

Imagination
to
Realization



Have It Your Way Imaging Apps

*Presented by: Karen Langtry, Suzanne Henkle
Johnson County Community College*

April 3, 2006

3:30 pm – 4:30 pm

Evaluation Code 494

Session Rules of Etiquette

- Please turn off your cell phone/pager
- If you must leave the session early, please do so as discreetly as possible
- Please avoid side conversation during the session

Thank you for your cooperation!

Johnson County Community College Overland Park, Kansas

- Located in suburb of Kansas City
- More than 18,000 Credit and 17,000 Continuing Education students enrolled in classes each semester
- Banner modules A/R, Financial Aid, Finance, HR and Student implemented; no modifications to baseline - Banner v7.x
- Banner Xtender Solutions (BXS) v7.0, EMC/Documentum version 5.25.081
- 185 WebX licenses, 185 AppX licenses, 11 ScanX licenses and 20 OCR/Full Text Licenses



Presenters

- Suzanne Henkle
 - Systems Specialist for Finance

- Karen Langtry
 - Systems Specialist for Student and Instruction

Why Attend This Session?

- In this session you will learn:
 - 'custom imaging application' does not mean modification to baseline
 - the benefits of building a custom imaging application
 - overview of building a custom application

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Imaging at JCCC

SUNGARD SUMMIT 2006

April 2-5 Orlando, Florida



That was then...

- BXS product implemented in Spring 2002
- Prior to 2002 Student was using SunGard Higher Education's former imaging product
- Migrated over 1 million student documents to Xtender June 2002
- Went live in May/June 2002 with six BXS delivered apps and one customized app
 - 1 customized application – Accounts Receivable
 - 4 delivered applications - Student
 - 2 delivered applications – Financial Aid
- 100 distinct user accesses

This is now...

- 17 customized apps
 - two OCR/Full text
- 9 SunGard Higher Education delivered apps
- Approximately 300 distinct user accesses
- Areas of the college include:
 - A/R
 - Bookstore
 - College Publications
 - Continuing Education
 - Finance
 - Financial Aid
 - Human Resources
 - Information Services
 - Institutional Research
 - Instruction
 - President's Office
 - Student



The 17 customized imaging applications have eliminated over 30 single filing cabinets worth of documents.



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Why Build a Customized Imaging App?

Why Build a Customized Imaging Application?

- With delivered imaging applications, SunGard Higher Education recommends only document types be modified.
- With custom apps, capability to:
 - Define indexing label, including
 - required fields
 - field datatypes and formats
 - Build to precisely meet client's needs

Process for Creating Customized Imaging App at JCCC

- Formal written, approved project request from client
- Analysis phase
 - Systems Specialists leading discussion – team effort
 - Use template to inventory documents
- Spec created and security requirements passed to technical resource
- Technical resource sets up application and security roles in pre-production
- Pre-production testing with client to validate application
- Training
- Production application created and accesses established

INVENTORY OF FORMS/DOCUMENTS

Objective: Assist w/ formulating what applications & document types A/R will need & to determine security on the documents. List a form/document only once.

***TPC: Third Party Coordinator, now Billing & A/R Specialists**

Name of Form/Doc	Where Does the Form/Document Originate? (i.e. student)	Filed?	Copied?	Who Receives a Copy? (Department or Individual)	Indexes	Who needs Access	Annotations / Rubber Stamping	Process Changes	Any Record Retention Length?
Invoice (TWRTBIL and TFRBILL)	Billing and A/R Specialists	yes	4 copies printed	<u>White & Yellow</u> : company <u>Pink</u> : in file (unpaid until paid, then moved to paid) <u>Blue</u> : in 3-ring book in numerical order	TP ID # (validate to Banner on this) Invoice # Amt (opt) Term (opt) (student ID # with ERM) (Due Date later or with ERM)	TPC, Joel, Gayle, Susan, Student Worker	Paid- item Past Due sent (date) Invoice Complete Partial Pay	Eliminate Blue copy filed by # <i>Eventually eliminate all office copies</i>	10 years
Authorization/ Purchase Order	Company or student (in the case of CE, auths are received by CE Reg. from the company & picked up by TPC for processing)	yes	yes	TP office keeps one copy on file w/ invoice; student receives one if s/he does not already have one; if required, copy or original is sent w/ invoice to company	Student ID# TP ID # Invoice # (opt) Term (opt)	TPC, Joel, Gayle, Susan, Student Worker	Free form annotations May include terms covered, highlight courses covered, etc.	At what point do we scan? Make Inv # optional and when invoice is generated go back and add	
Temporary Authorizations	Company or student (credit; not accepted for CE)	yes	if necessary	temp auths are accepted if it is likely an official authorization will result (ex: WIA ITA's, GM, Ford, etc)...these are kept on file only until the official auth is received; copy is given to	Student ID# TP ID # Invoice # (opt) Term (opt)	TPC, Joel, Gayle, Susan, Student	Free form annotations		

