



# Introduction to Workflow

Joshua Aversa, Product Manager



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# Workflow Definitions and Concepts

## Workflow:

“...the automation of a business process, in whole or part, during which documents, information, or tasks are passed from one participant to another for action, according to a set of procedural rules.”



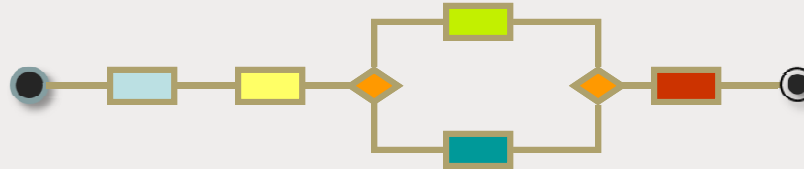
the Workflow Management Coalition™



# 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	Attachments
Custom Forms	BXS
Manual Activities	Email
Approvals	Database
3rd Party Integration	

Progressed by

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

Results in

Better communication  
Timeliness  
Consistency  
Responsiveness  
Notification

## **Workflow is a solutions framework that provides**

- **Intelligent movement of activities between participants with one view of all tasks**
- **Visibility to and reporting on processes and individual activities and to gather metrics**
- **Status of any running or completed workflow**
- **Confidential handling of sensitive work items**
- **Automated business events processing**
- **E-mail notification of new work**
- **Document attachments within email and work processes**
- **Custom activities design and deployment**
- **Banner, Luminis, and BXS integration**
- **External Integration**
  - **Desktop, Server, or Web Applications**
  - **14 web services for extra flexibility**

# Integration – SunGard Higher Education Applications

- **Banner**
  - SSO
  - Contextually Opens Forms
  - DB Procedures and SQL
  - Business Events
- **Luminis**
  - SSO
  - Worklist Channel
  - Instantiate Business Processes
  - Alerts Channel
- **BXS**
  - BXS Document Events integration
  - Launch of Forms linked to BXS Document
- **Identity Management**
  - With 8.0 release will participate in the same IdM Environment as other SunGard Higher Education Applications

# How is work distributed?

- **Role Based**
  - Activity sent to all users within the role
  - Any user may perform the task
- **Directed**
  - Activity sent to a specific user within the role
  - Specified user may perform the task
  - User can be derived from actual performer of a previous task
- **Proxy Based**
  - Temporary change to work item access
  - Helps easily manage short term staff absence, unexpected work process changes, or responsibility reassignment
  - Effective dated



# Workflow in Action



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Workflow Testing Login - powered by SunGard Higher Education - Microsoft Internet Explorer provided by

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Secure Access Login

User Name: admin

Password: .....

Login Cancel

Having problems logging in? [Click here.](#)

How do I get a user name and password?

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Make this my homepage.


[Click here](#) for instructions on how to make your browser load this page on startup.


Welcome to My University.

This secure site provides students, faculty and administrative staff with world-class Intranet and Internet services. This is where you can check e-mail, register for courses, and explore the Internet.

What's Inside?

 **E-mail:** Send and receive e-mail, and create your own personal address book.

 **Calendar:** Access and manage your personal, course and school calendars.

 **Groups:** Create, manage and join group homepages for clubs, affiliations and interests.

and much more...

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February 6, 2007

## Worklist



Organization	Workflow Name	Activity	Created	Details
Coastal College.BAY	<a href="#">Interview Kevin Smith</a> Ready	Interview Evaluation	06-Feb-2007 11:06:52 AM	
Coastal College	<a href="#">Interview James Horn</a> Ready	Register Candidate In Banner	06-Feb-2007 11:04:52 AM	
Coastal College.SAND	<a href="#">Interview Sarah Johnson</a> Ready	Interview Setup	06-Feb-2007 10:58:24 AM	

[Refresh](#) [Show Entire Worklist](#) [Open Workflow](#)

## My Processes



Coastal College  
[Administer Tenure Activities](#)  
[Interview Candidate](#)  
[New Gifts](#)  
[New Hire](#)

Coastal College.BAY  
[Interview Candidate](#)

Coastal College.SAND  
[Interview Candidate](#)

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## Workflow Alerts



Instance Name	Date	Process Name
<a href="#">James Adams donor new gift #G222</a> The workflow has stalled because none of the guard conditions on the outgoing transitions are satisfied	06-Feb-2007 10:41:22 AM	New Gifts

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Address http://malwfm3.corp.sct.com:7777/wfsummit/home/luminisRedirect.do?target=com.sct.workflow.web.struts.actions.redirect.ViewWorklistForwardSelector&token=1170811046937&renderer=luminis&hidecrumbs=false&hider Go Links

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Organization	Workflow	Activity	Priority	Created	
Coastal College.BAY	<a href="#">Interview Kevin Smith</a> Ready	Interview Evaluation	Normal	06-Feb-2007 11:06:52 AM	
Coastal College	<a href="#">Interview James Horn</a> Ready	Register Candidate In Banner	Normal	06-Feb-2007 11:04:52 AM	
Coastal College.SAND	<a href="#">Interview Sarah Johnson</a> Ready	Interview Setup	Normal	06-Feb-2007 10:58:24 AM	

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Stop Workflow Request

Organization: Coastal College.BAY

Workflow Name: Interview Kevin Smith

Activity Name: Interview\_Evaluation

Created Date: 06-Feb-2007 11:06:52 AM

Priority: 

Normal

Status: Ready

Workflow Attachments

Notes

Metrics

Details

Proxy

✓ Resume

Resume.doc (39 KB)

06-Feb-2007 11:01:43 AM

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Stop Workflow Request

Organization: Coastal College.BAY

Workflow Name: Interview Kevin Smith

Activity Name: Interview\_Evaluation

Created Date: 06-Feb-2007 11:06:52 AM

Priority: 

Normal

Status: Performing

Workflow Attachments

Notes

Metrics

Details

Proxy

Workflow

Work Item

Add Note

Work Item Note

User	Date	Note
admin	06-Feb-2007 09:15:52 PM	This candidate looks like a good candidate for this position.

