

SUNGARD SUMMIT 2010
Today's Priorities. Tomorrow's Possibilities.

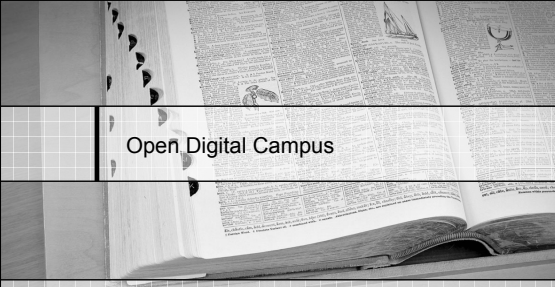
Banner Workflow Kick-off

Presented by: Joshua Aversa
SunGard Higher Education
April 11, 2010
Session ID 0718

Agenda Slide

- What is Banner Workflow
- Client Updates
- Updated RPE Process
- Professional Services Update
- Release Updates
- The Banner Workflow Roadmap
- Client Workflow Commons
- Banner Workflow at Summit 2010

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Open Digital Campus

Our vision and framework for making digital campus environments more flexible, efficient, innovative and cost-effective

What is Banner Workflow

Banner Workflow automates business processes by moving documents, information, and tasks between participants
Activities Organized in UML Diagrams

Started By

- Business Events Through the Database or Web Services
- People

Utilizes

- Banner
- Custom Forms
- Manual Activities
- Approvals
- 3rd Party Integration
- Attachments
- BDMS
- Email
- Database

Progressed by

- Business Rules and Conditions to Paths, Roles, People in parallel or in sequence

Results in

- Better communication
- Timeliness
- Consistency
- Responsiveness
- Notification

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Banner Workflow Client Updates

Welcome new Banner Workflow Clients!

Blinn College	Morehouse School of Medicine
California University of Pennsylvania	Shippensburg University
Colorado Community College System	Skidmore College
Dawson Community College	Slippery Rock University
East Stroudsburg University	SUNY Maritime College
Eastern Illinois University	TAFE South Australia - DFEEST
Escuela Politecnica del Ejercito	Texas State University-San Marcos
Goldsmiths College, University of London	Universidad San Sebastian
INSPER Instituto de Ensino e Pesquisa	University of New Haven
ISCP - Sociedade Educacional S/A	University of South Carolina, Columbia
Kentucky State University	University of the District of Columbia
Miles Community College	

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Recent Case Study – St. Johns University

Combination of Banner Workflow and BDMS Delivers Business Process Improvements and Improved Customer Service at St. John's University

- Needed to quickly and efficiently process additional 32,000 applications and accompanying documentation
 - Achieved significant business process improvements throughout the university
 - Reduced processing time for applications by 86% - from two weeks to two days
 - Delivered improved service to students, deans and other internal staff
 - Gained ability to better manage staff workload whether in or away from office



Recent Case Study – St. Johns University

A few notable quotes from the study:

— “By incorporating workflow with imaging, we have achieved significant business process improvements, improved service to our students and we are leveraging our investment and resources in our Banner ERP.”

— “Even though our freshman students were one of 53,000 applicants, they didn't feel like they were part of a big number. They felt like they were being reviewed promptly and getting good service. ”



— “I seriously doubt we could have handled the increased volume if we were not using imaging and workflow. The solutions enabled us to handle the increase without increasing clerical staff and to continue to provide great customer service.”

Upcoming Case Study – University of Denver

Contribute to university's sustainability initiatives and streamline work processes using Banner Workflow, BDMS, and Banner Self-Service

Results:

- Consumption of paper has been greatly reduced
- Processes are streamlined and more transparent
- Staff members can process about 15 new hires in the time it used to take to complete one
- Auditing trail is strengthened
- Data is more accurate

Upcoming Case Study – University of Denver

- **A few notable quotes from the study:**
 - “Imaging just provides an electronic picture of a document, but when you incorporate workflow, you find many instances where you don’t even need a paper document anymore”
 - “In the past, [the new hire process] was a lengthy, paper-driven process that often times required additional communication between the central office and the hiring unit. Now the entire process for a new hire can be executed in just a few minutes.”
 - “Workflow is very important to our university. It translates to improvement in processes which ultimately impact the bottom line. It helps us to do more with our existing resources and it greatly reduces errors.”


