

## PerfectForms Success Story: University of Portland

### EXECUTIVE SUMMARY

#### CUSTOMER NAME

- University of Portland

#### INDUSTRY

- Education

#### BUSINESS CHALLENGE

- Eliminate paper-based processes
- Deploy form solution that could be used by all groups on campus
- Free up IT resources

#### PERFECTFORMS SOLUTION

- Deployed PerfectForms across campus, empowering students, faculty and administrators with form creation.
- Integrated PerfectForms with PayPal to streamline donation and payment collection.
- Helped centralize data collection, ensure data stays within the construct of the University.

#### BUSINESS CHALLENGE

The University of Portland (UP) has made a concerted effort to transition paper-based processes online to streamline workflows and reduce labor related costs. Central to this effort is the University's use of online forms to empower the whole gamut of their community, including students, faculty, and administrators.

Traditionally, the University tasked its IT and web services department to custom build online forms on a request basis. This process proved cumbersome and limited the IT department's ability to focus on creating new, innovative projects that could benefit the greater community.

Faced with an incredible amount of data creation and collection needs, it was difficult for the IT department to keep up with the forms needs of the campus community. UP needed to find a new solution that could decentralize the form creation process, enabling the entire campus community to build, create and deploy their own forms. Because of the non-technical background of its users' community, the solution needed to be intuitive and easy to use, as well as providing a breadth of functionality to address the multitude of applications needed to meet the needs of this diverse audience.

**“The use of PerfectForms campus wide has been amazing. Because PerfectForms is so easy to use and can address almost any online form challenge our users are faced with, the product is in continual use.”**

- Jenny Walsh, Director, Office of Web & Administrative Systems for University of Portland

#### FORM AND WORKFLOW SOLUTION

Jenny Walsh, Director, Office of Web & Administrative Systems for University of Portland, chose PerfectForms because of the product's extensive functionality, affordability and ease of use. UP was able to deploy PerfectForms to serve the data collection and online process needs of their entire campus community, including student groups, faculty, administrative users and more.

Since deployment in late 2009, the UP community has created more than 100 forms to streamline both simple and complicated tasks, freeing up IT resources to focus on more comprehensive projects. UP students, staff and faculty use PerfectForms to manage tasks such as student, faculty and dean evaluations, nominations for awards, and event registration, as well as to create a multitude of surveys to collect critical data and feedback, including those for incoming freshman, graduating students, faculty and various academic groups on campus.

In addition, UP was able to develop an innovative solution to help streamline the ability to securely collect funds and payments across campus. By integrating PerfectForms with PayPal, UP was able to create online payment forms to collect event registration payments, donations, and sell University paraphernalia online.

## **BUSINESS RESULTS**

PerfectForms made form building easy for users across the campus, eliminating time consuming paper-based processes and freeing up valuable IT and Web Services Group resources. Because PerfectForms doesn't require application development skills, UP was able to empower their campus community to meet their own needs with limited guidance. As a result, the University was able to streamline operations and realize significant value in many areas, including:

- Easy form creation proved to be a high time saver, ensuring the IT department wasn't continually tasked with new form and data report creation requests;
- PerfectForms enabled the University to deploy a centralized data collection system, significantly reducing the number of paper, or telephone and email-based processes on campus;
- Significantly reducing the amount of time the administrative staff spends on data entry and report creation;
- Streamlining the ability to collect donations and payments through an integration with PayPal, making fund collection easier to record and track;
- Providing a pathway for centralized data collection, enabling users to view reports and manipulate data for process improvements.