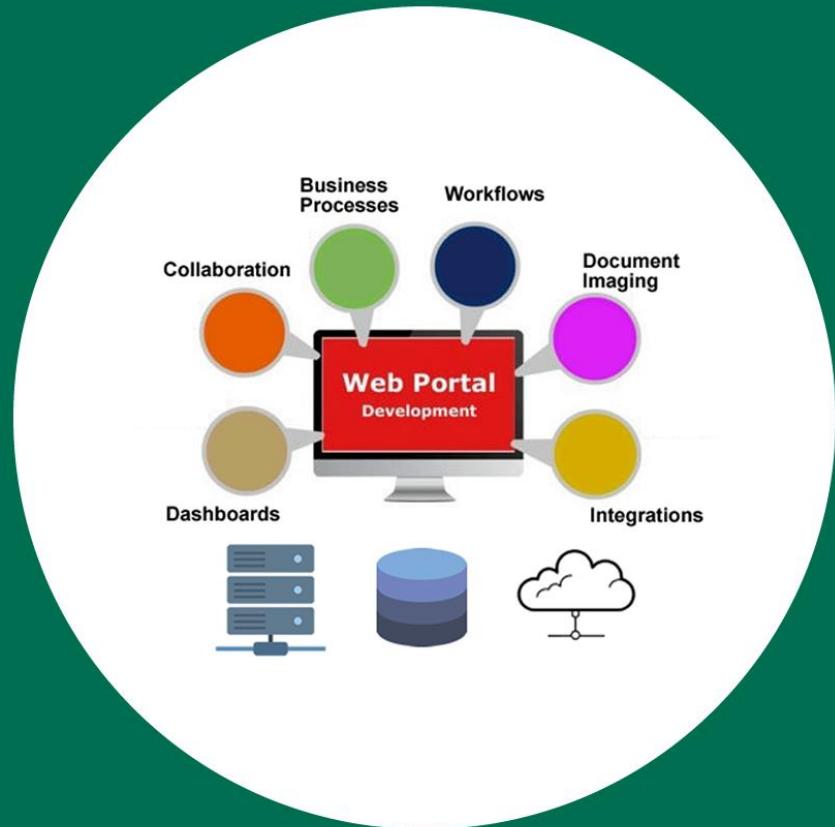


Northwest Portal Strategy

Designing the Portal Framework



NORTHWEST
MISSOURI STATE UNIVERSITY

Jeff Thomas – AVP Information Technology

Why is a Portal is Important?

- IT Governance
- Custom communication with all students and employees
- Information in a central location
- Encourage collaboration



Northwest Missouri State University

Key Portal Segments

Collaboration

Dashboards/Checklists

Business Processes

Basic Workflows

Document Imaging

Integrations



Northwest Missouri State University

Key Portal Segments Collaboration

Why is collaboration important?

- IT Governance
- Provides context
- Area and team sites
- Enable communication with all staff

"The most striking consequence of institutional competitiveness is the failure of colleges and universities to focus on the needs of the ecosystem as a whole."

INSIDE
HIGHER ED



Northwest Missouri State University

Key Portal Segments - Collaboration

Why SharePoint?

- We already own it
- Can be a complete portal (EX: Ellucian)
- Scalability
 - Simple to complex
- Integrations
 - Mobile
 - Microsoft & non-Microsoft tools
 - APIs
 - Application program interface



Northwest Missouri State University

Key Portal Segments - Collaboration

SharePoint Scalability

Levels of complexity

1. Basic GUI skills & adding documents
2. Syncing with associated apps
 - MS Project
 - MS Teams
 - Zoom
3. Complex database-driven code compatibility

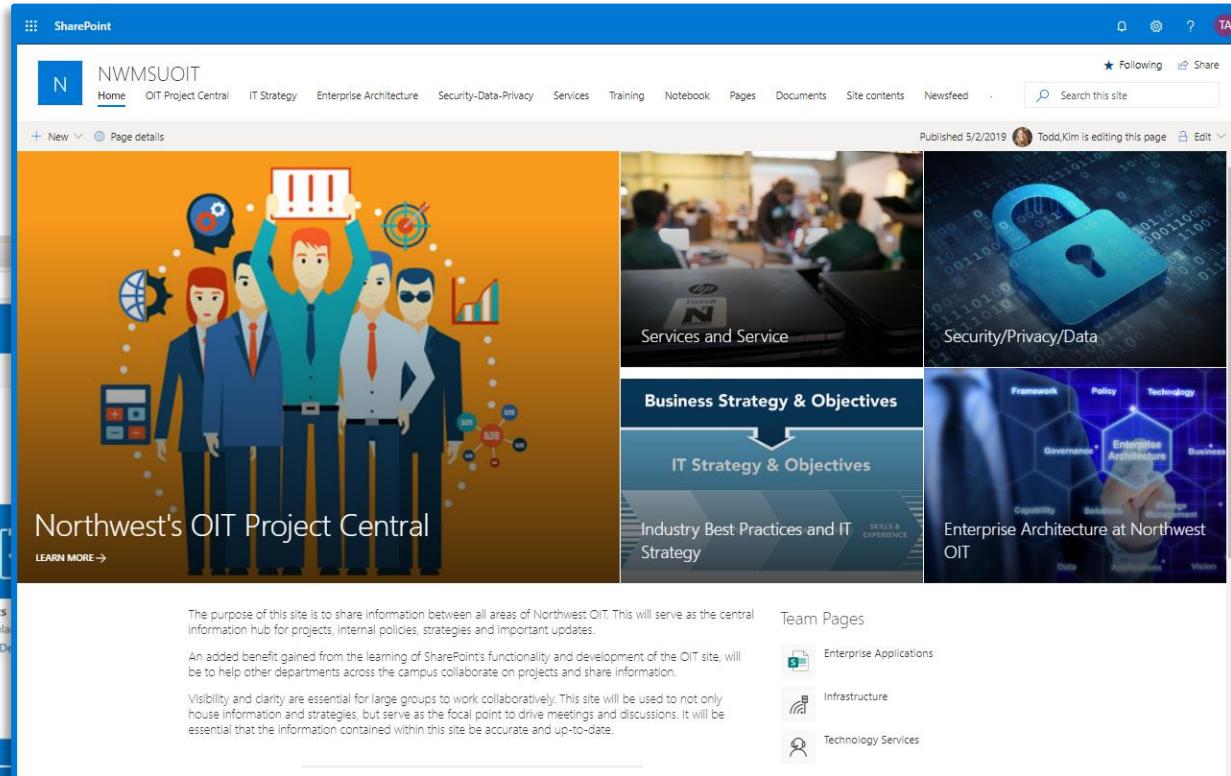
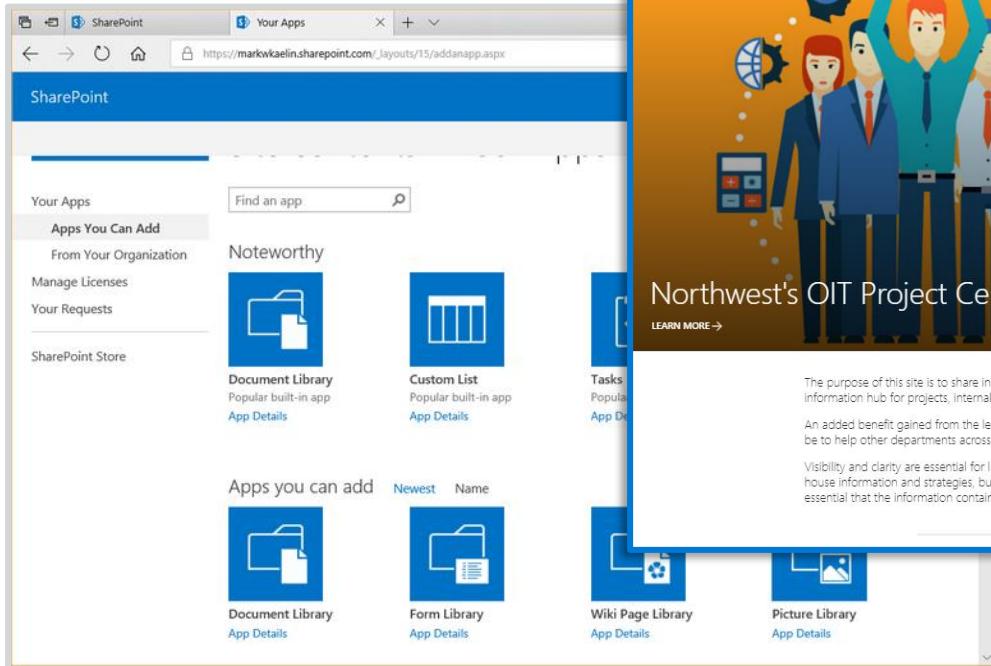


Northwest Missouri State University

Key Portal Segments - Collaboration

SharePoint Scalability

- Basic GUI skills
 - Drag and drop
 - Create team sites

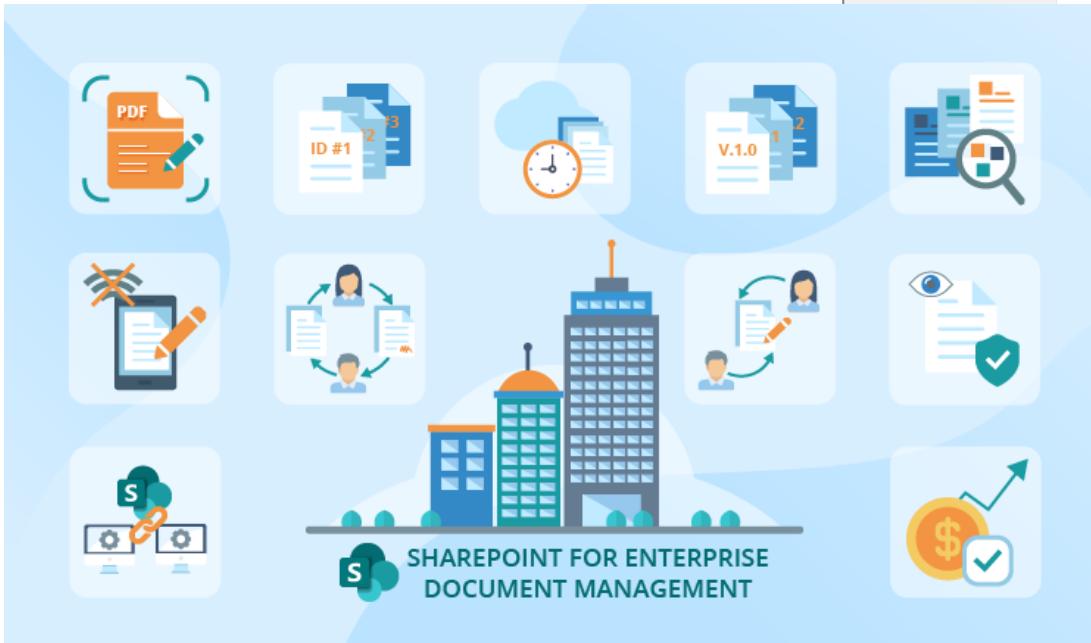


Northwest Missouri State University

Key Portal Segments - Collaboration

SharePoint Scalability

- Adding documents
 - Create document repository
 - Industry standard



A screenshot of a SharePoint document library interface. The left sidebar shows navigation options like 'Upload File', 'New Folder', and 'Company' (Documents, Spreadsheets, Recycle Bin). The main area displays a list of shared files with columns for Title, Size, Versions, and Modified By. The files listed are:

Title	Size	Versions	Modified By
HyperOffice EcoSystem.pptx	9 MB	OFF	Porta
Terms of Service.docx	192 KB	OFF	Porta
Logo Design.png	26 KB	OFF	Porta
Infographic.png	248 KB	OFF	Porta
Brochure.pdf	146 KB	OFF	Porta



