for us to explore it.

Q. How is your school leveraging GlobalSearch and GlobalCapture?

Morales: Square 9's solutions are being used across multiple departments including Finance, Human Resources, Administration, Registration, Medical and more. With our student records, we have every single piece of paperwork a student provides as part of registration and the application process. That was all in paper. It was in folders in different cabinets and the cabinets were already running out of space and we're not even that old. So, it was a no-brainer to start there.

GlobalSearch was great for its seamless integration with PowerSchool. We use PowerSchool daily so now if we are looking at a record in PowerSchool we could easily pull up matching records in GlobalSearch. GlobalCapture has helped fit our needs as well. We have logic built into the scanning process, so documents are automatically OCR'd based on zones. The system can then split pages, split documents and prefill index fields, eliminating administrative work. We started quickly by taking a batch of 100,000 documents archived from our first six or seven years. We scanned them, and they were automatically indexed, enabling us to then shred each file with the exception of nurse files. Our school nurse has been using GlobalSearch a lot more for the paperwork, specifically over the counter medicine authorizations. In fact, both the nurse and athletic trainer deal with student medical records and GlobalSearch has helped a lot by providing both with immediate access to documents at any given time from wherever they are.

Q. How has Square 9's solution impacted processes?

Morales: A lot of administrative time has been saved between filing, storing, and accessing documents. We're still trying to get our gears together so we're not taking the full benefit yet, but I would say a couple hundred hours have been

> " *Between filing, storing, and accessing documents alone, staff has saved over 200 hours across departments and has increased productivity by at least 10%.* "
>
> **- David Morales**
> *Director of Technology*

saved already. Compared to what we were doing before, where they had to take every check and walk it over to the copier, wait for it to be open, lay them all out flat, scan and bring them back. Now we have desktop scanners where staff can scan everything in and GlobalCapture workflows break the data up into the system. We're easily saving a couple hundred hours, primarily in Finance. Purchase orders. Vendor invoices. All of that was paper. So, for me, even in technology whenever I needed to pull a bill from last year to review the numbers, I'd have to go over to them, wait for them to go through the cabinets and find everything first by year, then by name, and sift through to find the one copy. Then I have to take the copy, keep it safe, review the data and bring it back. All that just to pull a quick piece of information. Now the process is streamlined, and document access is secure yet immediate.

Q. Would you recommend Square 9's solutions and why?

Morales: Whenever we've had questions about the software or the installation, we go through our Reseller who gets in touch with Square 9 for us. Square 9 has been great - remoting in and looking into our specific installation. Once we're all connected - everything goes smoothly. I would definitely recommend Square 9 and their products. We are still growing and would like to explore additional Square 9 solutions as well, including the GlobalForms web forms product. Something to keep in mind for future users is to really take the time to assess what your goals or and how to accomplish them. There is so much you can do with the software and so many modules to add on! It's a great product but make sure you have a good idea about what you need upfront in order to accomplish it as quickly and effectively as possible.