Recent Client Case Studies - Wayne State University

SunGard Higher Education Banner Workflow Accelerates Processes and Improves Student Services at Wayne State University

- **At peak times Wayne State will process 250-300 grade changes a day. Each one used to take up to a month to process. With Banner Workflow they now have most processed within a minute!**
- **Not only does that speed free up those students to move forward with other administrative processes, the workflow also helps them give better customer service by automatically notifying the process stakeholders all along the way.**

Recent Client Case Studies - Wayne State University

- **A few notable quotes from the study:**
 - “We are always being asked to do more with less, and Banner Workflow is a great enabler to meet this challenge. Any process that is labor intensive, complicated, and takes a lot of time for people to do is ripe for Banner Workflow.”
 - “I can’t say enough good things about the Banner Workflow product. It has been one of the most beneficial applications since we implemented the Luminis Platform and Banner Self Service on our campus.”

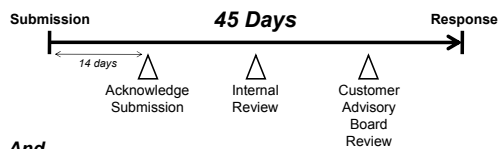


Updated RPE Process

New RPE Management Process

Our Commitment to You:

Submission **45 Days** Response



And...

We will review the entire inventory of RPEs from January 1, 2006 to today by the end of August 2010.

More Information is Available via the Customer Support Center (FAQ 1-B2T8YC) or ActionLine


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New RPE Management Process – Next Steps

- Continue the RPE Inventory Update Process through August
- Create RPE Management Area on Commons
 - This is how you will measure us – how we insure transparency
- More Information is Available via the Customer Support Center (FAQ 1-B2T8YC) or ActionLine

Inventory Update	
Milestone	Date
16% Complete	April 2010
33% Complete	April 2010
66% Complete	June 2010
100% Complete	August 2010

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Banner Workflow Services

Presented by: Lori Mauthe

Helping You Get Workflow Up and Running

Service Packages	Value	Service
Package 1: Banner Workflow Basic	See the value Banner Workflow can provide with minimal effort from your team	60 Hours
Package 2: Banner Workflow Foundations	Begin to leverage Banner Workflow by learning how to build and deploy your own workflows	140 Hours
Prebuilt Workflow Models	Further leverage Prebuilt Banner Workflow Models from SunGard Higher Education	Fixed fee plus Hours
Workflow Training	SQL for Workflow Web Services for Workflow Workflow Process Analysis	40 Hours each

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Prebuilt Workflows

<p style="text-align: center;">General / Other</p> <ul style="list-style-type: none"> Name Change Notification Address Change Notification Deceased Notification Duplicate Record Processing Queue List Management 	<p style="text-align: center;">Finance</p> <ul style="list-style-type: none"> Purchase Order Complete Notification Requisition Approval Notification New Detail Code Notification
<p style="text-align: center;">Advancement</p> <ul style="list-style-type: none"> New Designation Process New Gift Notification 	<p style="text-align: center;">Human Resources</p> <ul style="list-style-type: none"> New Hire Notification Termination Notification New Position Request Process
<p style="text-align: center;">Financial Aid</p> <ul style="list-style-type: none"> New Financial Aid Award Notification Withdrawn Student Notification 	<p style="text-align: center;">Student</p> <ul style="list-style-type: none"> Change of Student Status Notification Course/Section Cancelled Notification

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Travel & Expense Workflow Options

Level 1 - Ad Hoc

- 1st approver based on profile
- Options for approval include 'approve and next approver'
- Must key in the approver's ID

Level 2 - Finance Approval Queue

- 1st approver based on profile
- Subsequent approvals based on configured Finance Approval Queue
- Separate Document types configured
- Based on fund code, dollar amount, organization

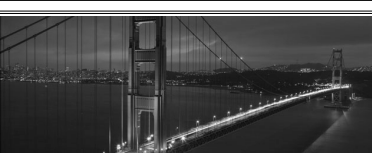
Level 3 - Site Specific Requirements

- Based on level 1 and 2
- Site specific extensions

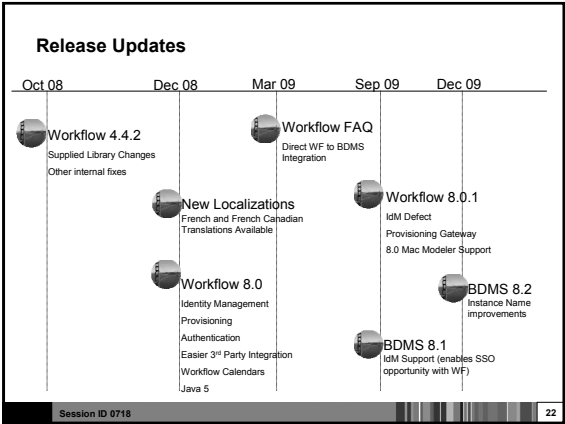
Remember...