Northwest Missouri State University

Key Portal Segments - Collaboration

SharePoint Scalability

- Complex database-driven code compatibility
 - .Net standard

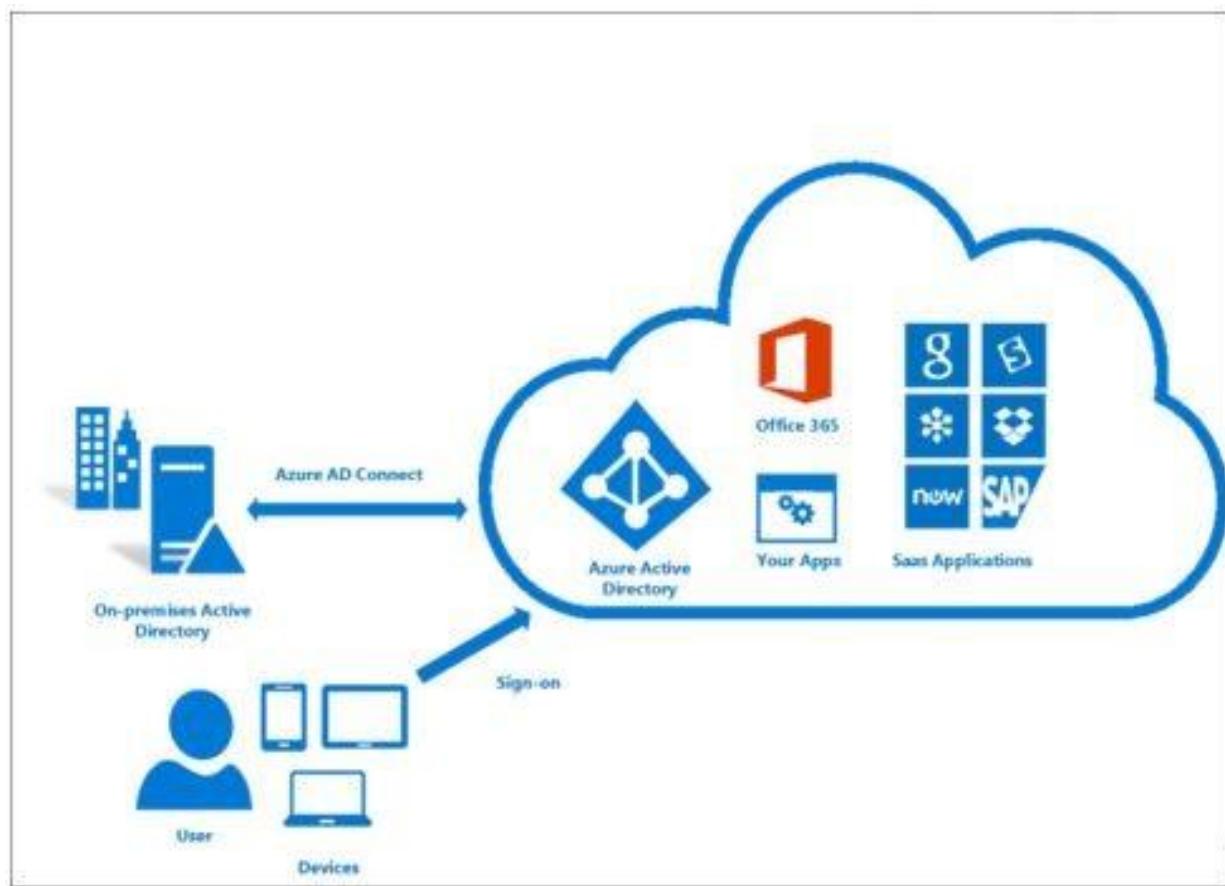


Northwest Missouri State University

Key Portal Segments - Collaboration

SharePoint Integrations

- Mobile friendly
- Microsoft and Non-Microsoft connectors
- Industry standard coding compatibility



Northwest Missouri State University

Key Portal Segments - Collaboration

SharePoint Integrations

- Mobile friendly
 - Notifications
 - Easy approvals



The screenshot displays the SharePoint mobile application interface. At the top, there's a header bar with the SharePoint logo, a search bar labeled "Search in SharePoint", and two buttons: "Create site" and "Create news post". Below the header, the main content area shows a list of news items under the heading "News from sites". Each news item includes a thumbnail image, the title, a brief description, the author, and the date. To the right of each news item, there are three blue star icons. The news items listed are:

- Fashion Events: Event Planning - Behind the Scenes. Description: Take a look at the team behind del... Author: Lynne Robbins Date: Feb 24, 2017
- Fashion Events: New York Launch - highlights. Description: Big moments in the Big Apple! Author: Isah Langer Date: Feb 24, 2017
- Fashion Events: Contoso Cares - fashion show for charity. Description: See how fashion can influence pe...

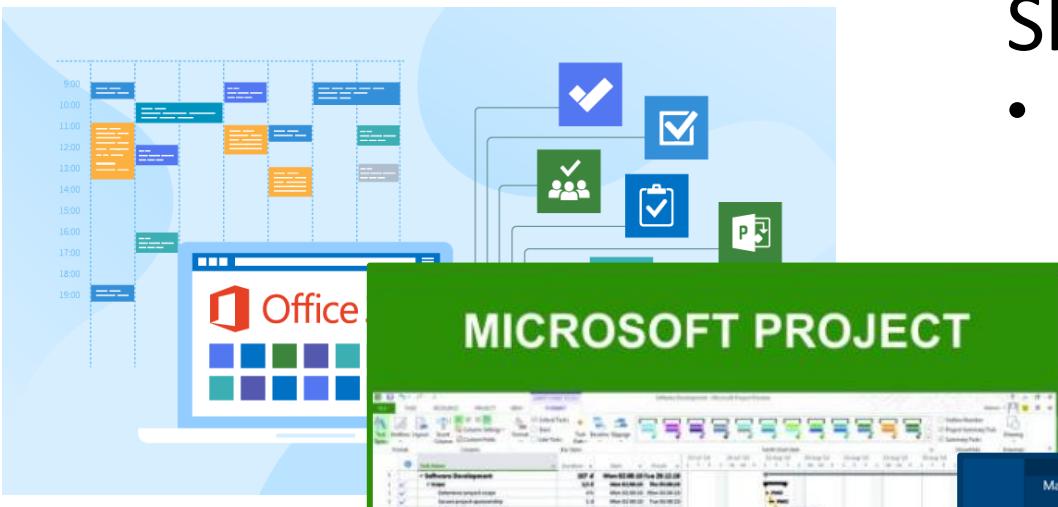
On the far right, there are two small images: one of a conference room and another of a person working at a desk. Below these images, there are two more news items under the "Marketing" category:

- Marketing: New International Marketing Initiatives. Author: Miriam Graham Date: 10/21/2019
- Marketing: Marketing: New V Connection Proce... Author: Allan Deyoung Date: 10/21/2019



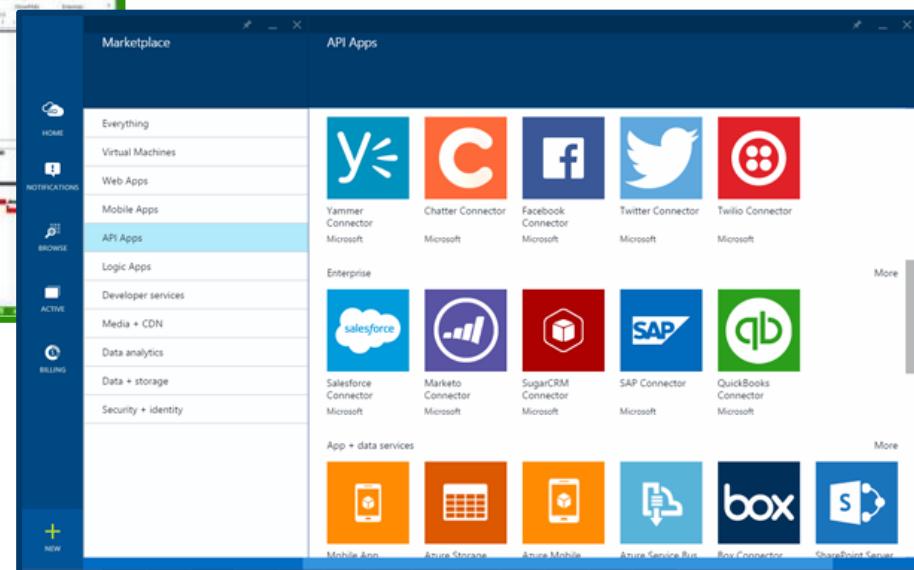
Northwest Missouri State University

Key Portal Segments - Collaboration



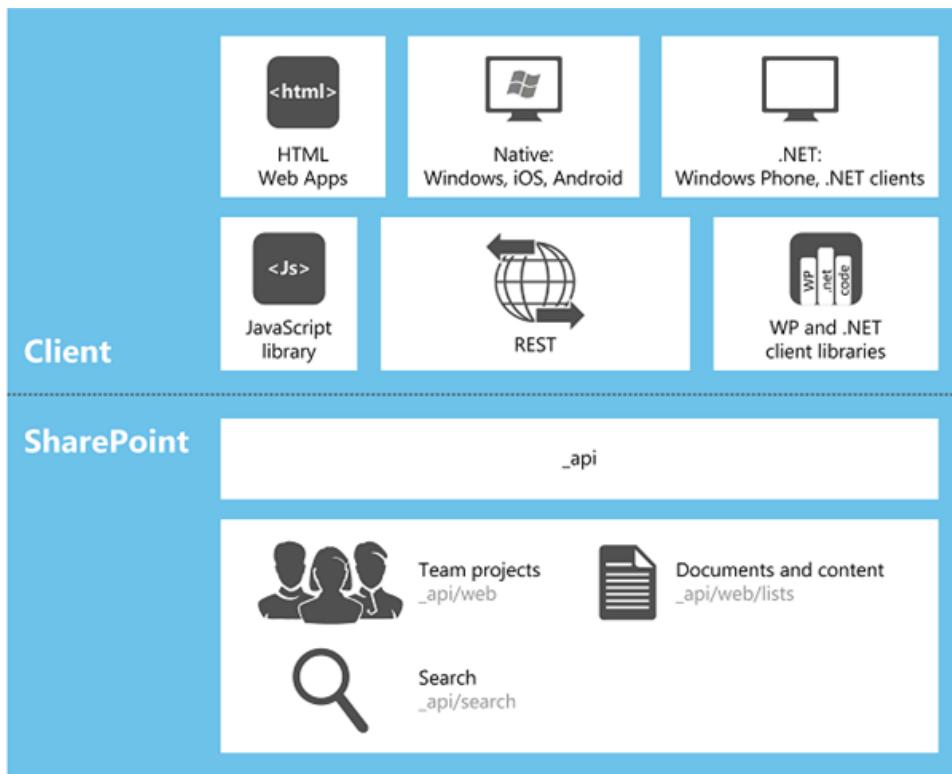
SharePoint Integrations

- Microsoft and non-Microsoft tools
 - Office 365 suite, MS Project, MS Teams
 - Zoom, Twitter, Salesforce



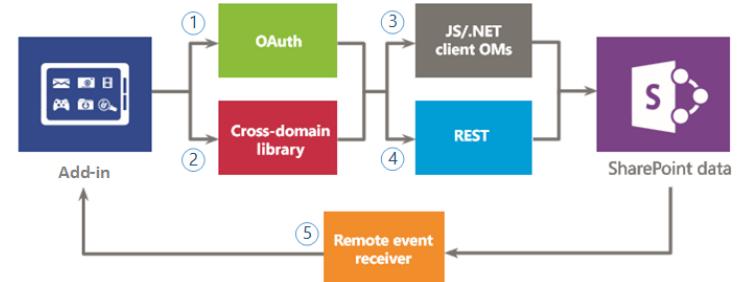
Northwest Missouri State University

Key Portal Segments - Collaboration



SharePoint Integrations

- Industry standard coding compatibility
 - .Net standard



Northwest Missouri State University

Key Portal Segments

Dashboards and Checklists

Why are dashboards and checklists important?

