

# Imagine Service: Overview, Case Histories and Benefits

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## About

The Imagine Service provides a document management, imaging, and workflow system that enhances how the campus manages paper and documents processing. The service provides hosting and support for a document imaging system that enables customers to reduce or replace paper-based storage and business processes with more efficient and cost effective electronic storage and business processes. The service helps customers to update business processes, preserve documents, determine retention periods, eliminate physical storage, collaborate with colleagues, share data with other campus technology systems, and prepare for business continuity in event of a disaster.

The Imagine Service uses the Perceptive Content (previously ImageNow) product. Perceptive Content has its own workflow functionality — allowing task management, approvals, exception handling, permissions setting and document retention management. Easy annotation tools allow stamps, sticky notes, and text messages to be added. Perceptive Content can be integrated with the PeopleSoft/Oracle financial system's workflow management or other host applications. See [Service Features and Benefits](#) (below) for more details about Perceptive Content functional options and benefits.

As of FY 2012-2013, AVC CFO has provided ongoing operations funding for the service. *This means application licenses, document storage and user support costs are covered.* Departments are responsible only for costs relating to scanner licenses and custom implementation services.

The Imagine Service is part of the IST Applications, Platforms and Infrastructure (API) department. The service began in 2007 and continues its expansion to additional campus departments.

We welcome you to the Imagine service wiki. Please take an opportunity to browse and become familiar with who we are and what we do. If you have questions, please do not hesitate to contact us.

## Contact Us

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## Imagine Listserve

We use the Imagine Users Listserv to send announcements to Imagine customers. Additionally, users use it to discuss topics of interest with one another. Staff who are subscribed to the listserv receive emails about system upgrades, system changes, system availability and hours, training classes, system problems, etc.

To *subscribe* to the Imagine Users listserv, please complete this [form](#). You will be sent an email requesting confirmation, to prevent others from gratuitously subscribing you. This is a hidden list, which means that the list of members is available only to the list administrator.

Click [here](#) and scroll to the end of the page to:

- Unsubscribe from the Imagine Users listserv (imagine\_users)
- Obtain a password reminder
- Change your Subscription Options

## Brief History of Imagine Service

We launched our first campus implementation in December 2007. This was a Central Disbursements (AP) project for the Controller's Office. The implementation enabled rapid, simple invoice capture and resulted in shorter processing times for UCB vendor vouchering and payment. The ability to view and access invoices prior to voucher approval also proved to be a very important contribution to the wider UCB community, which in the past would have waited for days or even weeks to see invoices.

In 2010 the service was moved under the IST Research and Content Technologies umbrella where Imagine was part of a wide array of Enterprise Content Management (ECM) services. In 2012, the service was moved under the IST Applications, Platforms and Infrastructure (API) department.

## Service Features and Benefits

Imagine solutions are customized to your needs. We can provide everything from a simple scan, index and store implementation that can be up and running in a few days to complex implementations that are integrated with your backend systems and databases.

**Key implementation functionality** can include, but is not limited to:

- Document intake via:
  - Automated document indexing and metadata input
  - Document scanning
  - Web site upload
  - Bulk import from a server or another system
  - Fax
  - Email
- Document annotation tools such as stamps, sticky notes, and text messages
- Permissions management:

- Group based
- Can be applied to document access, routing rules, documentation annotation options
- Form input. Data can be entered via:
  - Metadata exchange with backend system
  - Manually
- Reports
- Retention Management and Archiving

**Key benefits** include:

- Secure central storage
- Improved effectiveness and efficiency in managing documents
- Automating workflows and business processes
- Reduced physical storage space requirements and costs
- Sustainable practice
- Campus product expertise
- Experienced campus user group
- Integration with system of record/backend/host applications
- Support for business continuity and disaster recovery

Perceptive Content can be implemented more quickly than many other solutions at lower costs:

- Backend/host integration without programming
- Low user training costs
- Zero costs for server, storage, maintenance, admin,
- Minimal departmental IT resource demands
- Workflow and extended functionality with minimum scripting, programming
- Streamlined indexing
- Reduced manual data entry
- Improved accuracy
- Perceptive Content can be integrated with host systems during the capture (indexing) process
- Perceptive Content takes data from active SIS screens to index documents without manual data entry. It is accurate (reduces data entry errors) and it is fast (one person can link about 500-1000 documents per day).

## Rapid ROI

Moving to an electronic document management system provides very fast return on investment (ROI) from the most basic savings obtained through not purchasing paper to increased efficiency and reduced risk.

