



Palo Alto University, Palo Alto, CA

Document & Content Management Case Study

Docubase Education Suite providing campus-wide document management.

BACKGROUND

Palo Alto University (PAU), a private, non-profit university located in the heart of Northern California's Silicon Valley, is dedicated to addressing pressing and emerging issues in the fields of psychology and counseling to equitably meet the needs of today's diverse communities.

As part of a digital transformation initiative in order to prepare for the future, the university realized they needed a way to centralize, manage, and control access to their institutional records. Of particular importance was to find a system that could help streamline the expected influx in new student applications.

The main requirements for the system were:

- Support multiple departmental databases in a single environment.
- High security and access permissions based on roles.
- Hosted system with high reliability and fast performance.
- Easily integrated with other systems such as J1 and Salesforce.
- Excellent price to value ratio.

SUMMARY OF THE SOLUTION

After a comprehensive review, Palo Alto University selected Docubase Education Suite SaaS. Hosted in the dbs Cloud, deployment was completed in a few weeks, starting with Admissions as the first power users of the solution. Additional departments that are expected to make good use of the system include HR, Financial Aid, Business Operations, and Faculty.

With Docubase Education Suite, the university now has full-featured document management available to users across the campus, with document indexing, storage, and retrieval accessible by individual users. In addition, the system's integration plan includes using the Docubase API to connect it to other systems, including Jenzabar's SIS and Salesforce CRM. As a result, by having Docubase be the "Single Point of Truth" for all documents, the university will be able to provide digital document services and support for its students and faculty well into the future.

Palo Alto University is now looking forward to extending the use of Docubase throughout the campus and exploring other functionality such as workflow and forms automation for admissions.

WHAT WERE THE CHALLENGES?

- Implement a central document repository that is secure and serves as the "single source of truth" for institutional documents.
- Transparent integration with Jenzabar and other systems with emphasis in the user experience.
- Intuitive and easy to use by both business and technical users.
- Short deployment timeline.

WHAT BENEFITS WERE ACHIEVED?

- Expedited project timeline from signing to delivery in a few short weeks.
- Centralized secure document management system providing document services to both individual users and other systems via API.
- Quick adoption of the new system by Admissions generated strong interest by other departments.
- Implemented an enterprise grade document management solution at a very reasonable budget.



DEPLOYED SOLUTION FEATURE SET

- Environment hosted in dbs Cloud and managed by dbs' support experts.
- Full ECM feature set including indexing, secure storage, and retrieve functionality.
- RESTFUL API integration to Jenzabar's One Student Information System and other systems.
- Support for multiple databases.
- Advanced user access and control.
- Web based user access.

"Our experience working with DBS has been excellent! Their depth of document management expertise, combined with top notch software and concierge-style support model ensured a quick project implementation and helped us make significant progress in our Digital Transformation initiative."

~ Dr. Brian Stover, Deputy CIO, Palo Alto University