- Real-time snapshot of most important data
- Customized information based on staff or student
- After login, the system knows who you are and what your situation is



The screenshot shows the ellucian CRM ADVISE interface for a student named Caroline Wills. The top navigation bar includes links for Advisors, My Students, and Caroline Wills, along with options for Search CRM data, Share, Follow, Run Workflow, Start Dialog, Word Templates, and Help.

Summary Section: Displays student details such as Current Academic Standing (Active), Undergraduate Freshman, Overall GPA (2.75), and Current Success Score (59). It also shows the STEM Student indicator (Active) and three alerts: Requested tutoring (inactive), Missing multiple CHE (active), and Missing Registration Hold (active).

Success Score Performance: A chart showing Caroline's success score over time, with a current score of 59. The chart includes a legend for Success Plan: All, Score: Success, Term: 2016 Spring Term, and a graph showing a downward trend from approximately 75 to 59.

Current and Future Enrolled Student Sections: A table listing courses for the 2016 Spring Term, including AGME-100, ART-200, BIOL-100, MATH-100, and WELD-100. Statuses range from Active to Dropped.

Alerts: A section showing a single alert: "Missed Registration Deadline" (Owner: CRM Admin) with tasks, emails, phone calls, and letters listed.

Key Portal Segments – Dashboards & Checklists

Real-time Snapshots of Data

- Capture real-time data from several sources
- Organize strategy data to aid decision-making

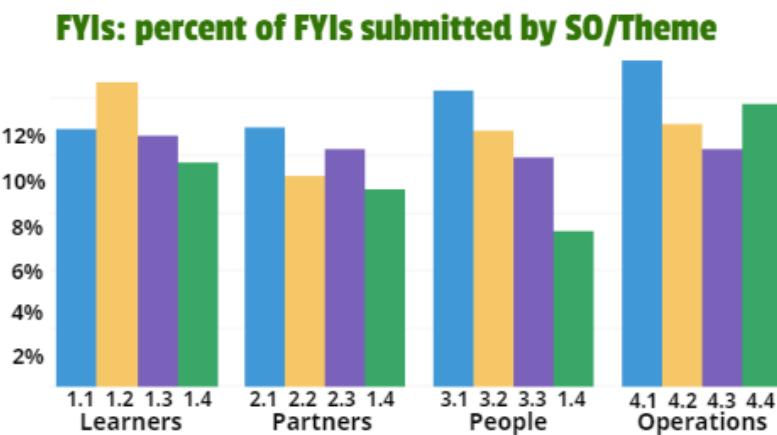
FYIs SLT Review - INFORMATION TECHNOLOGY
(JEFF THOMAS)

I have no individual FYIs at this time

RFP for Oracle Cloud Migration Partner

For Board?:
Yes No

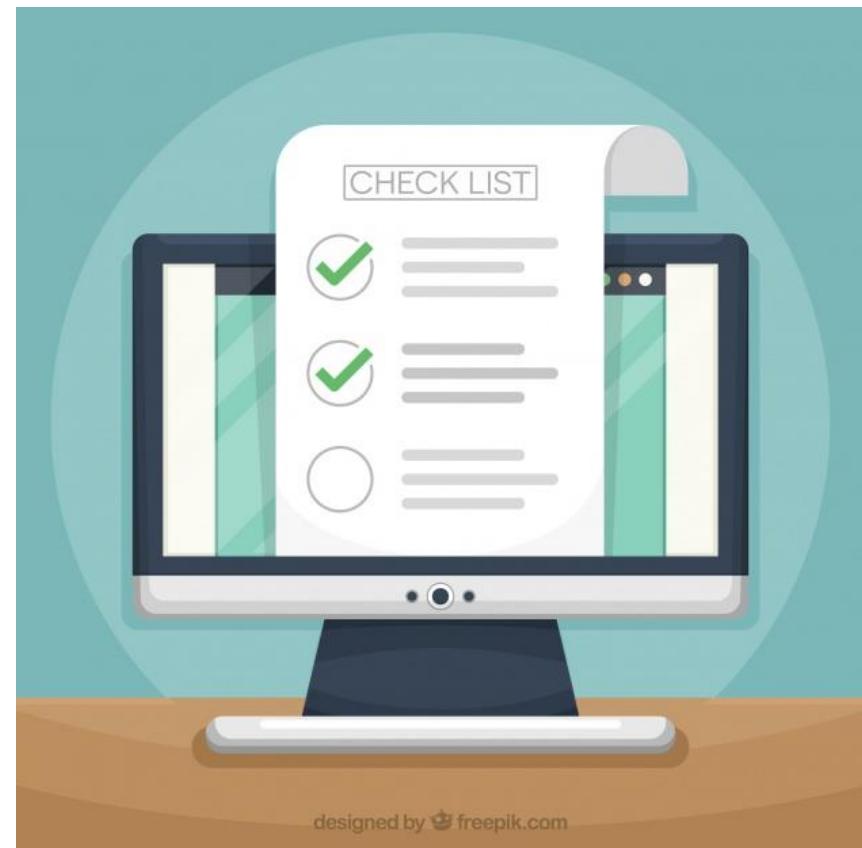
SO 4 Ops (4.3: Systemize a continuous improvement model)



Northwest Missouri State University

We Know who You Are

- Customized student and staff checklists based on situation
 - Registration process
 - Graduation timeline
 - Academic petitions
- Only see the forms you need



designed by freepik.com



Northwest Missouri State University

Key Portal Segments – Dashboards/Checklists

KSU Checklist Example

- Advising has emulator view

The image shows two screenshots side-by-side. On the left is the 'Checklist Emulator' interface, which includes a text input for 'FlashLine user name or Kent State ID number' containing 'jsmith12', and a button labeled 'Emulate Checklist'. A note above the input says: 'Use this interface to emulate what a person is seeing on their checklist. Enter the desired FlashLine user name and click **Emulate Checklist** to display the appropriate items.' On the right is the 'Checklist Emulator' page itself, featuring a heading 'Welcome to FlashLine, our university community portal. This checklist will help you complete next steps as you gear up for *Excellence in Action* at Kent State.' Below this are several sections: 'Take Your Placement Assessments' (with a red 'More Information' button), 'Get Your Financial Aid' (with a green checkmark icon), 'Grant Online FERPA Authorization' (with a green checkmark icon), 'Renew or Apply for a Housing Contract or Request a Mandatory Housing Policy Exemption Form' (with a green checkmark icon), and 'Register for Classes' (with a green checkmark icon). A note at the top of the checklist page states: '* Please note the items below are exactly what is visible to the owner of the checklist. Some links in the items may point to data for the owner, and hence will not work correctly if clicked on.'

Accessing the Emulator

Advisors can access the **Dynamic Student Checklist Emulator** through FlashLine in the **Faculty & Advisors** category, the Advisor Resources page, and a link in the **Advising** section.

The image shows the KSU FlashLine portal. The left sidebar has a 'Faculty & Advisors' menu item highlighted with a red box. The main content area is titled 'Advising' and contains several links: 'FlashFAST for Advisors', 'KSUAdvising', 'Dynamic Student Checklist Emulator' (which is also highlighted with a red box), 'Student Current Term Final Grades View', 'DKS Scheduler (1 and 2 day)', 'Advising SharePoint', 'Dismissal SharePoint', 'Pathfinder - Authorized Users Only', 'View Submitted Graduation Application', and 'University Catalog'.



Northwest Missouri State University

Key Portal Segments – Dashboards/Checklists

KSU Checklist Example

Dynamic Student Checklist

Emulator View

Welcome to FlashLine, our university community portal. This checklist will help you complete next steps as you gear up for *Excellence in Action* at Kent State.

[More Information](#)

- Get Your Financial Aid**
 - File the 2016-2017 FAFSA
Your FAFSA has been received and is valid.
 - Accept Your Scholarship
Your scholarship has been accepted. [View your awards](#).
 - Satisfy Your Direct Loan Entrance Counseling
Take the Entrance Loan Counseling Questionnaire by **08/01/2016**. Visit <http://www.studentloans.gov> to complete your Direct Loan entrance counseling.
- Grant Online FERPA Authorization**
 - To view a listing of the individuals authorized for FERPA release, go to [your existing authorizations](#).
- Register for Classes**
 - Thank you for registering; you are currently enrolled for 13 hours. Access your [schedule](#) if you would like to make any adjustments. You can also [print your schedule](#).
- Pay Your Bill**
 - Make your payment by **08/12/2016**.
The University offers several [payment options](#) through the Bursar's Office. You can make payments directly on your [student account](#).

Student View

DYNAMIC STUDENT CHECKLIST OTHER TO-DO'S X

- Get Your Financial Aid**
 - File the 2016-2017 FAFSA
Your FAFSA has been received and is valid.
Deadline: 02/15/16
 - Accept Your Scholarship
Your scholarship has been accepted. [View your awards](#).
Deadline: 05/01/16
- Take the Entrance Loan Counseling Questionnaire by 08/01/2016.**
Visit <http://www.studentloans.gov> to complete your Direct Loan entrance counseling.
Deadline: 08/01/16
- Grant Online FERPA Authorization** +
- Register for Classes** +
- Make your payment by 08/12/2016.** +

DYNAMIC STUDENT CHECKLIST OTHER TO-DO'S X

Other To-Do's

- Commuter Resources
If you are under the age of 20 and live within 50 miles of the Kent Campus and plan to commute from your parent's home or meet one of the other exemption criteria, be sure to [check out our commuter resources](#). Please remember you must submit a [Commuter Exemption Form](#) for an exemption to the on-campus residency requirement.
- Confused About your Major or Degree?
Tap into resources offered by the Career Services Center. [More info...](#)
- Find A Job
Visit Career Services to find student jobs and internships at Flash@Work. [More info...](#)
- Find Out How To Get Involved
Investigate student organizations and activities by following this headline. Also, discover how to stay active and fit by taking advantage of offerings at the [Student Recreation and Wellness Center](#).
- Sign up for Flash Alerts
Sign up for Flash ALERTS via your My Account tab within your FlashLine account. Flash ALERTS is Kent State's emergency text notification system that will inform you of important information such as school closings or other emergencies or news flashes. [More info...](#)



Northwest Missouri State University

Key Portal Segments

Simple Workflows

Why are simple workflows important?

- Easy to create – low code
- Easy to complete by user
- SSO integration
- Can export data to SQL Server
- Can auto-index into document imaging
- Banner APIs (integration)



Northwest Missouri State University

Key Portal Segments - Simple Workflows

Easy to Create - Low Code

Easy to create – low code

- Drag and drop
- No coding experience needed
- Very fast onboarding (8 hours)
- IT can train departmental staff



The screenshot shows a web-based portal builder interface for Northwest Missouri State University. At the top, the university's logo and name are visible. The main area is a form editor with the following components:

- Form Configuration:** A sidebar on the left lists "Name / Type" options: Admin Notification, Payments, Custom Text, Participants, SSO, Events, and Advanced. The "Advanced" option is selected. A "Pages" section shows "Page 1". Buttons for "Preview in Browser" and "Preview as PDF" are present.
- Form Fields:** A table named "Table9" is being edited. It has one row and two columns. The first column contains a "Name" field with the value "Table9" and a "Width" of "1000". The second column contains a "Rows" section with "+Add" and "-Remove" buttons. A "Columns" section also has "+Add" and "-Remove" buttons.
- Image:** A large image of a red brick university building with a prominent tower and flags is displayed.
- Table:** A table named "Table3" is shown below the image.
- Section:** A section titled "Table4" contains the text "Northwest Monthly FYIs".
- Table:** A table named "Table5" is shown below the section.
- Form Fields:** A table named "Table1" is at the bottom. It includes a "Name" field with a red asterisk and a "Required" label, and a "Intended for Board" section with "Yes" and "No" radio buttons.