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Workflow Name: Interview Kevin Smith  
Activity Name: Interview\_Evaluation  
Created Date: 06-Feb-2007 11:06:52 AM  
Priority:   
Status: Performing

Workflow Attachments	Notes	Metrics	Details	Proxy
	Workflow			Work Item
Expected Completion Date:		08-Feb-2007 09:00:00 AM		
Estimated Time:	00:00	16:00		
Elapsed Time:	09:56	00:00		
Lagging Date:		07-Feb-2007 03:00:00 PM		

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Organization: Coastal College.BAY  
Workflow Name: Interview Kevin Smith  
Activity Name: Interview\_Evaluation  
Created Date: 06-Feb-2007 11:06:52 AM  
Priority:   
Status: Performing

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Organization: Coastal College  
Definition Name: Interview Candidate  
Definition Version: 1  
Workflow Initiator: admin  
Activity Description:  
Role: Supervisor  
Type: Mandatory

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Start



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Complete



Skip



Release



Status



Stop Workflow Request

Organization: Coastal College.BAY  
Workflow Name: Interview Kevin Smith  
Activity Name: Interview\_Evaluation  
Created Date: 06-Feb-2007 11:06:52 AM  
Priority:   
Status: Performing

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Directed to User: admin

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Worklist

## Interview Evaluation Form


 Workflow H

## Candidate / Job Profile

\* Candidate ID: 313313313

\* Last Name:

\* First Name:


Date:  


\* Position Applied For:


Interview Location:


\* Responsibilities:

## Evaluation

\* Relevant Experience:  

\* Leadership Ability:  

\* Communication Skills:  

\* Organization Skills:  

Comments:

\* Recommendation

☐ Hire☐ Don't Hire☐ Consider

Please sign below by entering your name and pressing the 'Complete' button.

\* Signature:

**Attachments**

✓ Resume

Resume.doc (39 KB)  
06-Feb-2007 11:01:43 AM  
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Coastal College	<b>Interview James Horn</b> Ready	Register Candidate In Banner	Normal	06-Feb-2007 11:04:52 AM	
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Organization: Coastal College.BAY  
Workflow Name: Interview Kevin Smith  
Activity Name: Interview\_Evaluation  
Created Date: 06-Feb-2007 11:06:52 AM  
Priority:   
Status: Performing

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 **✓ Resume**  
Resume.doc (39 KB)  
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Workflow Status

Workflow Details

100%

Stop Workflow

Last Refresh Date: 06-Feb-2007 09:17:09 PM

Interview\_Setup

Interview\_Evaluation

recommendation = "Hire"

recommendation <> "Hire"

Notify\_Recommendation

Notify\_Later\_Consideration

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# Workflow Status

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**Organization:** Coastal College.BAY  
**Workflow Name:** Interview Kevin Smith

**Workflow Status** | **Workflow Details** | **Activity: Interview\_Setup** | **Work Item Details**

100%

**Stop Workflow** Last Refresh Date: 06-Feb-2007 09:17:09 PM

```
graph TD; Start(( )) --> Interview_Setup[Interview_Setup]; Interview_Setup --> Interview_Evaluation[Interview_Evaluation]; Interview_Evaluation --> Decision{ }; Decision -- "recommendation = 'Hire'" --> Notify_Recommendation[Notify_Recommendation]; Decision -- "recommendat" --> Notify_Later_Consideration[Notify_Later_Consideration];
```

**Description:**

**Role:** Hiring Manager

**Status:** Completed

**Activity Details**

**Work Item Details**

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**Work Item Details** [Workflow H](#)**Organization:** Coastal College.BAY**Workflow Name:** Interview Kevin Smith**Workflow Status****Workflow Details****Activity: Interview\_Setup****Work Item Details** Last Refresh Date: 06-Feb-2007 09:17:09**Details**

**Organization:** Coastal College.BAY  
**Activity Name:** Interview\_Setup  
**Type:** Mandatory  
**Description:**  
**Ownership:**  
**Role:** Hiring Manager  
**Activity Status:** Completed  
**Performer:** admin  
**Directed User:** admin  
**Activity ID:** 22198

**Created:** 06-Feb-2007 11:01:46 AM  
**Completed:** 06-Feb-2007 11:06:52 AM  
**Estimated Time:** 00:00  
**Actual Time:** 00:01  
**Elapsed Time:** 00:05  
**Lagging Date:**  
**Expected Completion Date:**

**Notes**

There are no work item notes.

**Work Item Context Parameters**

Name	Type	Value	Description
candidate_id	Text	313313313	
position	Text	Business Analyst	
date	Date	27-Feb-2007 11:07:00 AM	
last_name	Text	Smith	
location	Text	Bay Area Campus	
first_name	Text	Kevin	
job_description	Text	Analyze, Test	

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Coastal College	<a href="#">Interview James Horn</a> Ready	Register Candidate In Banner	Normal	06-Feb-2007 11:04:52 AM	
Coastal College.SAND	<a href="#">Interview Sarah Johnson</a> Ready	Interview Setup	Normal	06-Feb-2007 10:58:24 AM	

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In-process Search

## In-process Workflow Monitoring

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Organization	Workflow Name	Version	On time	Lagging	Overdue	Total Running
Coastal College	Interview Candidate	2	1	0	0	1

### Running Activities within Workflow

Activity Name	On time	Lagging	Overdue	Total Running
Interview_Evaluation	0	1	0	1

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### In-process Search

Organization:

Workflow Definition:

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ome Administrator  
re currently logged in.

In-process Search > In-process Search: Interview Candidate - 2

## In-process Workflow Monitoring - On time Workflows

Organization	Instance Name	Status	Date Created
Coastal College.BAY	<a href="#">Interview Kevin Smith</a>	Ready	07-Feb-2007 11:08:36 AM

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### In-process Search

Organization: Coastal College.BAY  
Workflow Definition: Coastal College - Interview Candidate - 2

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You are currently logged in.


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Organization	Workflow Name	Version	On time	Lagging	Overdue	Total Running
Coastal College	Interview Candidate	2	1	0	0	1

Running Activities within Workflow

Activity Name	On time	Lagging	Overdue	Total Running
Interview_Evaluation	0	1	0	1

Generate Spreadsheet

In-process Search

Organization: 

Coastal College.BAY

Workflow Definition: 

Coastal College - Interview Candidate - 2

Search

Done

Trusted sites

Luminis Platform - Microsoft Internet Explorer provided by

File Edit View Favorites Tools Help


Back

Search

Favorites

abc

Address [http://malwfm1.corp.sct.com/cp/tag.ee5a10015ee6a430.render.userLayoutRootNode.uP?uP\\_root=root&uP\\_sparam=activeTab&activeTab=s43&uP\\_tparam=frm&frm=frame](http://malwfm1.corp.sct.com/cp/tag.ee5a10015ee6a430.render.userLayoutRootNode.uP?uP_root=root&uP_sparam=activeTab&activeTab=s43&uP_tparam=frm&frm=frame) Go Links »



Luminis  
UNIVERSITY

My Account  
Content/Layout  
Channel Admin

Welcome Administrator  
You are currently logged in.

e-mail

calendar

groups

admin

logout

help

All Users Sample

Tutorial

Sample

Workflow Channels

Workflow

February 7, 2007

Home

- Worklist
- Workflow Status Search
- Workflow Alerts

User Profile

- My Processes
- User Information
- Change Password

Administration

- Business Component Catalog
- Enterprise Management
- User Management
- Role Management
- Business Events
- Work Calendars
- In-process Monitoring
- Workflow Modeler
- Workflow System Administration

