

San Diego State University (SDSU) implemented **Perceptive Content** (formerly ImageNow) and **Workflow** to help manage a document intensive process for Student Employment Authorizations (SEAs). The implementation relied heavily on manual indexing, routing, and processing.

As a result, SDSU was not able to improve document processing times and did not find any efficiencies. Due to a strong track record on other HR projects, SDSU chose RPI Consultants to help automate SEA workflows utilizing **iScripts** and **Recognition Agent**. As part of the project, RPI identified further efficiencies through intelligent exception handling.

## Client and Solution Background

An SEA document is a requisition for student employment transactions, such as new employees, pay rate changes, and terminations. Pre-boarding Packets are documents completed by new and re-hires based on the position or student type.

Originally, SDSU had intended on using Recognition Agent to help automate the capture and indexing of SEA documents and Pre-boarding Packets. Due to quality control issues related to OCR of hand-written forms, the solution was abandoned.

However, SDSU eventually acquired Adobe EchoSign to replace the forms, which provided a new opportunity to automate data capture and entry in Workflow. As a very savvy client, SDSU reached out to RPI with specific integration and automation requirements which helped deliver a quick and high value project.

## Integration and Automation

With SEA documents and Pre-boarding Packets completed in Adobe EchoSign, documents are captured and exported as PDFs with key meta data embedded into a CSV. For SDSU, EchoSign exports documents as emails to a mailbox that is monitored by RPI's proprietary Email Capture Service (EC Service), an alternative solution to Perceptive's Mail Agent. RPI developed EC Service to provide more robust import and indexing options and with fewer issues with newer versions of Perceptive Content than Mail Agent. Additionally, EC Service logs more metadata about the email, improving reporting and auditing capabilities.

EC Service captures emails from Adobe EchoSign and automatically moves the PDFs and CSV files to an import directory. This directory is monitored by an iScript that imports the PDF and automatically indexes the document with metadata from the CSV file. This allows documents to be added to the SEA workflow automatically, but it also allows for automated error handling and notifications when metadata is found to be incorrect.



San Diego State University (SDSU) is a public research university in California, and is the largest and oldest higher education institution in San Diego County. SDSU had a Fall 2016 student body of nearly 35,000 and an alumni base of more than 280,000.

## Client Feedback

"We were using manual processes to review and scan documents, and send email notifications to new hires, supervisors, and department coordinators. The manual processes required many labor hours; were very time consuming and inefficient; and there was no real-time notification to departments."

"Our favorite outcome of the solution is the automation, which enables us to provide better service to our customers."

"Mr. Madsen is very knowledgeable, easy to work with, patient, dependable and flexible with his schedule."

**Catherine Love**

**Associate Human Resources Director**

With SEA documents automatically imported and indexed in Perceptive Content Workflow, they are automatically routed based on the document type and student type. Users focus exclusively on processing and qualifying requisitions, including eligibility, citizenship, and financial aid. When SEA requisitions are processed and routed, a new RPI developed iScript automatically emails students with required Pre-boarding Packet documents.

These documents are also completed in Adobe EchoSign and automatically imported and indexed with RPI's EC Service. This process enables automatic notification for SEA processors when all required documents have been collected and received. This saves time due to processors not monitoring incoming Pre-boarding Packet documents.

Finally, SEA documents, including the required Pre-boarding Packets are routed forward to automatically notify supervisors that students are ready to start work. The documents are also routed for payroll processing and direct deposit. Overall, this level of automation finally delivers on the original promise of the Perceptive Content implementation to help expedite processing and improve visibility and auditing.

## Processes Overview

1. Capture and Index SEA Documents from Adobe EchoSign
2. Validate index keys from PeopleSoft
3. Identify Req. Pre-boarding Packet
4. Capture and Index Pre-boarding Packet Documents Adobe EchoSign
5. Monitor for Mistyped Student Info and Automate Exception Handling
6. Automatically Notify SEA Processors of Complete Packets
7. Validate Eligibility, Background Check, and Confirm Financial Aid
8. Route for Payroll and Direct Deposit

## RPI's Email Capture Service

RPI's Email Capture Service (EC Service) is a proprietary solution for capturing emails and meta data, and is more flexible than Mail Agent for Perceptive Content. If you are interested in EC Service, please contact RPI Consultants.

## About RPI Consultants

RPI Consultants is a professional services and consulting firm with over 18 years of experience supporting ERP, ECM, and Advanced Data Capture products and solutions, including Lawson, PeopleSoft, Perceptive Content, Kofax, and OnBase. RPI Consultants is based out of Baltimore, MD, with other offices located in Tampa, FL and Kansas City, MO. For more information on RPI Consultants, please visit [www.rpic.com](http://www.rpic.com).

### About the Author



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Michael Madsen is a Senior Consultant with over 6 years of experience designing and supporting ECM and advanced data capture solutions, especially in the area of back office solutions for higher education clients. A dedicated professional, Michael knows that success is in the details and his work with SDSU is a testament.