### Paper

- Associated paper costs such as copying, printing, postage, disposal, recycling and storing can be as much as 31 times the purchasing cost. Translated, a \$5 ream of paper could actually cost up to \$155—and that doesn't include labor. [Source: Green Life]

### Filing

- A four-drawer filing cabinet costs about \$25,000 to fill and \$2,000 per year to maintain. [Source: Delphi Group]
- 45% of the files in filing cabinets are duplicated information, and 80% is never accessed again. [Source: IDC]
- US companies spend an estimated \$20 on labor costs to file a document, \$120 on finding a misfiled document and \$220 to reproduce a lost document. [Source: Coopers & Lybrand]

## Time

- 7.5 % of all documents get lost, 3 % get misfiled, and the average professional spends 50% of their time looking for information. [Source: Gartner Group]

## Invisible, intangible costs

There are many invisible and intangible costs you can reduce by implementing the Imagine Service technology. Research from the Association for Information and Image Management (AIIM) shows that scanning and capture improved the speed of response to customers, suppliers, citizens or staff by 6 times or more. Funneling incoming mail through a digital mailroom enhances this benefit, ensuring that all customer or supplier correspondence is immediately available to anyone who needs access whether on site or off. Overall AIIM research found a return on investment within 18 months, often less. **Since campus already has the system in place and it is paid for centrally, a specific unit or departments ROI is almost immediate.**

## Customer Engagement Process

### Working in Partnership

The Imagine service provides planning and scoping, analysis and design, implementation, training, and maintenance and support.

All projects are based on a close, active partnership between the customer and Imagine teams.

For simple projects, for example scanning projects that do not require much customization or workflow management, we have project templates that will enable us to get your project up and running very quickly. More complex projects require deeper analysis and a longer time frame.

Nevertheless, both simple and complex projects will follow the same overall trajectory:

### 1. Scope and Plan

During the Scope and Plan phase the Imagine and customer teams focus on identifying enough of the project specifics to develop an SOW or Project Charter.

1. Confirm Scope and Business Objectives
2. Develop Project SOW/Charter including scope, time frame, roles and responsibilities
3. SOW/Charter customer sign off
4. Kick Off

### 2. Analysis and Design

Since much of the implementation detail cannot be known until work is underway, we undertake a more in-depth analysis and design phase with iterative hands-on prototyping during which the customer works side-by-side with our team.

1. Analyze Business Processes
2. Gather Business and Technical Requirements
3. Define Functional and Technical approach to meet customer goals
4. Iterative prototyping
5. Train the Trainer
6. Technical and user testing, revisions on the QA Server

### 3. Implementation Preparation and Verification

During this phase we move an approved implementation to the Production Server. Both Imagine and customer team members are responsible for testing. The customer is responsible for their user training.

1. Implementation Preparation
2. Software Deployment, Configuration and Testing
3. Training Before Implementation

### 4. Deploy and Support

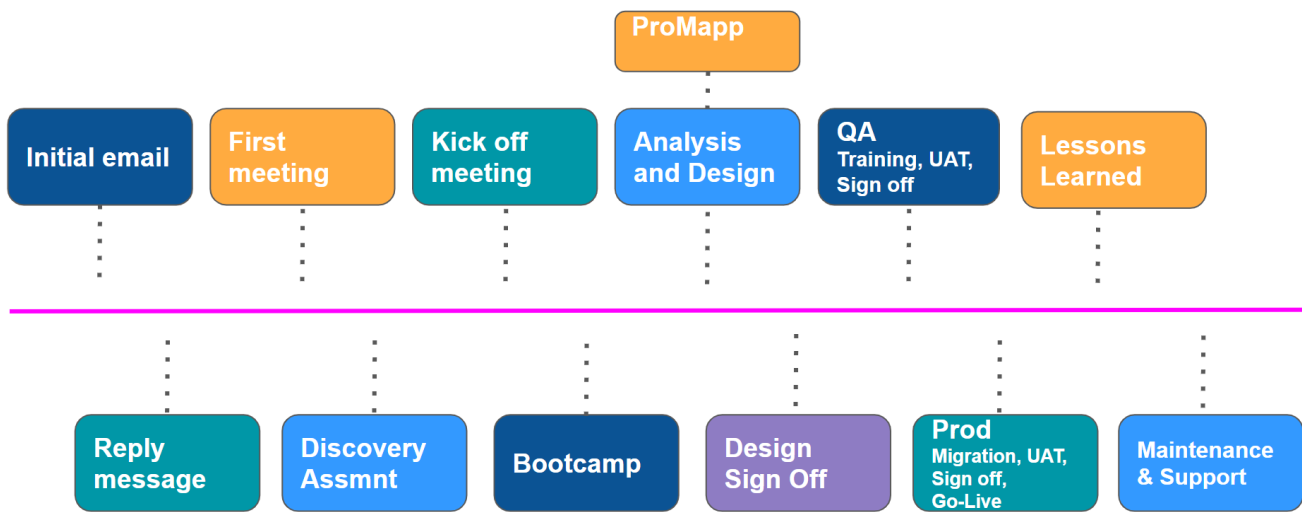
1. Go Live
2. System Transition to Support Phase
3. Project Closure