- **Your next steps**
 - Contact your Account Manager or Practice Manager Lori Mauthe (Lori.Mauthe@sungardhe.com or call 972-439-4802) to get more information
 - Stop by the SunGard booth to obtain the Banner Workflow Success Story

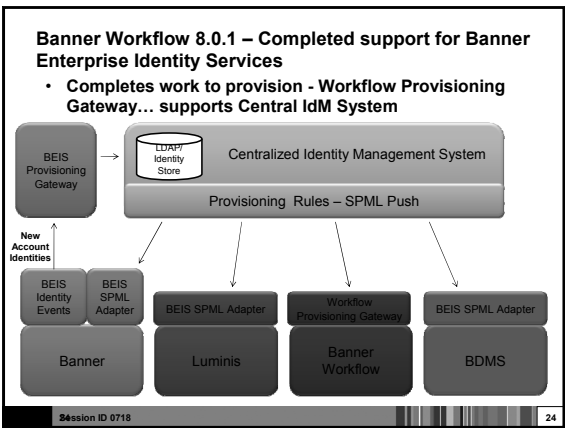




Release Updates

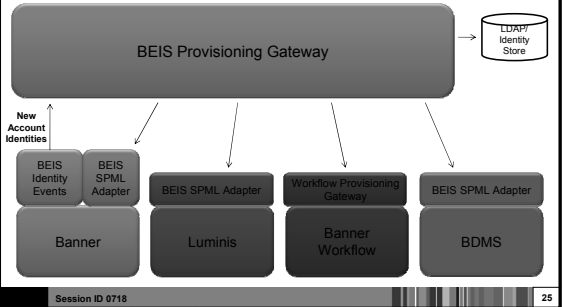


- ### Banner Workflow 8.0.1
- Completed support for Banner Enterprise Identity Services
 - Simplified configuration of access managers
 - Support for Banner Enterprise Identity Services 8.1 release
 - Release synced with BDMS 8.2 for SSO options
 - 8.x Workflow Modeler support on OSX
 - New 3 year VeriSign certificate
- Session ID 0718 23



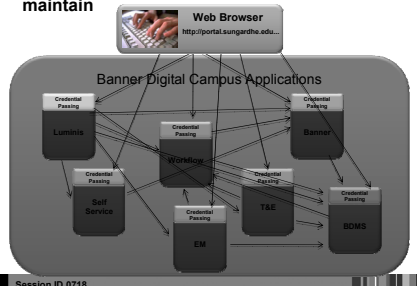
Banner Workflow 8.0.1 – Completed support for Banner Enterprise Identity Services

- Completes work to provision - Workflow Provisioning Gateway... supports Simpler LDAP based centralization



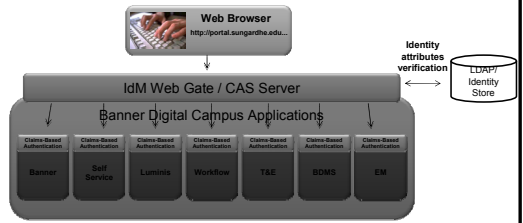
Legacy Single Sign On

- Today's SSO is typically a one-off, between two specific applications, and creates a spaghetti diagram of accounts that are individually synchronized and hard to maintain



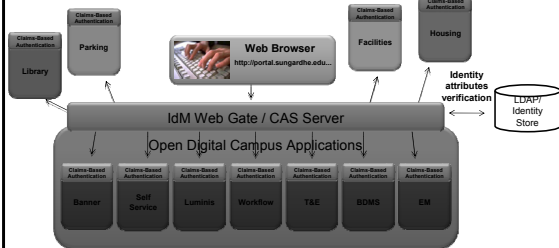
Single Sign On – When utilizing Access Managers and Banner Enterprise Identity Services

- With centralized Access Management, the applications are signed-in "globally", decreasing the complexity to maintain and increasing the opportunities for SSO between applications without needing a one-off connection.



Single Sign On – Additional Opportunities from other applications

- Other applications under the same Access Manager present an opportunity for more seamless use of those in a unified way.

