

# Connecticut Student Loan Foundation Enables a Smart Future with Document Management

## challenge

*To make the process of financing higher education to be as easy, efficient, and inexpensive as possible for their customers*

## solution

*OIT's DocFinity® Suite of Document Management Software*

## benefits

*Increased accuracy and efficiency, and the ability to provide enhanced services to customers of the Foundation*

The decision to pursue higher education is one of the most important choices a person can make. Connecticut Student Loan Foundation (CSLF or Foundation) is a nonprofit student loan provider dedicated to providing access to funding for higher education through customized and personalized high quality service. CSLF administers, guarantees, finances and services the Federal Family Education Loan Program. The Foundation has over 35 years of experience providing assistance to students and parents seeking to finance higher education. CSLF wants the process of financing higher education to be as easy, efficient and inexpensive as possible for their customers, and CSLF is committed to simplifying the process of borrowing student loans. CSLF serves as a single source agency by providing all loan services from application through repayment. Students or parents who receive loans for higher education through CSLF need only deal with CSLF throughout the life of the loan.

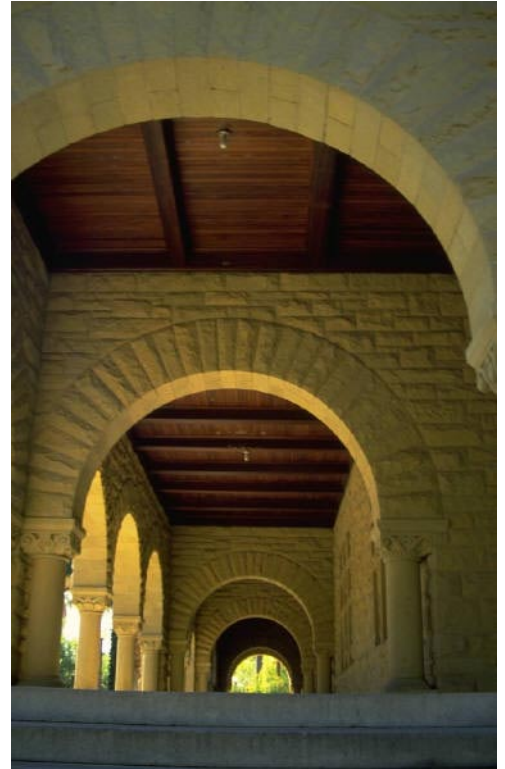
The Foundation has developed an array of services for its customers that includes providing free pre-printed applications, debt management programs, student counseling, as well as having representatives available through toll-free customer service telephone lines. The wide-range of duties that CSLF undertakes for its customers requires a vast amount of documentation. Most of this documentation needs to be retained for many years. Promissory notes, checks, loan applications, letters, and other forms of correspondence arrive at CSLF on a daily basis and it is necessary for CSLF to store these documents.

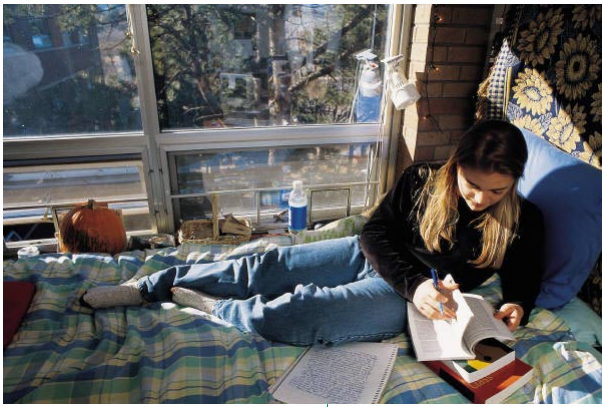
## the need for EDMS

Prior to using OIT, CSLF stored documents on microfilm. Documents were microfilmed and then stored in a library located in CSLF's facilities. CSLF officials felt that the microfilm archive system had several drawbacks, as the process was both time and space consuming. It was also a rather expensive process because of consumables, developing and ongoing maintenance costs. An internal evaluation was performed and it was decided that the move towards an Electronic Document Management System (EDMS) would not only address all these concerns, but would also open up new avenues of customer service such as web based solutions. The investigation delved into several options in the world of EDMS including document imaging, Computer Output to Laser Disk (COLD), Optical Character Recognition (OCR), as well as barcode indexing.

