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

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
- People

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

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

Results in
- Better Communication
- Timeliness
- Consistency
- Responsiveness
- Notification

Banner Workflow Client Updates

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

△ Acknowledge Submission
△ Internal Review
△ Customer Advisory Board Review

*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

### Inventory Update

<table>
<thead>
<tr>
<th>Milestone</th>
<th>Date</th>
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<tbody>
<tr>
<td>16% Complete</td>
<td>April 2010</td>
</tr>
<tr>
<td>33% Complete</td>
<td>June 2010</td>
</tr>
<tr>
<td>66% Complete</td>
<td>August 2010</td>
</tr>
<tr>
<td>100% Complete</td>
<td>August 2010</td>
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**Goal Attained**
Banner Workflow Services

Presented by: Lori Mauthe

Helping You Get Workflow Up and Running

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

<table>
<thead>
<tr>
<th>General / Other</th>
<th></th>
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<tbody>
<tr>
<td>Name Change Notification</td>
<td></td>
</tr>
<tr>
<td>Address Change Notification</td>
<td></td>
</tr>
<tr>
<td>Deceased Notification</td>
<td></td>
</tr>
<tr>
<td>Duplicate Record Processing</td>
<td></td>
</tr>
<tr>
<td>Queue List Management</td>
<td></td>
</tr>
<tr>
<td>Advancement</td>
<td></td>
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<tr>
<td>New Designation Process</td>
<td></td>
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<tr>
<td>New Gift Notification</td>
<td></td>
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<tr>
<td>Financial Aid</td>
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<tr>
<td>New Financial Aid Award</td>
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<tr>
<td>Notification</td>
<td></td>
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<tr>
<td>Withdrawn Student Notification</td>
<td></td>
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<tr>
<td>Finance</td>
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<tr>
<td>Purchase Order Complete</td>
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<tr>
<td>Notification</td>
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<tr>
<td>Requisition Approval</td>
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<tr>
<td>Notification</td>
<td></td>
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<tr>
<td>New Detail Code Notification</td>
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<td>Human Resources</td>
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<td>New Hire Notification</td>
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<td>Termination Notification</td>
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<td>New Position Request Process</td>
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<tr>
<td>Student</td>
<td></td>
</tr>
<tr>
<td>Change of Student Status</td>
<td></td>
</tr>
<tr>
<td>Notification</td>
<td></td>
</tr>
<tr>
<td>Course/Section Cancelled</td>
<td></td>
</tr>
<tr>
<td>Notification</td>
<td></td>
</tr>
</tbody>
</table>
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

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**Banner Workflow 8.0.1 – Completed support for Banner Enterprise Identity Services**

- Completes work to provision - Workflow Provisioning Gateway... supports Central IDM System

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**Release Updates**

<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
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<tbody>
<tr>
<td>Oct 08</td>
<td>Workflow 4.4.2</td>
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<td></td>
<td>Supplied Library Changes</td>
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<tr>
<td></td>
<td>Other Internal fixes</td>
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<tr>
<td>Dec 08</td>
<td>New Localizations</td>
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<td></td>
<td>Search andinvites Users</td>
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<td>Translation Available</td>
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<td>Mar 09</td>
<td>Workflow FAQ</td>
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<td>Direct WS to BDMS Transformation</td>
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<tr>
<td>Sep 09</td>
<td>Workflow 8.0.1</td>
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<tr>
<td></td>
<td>Identity Management</td>
</tr>
<tr>
<td></td>
<td>Provisioning</td>
</tr>
<tr>
<td></td>
<td>Authentication</td>
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<td>2nd Party Integration</td>
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<td>Workflow Calendar</td>
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<td>Dec 09</td>
<td>BDMS 8.2</td>
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<td></td>
<td>Version Note</td>
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<td></td>
<td>Improvements</td>
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<td>Mar 09</td>
<td>BDMS 8.1</td>
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<tr>
<td></td>
<td>IdM Defect</td>
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<tr>
<td></td>
<td>Provisioning Gateway</td>
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<tr>
<td></td>
<td>8.x Modeler Support</td>
</tr>
<tr>
<td>Sep 09</td>
<td>Workflow FAQ</td>
</tr>
<tr>
<td></td>
<td>Direct WS to BDMS Transformation</td>
</tr>
</tbody>
</table>

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**Banner Workflow FAQ**

- Direct WS to BDMS Transformation

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**Banner Workflow 8.0.1 – Completed support for Banner Enterprise Identity Services**

- Completes work to provision - Workflow Provisioning Gateway... supports Central IDM System

---

**Banner Workflow FAQ**

- Direct WS to BDMS Transformation
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.

Parking
Claims-Based Authentication
Library
Facilities
Housing
Claims-Based Authentication
Open Digital Campus Applications
Web Browser
http://portal.sungardhe.edu...
LDAP/Identity Store
Identity attributes
Banner
Claims-Based Authentication
Self Service
Claims-Based Authentication
Luminis
Claims-Based Authentication
Workflow
Claims-Based Authentication
T&E
Claims-Based Authentication
BDMS
Claims-Based Authentication
EM
Claims-Based Authentication
IdM Web Gate / CAS Server

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
  — 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

Can now make use of BEIS enabled claims-based authentication when launching
Banner Workflow to Banner Document Integration

- Enabled integration from a Workflow Custom Form Activity:
  - Document launching from Banner Workflow
  - Document query from Workflow (e.g., 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

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

After including parameters, you can quickly add these links to a custom form activity
Where can I find out more about this Integration?