Results of Inventory of Forms/Document

- Document inventory assists with determining:
 - Indexing fields for the customized app, including:
 - Document Types
 - Required fields
 - Rubber Stamps
 - Security Accesses
 - Process Improvements
 - Team Building

Technical Set Up

- AppGen provides ability to build custom applications
 - Configure applications, users, groups and annotation groups within AppGen.
- Information that is needed to set up custom applications:
 - an application name adhering to naming convention
 - JCCC custom apps follow X_ application name
 - indexing label info:
 - field name
 - field length, data type and format
 - whether field is searchable or not
 - document type pick list
 - whether field is required or optional
 - Multiple indexing

Technical Set Up (continued)

- OCR/Full text
- Validate against Banner
 - SunGard Higher Education has guidelines for what fields are required in the indexing label.
 - Currently, we only validate against a subset of spriden table AE_RFSCT (otherwise known as shared key reference table)
- Primary key set up (typically required fields)

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Examples of JCCC Customized Applications

- **Application Name: AR_CHECKS**
 - Requested by Bursar
 - Validates against Banner
 - Image all checks
 - Endorser on scanner
 - Multiple indexing feature
 - Index label: Student ID, PIDM, Document Type, Last Name, First Name, SSN, Birth Date, Check No., Dollar Amount, Payor Name, Department Code, Cashier Name, Cashier Session and Date Processed

- **Application Name: S_CONFIDENTIAL**
 - Requested by Dean of Students
 - Houses behavioral incidents/police reports
 - Limited access
 - Validates against Banner
 - Use with cross app query with delivered apps
 - Index label: Student ID, PIDM, Document Type, Last Name, First Name, SSN, Birthdate, Term and Activity Date

Examples of JCCC Customized Apps (con't)

- **Application Name: P_BOARD**
 - Office of the President
 - Requested by Assistant to President
 - OCR/Full Text
 - Board Packet meeting minutes
 - Upcoming roll out to other areas of the college
 - Index label: Meeting Date, Document Type, Activity Date

- **Application Name: S_IRPUBLICATIONS**
 - Requested by Director, Institutional Research
 - OCR/Full text
 - Index label: Document, Publication Name, Year Published, Publication Description and Activity Date

Examples of JCCC Customized Apps (con't)

- **Application Name: IS_REQUESTS**
 - Requested by Director, Administrative Computing
 - Houses all project requests and supporting documentation
 - Index label: Project Request Number, Banner Module, Project Lead, Completion Date, Project Title and Activity Date

What's Next with Imaging at JCCC

- Customized Imaging Apps in the queue
 - Microfiche/Microfilm
 - Film/fiche becoming brittle
 - DVD's created by outsourced vendor
 - Will be indexed based on DVD label
- Roll out of WebXtender across campus
- ERMXtender

Summary

- Customized apps provide flexibility to meet client requirements
- Know your options – is there an existing delivered app that may meet requirements?
- Thorough needs analysis is critical
- Less is more
 - Condense applications
 - Indexing fields
- Technical Resource with AppGen knowledge

Questions & Answers

Thank You!



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Please complete the on-line Evaluation Form
Evaluation Code 494

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