

Admissions:

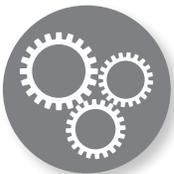
DocFinity streamlines processes throughout the student life cycle. Once a checklist of documents has been received, the information is automatically tied to the Banner account and routed for review. Approvals and denials trigger appropriate tasks - letter generation, financial aid processes, and gathering of transcripts and other personal information. All of these tasks can be tied back to and monitored from the student record in Banner.

Registrar:

- ✓ DocFinity eForms enables easy, standardized collection of information and requests, with drop-in scanning of high-volume, routine forms.
- ✓ 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 Banner interface.

Financial Aid:

- ✓ DocFinity updates Banner checklists in real time as verification data is received.
- ✓ Financial aid offices can launch commands to perform regular actions such as form letters or automated calls requesting additional documentation
- ✓ Complete files are automatically routed for review.
- ✓ Institutions can return decisions more quickly, resulting in increased enrollment.



DocFinity Core
Intelligent Capture
Records Management
BPM/Workflow
eForms
DocFinity Exporter
DocFinity Connect

Fax Integration
Print to DocFinity
COLD/ERM
Enterprise Search
HL7
HSM
Dashboards

BANNER INTEGRATION

Getting the Most from Banner with DocFinity



COMPANION
DATA SERVICES®

A CELERIAN GROUP COMPANY

328 Innovation Boulevard, Suite 200, State College, PA 16803
800.678.3241 | www.docfinity.com/companiondataservices

Better manage enrollment, improve student services, expedite operational processes, and connect staff with a broader set of information.



Image Enabling Banner

Easily associate documents with student information for a complete student record. With a click of a button within Banner, you can expedite decisions and standardize processes by:

- ✓ Pulling a hit list of documents stored within DocFinity and other applications;
- ✓ Displaying data from other systems; and
- ✓ Triggering or continuing processes.



Enhance Your Banner Investment.

Your Banner by Ellucian SIS system is pivotal to your institution's ability to input, access, and manage student information. Integration with DocFinity can help you expand that functionality, enabling immediate access—via your Banner interface—to the critical information stored within your documents. The ability to share information in real time provides your institution with the tools you need to enhance and expedite services to students and other stakeholders. Processes are standardized and automated, resulting in improved turnaround times, reduced errors, and faster decision-making. With DocFinity you'll:

- ✓ **Simplify processing:** Your DocFinity/Banner integration will enable users to view documents that are stored in DocFinity from within their familiar Banner interface.
- ✓ **Streamline enrollment:** Utilize DocFinity workflow and checklists to automate the collection of documents and notifying applicants, coaches, and faculty of needed information before the evaluation step.
- ✓ **Improve decision-making:** Accelerated Admissions processing enables expedited acceptance, keeping enrollment numbers at their max.
- ✓ **Keep processes moving on the go:** Mobile access enables professors to approve grade changes during breaks, recruiters to upload documents, and physical plant staff to view approved orders.

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

Status	Item	Requested	Received
✓	Application Fee		11/03/13
✓	Application for Admission		11/03/13
✓	High School Transcript	11/05/13	11/15/13
✓	SAT or ACT Scores	11/05/13	11/15/13

STUDENT: Stella A. Rose
ADDRESS: 203 Pine Road Moab, UT 84532
PHONE: 555-678-3241
DOB: 05/12/1995
SEX: Female

Official Secondary Transcript Final 2013

Course Name	Yr	Credit	Grade
ENGLISH 9	9	1.0	A
US HISTORY	9	1.0	B

Options for Integration:

- ✓ Use DocFinity web services to write code to view, retrieve and display documents with 3rd party viewers.
- ✓ Using DocFinity BPM, query student data within Banner and trigger workflow processes without human intervention.
- ✓ Use DocFinity's Banner indexing plug-in to pull relevant index data from Banner application screens to automate document indexing.
- ✓ If you don't have the resources, use DocFinity Connect for a zero programming option - a hot key that queries for files held in DocFinity.