In-process Search > In-process Search: Interview Candidate - 2

In-process Workflow Monitoring - Lagging Activities

Workflow Help

Organization: Coastal College

Workflow Name: Interview Candidate

Workflow Version: 2

Activity Name: Interview\_Evaluation

Organization	Instance Name	Status	Date Created	Date Acquired	Performer
Coastal College.BAY	<a href="#">Interview Kevin Smith</a>	Ready	07-Feb-2007 11:12:04 AM		

1 - 1 of 1 [First](#) [Previous](#) [Next](#) [Last](#) Go to page:

In-process Search

Organization: Coastal College.BAY

Workflow Definition: Coastal College - Interview Candidate - 2

Search

Trusted sites

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Back

Search

Favorites


abc

Address 

http://malwfm1.corp.sct.com/cp/tag.ee5a10015ee6a430.render.userLayoutRootNode.uP?uP\_root=root&uP\_sparam=activeTab&activeTab=s43&uP\_tparam=frm&frm=frame

Go

Links




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• Enterprise Management

• User Management

• Role Management

• Business Events

• Work Calendars

• In-process Monitoring

• Workflow Modeler

• Workflow System Administration

In-process Search

In-process Workflow Monitoring

Workflow Help

Organization	Workflow Name	Version	On time	Lagging	Overdue	Total Running
Coastal College	Interview Candidate	2	1	0	0	1

Running Activities within Workflow

Activity Name	On time	Lagging	Overdue	Total Running
Interview_Evaluation	0	1	0	1

Generate Spreadsheet

In-process Search

Organization:

Coastal College.BAY

Workflow Definition:

Coastal College - Interview Candidate - 2

Search

Done

Trusted sites

Luminis Platform - Microsoft Internet Explorer provided by L...

File Edit View Favorites Tools Help


Back

Search

Favorites

abc


Address [http://malwfm1.corp.sct.com/cp/tag.ee5a10015ee6a430.render.userLayoutRootNode.uP?uP\\_root=root&uP\\_sparam=activeTab&activeTab=s43&uP\\_tparam=frm&frm=frame](http://malwfm1.corp.sct.com/cp/tag.ee5a10015ee6a430.render.userLayoutRootNode.uP?uP_root=root&uP_sparam=activeTab&activeTab=s43&uP_tparam=frm&frm=frame) Go





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[My Account](#)  
[Content/Layout](#)  
[Channel Admin](#)


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You are currently logged in.


 e-mail

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 groups

 admin

 logout

 help

All Users Sample Tutorial Sample Workflow Channels Workflow

February 7, 200

Home

- [Worklist](#)
- [Workflow Status Search](#)
- [Workflow Alerts](#)




User Profile

- [My Processes](#)
- [User Information](#)
- [Change Password](#)

Administration

- [Business Component Catalog](#)
- [Enterprise Management](#)
- [User Management](#)
- [Role Management](#)
- [Business Events](#)
- [Work Calendars](#)
- [In-process Monitoring](#)
- [Workflow Modeler](#)
- [Workflow System Administration](#)

Workflow Help

Organization	Workflow	Activity	Priority	Created	
Coastal College.BAY	Interview Kevin Smith Performing	Interview Evaluation	Normal	06-Feb-2007 11:06:52 AM	
Coastal College	Interview James Horn Ready	Register Candidate In Banner	Normal	06-Feb-2007 11:04:52 AM	
Coastal College.SAND	Interview Sarah Johnson Ready	Interview Setup	Normal	06-Feb-2007 10:58:24 AM	


1 - 3 of 3 | First | Previous | Next | Last | Go to page: 1

Show Reserved Items




Workflow Modeler: : Untitled Workflow - 0

File Edit View Workflow Help



100%



Untitled Workflow:0

AlphabetizedCategorized

Definition

Organization	
Name	Untitled Workflow
Description	
Version	0

Management

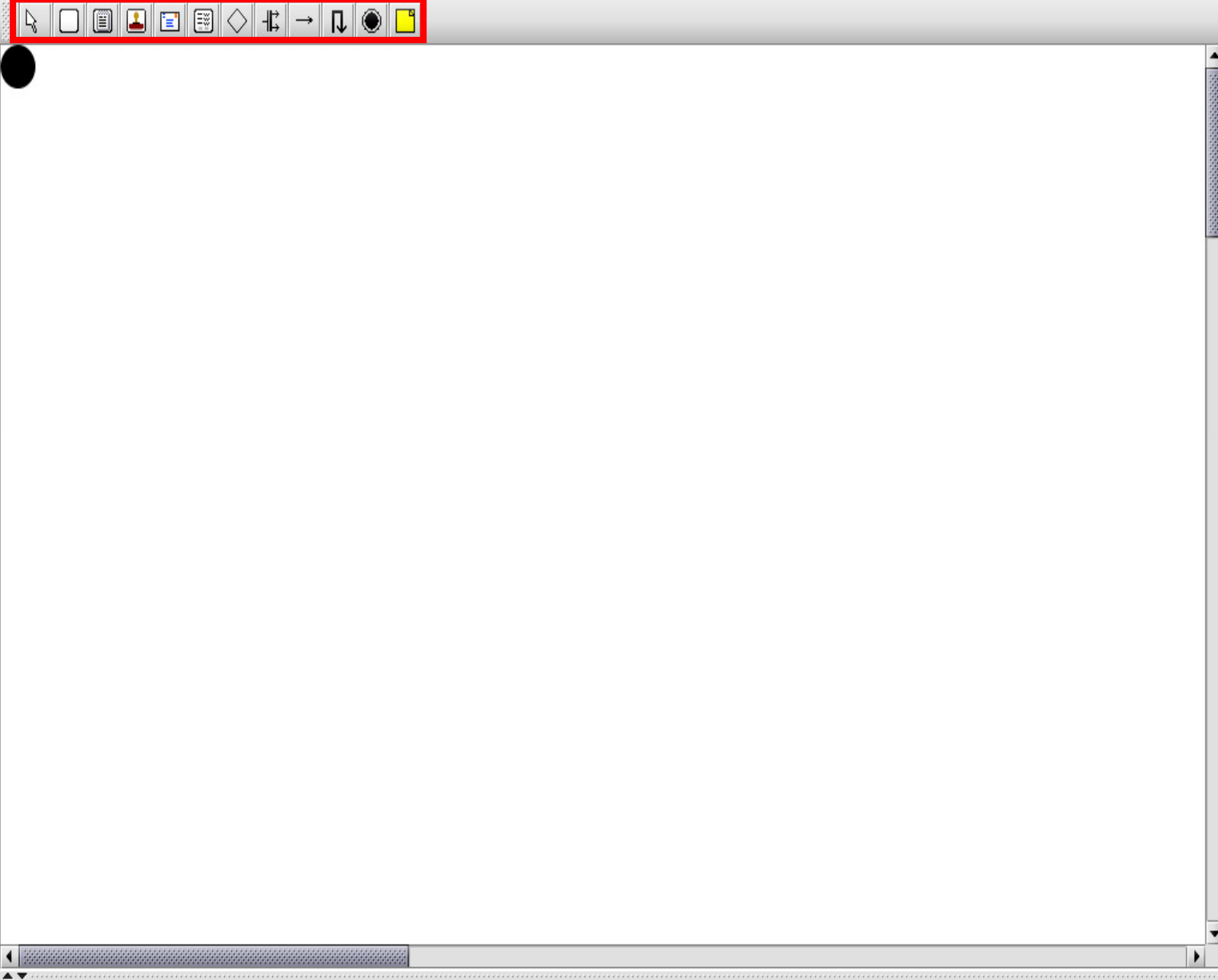
Administrator	
Owner	

Supplemental

Context Parameters	(0)
Document Tags	(0)
Confidential	No
Status	Development
Best Practice	No
Attribute Mappings	(0)