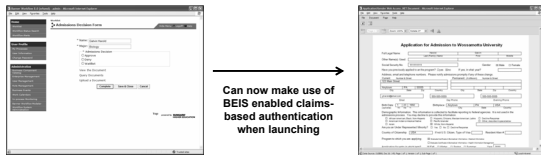


Banner Workflow 8.0.1 – Support for Banner Enterprise Identity Services 8.1 release

- Account provisioning XPath filters
 - Determine if the identity message should go to a specific target
 - `/prx:UDCIdentity/prx:institutionRoles/prx:institutionrole[prx:role='STUDENT']`
 - Especially useful if using BEIS without IdM Solution
- Identity data export filters
 - Improved mechanisms for loading UDC Ids and synchronizing prior identity data
- SPML LDAP adapter
 - Directly provision LDAP v3 type directories
 - Uses XPath expressions to map attributes

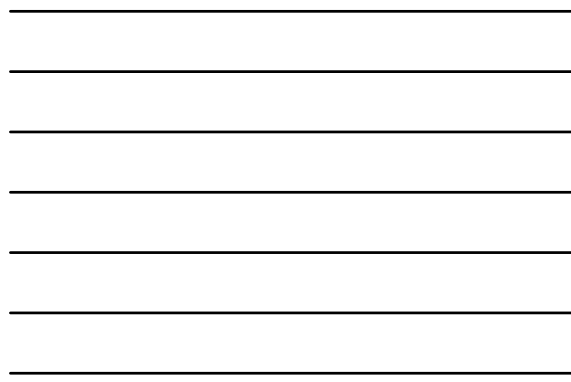
Banner Workflow 8.0.1 – synced with BDMS 8.1 for SSO options

- FAQ release last year on how to integrate BDMS documents with Workflow
 - *Still required an initial sign-in
- With BDMS 8.1's support of IdM, authentication SSO options increased – including launching from Workflow

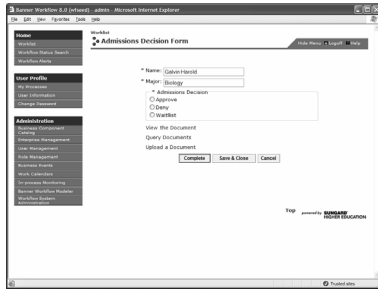


Banner Workflow to Banner Document Integration

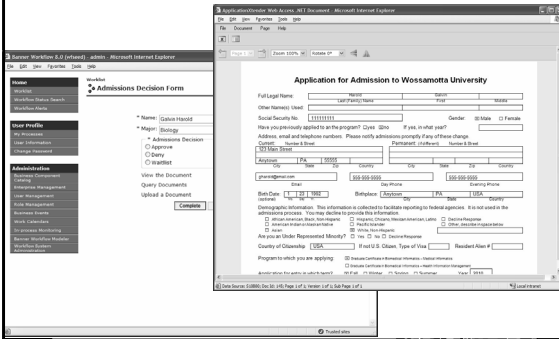
- Enabled integration from a Workflow Custom Form Activity:
 - Document launching from Banner Workflow
 - Document query from Workflow (eg...multiple documents)
 - Document attachment/save to BDMS from Banner Workflow
- Is set up by WF analyst and does not require IT support
- Does require one log-in for the first document action when Banner Enterprise Identity Management based authentication is not in place.



BDMS links can be added to the Custom Form Activity



One link contextually launches a BDMS Document



Another link can run a Query of documents in BDMS

The screenshot shows a web browser window with a table of query results for 'Application for Admission to Wossamotta University'. The table has columns for Application ID, Application Name, Status, and Date. Below the table is a form with various input fields for personal information, including name, address, phone numbers, and birth date. The form is titled 'Application for Admission to Wossamotta University'.

Application ID	Application Name	Status	Date
1000000001	ADMISSIONS 8700A ADMISSIONS APP	QUEUED	12/14/2011 10:40:10 AM
1000000002	ADMISSIONS 8700B HIGH SCHOOL TRANSFER	QUEUED	12/14/2011 10:40:10 AM
1000000003	ADMISSIONS 8700C HIGH SCHOOL TRANSFER	QUEUED	12/14/2011 10:40:10 AM
1000000004	ADMISSIONS 8700D HIGH SCHOOL TRANSFER	QUEUED	12/14/2011 10:40:10 AM

You can also include a link to add a document to BDMS

The screenshot shows a web browser window with a 'Submit New Page' dialog box open. The dialog box has a 'No Page?' field and a 'Submit' button. The background shows the same web application interface as the previous screenshot.

After including parameters, you can quickly add these links to a custom form activity

The screenshot shows a workflow designer interface. On the left, there is a 'Properties' pane for a 'CustomActivity_BDMS_Integration' activity. The 'Definition' section shows the activity name and description. The 'Presentation' section shows the background color and font color. The 'Component' section shows the custom activity description. The 'Performance' section shows the role and consistency. The 'Supplemental' section shows the mandatory and optional flags. The 'Tracking' section shows the logging and logging percentage. On the right, there is a 'Custom Activity Designer' window showing a form with a 'Submit' button. The form is titled 'Application for Admission to Wossamotta University'.

Where can I find out more about this Integration?


