

“*(Workflow and imaging) have become as integrated and necessary to our daily work as e-mail.*”

– *Felecia Flack*
director of support and consulting services,
Northern Michigan University

Workflow and Banner XtenderSolutions Reduce Manual Work, Speed Up Processes at Northern Michigan University

At Northern Michigan University (NMU), Workflow is reducing manual work while Banner XtenderSolutions have eliminated reams of paper.

“These two tools are transforming the way we do business,” said Felecia Flack, director of support and consulting services at NMU. Currently, the University is using both solutions in admissions and financial aid and will likely implement them in human resources in the near future.

When student documents arrive in the admissions or financial aid offices, they are scanned in to Banner XtenderSolutions, the imaging module for the Banner administrative system. Banner XtenderSolutions enable seamless one-click document retrieval and capture, integrated security, workflow events, common data repositories, and automated student admissions checklist and financial aid tracking updates. The solution also provides secure access to materials unrelated to Banner or other SunGard Higher Education systems.

Along with imaging, the admissions office has established an admissions review workflow within Workflow. The solution helps automate, simplify, and direct information flow and provides tight integration with Banner and the Luminis Platform, which provides portal capabilities, collaboration, and communication tools, and a common interface to the college’s entire digital campus. Automated activities, worklist updates, and e-mail notifications make sure the right information gets to the right people immediately, inside and outside of the institution.

At NMU, the admissions review workflow is triggered by the decision field. If the applicant does not meet admission requirements, a specific decision kicks off the workflow and sends the director of admissions a worklist item. If additional information is required from the student, the director of admissions can workflow that student back to the admissions processor who then inputs the request for additional information on that student’s application.

“After our admissions processors verify that all of a prospect’s required information is in Banner, they send the student file to the director for review. The director makes the decision of accepted or not and that decision kicks off another workflow,” explained Bill Laffey, associate director of admissions at NMU.

“Workflow has drastically decreased the time it normally takes to complete a task and it is allowing us to make decisions



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It has helped us streamline a lot of our processes within the admissions office and inter-office. Together with Banner XtenderSolutions, it has allowed us to eliminate paper processes,” said Mr. Laffey.

The University also has established a workflow between the Admissions and Registrar’s offices. When Admissions accepts a transfer student and has scanned his/her official college transcripts, a workflow trigger goes to the Registrar’s office for a review of courses taken by the student.

“The solutions have eliminated inter-office mail and the handling of transcripts, which can lead to misplaced documents and lengthy review cycles. With imaging, everything is scanned and indexed and it’s just one click away from everyone who needs to see it. It’s instant. And workflow makes the process cycles go much faster. The solutions and the support we have received from SunGard Higher Education have been phenomenal,” said Mr. Laffey.

The financial aid office is using Workflow for tracking the myriad student documents it must process. The office receives a download from the federal government that populates Banner with the list of required documents. Based on that information, NMU created a trigger that monitors the required document list and notifies the financial aid officer when all the documents are in and a student’s file is ready for review.

The department is now working on a workflow that will automatically send e-mail notifications to students alerting them if required documents, like high school transcripts or a Social Security card, are lacking.

“Workflow is a tremendous opportunity to eliminate manual work, and imaging eliminates the passing of folders back and forth between offices. The solutions have really streamlined our processes. They have become as integrated and necessary to our daily work as e-mail,” said Ms. Flack.

4 COUNTRY VIEW ROAD | MALVERN, PA 19355 | TOLL FREE 800.223.7036
TEL 610.647.5930 | www.sungardhe.com

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