Northwest Missouri State University

Key Portal Segments - Simple Workflows

Easy to Complete by User

Easy to complete by user

- Consistent layout
- No separate Dynamic Forms login needed (myNW SSO)
- Skip logic makes it easy
- Banner/Dynamic Forms APIs will provide pre-filled data

The screenshot shows the Human Resources Main Menu. At the top, there's a logo for Northwest Missouri State University with the text "NORTHWEST MISSOURI STATE UNIVERSITY MARYVILLE | KANSAS CITY". Below the logo, the text "HUMAN RESOURCES Employment/Exit Process MAIN MENU" is displayed. At the bottom of the menu bar, there are four options: "REQUEST", "NEW/REPLACE", "CHANGE", and "EXIT".

The screenshot displays two side-by-side forms. On the left is the "CURRICULUM & DEGREE REQUIREMENTS" form, which includes fields for First Name, Middle Name, Last Name, Home Address, Alternate Email, Preferred Phone #, and an explanation for the petition. On the right is the "HUMAN RESOURCES Employment/Exit Process PERSONNEL REQUEST" form, which includes sections for Department Information, FOAP, Justification of Replacement, and Log Off Data for Departing Employee.



Northwest Missouri State University

Key Portal Segments - Simple Workflows

Easy to Export Data

Can export data to SQL Server

- Nightly data exports into myNW SQL Server
 - Share essential info with admins
 - Populate data for dashboards

- Sync w/other portal programs
- Generate Dashboards



Northwest Missouri State University

Key Portal Segments - Simple Workflows

Automated Document Imaging



Forms automatically pushed to document imaging system

- No indexing needed

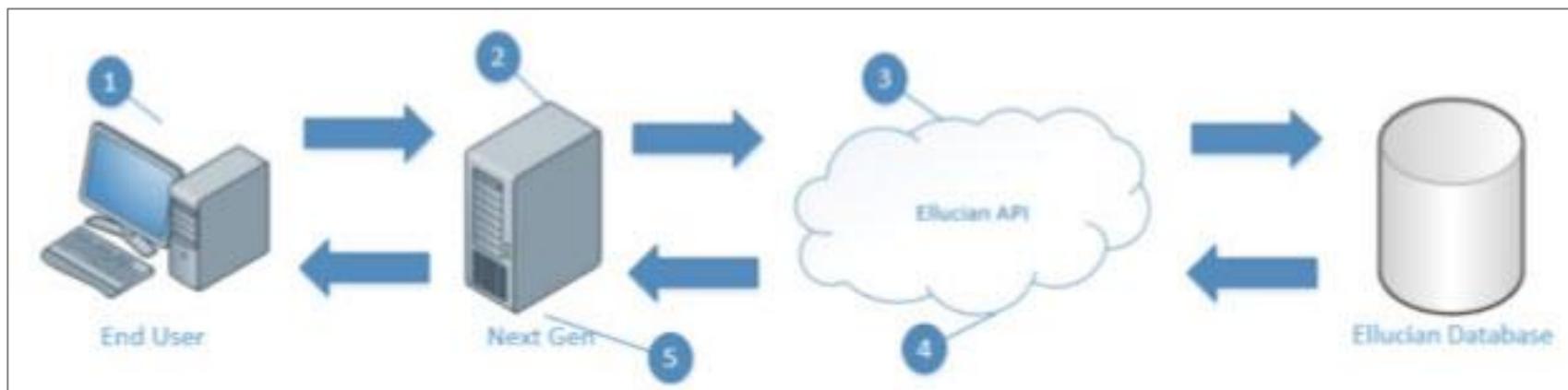
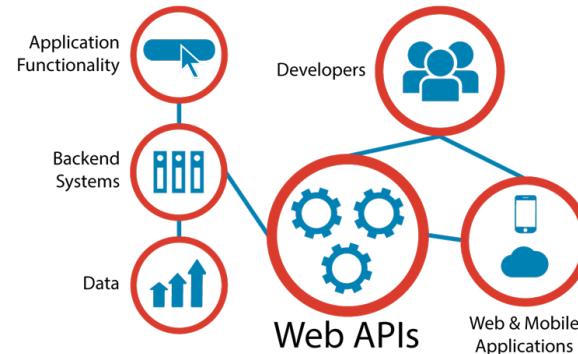


Northwest Missouri State University

Key Portal Segments - Simple Workflows

Banner APIs (integration)

- Pull information from Banner for auto-populated data
- Push information to Banner for total automation



Northwest Missouri State University

Key Portal Segments - Simple Workflows

Dynamic Forms Examples - CER

- Functional area reviews
- Stages / logic of approvals
- Capital and Finance Sync

 **NORTHWEST**
MISSOURI STATE UNIVERSITY
MARYVILLE | KANSAS CITY

CAPITAL PROGRAMS
Capital Project Request Process
CER REQUEST - ORIGINAL

CER - WHAT ARE YOU WANTING TO DO?

Original CER (NEW CER)
 Amended CER

SECTION 1 - REQUEST YOUR APPROVED CER NUMBER

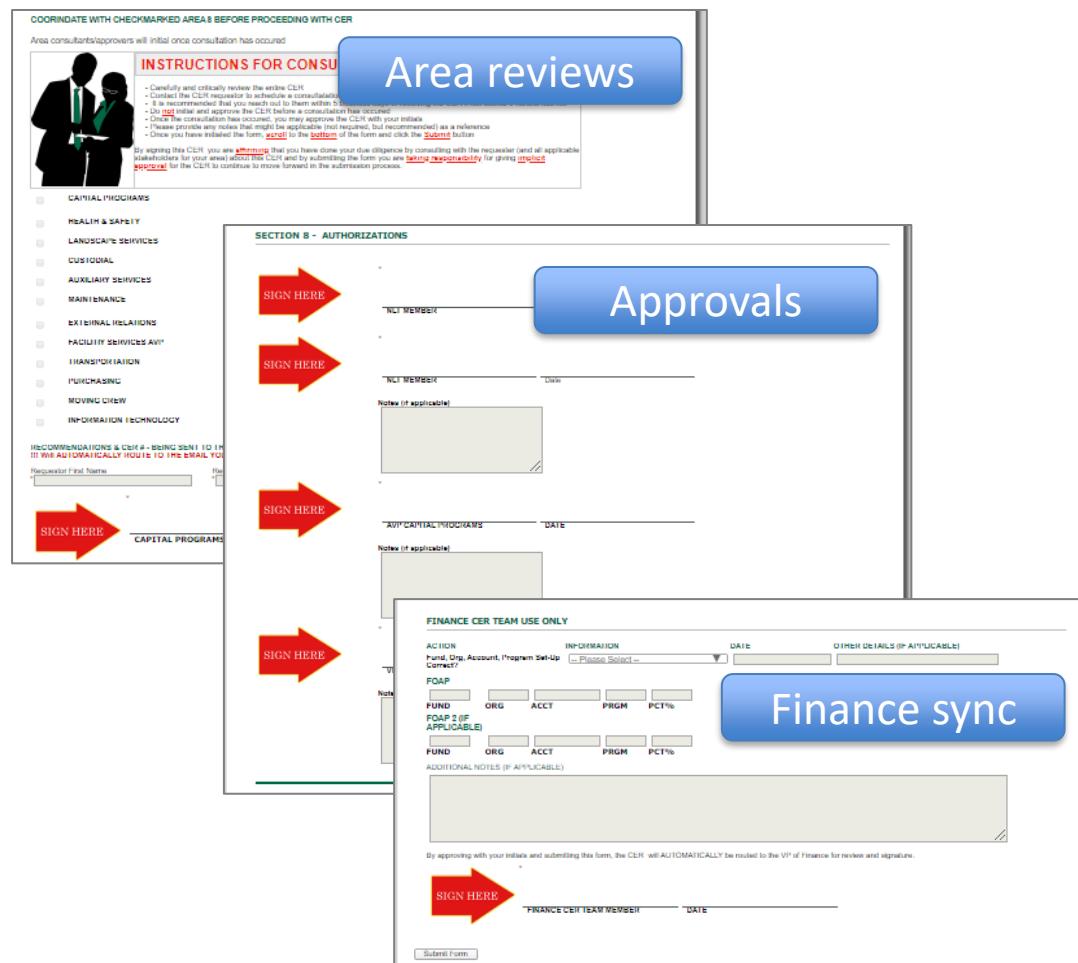
Jeffrey First Name	Middle Name	Thomas Last Name
Username	Department	Job Title/Rank
User ID (SIS #)	Email NORTHWEST@NWMISSOURI.EDU	

BASIC BRIEF DESCRIPTION OF PURCHASE/PROJECT

ESTIMATED FUNDING AMOUNT (TOTAL AMOUNT OF ENTIRE PURCHASE/PROJECT)

DATE YOU WOULD LIKE TO HAVE THIS PURCHASE OR PROJECT ACCOMPLISHED

(click to sign)
REQUESTOR SIGNATURE **DATE**

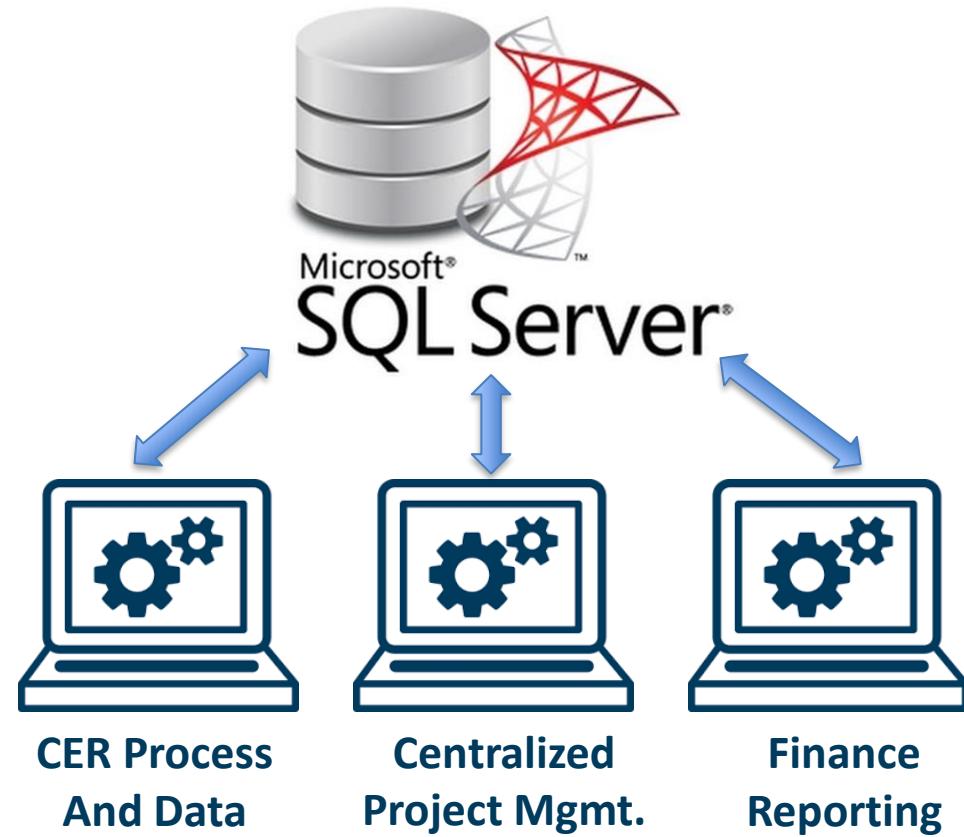


Key Portal Segments

Complex Business Processes

Why are more complex business process important?