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

<table>
<thead>
<tr>
<th>Time</th>
<th>Session Code and Title</th>
<th>Room</th>
<th>Primary Presenter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monday, April 12</td>
<td>11:00 - 12:00 PM</td>
<td>1103 - From Paper to Web: Online Grad Admissions</td>
<td>112A (M)</td>
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<tr>
<td></td>
<td>2:30 - 3:30 PM</td>
<td>1242 - Leveraging Imaging and Workflow in T&amp;F</td>
<td>114 (M)</td>
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<tr>
<td>Tuesday, April 13</td>
<td>10:00 - 11:00 AM</td>
<td>459 - Integrating BDMS with Banner Workflow</td>
<td>474 (M)</td>
</tr>
</tbody>
</table>

BDMS 8.2 – Workflow Instance Name Improvements

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

The Banner Workflow Roadmap
Banner Workflow Roadmap

<table>
<thead>
<tr>
<th>Release Date</th>
<th>Component</th>
<th>Release</th>
<th>Key Features</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q4 2009 - Released</td>
<td>BDMS - Banner Workflow integration</td>
<td></td>
<td>Improved integration between BDMS and Workflow for document events</td>
</tr>
<tr>
<td>2H 2010</td>
<td>Banner Workflow 8.1</td>
<td></td>
<td>Enhanced role and user selection functions, Custom Form Activity Enhancements, Data driven drop-downs, etc.</td>
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<tr>
<td>Q1 2010</td>
<td>Banner Workflow 8.2</td>
<td></td>
<td>Common UI updates and other UI and usability improvements, Infinity Process Platform interoperability, Timer activity, Updated modeler look and feel</td>
</tr>
<tr>
<td>2H 2010</td>
<td>Pre Packaged Workflow And Process Models</td>
<td></td>
<td>Additional available pre-packaged workflows</td>
</tr>
<tr>
<td>2011</td>
<td>Banner Workflow 8.3</td>
<td></td>
<td>Productivity Enhancements, Medical improvements, Additional modeling tools and functionality</td>
</tr>
<tr>
<td>2011</td>
<td>Pre Packaged Workflow And Process Models</td>
<td></td>
<td>Additional available pre-packaged workflows</td>
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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.

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.
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!

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/
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
### Workflow Sessions at Summit – Monday

<table>
<thead>
<tr>
<th>Time</th>
<th>Session Code and Title</th>
<th>Room</th>
<th>Primary Presenter</th>
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</thead>
<tbody>
<tr>
<td>9:30 - 10:30 AM</td>
<td>830 - Intro to Banner Workflow</td>
<td>605</td>
<td>Carolyn Clark - SunGard Higher Education</td>
</tr>
<tr>
<td>10:30 - 11:30 AM</td>
<td>835 - Using HTML with Workflow</td>
<td>606</td>
<td>William Price - Savannah College of Art and Design</td>
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<tr>
<td>11:30 - 12:00 PM</td>
<td>818 - Banner Access Request Workflow</td>
<td>601</td>
<td>Heather Sege - University of Denver</td>
</tr>
<tr>
<td>1:30 - 2:30 PM</td>
<td>818 - Using Workflow in Banner Advanced</td>
<td>604</td>
<td>Carolyn Clark - University of Denver</td>
</tr>
<tr>
<td>2:30 - 3:30 PM</td>
<td>820 - Why Workflow is Faster Than You Are</td>
<td>603</td>
<td>Shari Powell - Portland State University</td>
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### Workflow Sessions at Summit – Tuesday

<table>
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<th>Session Code and Title</th>
<th>Room</th>
<th>Primary Presenter</th>
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<tbody>
<tr>
<td>10:00 - 11:00 AM</td>
<td>830 - Integrating BDMS with Banner Workflow</td>
<td>605</td>
<td>Joanne Rajotte - Langara College</td>
</tr>
<tr>
<td>11:00 - 12:00 PM</td>
<td>816 - Workflow - It's more than FYI</td>
<td>601</td>
<td>Susan Lutz - University of Denver</td>
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<tr>
<td>11:30 - 12:30 PM</td>
<td>820 - Workflow - Some Pain/Much Gain</td>
<td>604</td>
<td>Christine Stephens - Wayne State University</td>
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<tr>
<td>12:30 - 1:30 PM</td>
<td>834 - EP &amp; Workflow - No More Paper!</td>
<td>603</td>
<td>Anthony Lower - Temple University</td>
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<tr>
<td>1:30 - 2:30 PM</td>
<td>820 - Get Your Hands On Banner Workflow</td>
<td>602</td>
<td>Kimberly Lewis - Temple University</td>
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### Workflow Sessions at Summit – Wednesday +

<table>
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<tr>
<td>9:30 - 10:30 AM</td>
<td>730 - The Wonders of Workflow</td>
<td>605</td>
<td>Toby Boyle - Western Michigan University</td>
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<tr>
<td>9:30 - 10:30 AM</td>
<td>710 - Get Your Hands On Banner Workflow</td>
<td>606</td>
<td>Carolyn Clark - SunGard Higher Education</td>
</tr>
<tr>
<td>10:30 - 11:00 AM</td>
<td>710 - Workflow Work of P-Faculty</td>
<td>601</td>
<td>William Price - Savannah College of Art and Design</td>
</tr>
<tr>
<td>11:00 - 12:00 AM</td>
<td>710 - Workflow Work of P-Faculty</td>
<td>604</td>
<td>Heather Sege - University of Denver</td>
</tr>
<tr>
<td>12:00 - 1:00 PM</td>
<td>710 - Leveraging Imaging and Workflow in HR</td>
<td>603</td>
<td>Shari Powell - Portland State University</td>
</tr>
</tbody>
</table>

### Thursday, April 15 - Summit

Thanks to all of our Banner Workflow presenters!!!
Laundry Process Improvement

Source of lifetime Laundry time:

Questions & Answers

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

Thank You!
Joshua Aversa
joshua.aversa@sungardhe.com

Please complete the online class evaluation form
Session ID 0718

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