Tracking

Metrics Tracking	No
Work Calendar	
Estimated Time	00:00
Lagging Percentage	



Development

Workflow Modeler: : Untitled Workflow - 0

File Edit View Workflow Help

100%

Untitled Workflow:0

Alphabetized Categorized

**Definition**

Organization	
Name	Untitled Workflow
Description	
Version	0

**Management**

Administrator	
Owner	

**Supplemental**

Context Parameters	(0)
Document Tags	(0)
Confidential	No
Status	Development
Best Practice	No
Attribute Mappings	(0)

**Tracking**

Metrics Tracking	No
Work Calendar	
Estimated Time	00:00
Lagging Percentage	

Workflow Modeler: : Untitled Workflow - 0

File Edit View Workflow Help

Activity\_1

AlphabetizedCategorized

Definition

Name

Activity\_1

Description

Presentation

Background Color

Foreground Color

Image Name

Component

Business Component

Component Type

Product Type

Release ID

Status

Parameter Mappings

(0)

Performer

Role

Performer Rule

Confidential

No

Supplemental

Notification

Mandatory

Yes

Attribute Mappings

(0)

Tracking

Metrics Tracking

No

Estimated Time

00:00

Lagging Percentage

Activity\_1

Development

Workflow Modeler: : Untitled Workflow - 0

File Edit View Workflow Help

100%

Email\_1

Alphabetized Categorized

**Definition**

Name	Email_1
Description	

**Presentation**

Background Color	
Foreground Color	
Image Name	email_activity.gif

**Component**

From	
To	
CC	
BCC	
Subject	
Body	
Attachments	(0)
Sending Failure	Ignore

**Supplemental**

Attribute Mappings	(0)
--------------------	-----

Activity\_1

Email\_1

Development

Workflow Modeler: : Untitled Workflow - 0

File Edit View Workflow Help

100%

CustomActivity\_1

Alphabetized Categorized

Definition	
Name	CustomActivity_1
Description	

Presentation	
Background Color	
Foreground Color	
Image Name	custom_activity.gif

Component	
Custom Activity De...	Untitled Form
Parameter Mappings	(0)

Performer	
Role	
Performer Rule	
Confidential	No

Supplemental	
Notification	
Mandatory	Yes
Attribute Mappings	(0)

Tracking	
Metrics Tracking	No
Estimated Time	00:00
Lagging Percentage	

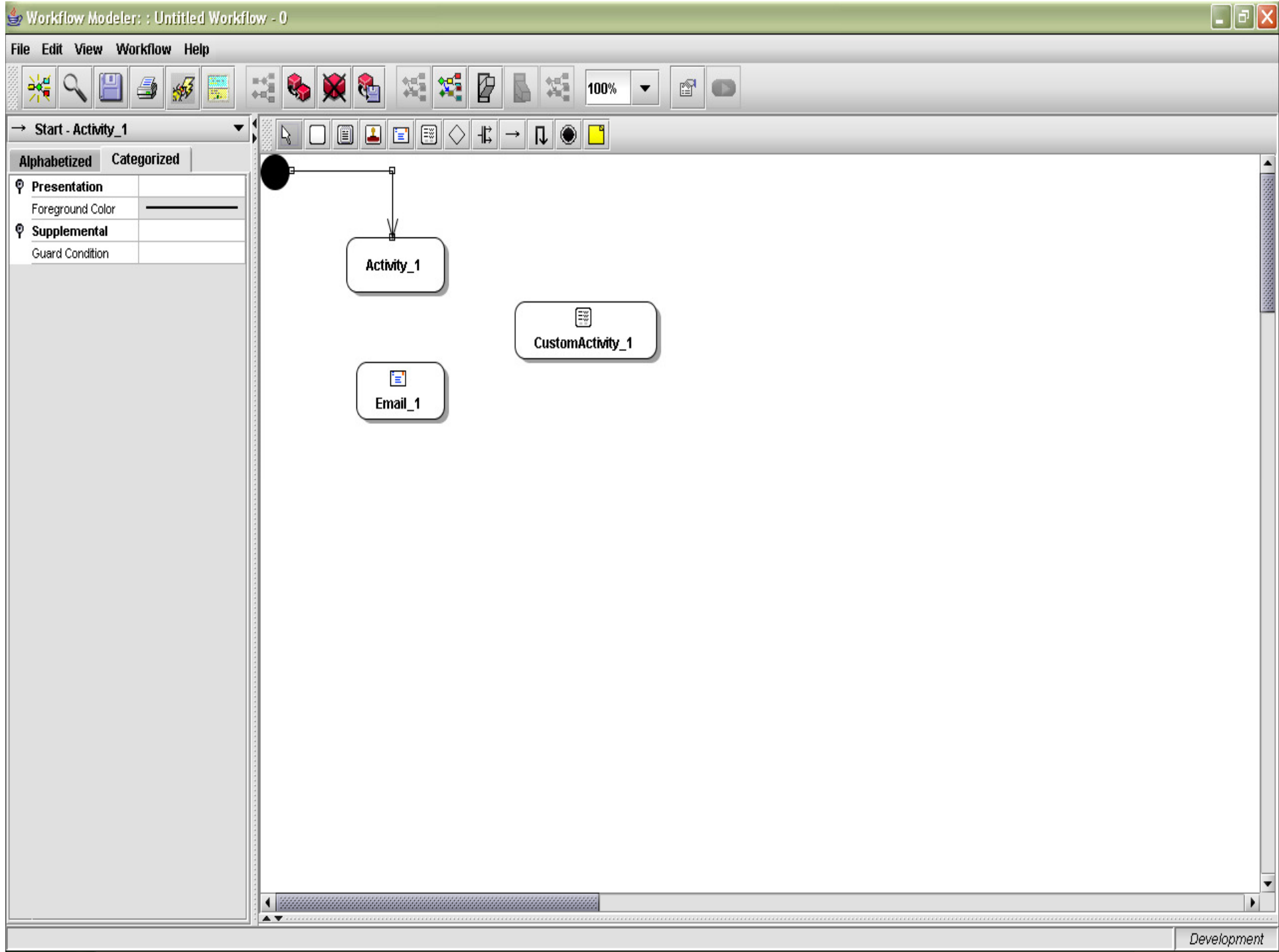
Activity\_1

Email\_1

CustomActivity\_1

Development





Workflow Modeler: : Untitled Workflow - 0

File Edit View Workflow Help

100%

Activity\_1

Alphabetized Categorized

**Definition**

Name	Activity_1
Description	

**Presentation**

Background Color	
Foreground Color	
Image Name	

**Component**

Business Component	
Component Type	
Product Type	
Release ID	
Status	
Parameter Mappings	(0)

