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Complex Conversion to New ECM System A Success for Edfinancial Services

20 Years of Loan Data; 40 Million Documents;
Lessons Learned

For the last 20 years, Enterprise Content Management (ECM) software has made the job of storing, retrieving, indexing and sharing documents electronically easy—until the software goes out of date, is no longer supported, or the manufacturer is acquired, forcing a change on users.

Converting images and data to a new ECM system can be a major challenge. Migrations are rife with potential problems: from corrupt data, to content that can't be extracted, to maintaining data integrity, to storage and indexing differences.

Edfinancial Services based in Knoxville, Tenn., one of the nation's largest student loan servicers, faced converting 20 years of loan documentation to a new ECM system in late 2013.

Maintaining its previous ECM system's document search and retrieval performance was becoming a burden for the company's IT department, as was the high cost of licenses for a growing number of users. With nearly a million borrowers and \$16 billion in student loans, automation is crucial for efficient workflow at Edfinancial, which recently began expanding its loan services to the healthcare industry.

"Our core competency is, essentially, customer service," says Rich Tarantino, a Product Manager in Edfinancial's eBusiness Solutions IT department, and project manager for the conversion. "We have constant interactions with our customers, and federal requirements for reporting the status of each loan, so we need to stay on the cutting-edge of technology."

Among the requirements for the new ECM software were easier administration, improved OCR accuracy, better support and lower ongoing costs.

After evaluating several options, Edfinancial chose **OnBase® ECM by Hyland** to replace its previous ECM software, and to replace the proprietary and expensive EMC Centera devices for long-term storage.

It then faced the next hurdle: converting 40 million documents—amounting to 70 million pages—to the new system.

CASE HISTORY:



Proprietary audit methodologies and conversion tools save time, and ensure that documents are not missed.

A Complex Conversion

Having never before managed a conversion of this magnitude, Edfinancial was referred to Hyland OnBase VAR business partner [Integrated Document Technologies, Inc. \(IDT\)](#), Itasca, IL, for its expertise with multiple software makers' products and integrations. Managing the extraction workload itself, on top of rolling out an entirely new ECM infrastructure, was not an option for Edfinancial.

"There are clear efficiencies to outsourcing, and often, conversions are too large a job for internal IT staff that has other priorities," says Mike Nolfo, IDT President. Having implemented hundreds of different ECM systems for businesses across the country since 1992, IDT has outlasted numerous manufacturers and software iterations, and thus is a consistent resource for its customers, regardless of which system they use.

Conversions require an understanding of how both the old and new software systems are architected, Nolfo explains. "You have to know where to go to get the data, how separate pieces of data are interrelated, and how to extract it in the right format. Mistakes are easy to make, and without detailed knowledge, can be very time consuming." Nolfo estimates that without IDT's tools, the conversion process for Edfinancial would have taken at least five times longer to complete.

IDT uses proprietary audit methodologies and conversion tools to ensure that documents are not missed, maintaining data integrity and accountability throughout the conversion process.

Both data integrity and accuracy were important in the conversion for Edfinancial, which was using and adding documents as well as e-mails to its system throughout the 11-month long conversion process.

Converting this vast quantity of data (just one ECM application instance alone held over 30 million documents) included mapping and re-organizing them into new document types or categories to make the information easier to retrieve, and to provide more logical storage.

"We wanted to clean up the data to make the conversion as seamless as possible, and to ensure there were no problems for users who needed to retrieve files during the transition," notes Tarantino.

"Because of IDT's vast experience with multiple product sets, and its solid grasp of ECM system architecture, it can work quickly without loss of data," says Jim Hartigan, IDT's Senior Project Manager. "Having come to IDT from the financial services industry at HSBC, I understand the necessity of paying attention to the details when it comes to a conversion of this magnitude," he adds. "Big Data or quantity doesn't affect the importance of the data. We take the same approach using our proprietary methodologies, no matter how large or small the conversion project is."

Experience with multiple product sets and grasp of system architecture means IDT can work quickly, without loss of data.

