

## PERFECTFORMS SUCCESS STORY: UNIVERSITY OF TENNESSEE MARTIN

### EXECUTIVE SUMMARY

#### CUSTOMER NAME

- University of Tennessee Martin

#### INDUSTRY

- Education

#### BUSINESS CHALLENGE

- Automate student ID requests
- Streamline workflow and reduce labor and printing costs

#### PERFECTFORMS SOLUTION

- Integrated PerfectForms into the existing secured network
- Eliminated the costs of hiring photographers and staging booths for student IDs

### BUSINESS CHALLENGE

[University of Tennessee Martin \(UTM\)](#) Business Affairs department was faced with the challenge of taking student ID pictures and processing them during orientation. Each year, as incoming freshmen and transfers flood the campus, both excited and confused as to what happens next, the first thought in their minds isn't usually "I should take care of necessary administrative tasks."

In years past, the Bursar's Office had set up six digital camera stations during orientation. Students would be directed to the photo stations during orientation registration, and the goal was to take about 300 ID photos within a short amount of time. The pictures would then be processed and uploaded to UTM's ID card program, CBORD, and ID cards would be printed later that day.

Students would then go back to the orientation registration area, line up by the photo stations and wait for their cards to be handed out. One could imagine the students would prefer being able to explore campus or decorate their dorm rooms instead; it was an inconvenience for both the students and the administrators.

**"With PerfectForms, we took an entire department paperless – automating 20 processes in 2 weeks with just one resource!"**

-Mike Abney, process improvement facilitator, University of Tennessee Martin

### FORM AND WORKFLOW SOLUTION

After a 23-year career in IT support services at UTM, Mike Abney was named to the newly created position of process improvement facilitator at the university. He turned to PerfectForms, a SaaS offering used to develop workflow applications. Tailored to the needs of business users with no knowledge of programming, PerfectForms caught Abney's attention for its ease of use, power and flexibility.

Using PerfectForms custom workflow solution, UTM did away with its process-heavy orientation system by creating and automating a student ID request form online. Instead of standing in line for hours on move-in day, now students request their ID at the time they apply for orientation (well before they arrive on campus) and upload a photo.

UTM can then email the students who forget to request an ID after they register, asking them to send their pictures so they can get IDs as soon as they arrive for orientation. Using this simple system, with the entire process completed well before things get hectic on move-in day, students arrive on campus with their ID cards waiting for them in their orientation packets.

This saves time and eliminates the cost of hiring photographers and staging photo booths. An added bonus – UTM has student assistants who supervise the card creation process, freeing regular staffers to focus on other projects.



#### **BUSINESS RESULTS**

The University of Tennessee at Martin took first prize at the Professional Development Group's First Annual Best Practices Awards – which recognize colleges that implement the best easy-to-manage money-saving programs – for its PerfectForms student ID project. The award was validation of one of the many paper-heavy processes Mike Abney successfully set out to automate. Other processes he's brought online with electronic signatures using PerfectForms include a dual enrollment wizard and form that facilitates admissions and registration, student vaccination forms and purchasing forms.

Though the forms the university has created remain on PerfectForms' servers, they're easily embedded within the university's web pages with workflows routed by email. PerfectForms has become an online document management tool for Tennessee-Martin, replacing manual forms and PDF files. Abney considers PerfectForms easier to use than Adobe Acrobat and appreciates being able to track which stage the forms have reached along a given process.

PerfectForms doesn't require development skills, but successful use of the platform does require a "process-driven mind-set", according to Abney, something that he said most administrative staffers have. Abney considers PerfectForms to be the most user-friendly process implementation tool he's come across with point-and-click and drag-and-drop interfaces to easily map out process flows.