**Performer**

Role	
Performer Rule	
Confidential	No

**Supplemental**

Notification	
Mandatory	Yes
Attribute Mappings	(0)

**Tracking**

Metrics Tracking	No
Estimated Time	00:00
Lagging Percentage	

Activity\_1

CustomActivity\_1

Email\_1

Development

Workflow Modeler: : Untitled Workflow - 0

File Edit View Workflow Help

100%

Activity\_1

AlphabetizedCategorized

Definition

NameActivity\_1

Description

Presentation

Background Color

Foreground Color

Image Name

Component

Business Component

Component Type

Product Type

Release ID

Status

Parameter Mappings (0)

Performer

Role

Performer Rule

Confidential No

Supplemental

Notification

Mandatory Yes

Attribute Mappings (0)

Tracking

Metrics Tracking No

Estimated Time 00:00

Lagging Percentage

Find Business Component

QueryResults

Field	Value
Component Name	
Product Type	
Category	
Component Type	
Technology Type	
Source	

Search

Reset

Cancel

Development

Workflow Modeler: : Untitled Workflow - 0

File Edit View Workflow Help

100%

Activity\_1

AlphabetizedCategorized

Definition

NameActivity\_1

Description

Presentation

Background Color

Foreground Color

Image Name

Component

Business Component...

Component Type

Product Type

Release ID

Status

Parameter Mappings (0)

Performer

Role

Performer Rule

ConfidentialNo

Supplemental

Notification

MandatoryYes

Attribute Mappings (0)

Tracking

Metrics TrackingNo

Estimated Time00:00

Lagging Percentage

Activity\_1

Find Business Component

QueryResults

Field	Value
Component Name	SPAIDEN%
Product Type	
Category	
Component Type	
Technology Type	
Source	

Search

Reset

Cancel

Development

Workflow Modeler: : Untitled Workflow - 0

File Edit View Workflow Help

100%

Activity\_1

Alphabetized Categorized

**Definition**

Name Activity\_1

Description

**Presentation**

Background Color

Foreground Color

Image Name

**Component**

Business Component ...

Component Type

Product Type

Release ID

Status

Parameter Mappings (0)

**Performer**

Role

Performer Rule

Confidential No

**Supplemental**

Notification

Mandatory Yes

Attribute Mappings (0)

**Tracking**

Metrics Tracking No

Estimated Time 00:00

Lagging Percentage

**Find Business Component**

Query Results

Component Name	Descripti...	Product T...	Release ...	Status	Category	Compone...	Techno...	Source
SPAIDEN	General ...	SCT Ban...	7.0	Active	SUMMIT ...	Interactive	SCT B...	SCT
SPAIDEN_General Person ...	General ...	SCT Ban...	7.0	Active	Student ...	Interactive	SCT B...	SCT

Total objects found: 2

OK Cancel

Development



Workflow Modeler: : Untitled Workflow - 0

File Edit View Workflow Help

100%

Activity\_1

Alphabetized Categorized

**Definition**

Name	Activity_1
Description	

**Presentation**

Background Color	
Foreground Color	
Image Name	

**Component**

Business Component	SPAIDEN_General P...
Component Type	Interactive
Product Type	SCT Banner
Release ID	7.0
Status	Active
Parameter Mappings	(0)

**Performer**

Role	
Performer Rule	
Confidential	No

**Supplemental**

Notification	
Mandatory	Yes
Attribute Mappings	(0)

**Tracking**

Metrics Tracking	No
Estimated Time	00:00
Lagging Percentage	

Activity\_1

CustomActivity\_1

Email\_1

Development

```
graph TD; Start(( )) --> Activity_1[Activity_1]; Activity_1 --> CustomActivity_1[CustomActivity_1]; Activity_1 --> Email_1[Email_1];
```

Workflow Modeler: : Untitled Workflow - 0

File Edit View Workflow Help

100%

Activity\_1

Alphabetized Categorized

**Definition**

Name	Activity_1
Description	

**Presentation**

Background Color	
Foreground Color	
Image Name	

**Component**

Business Component	SPAIDEN_General P...
Component Type	Interactive
Product Type	SCT Banner
Release ID	7.0
Status	Active
Parameter Mappings	(0)

**Performer**

Role	
Performer Rule	
Confidential	No

**Supplemental**

Notification	
Mandatory	Yes
Attribute Mappings	(0)

**Tracking**

Metrics Tracking	No
Estimated Time	00:00
Lagging Percentage	

Activity\_1

CustomActivity\_1

Email\_1

Development

```
graph TD; Start(( )) --> Activity_1[Activity_1]; Activity_1 --> CustomActivity_1[CustomActivity_1]; Activity_1 --> Email_1[Email_1];
```

Workflow Modeler: : Untitled Workflow - 0

File Edit View Workflow Help

100%

Activity\_1

AlphabetizedCategorized

Definition

NameActivity\_1

Description

Presentation

Background Color

Foreground Color

Image Name

Component

Business ComponentSPAIDEN\_General P...

Component TypeInteractive

Product TypeSCT Banner

Release ID7.0

StatusActive

Parameter Mappings(0)

Performer

Role

Performer Rule

ConfidentialNo

Supplemental

Notification

MandatoryYes

Attribute Mappings(0)

Tracking

Metrics TrackingNo

Estimated Time00:00

Lagging Percentage

Activity\_1

Find Workflow

QueryResults

Field	Value
Name	
Organization	
Best Practice	
Confidential	
Status	
Owner	
Administrator	
Version	

Search

Reset

Cancel

Development

Workflow Modeler: : Untitled Workflow - 0

File Edit View Workflow Help

Activity\_1

Alphabetized Categorized

**Definition**

Name Activity\_1

Description

**Presentation**

Background Color

Foreground Color

Image Name

**Component**

Business Component SPAIDEN\_General P...