- Two-way, real time data manipulation
- Total control of information
- Allow multiple programs to connect to cross-functional data and serve many needs
- Custom displays

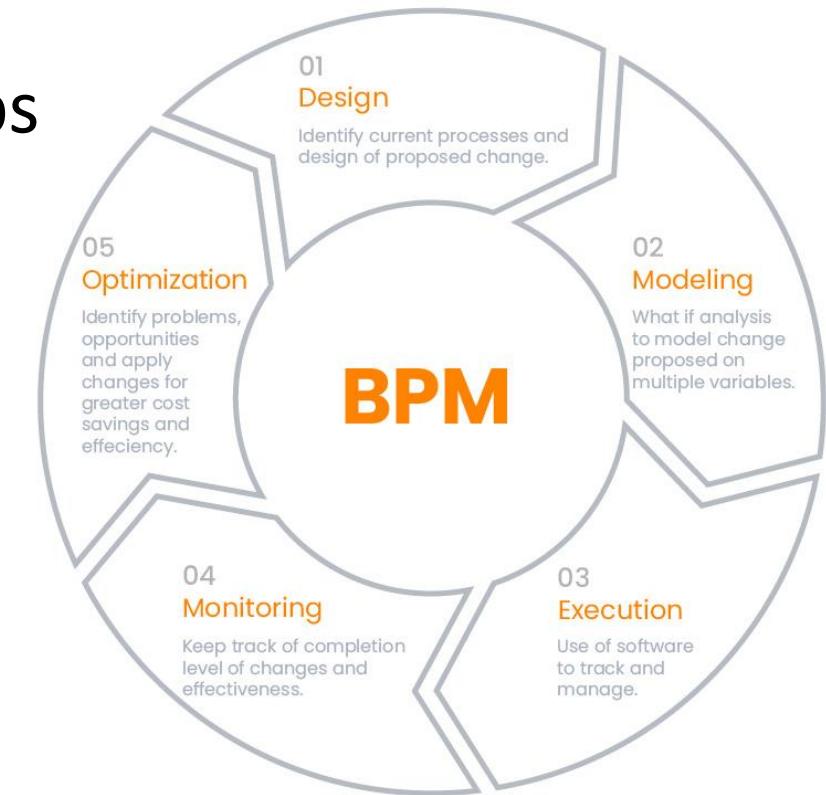


Northwest Missouri State University

Key Portal Segments – Business Processes

Business Process Examples

- Centralized Project Mgmt.
- Visual list of Data Team Jobs
- Northwest Strategy Site
 - Online Decision Briefs
 - Monthly FYIs
- Complex workflows
 - Admissions Transcripts



Northwest Missouri State University

Key Portal Segments – Business Processes

Centralized Project Mgmt.

- Database-driven
- Track all Data Team ERP Jobs
- All IT projects and tasks are visible to all stakeholders
- Data drives dashboards
- Strategically select priorities
- Estimate resource needs



The screenshot displays two main sections of the Northwest OIT Portal:

OIT Master Calendar Entry

Category	Value	Description
Cat1	Data_Team	or create a new task No special characters like % or / or - or .
Cat2	Registrar	or create a new task No special characters like % or / or - or .
Cat3	Summer Grades	or create a new task No special characters like % or / or - or .
Cat4	ERP	or create a new task No special characters like % or / or - or .
Cat5	NA	or create a new task No special characters like % or / or - or .
Cat6	NA	or create a new task No special characters like % or / or - or .

Fields include:
IT Lead: JTHOMAS
Non-IT Lead: JTHOMAS
For Department: OIT
Processes: show/hide
Stakeholders: show/hide
Acad/Awd/Fisc Year: NA
Description: (with a dropdown menu: File, New, Open, Save, Print, Register, Undo, Redo, Underline)

Master Calendar Entries

Need Date	Dept. Activity	Area Lead	IT Lead	Status	Date Completed	Edit/View
03/14/2020	STS Software - Implementation - Visual Zen	KATD	JTHOMAS	75%	NA	Edit/View
12/31/2019	STS System - SOAR Update	LCHAND	NNARNE	0%	NA	Edit/View
07/31/2019	STS Update Jobs - Email	LCHAND	NNARNE	0%	NA	Edit/View
07/19/2019	STS Housing - Export	LCHAND	NNARNE	0%	NA	Edit/View
07/01/2019	STS Update Jobs - Schedules	LCHAND	NNARNE	100%	NA	Edit/View
04/01/2019	STS Update Jobs - Schedules	LCHAND	NNARNE	100%	NA	Edit/View

You are viewing all entries your area is responsible for

Project

Need Date	Dept. Activity	Area Lead	IT Lead	Status	Date Completed	Edit/View
03/14/2020	STS Software - Implementation - Visual Zen	KATD	JTHOMAS	75%	NA	Edit/View
12/31/2019	STS System - SOAR Update	LCHAND	NNARNE	0%	NA	Edit/View
07/31/2019	STS Update Jobs - Email	LCHAND	NNARNE	0%	NA	Edit/View
07/19/2019	STS Housing - Export	LCHAND	NNARNE	0%	NA	Edit/View
07/01/2019	STS Update Jobs - Schedules	LCHAND	NNARNE	100%	NA	Edit/View
04/01/2019	STS Update Jobs - Schedules	LCHAND	NNARNE	100%	NA	Edit/View



Northwest Missouri State University

Key Portal Segments – Business Processes

Northwest Strategy Site

- Database-driven dashboards and programs
- Organized content based on strategic themes and objectives
- Visual tools and transparency



NORTHWEST MISSOURI STATE UNIVERSITY

Northwest Strategic Objectives and Themes

NW SO Home **Dashboards** **Decision Briefs** **fyi, Northwest FYIs** **Projects** **Strategic Plan**

The Northwest Leadership Team has put together the most important strategic objectives and themes to focus on in the next ten years. This group of 4 strategic objectives and 13 themes will help guide efforts to accomplish goals that are essential for the advances we as a university are determined to make.

[view the president's video](#) [How do I fit in?](#)

Northwest Strategic Initiatives

- 1.1 Innovative, rigorous academic programs, delivery methods, and experiences
- 2.1 Strengthen employers, communities and educational partners
- 3.2 Increase the time, opportunities and resources for faculty and staff
- 4.2 Developing an affordable and financially sustainable pricing and discounting structure

[View all current initiatives](#) [View all Decision Briefs](#)

1 Learners Addressing changing learner needs	2 Partners Addressing workforce and community solutions as a preferred provider	3 People Delivering on the best place to work	4 Operations Disrupting and innovating our business model
1.1 Leverage and launch innovative, rigorous academic programs, delivery methods, and experiences to deepen learning and enhance student curricular and co-curricular experiences.	2.1 Achieve solutions to strengthen employers, communities and educational partners, while driving sustainable alternative revenue streams for Northwest.	3.1 Create and foster an inclusive environment where faculty and staff are engaged, empowered and valued.	4.1 Create infrastructure and resource plans to enable net revenue generation both in the academic portfolio and other alternative sources (programs, services, etc.).
1.2 Implement holistic programs to address student success.	2.2 Establish sustained educational pathways to college completion and career readiness.	3.2 Increase the time, opportunities and resources for faculty and staff to develop their talents, skills and knowledge.	4.2 Develop an affordable and financially sustainable pricing and discounting structure.
1.3 Foster inclusive campus and community environments.	2.3 Improve faculty and staff well-being.	3.3 Increase faculty and staff job fulfillment by recognizing and utilizing their strengths and contributions.	4.3 Systemize a continuous improvement model to streamline processes, leverage technologies and simplify our work.
	2.4 Establish sustainable, flexible staffing models that address changing learner needs and financial viability.		4.4 Establish sustainable, flexible staffing models that address changing learner needs and financial viability.

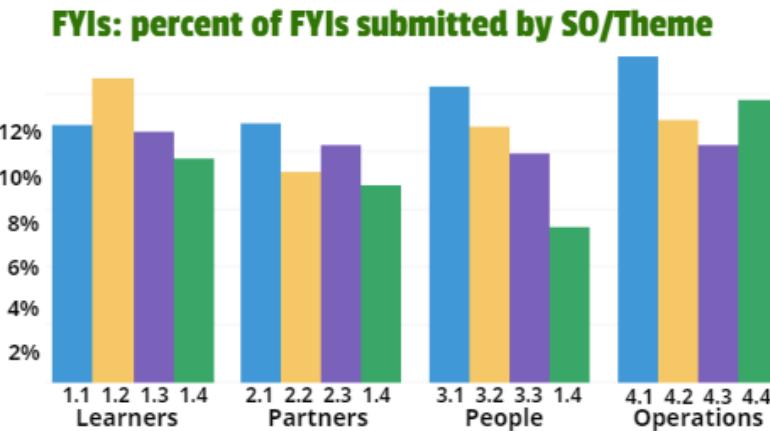


Northwest Missouri State University

Key Portal Segments – Business Processes

Strategy + Data = Modify Strategy

- Capture real-time data from several sources
- Organize strategy data to aid decision-making



FYIs SLT Review - INFORMATION TECHNOLOGY
(JEFF THOMAS)

I have no individual FYIs at this time

RFP for Oracle Cloud Migration Partner

For Board?:
Yes No

SO 4 Ops (4.3: Systemize a continuous improvement model)



Key Portal Segments – Business Processes

Northwest Strategy Site - Decision Briefs

- Decision Briefs tied to strategic themes and objectives
- Get staff to use
 - Transparent review
 - Strategic initiative tracking



On SO Dashboard

Decision Briefs

SOs-> Themes:	1	2	3	4
.1	3/5%	7/12%	0/0%	1/2%
.2	0/0%	0/0%	7/12%	4/7%
.3	5/8%	NA	1/2%	9/15%
.4	NA	NA	3/5%	2/2%

Northwest Strategic Plan

Please select up to four Northwest's Strategic Objectives this decision brief relates to:

SO 1 Learners

- 1.1 Leverage and launch innovative academic programs
- 1.2 Implement holistic programs to address student success
- 1.3 Foster inclusive campus and community

SO 2 Partners

- 2.1 Achieve solutions to strengthen employers
- 2.2 Establish sustained education pathways

SO 3 People

- 3.1 Create and foster inclusive environment
- 3.2 Increase time for employee development
- 3.3 Improve faculty and staff well-being
- 3.4 Increase faculty and staff job fulfillment

SO 4 Operations

- 4.1 Create infrastructure for revenue generation
- 4.2 Develop an affordable pricing model
- 4.3 Systemize a continuous improvement model
- 4.4 Establish staffing models

1) Opportunity Statement (from Accountable Agent)

Op Statement

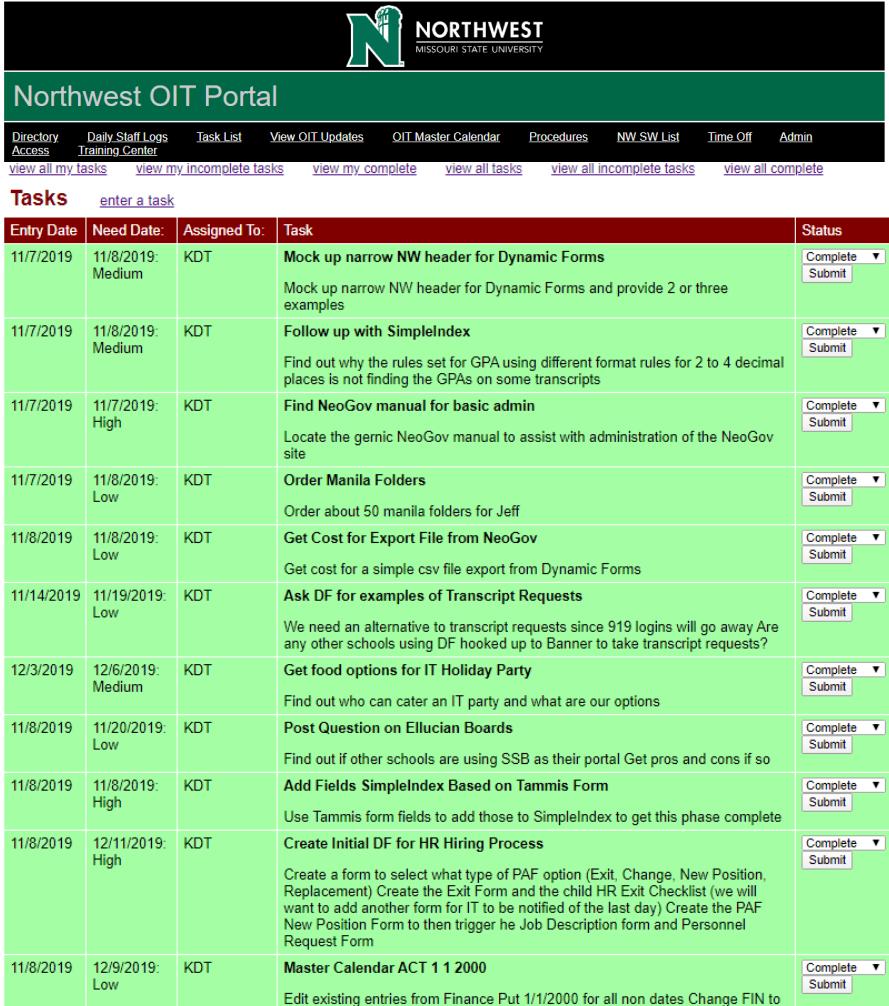


Northwest Missouri State University

Key Portal Segments – Business Processes

Staff Tasks

- Smaller scale than full projects
- Linked to same project management database for combined reporting
- Easy to use and track