- FAQ 1-4ZY08F
- Listserv posting and Commons
- Related Sessions:

Time	Session Code and Title	Room	Primary Presenter
Monday, April 12			
1:00 - 12:00 PM	1103 - From Paper to Web: Online Grad Admissions	2018 (W)	Jacqueline Sene - University of Denver
3:30 - 5:30 PM	1242 - Leveraging Imaging and Workflow in T&E	2014 (W)	Jeff Jones- SunGard Higher Education
Tuesday, April 13			
10:00 - 11:00 AM	459 - Integrating BDMS with Banner Workflow	2014 (W)	Joanne Rajotte - Langara College

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BDMS 8.2 – Workflow Instance Name Improvements

- Prior to 8.2, events from BDMS came over with workflow specific name of “undefined”
- Name now generated based on BDMS document name, type of event, and Banner ID for easy searching



Organization	Workflow	Activity	Priority	Created
Root	Insert APPLICATION INFO for MCK007 Building	Manual 1	Normal	11-Nov-2009 06:40:44 AM
Root	Insert APPLICATION INFO for MCK007	Manual 1	Normal	11-Nov-2009 06:40:44 AM
Root	Insert APPLICATION INFO for AM0139/4	Manual 1	Normal	11-Nov-2009 06:38:04 AM

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The Banner Workflow Roadmap

Banner Workflow Roadmap

Release Date	Component	Release	Key Features
Q4 2009 - Released	BDMS – Banner Workflow integration		Improved integration between BDMS and Workflow for document events
Q2/Q3 2010	Banner Workflow	8.1	Enhanced role and user selection functions Custom Form Activity Enhancements Data driven drop-downs, etc. Luminis 5 Workflow portlets
2H 2010	Banner Workflow	8.2	Common UI updates and other UI and usability improvements Infinity Process Platform interoperability Timer activity Updated modeler look and feel
2011	Pre Packaged Workflow And Process Models		Additional available pre-packaged workflows
2011	Banner Workflow	8.3	Productivity Enhancements Worklist improvements Search improvements Additional modeling tools and functionality

This document contains forward-looking statements based on current expectations, forecasts and assumptions of SunGard Higher Education that involve risks and uncertainties. Forward looking statements are subject to risks and uncertainties associated with SunGard Higher Education's business that could cause actual results to vary materially from those stated or implied by such forward-looking statements.

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Client Workflow Commons

The Commons: What Is It?

An online community where SunGard Higher Education customers and employees can share experiences, ask questions, find answers, and connect to a collaborative and informed network.



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The Commons: What's the Value?

- **Share**
 - Thoughts, ideas, best practices, and knowledge with each other and us
 - **Learn**
 - From over 1,600 institutions worldwide and thousands of minds, all in one community
 - **Explore**
 - Rich content, answers to your questions, and easy to use communication and collaboration tools
 - **Create**
 - Relationships through collaboration and communication that enable success
- stop by the booth to join the conversation!*



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Commons Communities

News

Bookmarks

Community Statistics

Current Community

Start a Discussion

Find It Fast

Community Workspace

Upcoming events

Interact with presenters and your peers post-Summit



- I've asked all presenters to post and continue some of those "after their presentation" podium conversations in the Banner Workflow Community
- Post questions/comments similar to what you would have on the WORKFLOW listserv

<http://www.edu1world.org/CommonsBannerWF/>

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Community Source Initiative: What Is It?

A unique collaborative software development model that harnesses the creative power of the customer community.



Community Source Initiative: What's the Value

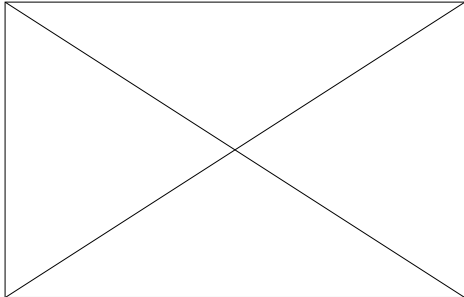
- Worldwide collaboration with peers
- Benefits of open source model, without the risk
- More solution enhancements
 - Quicker delivery through acceptance of customer-created code
 - Product quality through structured functional and technical review committees





Other Banner Workflow Sessions at Summit

Laundry Process Improvement



Source of lifetime Laundry time :
<http://www.bis.gov/opub/mlr/2009/07/art3full.pdf>

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Questions & Answers



<http://www.edu1world.org/CommonsBannerWF/>

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Thank You!

Joshua Aversa
joshua.aversa@sungardhe.com

Please complete the online class evaluation form
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<http://www.edu1world.org/CommonsBannerWF/>

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