Component Type Interactive

Product Type SCT Banner

Release ID 7.0

Status Active

Parameter Mappings (0)

**Performer**

Role

Performer Rule

Confidential No

**Supplemental**

Notification

Mandatory Yes

Attribute Mappings (0)

**Tracking**

Metrics Tracking No

Estimated Time 00:00

Lagging Percentage

Find Workflow

Query Results

Organization	Name ▲	Version	Status
Coastal College	Establish Benefits	0	Active
Coastal College	Establish Taxes and Othe...	0	Active
Coastal College	Grade Change	0	Active
Coastal College	Hire a Full Time Faculty M...	0	Active
Coastal College	Hire a Full Time Staff Mem...	0	Active
Coastal College	Institution Welcome	0	Active
Coastal College	Interview Candidate	2	Test
Coastal College	Interview Candidate	0	Active
Coastal College	Interview Candidate	1	Active
Coastal College	Load Faculty Information	0	Active
Coastal College	New Employee Security S...	0	Active
Coastal College	New Fund Request	0	Development

Total objects found: 20

OK Cancel

Development

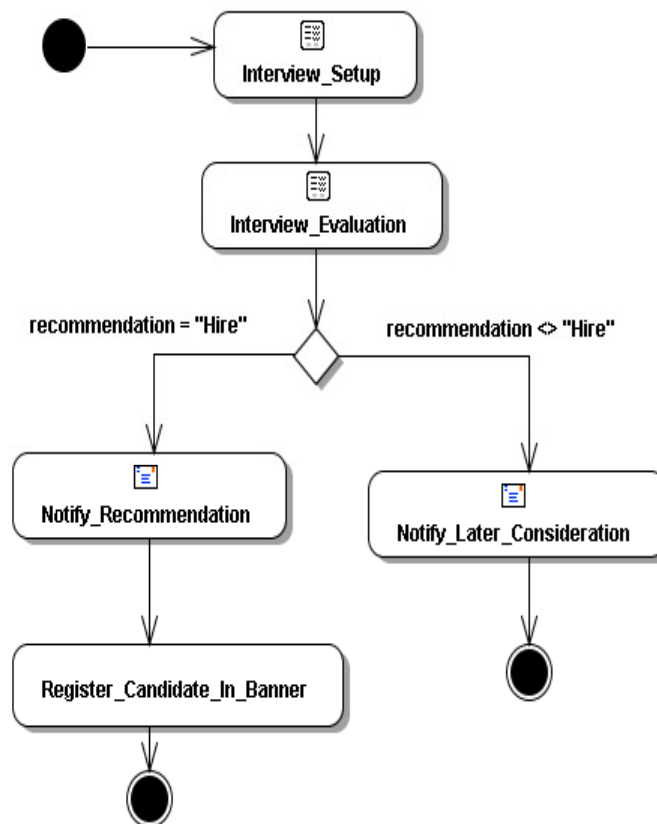
start Meeting Not... Workflow T... untitled - Paint Workflow W... 206 Java Console Workflow M... MikeBrzycki 11:50 AM



Interview Candidate:2

Alphabetized Categorized

Definition	
Organization	Coastal College
Name	Interview Candidate
Description	
Version	2
Management	
Administrator	<a href="#">Business Analyst</a>
Owner	<a href="#">Hiring Manager</a>
Supplemental	
Context Parameters	(11)
Document Tags	(1)
Confidential	No
Status	Test
Best Practice	No
Attribute Mappings	(2)
Tracking	
Metrics Tracking	No
Work Calendar	Institutional Calendar - ...
Estimated Time	00:00
Lagging Percentage	





Workflow Modeler: Coastal College: Interview Candidate - 2

File Edit View Workflow Help

100%

Interview\_Evaluation

Alphabetized Categorized

Definition	
Name	Interview_Evaluation
Description	

Presentation	
Background Color	
Foreground Color	
Image Name	custom_activity.gif

Component	
Custom Activity Desig...	Interview Evaluation F...
Parameter Mappings	(8)

Performer	
Role	Supervisor
Performer Rule	Logon_id
Confidential	No

Supplemental	
Notification	(message)
Mandatory	Yes
Attribute Mappings	(0)

Tracking	
Metrics Tracking	Yes
Estimated Time	00:02
Lagging Percentage	50%

```
graph TD; Start(( )) --> Interview_Setup[Interview_Setup]; Interview_Setup --> Interview_Evaluation[Interview_Evaluation]; Interview_Evaluation --> Decision{ }; Decision -- "recommendation = 'Hire'" --> Notify_Recommendation[Notify_Recommendation]; Decision -- "recommendation <=> 'Hire'" --> Notify_Later_Consideration[Notify_Later_Consideration]; Notify_Recommendation --> Register_Candidate_In_Banner[Register_Candidate_In_Banner]; Register_Candidate_In_Banner --> End1(( )); Notify_Later_Consideration --> End2(( ))
```

The diagram illustrates a workflow for interview evaluation. It begins with a start node leading to the 'Interview\_Setup' activity, followed by the 'Interview\_Evaluation' activity. A decision diamond follows, branching based on the 'recommendation' value. If the recommendation is 'Hire', the flow proceeds to 'Notify\_Recommendation' and then 'Register\_Candidate\_In\_Banner', ending at a final node. If the recommendation is not 'Hire' (indicated by 'recommendation <=> "Hire"'), the flow proceeds to 'Notify\_Later\_Consideration' and ends at another final node. A red arrow points to the 'Interview\_Evaluation' activity in the diagram.

Test

Workflow Modeler: Coastal College

Custom Activity Designer - Interview\_Evaluation

FileEditViewWorkflowHelp

Interview\_Evaluation

AlphabetizedCategorized

Definition

Name

Interview\_Evalu...

Description

Presentation

Background Color

Foreground Color

Image Name

custom\_activity

Component

Custom Activity Desig...

luation Form

Parameter Mappings

(8)

Performer

Role

Supervisor

Performer Rule

Lagon\_id

Confidential

No

Supplemental

Notification

(message)

Mandatory

Yes

Attribute Mappings

(0)

Tracking

Metrics Tracking

Yes

Estimated Time

00:02

Lagging Percentage

50%

Custom Activity Help

Interview\_Evaluation

AlphabetizedCategorized

Supplemental

Title

Interview Evaluation Form

Parameters

(14)

Show Attachments

Yes

Interview Evaluation Form

Candidate / Job Profile

\*Candidate ID:

\*Last Name:

\*First Name:

Date:

\*Position Applied For:

Interview Location:

\*Responsibilities:

Evaluation

\*Relevant Experience:

Strong

\*Leadership Ability:

Strong

\*Communication Skills:

Strong

\*Organization Skills:

Strong

Comments:

\*Recommendation

Hire

Don't Hire

Consider

Please sign below by entering your name and pressing the "Complete" button.