## selection/technical

In the first quarter of 2000, Optical Image Technology, Inc. (OIT)'s product suite was chosen to be the replacement for CSLF's current microfilming process. OIT software licensed to CSLF includes DocFinity COLD-ERM, DocFinity Imaging, DocFinity AutoARCHIVE, and DocFinity IntraVIEWER®. CSLF chose the Fujitsu M3097VRS scanner in conjunction with the Kofax Adrenaline product to get the images in to the system. This scanner utilizes Virtual Re-Scan (VRS) technology to eliminate much of the time-consuming, expensive pre-scan document sorting, re-scanning, and scanning adjustments. The backend system will be run on a dual processor Compaq Proliant Server with an initial 50-gigabyte RAID-5 (Redundant Array of Independent Disks) for storage, running MS Windows NT and MS SQL Server 7. Users will be accessing the system through their Dell workstations operating Windows 98.





*“CSLF employees now have the information they need at their fingertips in a matter of seconds.”*

## **solution**

With DocFinity Imaging, OIT’s powerful document imaging program, CSLF can now handle paper-based communications for indexing, storage, and retrieval. All relevant materials (for example, checks and loan applications) are scanned, indexed, and stored so that users can access the system from their desktop workstations. “CSLF employees now have the information they need at their fingertips in a matter of seconds,” said Optical Image Technology, Inc.’s President Scott Buchart. “In addition to being cost-effective and saving time and space, this EDMS solution goes right to the core of CSLF’s commitment to providing its customers with the best, most convenient customer service possible.”

For efficient, accurate scanning, CSLF will employ an OCR function – a process that automatically recognizes text from scanned images. “With the new imaging

system, CSLF will have more control over the quality of the scanned images than they did under the microfiche process,” said DJ Wilson, Information Specialist for OIT. Better control over such things as brightness and contrast during the scanning process will lead to improved scanned images.

CSLF didn’t choose OIT just for its ability to provide quick and easy access to images. The COLD solution utilizing DocFinity AutoARCHIVE and COLD-ERM allows for automated indexing and archival of hundreds of reports from their OS/390 Mainframe. This reduces the labor required in handling paper output as well as the cost of the consumables associated with printing massive reports. “The system of document storage and retrieval we used prior to the OIT solution was acceptable, but this is a whole new and exciting direction for us,” said Jeff Robillard, CSLF’s Lan Supervisor. CSLF is pleased with the accuracy and efficiency of OIT’s software solution and is pleased to be able to provide enhanced services to customers of the Foundation.

## **the future**

As part of its long-term EDMS goals, CSLF is positioning itself to develop even more intriguing concepts for improved customer service. Taking advantage of the truly “open” nature of the OIT software, the programming staff of CSLF easily connected “EnRoute,” CSLF’s Internet based educational loan processing and management system, to the OIT SQL database. This allows customers to securely look at imaged CSLF documents that pertain to their needs side-by-side with other detail derived from numerous CSLF sources.

CSLF customers will have access to their accounts on a 24-hours-a-day, seven-day-a-week basis. “Web access is on the top of the wish list for many organizations considering document management solutions today. The ability to allow customers access to documents or forms that they need on the Web provides an exciting enhancement to the customer service offered by CSLF,” said Buchart.

With a cutting-edge EDMS system developed by OIT and a dedication to helping students attain higher education, CSLF is proving to be committed to the future in more ways than one.

**Optical Image Technology, Inc.**  
[www.docfinity.com](http://www.docfinity.com)

**CSLF**  
[www.csflf.com](http://www.csflf.com)