

# ECM Initiative at Cal University Extends Capabilities of PeopleSoft SIS to Automate Business Processes Enterprise-Wide



“AS WE EXPAND THE ECM TECHNOLOGY TO MULTIPLE DEPARTMENTS ACROSS CAMPUS, WE ARE SEEING THE VALUE OF OUR SOLUTION INCREASE EXPONENTIALLY. WE ARE NO LONGER RESTRICTED BY DEPARTMENTAL SOLUTIONS THAT PREVENT THE NECESSARY SHARING OF COMMON INFORMATION.”

– Senior Director of IT, Student Services

## ORGANIZATION

California State University

## INDUSTRY

Higher Education

## SOLUTION

Oracle WebCenter Content enterprise integration with PeopleSoft SIS

## CHALLENGES

- › Paper documents and forms
- › Multiple imaging systems
- › Systems didn't communicate
- › Documents duplicated, misplaced & difficult to track
- › Status updates challenging
- › Manual document routing costly
- › Manual, paper-based procure-to-pay & enrollment processes
- › Manual updates required for SIS
- › Storing images of transcripts received via EDI

## KEY BENEFITS

- › Processing times greatly reduced
- › Content integrates with PeopleSoft & other line-of-business systems
- › Interdepartmental access
- › Electronic student folders
- › Automated capture reduces errors
- › OCR captures unstructured data from multiple transcript types
- › Workflow enables tracking in-process
- › Interdepartmental automation
- › Workers can view supporting documents from within the SIS
- › Increased throughput with existing staff
- › Distributed investment, pooled IT resources and improved security
- › Intercept and store content from EDI transcripts; update student files

Founded in the late 19th century, this institution is part of the largest system of public universities in the U.S. It offers rigorous course work and research opportunities to more than 30,000 undergraduate and graduate students.

With separate imaging systems, departments also had separate repositories, providing storage but no automation or interdepartmental access. A lack of common infrastructure hindered collaboration and efficiency, and required considerable IT resources.

Finance and Student Services co-sponsored an enterprise information solution to enable all departments to share common student and operational information and integrate all types of content with the Student Information System (SIS), and other legacy systems.

The architecture provides the foundation to manage all information across the University, resulting in universal access to information (with security parameters), pooled IT resources, improved accuracy and mitigation of risk.

## Oracle ECM & ILINX Extend PeopleSoft

The University's complex needs resulted in a revolutionary solution utilizing Oracle WebCenter Content and ILINX, providing a common content repository and interdepartmental workflow.

The robust ECM system eliminates duplication and enables document tracking and collaboration. Starting at enrollment, a unified folder is maintained for the entire educational lifecycle of each student.

## Automation Across Multiple Departments

**Student Services.** Electronic student files and rules-based workflow from application to registration.

**Transcript Processing.** Extraction of data to TS130 files; uploaded to PeopleSoft; automated credit calculation.

**Procurement & Purchasing.** Electronic packages move with workflow routing & approvals across multiple departments.

**Accounts Payable/Reimbursement.** Paper converted to electronic documents; workflow for approvals; Fully integrated with voucher application and PeopleSoft.

**Accounts Payable/eInvoice.** Exception based supplier invoice processing; fully integrated with supplier facing self-service website and PeopleSoft.

**College of Education.** Teacher certification process automated using existing content in electronic student files.

Additional functionality was initiated and delivered internally, utilizing knowledge obtained during previous projects.



## Enrollment Services Transformed

When enrollment is initiated, a variety of supporting documents are required. The keying of data, line by line, from incoming transcripts, routing of paper folders, and calculating credits manually has now been automated with electronic, departmental rules-based workflow. ECM technology integrates with the PeopleSoft SIS to provide real-time

collaboration and visibility of the entire undergraduate and graduate application process. Information on applications—student ID, application term, etc.—is extracted using advanced OCR, validated against the SIS and a workflow is triggered. Moving through queues, event rules proactively manage the process and update the SIS.

ILINX Integrate enables staff, with no additional training, to view electronic student admissions documentation stored in Oracle WebCenter Content by simply clicking a button on the SIS screens, never leaving the application. Automated checklists built into PeopleSoft help guide students, notifying the appropriate person of missing documents from the electronic student file.

#### **Advanced Transcript Processing**

Utilizing ECM, the University is benefiting from a unique and innovative transcript solution, including a custom-built tool to streamline processing and the conversion of transfer credits.