## Getting Started with Imagine

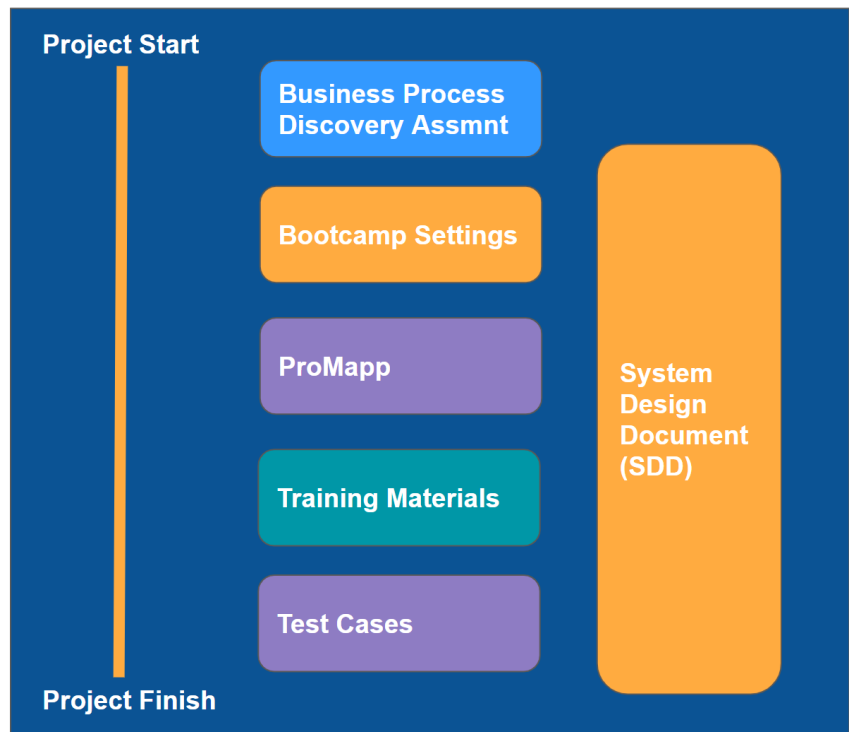
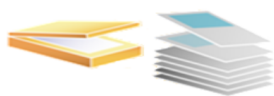
If you would like to get started with the service, please take a look at the documents below; they will give you an idea about what is needed to begin a project.

- [Service Level Agreement](#)
- [Business requirements discovery questionnaire](#)
- [Recommended scanners](#)
  - **Departments purchase equipment such as scanners based on IST-Enterprise Applications and vendor recommendations. Brand/model recommendations are based on the Imagine team's experience with the product. Although other hardware might also work, alternative selections should be verified with the vendor, Hyland, and with the Imagine team prior to purchase.**

# Onboarding Process



# Documentation



## Current Imagine Customers

- Academic Advising (*SIS Integration*)
  - Access to student documents via CalCentral integration
- Cal Student Central (*SIS Integration*)
  - Access to student documents related to Office of the Registrar, Admissions, Financial Aid
- CalHousing (*SIS Integration*)
  - Access to CalHousing/StarRez process
- Chancellor's Immediate Office
  - Correspondence ([Case History](#))
- Controller's Office
  - Accounts Payable invoices and purchase orders ([Case History](#))
  - Travel & Entertainment vouchers ([Case History](#))
  - Billing and Payment Services student loans
  - Contracts and Grants
  - Procurement, Supply Chain Management
- Financial Aid and Scholarship Office (*SIS integration*)
  - Evaluation and Processing
- Graduate Division
  - Student document management
- Law School - Registrar
  - Registrar and Applications documentation
- Office of the Registrar (*SIS integration*)
  - Records
  - Residency
  - Veterans
- Office of Undergraduate Admissions (*SIS integration*)
  - Applications Evaluation Management
- School of Public Health
  - Student documents processing
- Student Services (*SIS integration*)
  - Business Operations
- Transfer Credit (*SIS Integration*)
  - Electronic transcript integration and review
- University Development and Alumni Relations (UDAR)
  - Office of Gift Planning
- University Extension
  - Course and instructor approval
  - Grade cards and transcripts
  - Correspondence
- The following implementations have been retired and the functionality folded into other implementations due to campus reorganization
  - Residential and Student Service Programs (RSSP)
    - Accounts Payable invoices
    - Cashiers ([Case History](#))
  - Haas School of Business
    - Haas Undergraduate Admissions

- Haas Undergraduate Student Services
- Fulltime MBA Admissions ([Case History](#))
- College Writing Program
  - Student portfolios

## Case Histories

These brief case histories provide a high level view of some of our projects: the business need the projects addressed and the solution we implemented.

- [Chancellor's Immediate Office: Correspondence](#)
- [Controller's Office](#)
  - [Accounts Payable invoices and purchase orders](#)
  - [Travel & Entertainment vouchers](#)
- [Haas School of Business: Fulltime MBA Admissions](#)
- [Residential and Student Service Programs \(RSSP\): Cashiers](#)

## Presentations

- [Imaging Services, Presentation to BPAWG](#), May 26, 2011 (Berkeley Process Analysts Working Group)
- [UCCSC Document Imaging and Electronic Records Management at Berkeley](#), Presentation to UCCSC 2012