\*Signature:

Workflow Attachments Here

Close

Test



# Process Examples

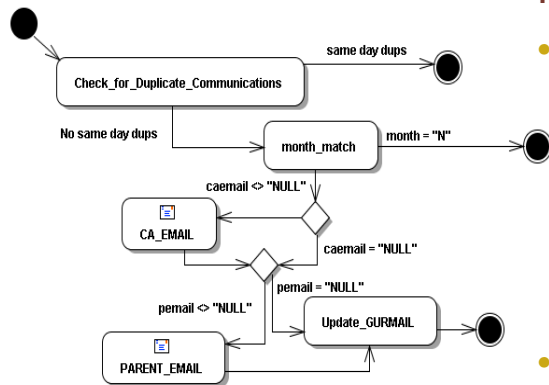


**SUNGARD** HIGHER EDUCATION

## Real World Process Examples

- **Finance / AR – Billing Notifications**
- **Financial Aid – Scholarship Payment Authorization Process**
- **Financial Aid / All Departments – Hire a Work Study Student**
- **Banner General**
- **Student/Admissions – Graduate Admissions Application Processing**
- **Advancement**
- **HR – Hire Adjunct Faculty/Employee Appointment**
  
- **+ Other Example Processes in each area that Professional Services has helped clients with**

# Finance / AR – Billing Notifications



## Plymouth State

### • Problem:

- Manual mail merge to notify students of Billing information waiting for them in Banner Self-Service.
- Untimely delays in Accounts Receivable of payments.
- No automated mechanism to notify students of Billing information between mail merges other than manual emails.

### • Process:

- Process identifies whether students have a credit, balance, or zero balance, and provides them instructions on how to log into Banner Self-Service and process payments, etc.
- Email routing information is updated and logged in Banner for better Customer Service communication.

### • Benefits:

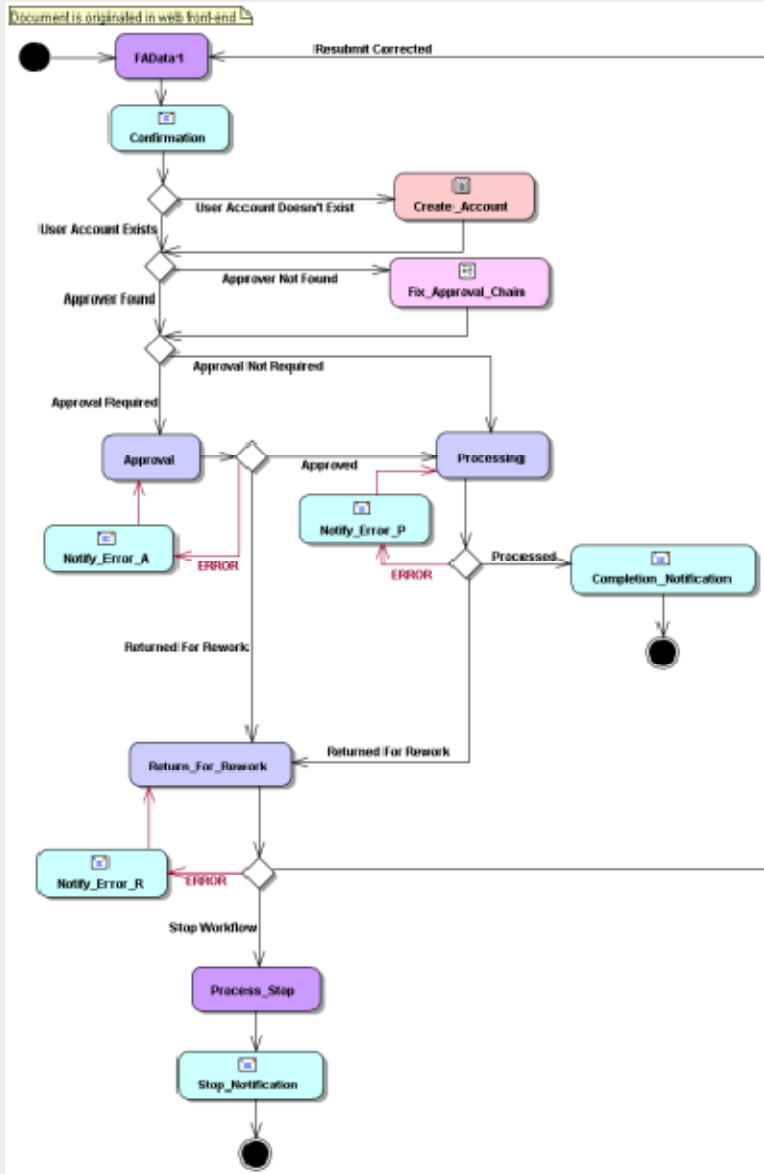
- Accounts Receivable increased significantly in a more timely fashion.
- More tailored specific communication to students and parents.



## **Finance / AR – Other Processes**

- **Creation of New Fund / Detail Code with Approvals**
- **Requisition Approval**
- **Budget Exceeded process**
- **Retired Fixed Assets**
- **Zero Balance**

# Financial Aid – Scholarship Payment Authorization Process



## Kent State

### Problem:

- Initiators can't see how their scholarship funding is set up to make good budgetary decisions
- Paper forms routed through campus mail cause a delay in processing
- Initiators can't find out where paper is once it has left in campus mail...they must call around to find the status of a request

### Process:

- Allows departments to notify Student Financial Aid which students to award scholarships
- Routes documents to dean for approval

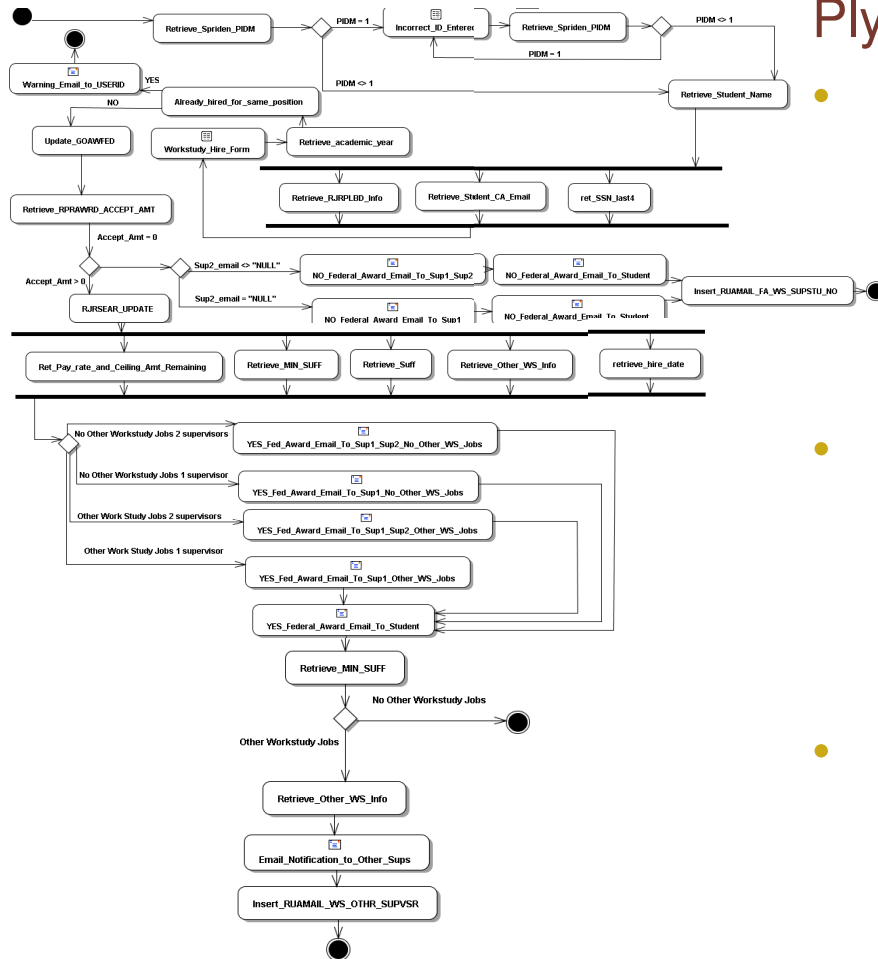
### Benefits:

- Decrease processing time required to award scholarships – especially when rework is required
- Initiator can see which funds/indexes are funding scholarships on the form
- Notifies the initiator when the scholarship has been awarded to the student.