Using advanced capture, data such as student name, course, units earned and grade point is extracted without human intervention from transcripts to create industry standard TS130 transactions that update the PeopleSoft SIS. An electronic calculator automatically computes the value of incoming credits based on predetermined weights, eliminating manual calculation. This innovative approach for managing transcripts reduces processing time from six weeks to as little as two days.

**THE SOLUTION EXTRACTS DATA FROM TRANSCRIPTS, CONVERTS IT TO A TS130 TRANSACTION THAT AUTOMATICALLY UPDATES PEOPLESOFT. PROCESSING HAS BEEN REDUCED FROM SIX WEEKS TO AS LITTLE AS TWO DAYS.**

#### **Automating Procurement & Purchasing**

The purchasing process that previously had been completely manual, requiring paper copies and physical routing by campus mail is now fully automated and integrated with the SIS.

Electronic workflows deliver requisition and backup documentation to decision makers and requestors. Approvals and rejections are handled electronically, as are automated updates. Purchase orders, generated by PeopleSoft, are stored electronically in the ECM repository.

#### **Accounts Payable Streamlines Direct Pay**

Automation in Accounts Payable has replaced paper-based processes for direct pay and employee reimbursement, providing a complete audit trail with consistent, repeatable and efficient processing. Direct integration with the existing LOB voucher application provides the ability to electronically collect and store all content. Electronic workflow routes payment requests to a designated individual for review, approval, escalation and communication. PeopleSoft is updated with check number and amount to formally close the transaction.

#### **Accounts Payable eInvoice Processing**

An integration with the Accounts Payable supplier website has significantly reduced paper invoice handling and data entry errors, while decreasing the overall supplier payment cycle time. Through the AP Supplier Portal, suppliers upload AP invoices and assign key metadata. ILINX functionality monitors and downloads the invoices and associated metadata to trigger an exception based workflow. Integrating with PeopleSoft, the workflow identifies process exceptions such as duplicate invoices, purchase order discrepancies and invalid or incorrect supplier information. Notifications are triggered to suppliers confirming receipt of invoices and providing visibility of invoice images. Results include fewer processing errors and manual supplier inquiries, and an increase in early-payment discounts.

#### **Departments Onboard and lead amongst Universities with an enterprise solution**

Various departments are leveraging the electronic student folders created in Enrollment Services for admission. Accounts Payable will continue to grow their solution, enhancing travel and expense practices. Eventually, many more departments are likely to take advantage of ECM to automate their processes.

The University's enterprise approach, utilizing a robust and versatile technology stack, has made it a trailblazer in the arena of content management. One integrated platform has replaced multiple departmental imaging systems. ECM is improving departmental collaboration, reducing handling costs, strengthening IT security, ensuring regulatory compliance, allowing for pooled IT resources, and improving the satisfaction of staff and students.

#### **Technology**



#### **ILINX INTEGRATE**

ILINX Integrate allows users to seamlessly orchestrate the retrieval and display of images with virtually any application regardless of source—host based, Windows, Web or Citrix—with ECM or other line-of-business systems. Requiring no development, ILINX can integrate whatever is running on your client desktop into a cohesive system that allows data to pass easily between two or more applications.

#### **ILINX IMPORT**

This easy-to-use interface imports a wide variety of image & document files into capture applications where they can be processed and placed into an imaging or document management system. ILINX Import's robust service-oriented architecture and logging capabilities provide mission critical performance.

#### **ILINX CAPTURE FOR HIGHER ED**

This technology provides intelligent, accurate and scalable data capture and forms processing. It provides a single entry point to automatically transform the stream of different forms and documents of any structure and complexity to usable and accessible data ready to be exported into any business applications and databases.  
[www.imagesourceinc.com](http://www.imagesourceinc.com)



#### **ORACLE® WEBCENTER CONTENT**

The Oracle Webcenter Content proactively and automatically delivers critical business content where and when it is needed. Integrates transaction documents and information into common business processes and third party applications. [www.oracle.com](http://www.oracle.com)



#### **KOFAX® CAPTURE**

Kofax Capture automates information capture from scanned paper or imported electronic documents. Based on criteria you define, the entire document or extracted data is digitized, then routed to an archive, database, or the next step in your business workflow.  
[www.kofax.com](http://www.kofax.com)



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