ITS: IPM Replacement Project Update
Presented by: Mike Wardley
February 5, 2015
Ground Rules

• The session is intended to last 20 minutes

• If you would like to ask questions, please use IM

• There will be a Q&A at the end

• This session is being recorded and placed on the ITS website as an update for people who couldn’t attend

• Please forward along feedback and suggestions for other session topics
What is Workflow and Imaging?

Figure 1 describes the workflow and imaging process.
Why Do It?

• Process automation and electronic documents means improved efficiency

• Electronic images and workflows are:
  - Searchable, findable, & faster retrieves
  - Routable
  - More accurate
  - Collaborative
  - Time-stable

• Workflows are repeatable

• Workflows are faster

• Workflows are traceable

• Workflows are auditable
Project Description

• The existing IPM product that SJSU uses is going away 15th Dec 2015

• This product move to “Extended” status as of the 15th Dec 2014

• The replacement needs to be found and implemented quickly if there is to be no risk of an interruption in service.

• This service is a core SJSU function and is used by some key university departments:
  
  Finance
  HR
  Academic Affairs
  Bursars Office
Figure 2 presents the Solution Component Timeline for Customers.
Figure 3 presents the Customer Deployment Timeline.
Current Work Items

• Document customer workflow to derive customer requirements

• Develop project requirement from customer requirements

• Develop Scope Of Work from project requirement

• Engage customers and selection committee to review project requirement and SOW

• Engage purchasing to develop RFP
Real Customer Example
Workflows

New Workflows:

• Gift Agreement Processing
• Funds Receipts Processing
• Gift Processing
• Gift Agreement Users

Legacy Workflows:

• NA
Figure 4 demonstrates the Workflow Gift Agreement Process.
<table>
<thead>
<tr>
<th>Area</th>
<th>Requirement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conversion</td>
<td>Physical document to digital document/image conversion feature</td>
</tr>
<tr>
<td>Storage</td>
<td>Digital document/image storage system with folder system for document grouping feature</td>
</tr>
<tr>
<td>Workflow</td>
<td>Digital document/image routing feature</td>
</tr>
<tr>
<td>Document Management</td>
<td>Digital document/image storage, search/retrieval feature</td>
</tr>
<tr>
<td>Migration</td>
<td>Migrate existing 2K folders and 21K documents for Gift Agreement folders into electronic document Store</td>
</tr>
<tr>
<td>3rd Party System Integration</td>
<td>Alert feature to alert CRM system when gifts are received</td>
</tr>
</tbody>
</table>

Is this electronic or an integration project?
How does it currently work?
What is the volume?
Online credit card charging
Online banking transactions