The screenshot shows the Northwest OIT Portal homepage. At the top, there's a navigation bar with links for Directory Access, Daily Staff Logs, Training Center, Task List, View OIT Updates, OIT Master Calendar, Procedures, NW SW List, Time Off, and Admin. Below the navigation bar is a search bar labeled "Tasks" with a placeholder "enter a task". The main content area displays a table of tasks:

Entry Date	Need Date:	Assigned To:	Task	Status
11/7/2019	11/8/2019: Medium	KDT	Mock up narrow NW header for Dynamic Forms Mock up narrow NW header for Dynamic Forms and provide 2 or three examples	Complete ▾ Submit
11/7/2019	11/8/2019: Medium	KDT	Follow up with SimpleIndex Find out why the rules set for GPA using different format rules for 2 to 4 decimal places is not finding the GPAs on some transcripts	Complete ▾ Submit
11/7/2019	11/7/2019: High	KDT	Find NeoGov manual for basic admin Locate the generic NeoGov manual to assist with administration of the NeoGov site	Complete ▾ Submit
11/7/2019	11/8/2019: Low	KDT	Order Manila Folders Order about 50 manila folders for Jeff	Complete ▾ Submit
11/8/2019	11/8/2019: Low	KDT	Get Cost for Export File from NeoGov Get cost for a simple csv file export from Dynamic Forms	Complete ▾ Submit
11/14/2019	11/19/2019: Low	KDT	Ask DF for examples of Transcript Requests We need an alternative to transcript requests since 919 logins will go away Are any other schools using DF hooked up to Banner to take transcript requests?	Complete ▾ Submit
12/3/2019	12/6/2019: Medium	KDT	Get food options for IT Holiday Party Find out who can cater an IT party and what are our options	Complete ▾ Submit
11/8/2019	11/20/2019: Low	KDT	Post Question on Ellucian Boards Find out if other schools are using SSB as their portal Get pros and cons if so	Complete ▾ Submit
11/8/2019	11/8/2019: High	KDT	Add Fields SimpleIndex Based on Tammis Form Use Tammis form fields to add those to SimpleIndex to get this phase complete	Complete ▾ Submit
11/8/2019	12/11/2019: High	KDT	Create Initial DF for HR Hiring Process Create a form to select what type of PAF option (Exit, Change, New Position, Replacement) Create the Exit Form and the child HR Exit Checklist (we will want to add another form for IT to be notified of the last day) Create the PAF New Position Form to then trigger the Job Description form and Personnel Request Form	Complete ▾ Submit
11/8/2019	12/9/2019: Low	KDT	Master Calendar ACT 11 2000 Edit existing entries from Finance Put 1/1/2000 for all non dates Change FIN to ACT	Complete ▾ Submit



Northwest Missouri State University

Key Portal Segments – Business Processes

Admissions Transcripts

- File upload
- Staff-segmented modules
- Visual tools
- Auto-processing
- Auto-push to document
- Imaging



The image displays two side-by-side screenshots of the "Admissions Transcript Processing Program".

Screenshot 1: Admissions Transcript Processing Program

This screenshot shows a form for uploading an Alt Loan Cert file. It includes a red instruction: "1) Select the new Transcript Spreadsheet From your PC ---- only select .csv files" and a "Choose File" button with the message "No file chosen". Below the button is an "Upload" button.

Screenshot 2: Transcript Process Display

This screenshot shows a list of student reviews. At the top, it says "Ready to Process: Student Review_(28)" and "Pending FTStatus Reviews: Missing Info_(1)". It also lists "Auto Decisions: Auto Approved_(0) | Auto Rejected_(0)". Below this, a section titled "Current Process: STUDENTREVIEW" shows a table of student data:

First	Last	Birth Date	email	SID	Student ID	Term	Student Type	Funnel Stage	Submit Info	Current Status	Full View
Andrew	cjlcycq	1/12/2002	cjlcycq	1248		Select ▾	Select ▾	Select ▾	Submit Stu Review	File Upload Complete	View Transcript
Connor	culpva	1/12/2002	culpva	1238		Select ▾	Select ▾	Select ▾	Submit Stu Review	File Upload Complete	View Transcript
Aspen	ekovols	1/12/2002	ekovols	1252		Select ▾	Select ▾	Select ▾	Submit Stu Review	File Upload Complete	View Transcript
Ashlie	eychwhf	1/12/2002	eychwhf	1243		Select ▾	Select ▾	Select ▾	Submit Stu Review	File Upload Complete	View Transcript
Amol	fbcidan	1/12/2002	fbcidan	1239		Select ▾	Select ▾	Select ▾	Submit Stu Review	File Upload Complete	View Transcript
Alexis	fqmrojh	1/12/2001	fqmrojh	1254		Select ▾	Select ▾	Select ▾	Submit Stu Review	File Upload Complete	View Transcript
Amylia	fwptyo	1/12/2001	fwptyo	1247		Select ▾	Select ▾	Select ▾	Submit Stu Review	File Upload Complete	View Transcript
Callie	hdmtppr	1/12/2002	hdmtppr	1259		Select ▾	Select ▾	Select ▾	Submit Stu Review	File Upload Complete	View Transcript



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Key Portal Segments

Document Imaging

Why is document imaging important?

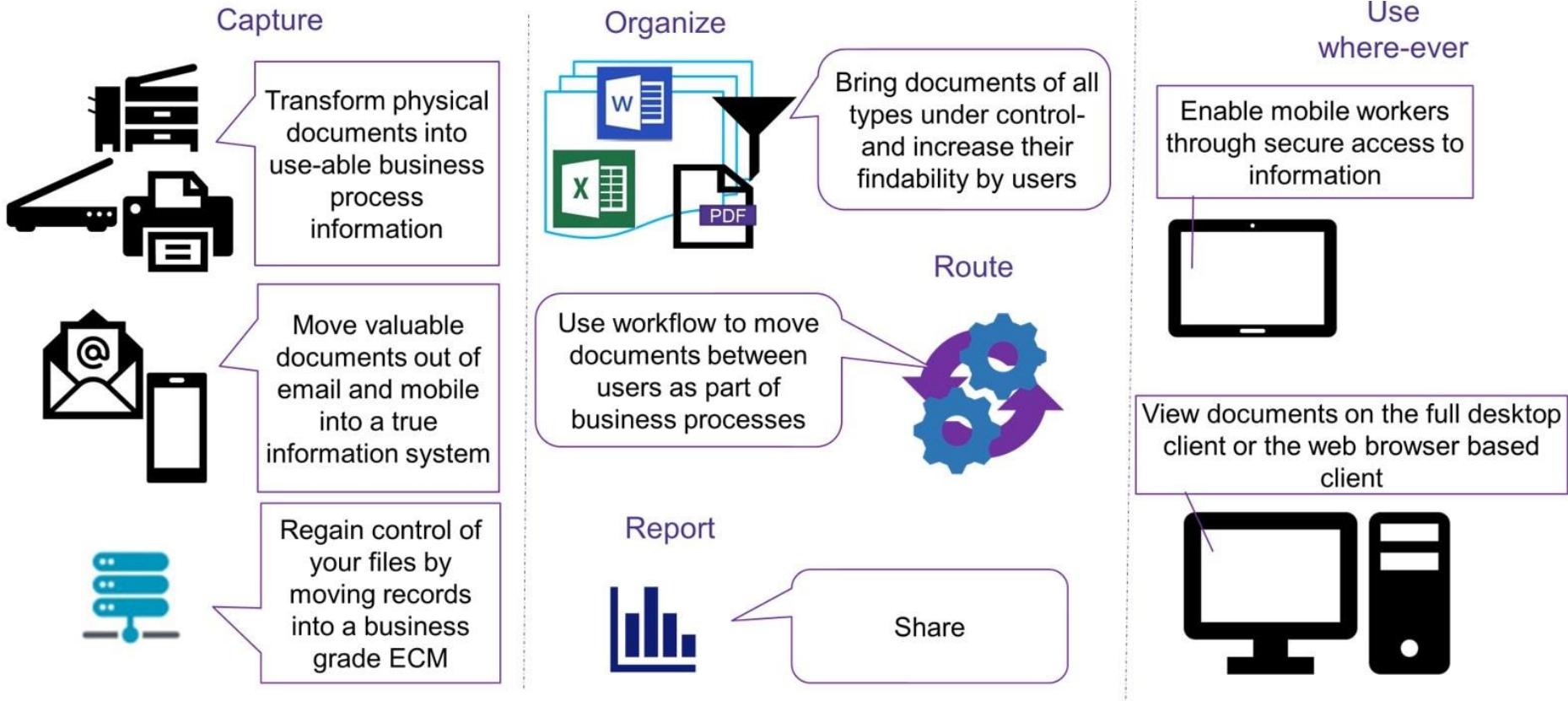
- Remote work friendly
- Centralized repository
- Risk management
 - Document Oversight
- Consistency of process
- Workflow capable
- Student records viewed from Banner



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Key Portal Segments – Document Imaging

Document Imaging



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Key Portal Segments – Document Imaging

Access student documents
directly via Banner



From INB Form

To view the BDMS documents associated with a student, you can use a Banner form such as SPAIDEN, to select the student by name or CWID. Once the student's name and ID display, you can use either of the two BDMS button on the top of the form to open a new window or tab with the

The screenshot shows the Oracle Developer Forms Runtime interface. The title bar reads "Oracle Developer Forms Runtime - Web: Open > SPAIDEN". The menu bar includes File, Edit, Options, Block, Item, Record, Query, Tools, and Help. A toolbar with various icons is visible, with the "New" icon highlighted by a blue box. Below the toolbar, a message box displays "General Person Identification SPAIDEN 8.2 (PROD)" and "BDMS -Display Document". To the right of the message box is a button labeled "Add Document". The main area contains fields for "ID" (with a dropdown menu open) and "Name Type" (with a dropdown menu open). Below these fields are tabs for "Current Identification", "Alternate Identification", "Address", "Telephone", "Biographical", "Email", and "Employer".

The system will display a list of BDMS documents stored for the selected student.

Query Results for Application 'B'S 10'										
Document 3 3 of 3										
	ITEM ID	DOCUMENT TYPE	LAST NAME	FIRST NAME	SSN	BIRTH DATE	TERM CODE	EDITING STATUS	ACTIVITY DATE	PAGES
<input checked="" type="checkbox"/>	1030000	ADVANCED PLACEMENTS	M	S	*****	23-JU-19	201211		2013-07-27 14:36:19	1
<input checked="" type="checkbox"/>	1030001	ACADEMIC RENAISSANCE	M	S	*****	23-JU-19			2013-07-27 14:36:06	1
<input checked="" type="checkbox"/>	1030000	MISC MISCELLANEOUS	M	S	*****	23-JU-19			2013-07-27 11:52:24	2

In the example above, there are three document types, Advanced Placements with one page, Academic Renewals with one page and Miscellaneous with two pages. Click on the document icon to the left of the listing to display the document image(s).