Challenges and Solutions

Documents in current use are one thing; stored documents are another. Legacy storage systems are usually highly proprietary. For Edfinancial, extracting documents from Centera storage and placing them into their new destination, into a Storage Area Network, was a complex process. IDT designed a special export process that sped up the typical, extremely lengthy extraction times attributed to Centera devices. “If we had used the normal Centera content addressed storage image extraction techniques, the conversion would have gone on for several years,” explains Nolfo. “That was not acceptable for obvious reasons.” The new, open standard storage hardware is also expected to save Edfinancial money by reducing ongoing maintenance costs and speeding up overall system performance.

Time and costs are always issues, and for Edfinancial, the conversion ran in to some delays at the project’s start, but ultimately was completed in a satisfactory timeframe, and on budget, says Tarantino.

“We had a bit of a rough start due to some additional software that had to be purchased for part of the conversion work. IDT came through and made that investment without cost to us. From there, we had internal resource changes, and also wanted to integrate Microsoft® SharePoint® and workflow, which caused some delays on our part,” he says.

In the final audit to determine if all the documents had successfully converted, IDT’s analysis showed an error rate of only 0.03%, or about 1% of the total number of objects contained in the system. Detailed reports were provided to Edfinancial so the company could decide what to do with those files, some of which were unusable due to damage or corruption.

“Considering the size of this conversion, we were very pleased with this low error rate,” says Brian Arthur, IDT Systems Analyst.

A Smooth Transition

Now that the conversion is complete and the new OnBase ECM system has seen six months’ use, Edfinancial has reaped a number of benefits across the organization.

The IT department has been especially relieved, with far less system troubleshooting needed. “We’ve had to do very little maintenance, and, we’ve had a very good reconciliation rate—not a single request for any of the documents that couldn’t be converted,” notes Tarantino.

For Edfinancial’s customer service team, the new ECM system provides a smoother, more interactive interface. For example, OnBase plugs right into Microsoft SharePoint, so staff only has to direct data to one location, versus two, enabling them to work faster and be more productive, Tarantino says.

The fact that OnBase is user-friendly also expedites training for the company’s large call center—an important benefit, together with lower overall licensing costs, for the company as it continues to grow.

For customers, all of this translates to better service and shorter wait times.

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IDT's contribution to the smooth transition was invaluable, continues Tarantino.

"Their customer service was fantastic every step of the way. They were very engaged and responsible, willing to go the extra mile, including monitoring uploads over weekends, and helping acclimate our new technical project lead," says Tarantino.

"Probably what was most impressive was their responsiveness. We always received quick attention to our questions."

Tarantino shares some key lessons from the conversion process: "Switching to a new platform was a real challenge; and as with other big projects, timing is everything," he says, recommending that companies clean up old data before the conversion, and, stay engaged throughout the process with the conversion service provider.

The complexity of this conversion—especially considering the large number of transactions—was typical of the highly-regulated financial service industry. By applying its broad ECM knowledge and technical expertise, IDT helped Edfinancial achieve a successful, on-time and on-budget conversion that paves the way for future internal and customer service efficiencies at the company.

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Integrated Document Technologies (IDT) helps companies eliminate paper at its source, offering consulting services and a full line of content management, data and image capture and process automation products including hardware and software systems and Internet-based electronic solutions. Since 1992, IDT has put its sole focus on creating customized document management solutions for companies in diverse industries, serving as a one-stop resource for design, integration and long-term system support. With system installations nationwide, IDT's expertise as system designer and integrator continues to expand as new document management technologies become available. Contact IDT at 630.875.1100 or visit www.idt-inc.com. Learn more about its conversion services at www.convertoracleipm.com.

Edfinancial Services, has provided exceptional student loan services for more than 25 years on behalf of lenders, including answering questions, counseling borrowers about repayment options, and processing student loan payments. The company's Higher Education Solutions offers services specifically designed for schools—such as call center capabilities, financial aid process outsourcing, and default prevention services. Contact the company at 855.337.6884, or visit www.edfinancial.com.

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