Admissions:

DocFinity streamlines processes throughout the student life cycle. Intelligent capture assists with automating the collection, categorization, and indexing of documents for a prospective student. Once all files in your PeopleSoft or DocFinity checklist have been received, the information is automatically tied to the PeopleSoft account and routed for review. Approvals and denials trigger appropriate tasks—letter generation, financial aid processes, and gathering of transcripts and other personal information. All of these tasks can be tied back to and monitored from the student record in PeopleSoft.

Registrar:

- DocFinity eForms enables easy, standardized collection of information and requests.
- Transcript requests, grade changes, and other activities involving multiple parties — or requiring approvals, signatures, or other actions — can be completed in a fraction of the time.
- DocFinity enables creation of a secure, centralized repository of student records that is accessible from within your PeopleSoft interface.

Financial Aid:

When institutions return decisions more quickly, it results in earlier commitments. DocFinity aids this part of the enrollment process in many ways. As verification data and other documents are intelligently captured by DocFinity without manual intervention, PeopleSoft checklists are updated in real time and automatically routed for review. Financial aid offices can launch commands to perform actions such as form letters or automated calls requesting additional documentation.
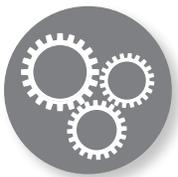
PEOPLESOFT INTEGRATION

Further Connecting People with Documents and Data

Accounting
Admissions
Bursar
Registrar
Financial Aid
Alumni Relations

COMPANION DATA SERVICES®

A CELERIAN GROUP COMPANY

DocFinity Core	DocFinity Exporter
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eForms	COLD
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Enterprise Search	HSM

328 Innovation Boulevard, Suite 200, State College, PA 16803

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Enhance Your PeopleSoft Investment.

You're using PeopleSoft to manage student records, transactions with vendors, alumni relations, and myriad other relationships. Integration with DocFinity can help you expand that functionality, enabling immediate access—via your PeopleSoft interface—to the critical documents and data needed to expedite and improve services to students, alumni, faculty, and vendors. In addition, you'll better manage the documentation that runs your campus. With a PeopleSoft/DocFinity integration you'll:

✓ **Instantly pull information needed:** Enable users to view documents that are stored in DocFinity from within their familiar PeopleSoft interface.

✓ **Eliminate information silos:** Manage accounts in one place—eliminating duplicate records and the need to open multiple applications to view info.

✓ **Expedite acceptance and denials:** With a hands-off approach to the collection and routing of documents, DocFinity intelligent capture, checklists, and secure access from any device allows quicker turnaround on professor reviews and enables Admissions to offer acceptance to the best candidates sooner, keeping enrollment numbers at their max.

✓ **Keep processes moving from anywhere:** Mobile access enables professors to approve grade changes during breaks, recruiters to upload documents, and physical plant staff to view approved orders on location.

Enabling Image Retrieval via PeopleSoft

With a click of a button within PeopleSoft, you can expedite decisions and standardize processes by:

Pulling a hit list of documents stored within DocFinity and other applications.

Displaying data held in other systems within an eForm.

Triggering additional steps or new processes.

Users can click on a link within PeopleSoft that executes a DocFinity URL API to view the document and supporting documentation.

Student Center Screenshot

Stella Rose	ID:000237985 ★	DocFinity

student center | general info | admissions | transfer credits | academics | finances | financial assistance

Stella's Student Center

▼Academics
My Class Schedule
Shopping Cart
My Planner
(i) View Fall 2013 Semester Schedule.
Other Academic... »

SEARCH FOR CLASSES

▼ Holds
No holds.

▼ To Do List
Enroll in Non-Aid Eligible Program
details ▶

▼Finances
My Account
Account Summary
View a Bill
View Parent Info
View SIS History
View/Create Plan

Account Summary
Your account balance is $5,678.00.
Currency used is US Dollar.

▼ Enrollment Dates
Enrollment Appointment
You may begin enrolling for the Spring 2014 Regular Academic Semester on November 12, 2013.
details ▶

Financial Aid
View Financial Aid

▼ Advisor
Program Advisor
Dr. Rebecca A. Leeman

▼ Personal Information

Demographic Data
Emergency Contact

Contact Information
Permanent:
203 Pine Road
Moab, UT 84532
Cell:
555-678-3241

Campus:
Finnegan Hall 2B
Campus Email:
slr009@bwst.edu

Student Center: General Info Admissions Transfer Credits Academics Finances Financial Assistance
Return to Search | Notify

Options for Integration:

✓ Use DocFinity web services to write code using PeopleTools to view, retrieve and display documents with 3rd party viewers.

✓ Using DocFinity BPM, query student data within PeopleSoft and trigger workflow processes without human intervention.

✓ Use DocFinity's PeopleSoft indexing plug-in to pull relevant index data from PeopleSoft application screens to automate document indexing.

✓ If you don't license PeopleTools, use DocFinity Connect for a zero programming option - a hot key that queries for files held in DocFinity.