A screenshot of a Microsoft Internet Explorer browser window. The address bar shows the URL: "http://edwinst.msu.edu:8080/edwinBatchView.aspx?ParamE=0+C+MSU+TSTTN+Inv+on+BanTest+Application+Render+Web+Ac...". The main content area displays a search form titled "B-S-ID - NULL REICHENBERGER - 4/12/2016 9:20:04 AM". The form includes fields for "Index Name" (set to "Field Value"), "ID" (containing "-02224596"), "FIDN" (empty), "DOCUMENT TYPE" (dropdown menu), "LAST NAME" (empty), "FIRST NAME" (empty), "SSN" (empty), "BIRTH DATE" (empty), "TERM CODE" (dropdown menu), "ROUTING STATUS" (dropdown menu), "ACTIVITY DATE" (set to "2016-04-12 09:20:07"), "VFDL_CODE" (empty), and "DISPOSITION DATE" (empty). A "Save" button is at the bottom of the form. To the right of the form is a toolbar with various icons. Below the toolbar is a banner for "Free IT Help Desk Software - ManageEngine ServiceDesk Plus" with the URL "https://www.manageengine.com/products/service-desk/free-it-help-de...". The banner features a cartoon character of a man in a suit with a speech bubble containing a checkmark, surrounded by a cloud of small icons. Text on the banner includes "60,000+ Companies" and "Help desk module is now FREE!". At the bottom of the banner, it says "Run queries without restrictions". Navigation links for the software include Active Directory, Application, Desktop & Mobile, Help Desk, Network, Server, IT Security, MSP, Cloud, Unified IT, Overview, Features, Demo, Get Quote, Resources, Support, Download, and a "Download" button.

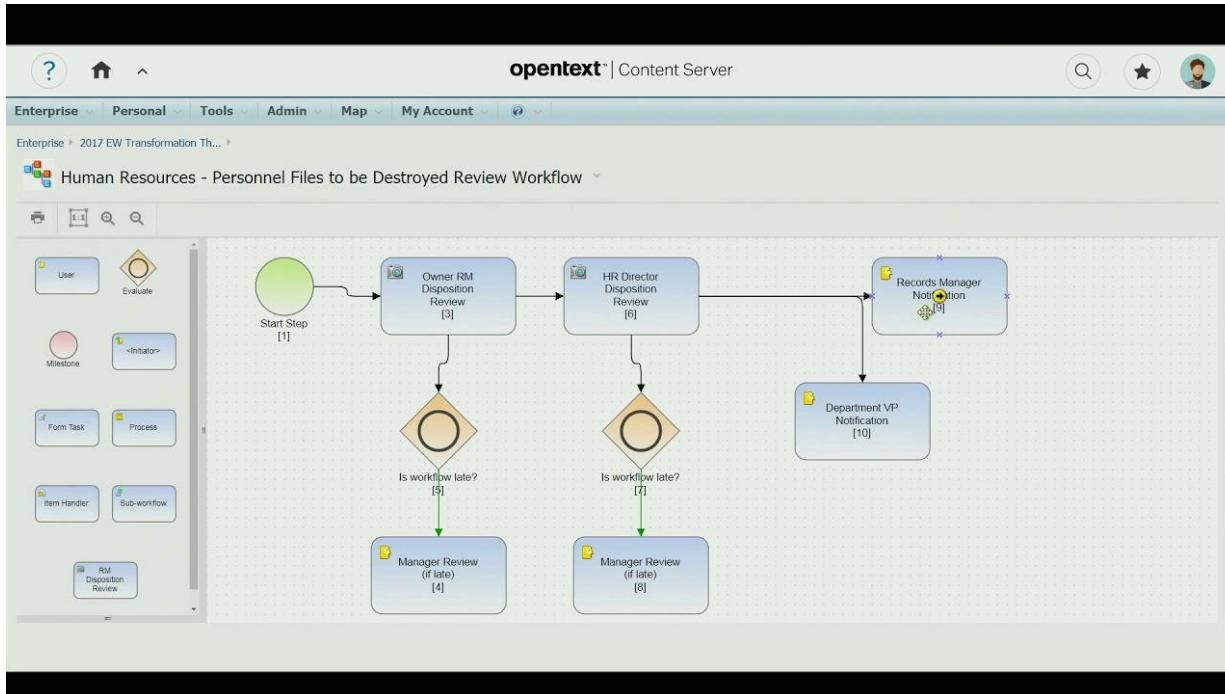


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Key Portal Segments – Document Imaging

Document Imaging & Workflow

- Combine imaging and workflow
- Dynamic Forms can image after workflow is complete
- Ellucian workflow will be more complex and require designated staffing

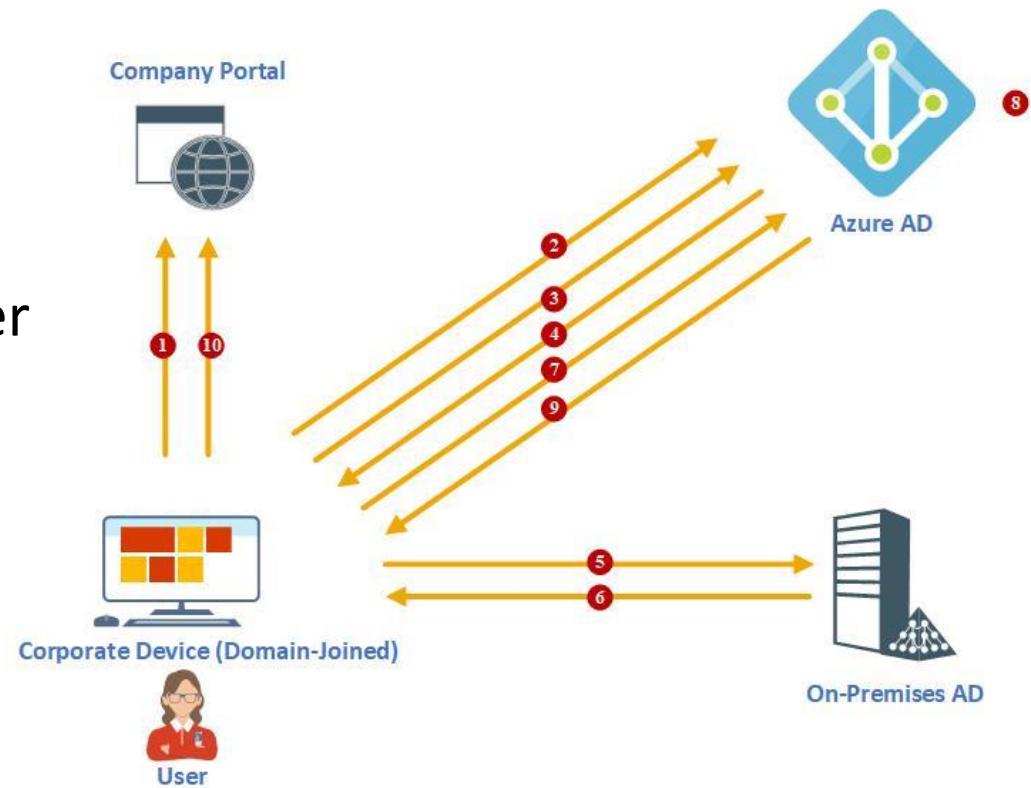


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Key Portal Segments Integrations

Why are integrations important?

- Single point of entry/SSO
- Seamlessly navigate to other resources
 - CatPaws
 - Canvas
 - Recruit
- APIs and nightly data files

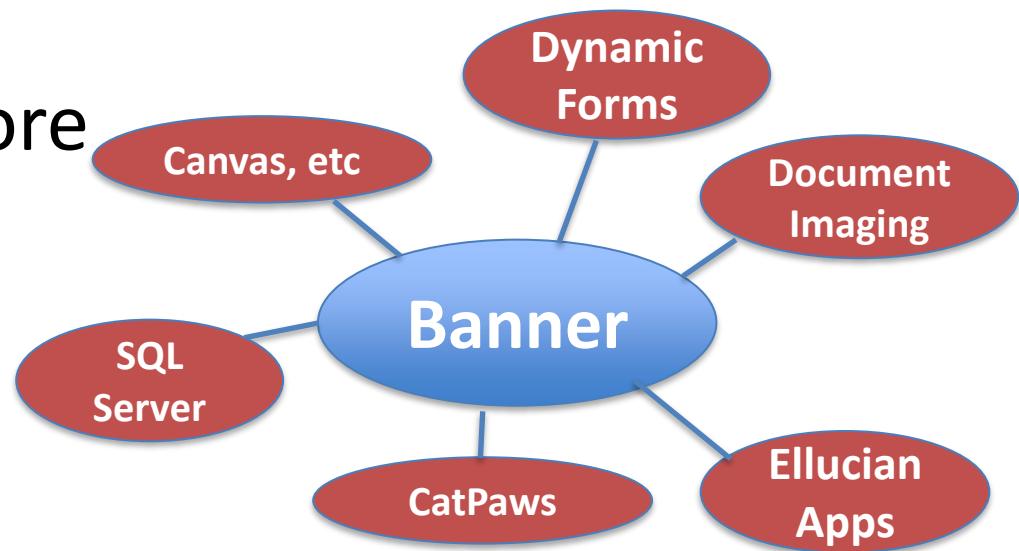
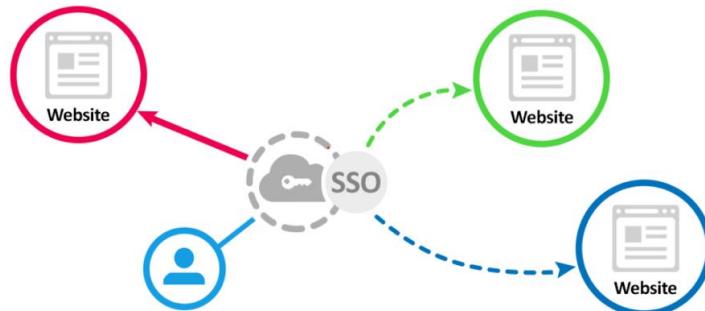


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Key Portal Segments - Integrations

Seamless Navigation - SSO

- Single point of entry
- Single Sign-on
- Banner data at the core
- SQL Server
- 3rd party applications