## **Financial Aid – Other Processes**

- **College Work Study**
- **Change of Residency**
- **Verification Process**
- **Notification to AR when Aid Changes**
- **Notification of New Documents after Billing**

# Financial Aid / All Departments – Hire a Work Study Student



## Plymouth State

### Problem:

- Could take weeks to process student hires
- Delays in communication between Fin. Aid, HR, Hiring Supervisor, and Student Hires

### Process:

- Completely automated process that takes minutes to complete
- Information is routed to Students, Supervisors HR, and Fin. Aid,

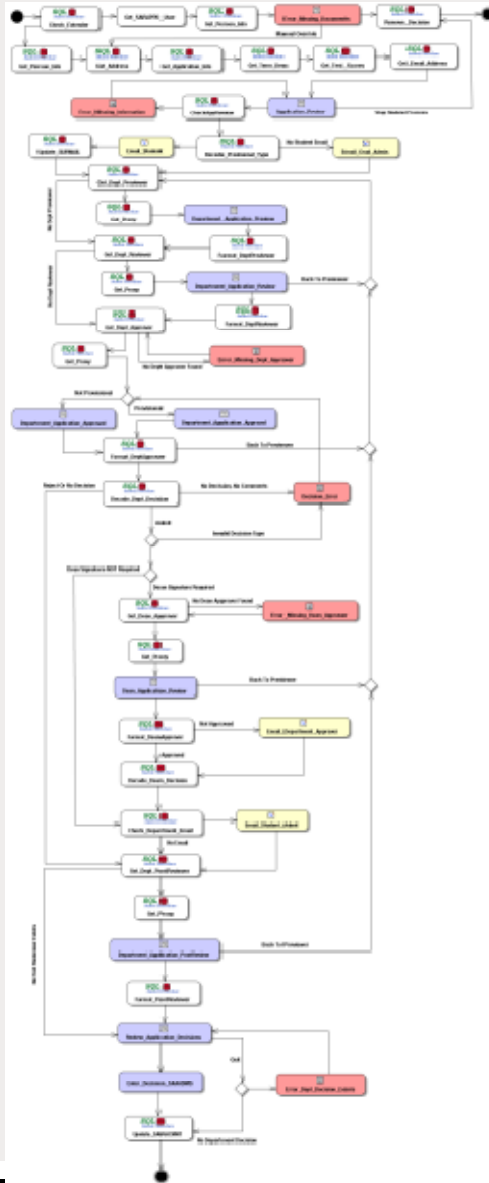
### Benefits:

- Students get initial paycheck quicker.
- Streamlined communication between Student, Hiring Supervisors, Financial Aid, and Human Resources.

## Banner General – Other Processes

- Change of Name Notification
- Change of Address Notification
- Death Notification
- Duplicate PIDM Processing

## Student/Admissions – Graduate Admissions Application Processing



# Mississippi State

- **Problem:**
  - Routing of applicant packet was not always happening in timely fashion - lost in the paperwork shuffle, no way to know whose desk it was on or where it was in the process
- **Process:**
  - This particular workflow is used by Office of Graduate School in conjunction with academic departments to make the admission decision on graduate students.
- **Benefits:**
  - Eliminated the need to send a packet of paper documents/copies from Office of Graduate Admissions to Academic departments.
  - Faster turnaround time on applicant decisions.
  - Ability to determine exactly where an applicant is in the process.
  - Ability to identify bottlenecks.
  - All of the above = faster, more efficient processing of applicants.



## **Student – Other Processes**

- **Notification of Change in Schedule**
- **Notification of Change in Catalog after Print Date**
- **Notification of Change in Residency**
- **Withdrawal Student**
- **Grade Change**
- **Admissions Approval process**
- **Course Load Below a Certain Level**
- **Faculty Load Below a Certain level**
- **Notify Wait-listed Students of New Sections**

## **Advancement Processes**

- **New Gift**
- **New Campaign Notification**
- **New Designation Process**
- **Goal Reached**
- **Change of Campaign Name**

- Problem:

- Process:

- **Benefits:**

- Estimated Savings of \$40,000/year
- Approvals are quick and pay is not delayed in the shuffle

## **HR – Other Processes**

- **New Hire**
- **Termination**
- **Benefits and Deductions**
- **Position Requisition**
- **Salary Increase Over Certain Percentage**
- **Employee Review Due in x Months**
- **Vacant Position**
- **Change of Employee Class**

# Workflow Delivered Examples

- **New Gifts**
- **Requisition Approval with E-mail functionality**
- **Hire a Full Time Faculty Member**
- **Hire a Full Time Staff Member**
- **Establish Benefits**
- **Load Faculty Information**
- **Establish Taxes and Other Deductions**
- **New Employee Security Setup**
- **Grade Change**
- **Withdraw a Student**
- **Process Withdrawn Student Aid**
- **Interview Candidate**

## *What Services does SunGard Higher Education provide?*

- **Business Process Analysis (BPA)**
  - Training and/or Facilitation
- **Workflow Process Analysis (WPA)**
  - Training and/or Facilitation
- **Installation, Workflow Technical Training, SQL for Workflow, BXS Integration**
- **Workflow and 3<sup>rd</sup> Party Applications**
- **Workflow Process Modeling Training**
- **Consulting services geared specifically to client needs**
  - Approach can vary from “Train the trainer” to “Full BPA and workflow implementation”
  - Workflow Production Readiness – Specific Module/Area
  - Post Production Visits





# Summary

## SunGard Higher Education's Workflow product

- Supports the Unified Digital Campus
- Provides process definition, control, metrics, and evolution
- Improves efficiency, effectiveness, and cost while helping you quantify those improvements
- Delivers unique Banner, Luminis, desktop application, email, and external resource integration
- Pays you back in the best ways possible – by giving you peace of mind and time back to your day
- Helps insure that you achieve excellence

# Questions and Answers



Joshua Aversa

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