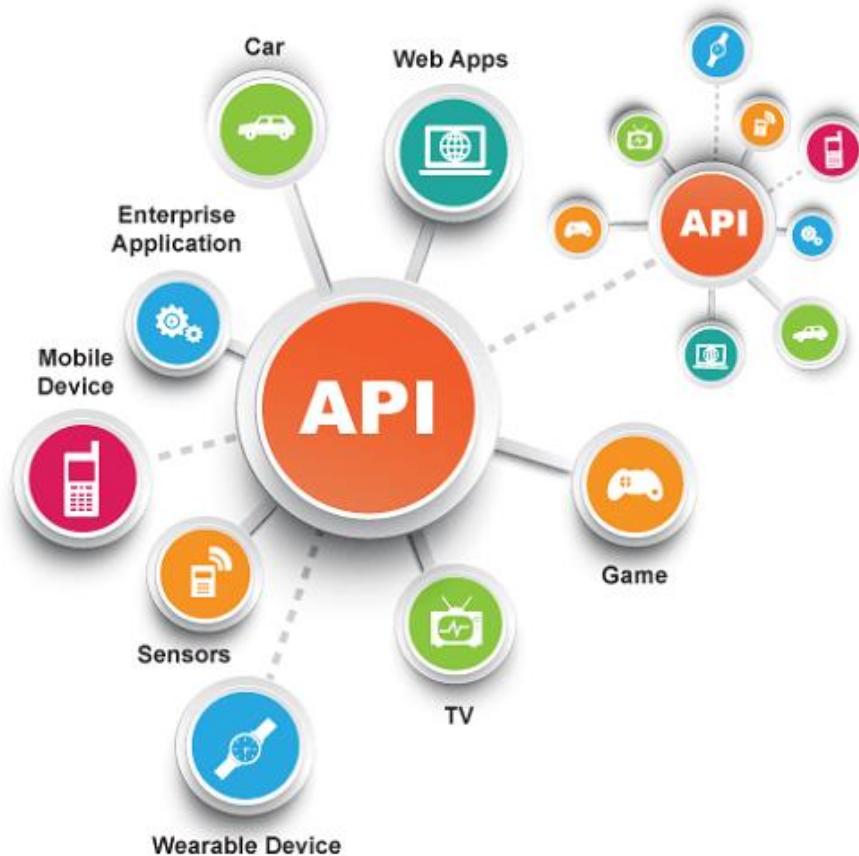
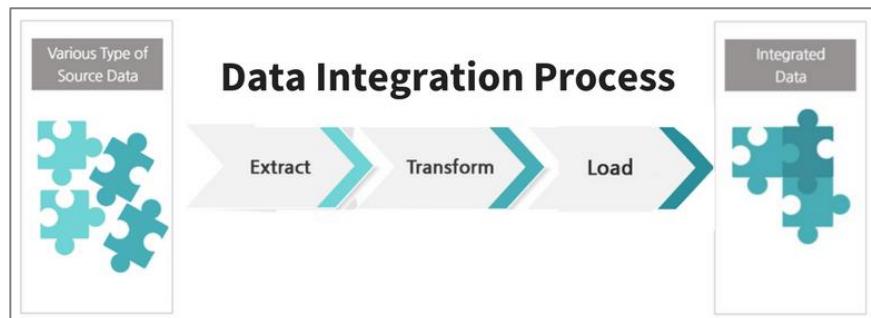
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Key Portal Segments - Integrations

APIs and Data Integrations

Nightly data files

- Nightly transfer of files between systems/databases
- Using APIs to efficiently share data between Banner and other applications



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Northwest Portal Strategy

Portal Demo

Putting the pieces
together



NORTHWEST
MISSOURI STATE UNIVERSITY

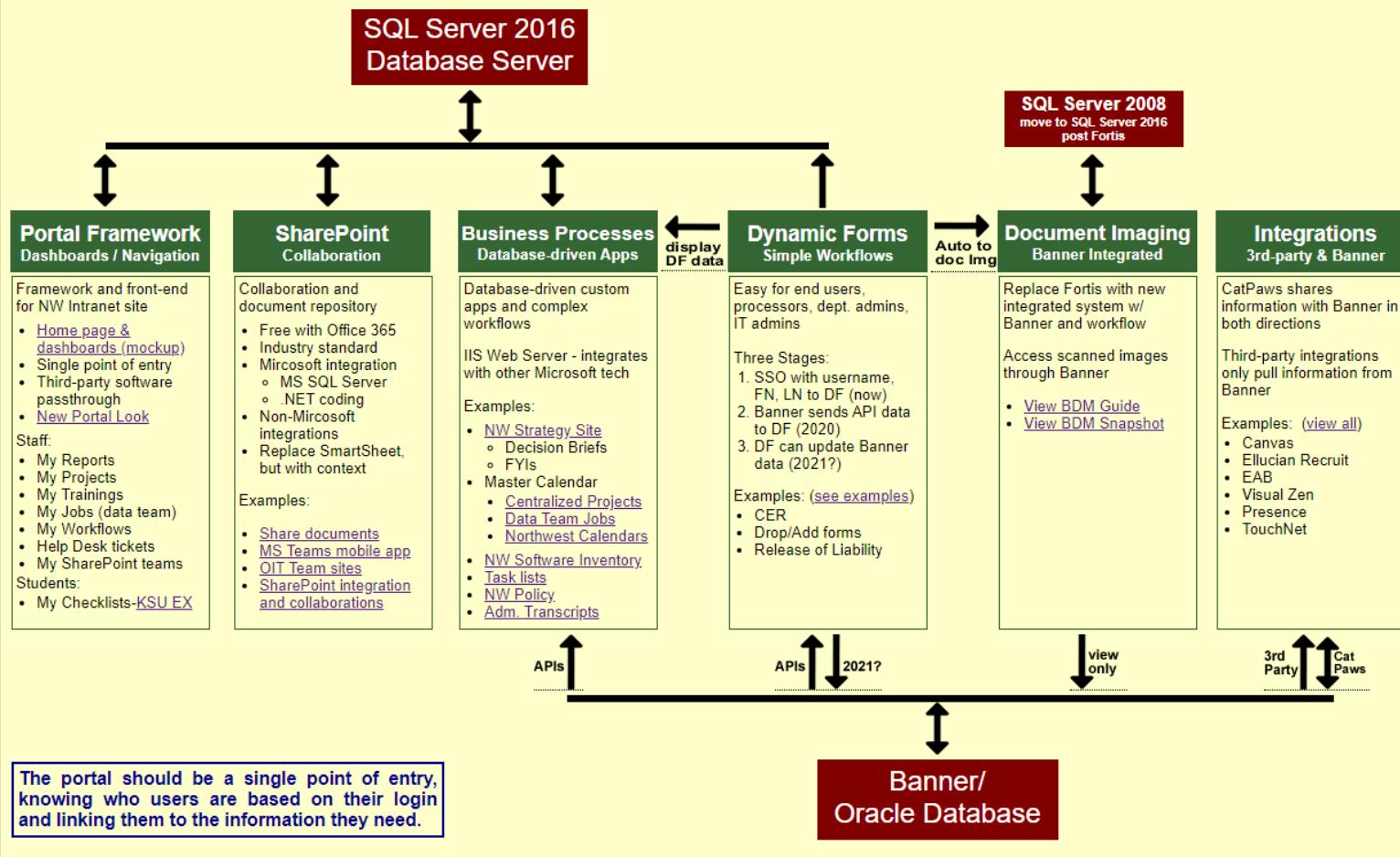
Jeff Thomas – AVP Information Technology

Portal Dataflow and Relationship Map

Northwest Portal Architecture Proposal

There are several elements that make up the framework of the portal. Users will need to be seamlessly linked to them and these elements need to be carefully coordinated and synchronized.

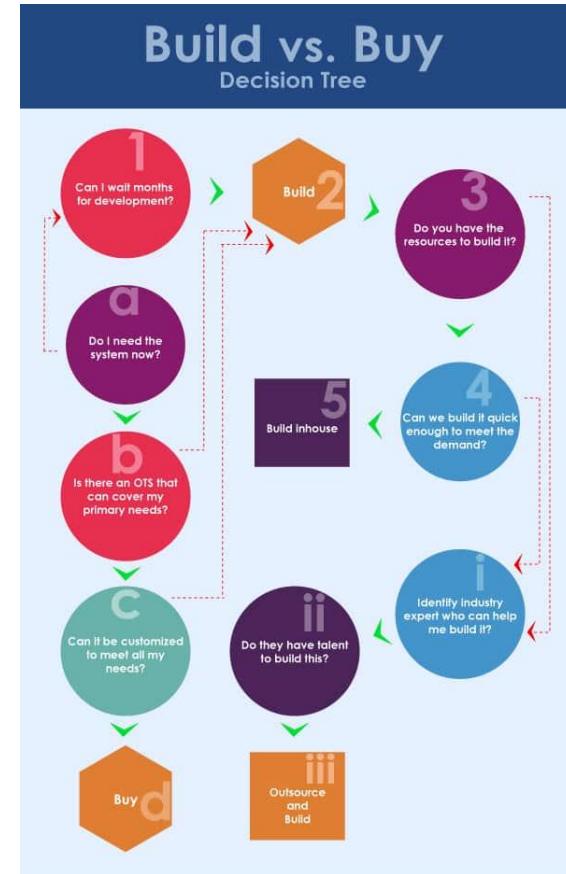
- Elements are in green and the arrows represent data flows.



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Future Northwest Portal Decision Point Options

1. Keep Luminis
 - Out of maintenance
 - Should not develop further
2. Buy new Ellucian Portal
 - \$40,000 per year
 - Based on SharePoint
 - Brand new, little feedback
3. Develop Custom
 - Build only what we need and scale up
 - myNorthwest portal backup site already created



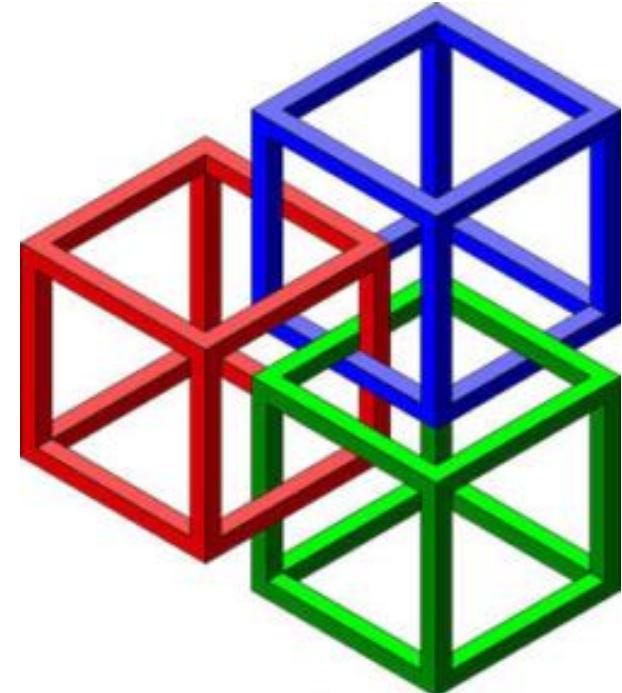
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Future Northwest Portal

Building a Custom Portal

Design the Framework

- Spin up Microsoft Web Server
- Design custom Web site and move out-of-maintenance myNorthwest portal content to new site
- Configure SSO for online workflow (Dynamic Forms)
- Start replacing PDFs with online workflow
- Start building data-driven, interactive programs
- Start adding interactive programs as needed
 - Decision Briefs, Master Calendar, etc.
- Spin-up SQL Server instance
 - Currently using MS Access databases in test
- Learn to use Banner APIs with workflow and custom programs to create dynamic user experiences
- Integrate document imaging with workflow



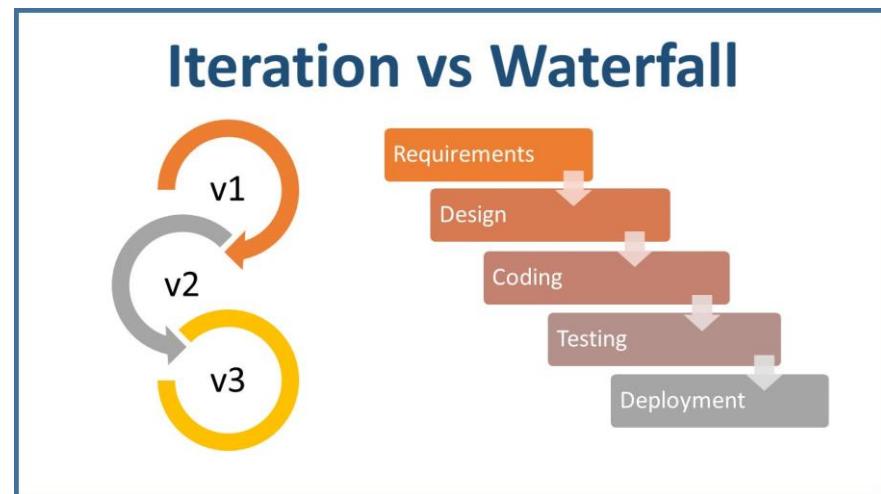
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Future Northwest Portal Staff Commitment Needed

- Can't only focus on the willing
 - Too many cross-functional processes
 - Most divisions haven't provided workflow requests
 - We need to weigh the form owner's preferences vs. the greater good of Northwest
 - The iterative approach requires more engagement

Iteration *is* Agile

“Don’t let the perfect be the enemy of the good”



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Northwest Portal Strategy



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