

Imagination
to
Realization



Using SCT Workflow with Imaging

*Presented by: Mike LaFortune
SunGard Higher Education*

April 4th, 2006

Evaluation Code 687

Session Rules of Etiquette

- Please turn off your cell phone/pager
- If you must leave the session early, please do so as discreetly as possible
- Please avoid side conversation during the session

Thank you for your cooperation!

Introduction

- The purpose of this session is to introduce ways of combining SCT Workflow and SCT Banner XtenderSolutions (Imaging) for maximum benefit on campus
- Benefits of attending:
 - Learn about workflow and imaging
 - Discuss examples of how these tools can be used with SCT Banner and SCT Luminis
 - Examine how existing integrations can be leveraged to do more with workflow and imaging together than separately
 - Interact with SunGard Higher Education Product Management

Session Agenda

- What is Workflow?
- What is Imaging?
- How does $2 + 2 = 5$?
- What if I have..
 - Banner
 - Imaging
 - Workflow
 - Luminis
- What can I do today?
- Q&A

What is Workflow?

Workflow:

Is 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.



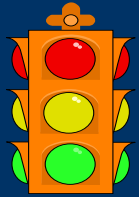
the Workflow Management Coalition™

Process Improvement Example

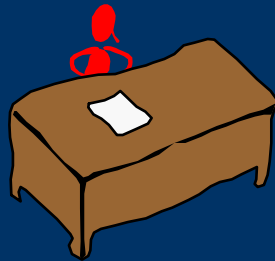
Circa 1600 – 1990

Process Improvement Example

Purchasing Requisition Review – circa 1600-1990



10 minutes



1/2 Day



30 minutes

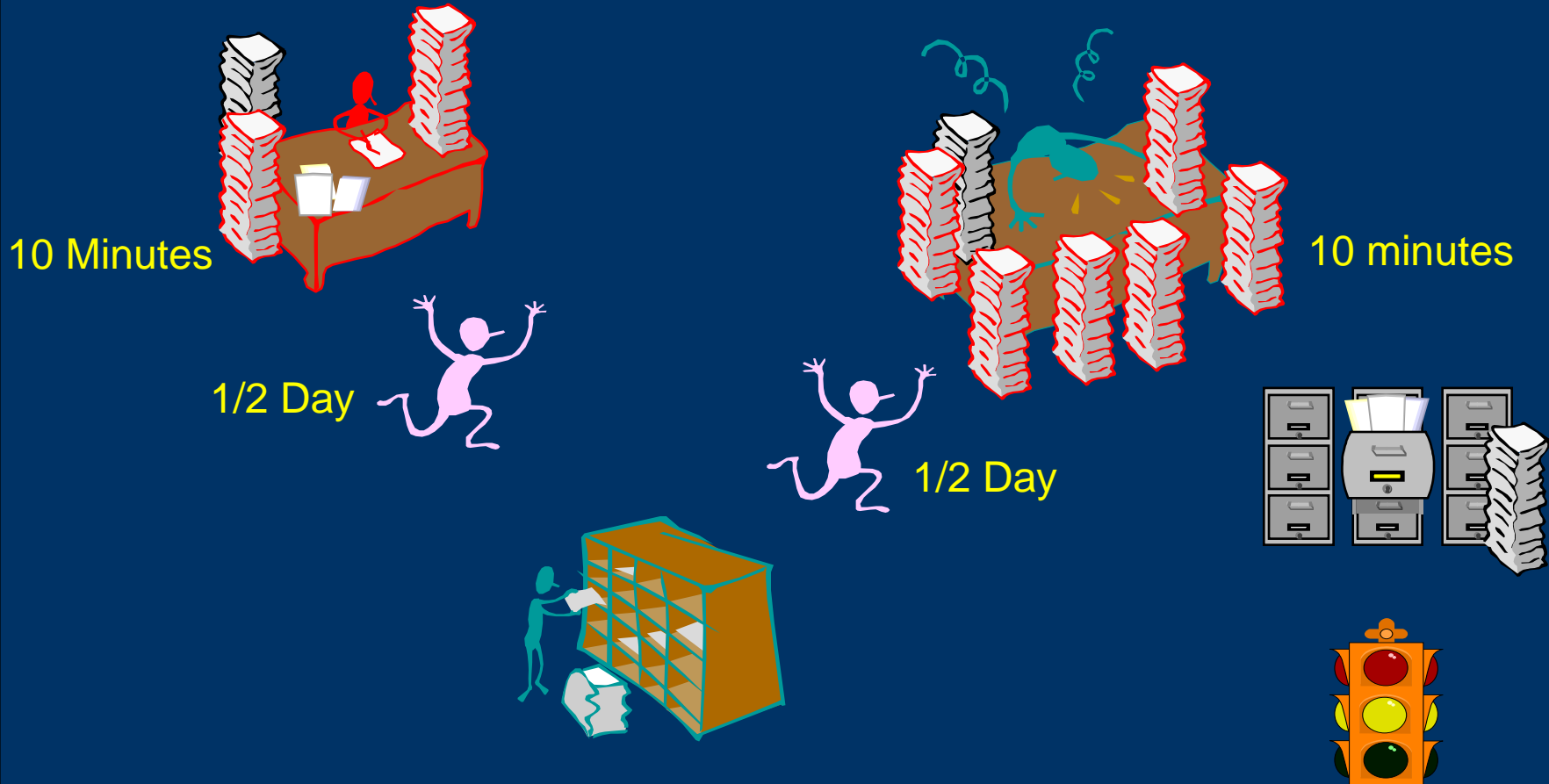
1/2 Day



1/2 Day

Process Improvement Example

Purchasing Requisition Review – circa 1600-1990



Process Improvement Example

Purchasing Requisition Review – circa 1600-1990

70 minutes

Completing paperwork
Updating system
Determining what to do next

4 Days

To move the paper across campus!

No workflow = slow, expensive, frustrating

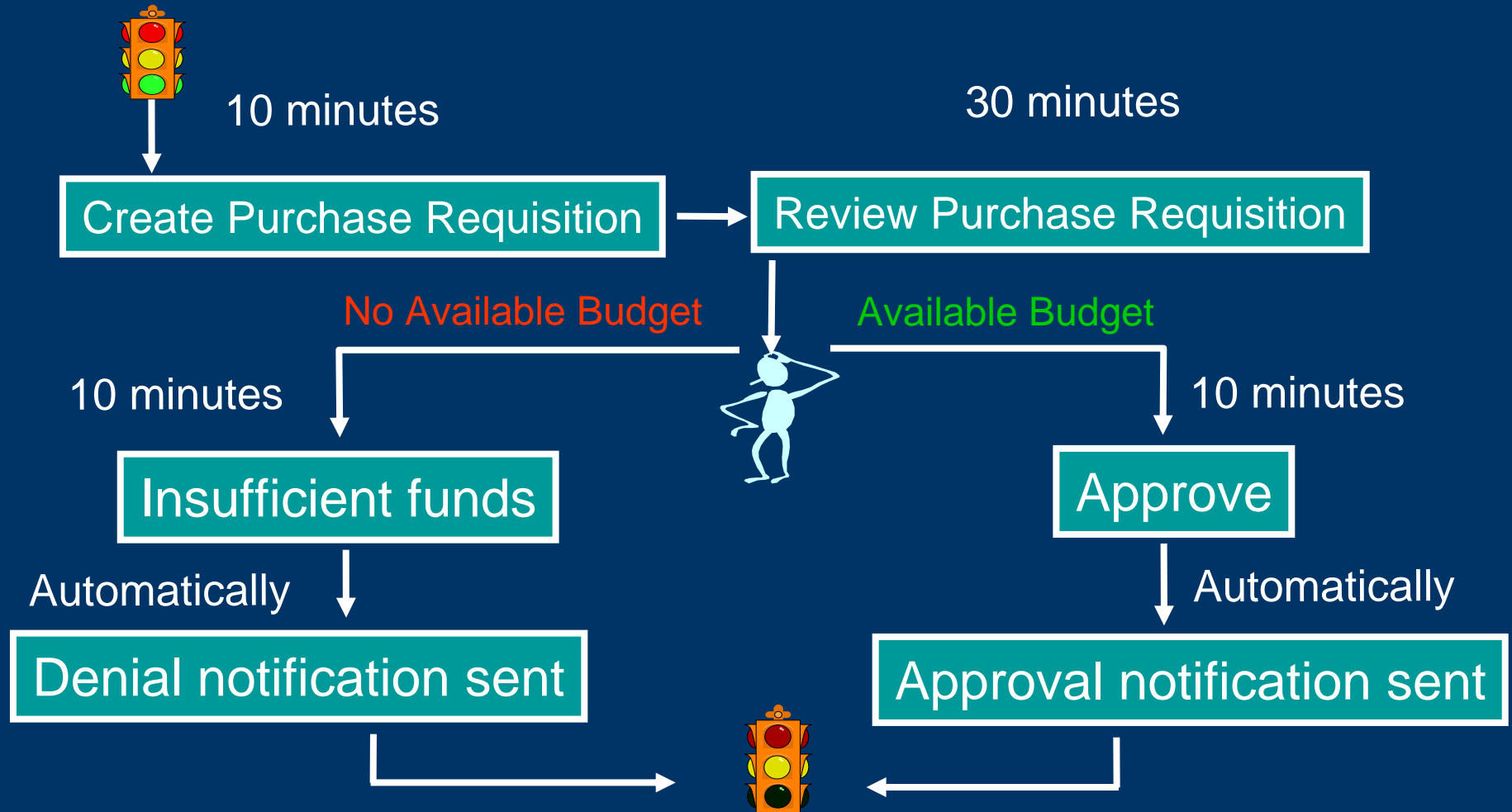
Process Improvement Example



NEW MILLENNIUM

Process Improvement Example

Purchasing Requisition Review – New Millennium



Process Improvement Example

Purchasing Requisition Review – New Millennium

50 minutes

Completing activities

Updating system

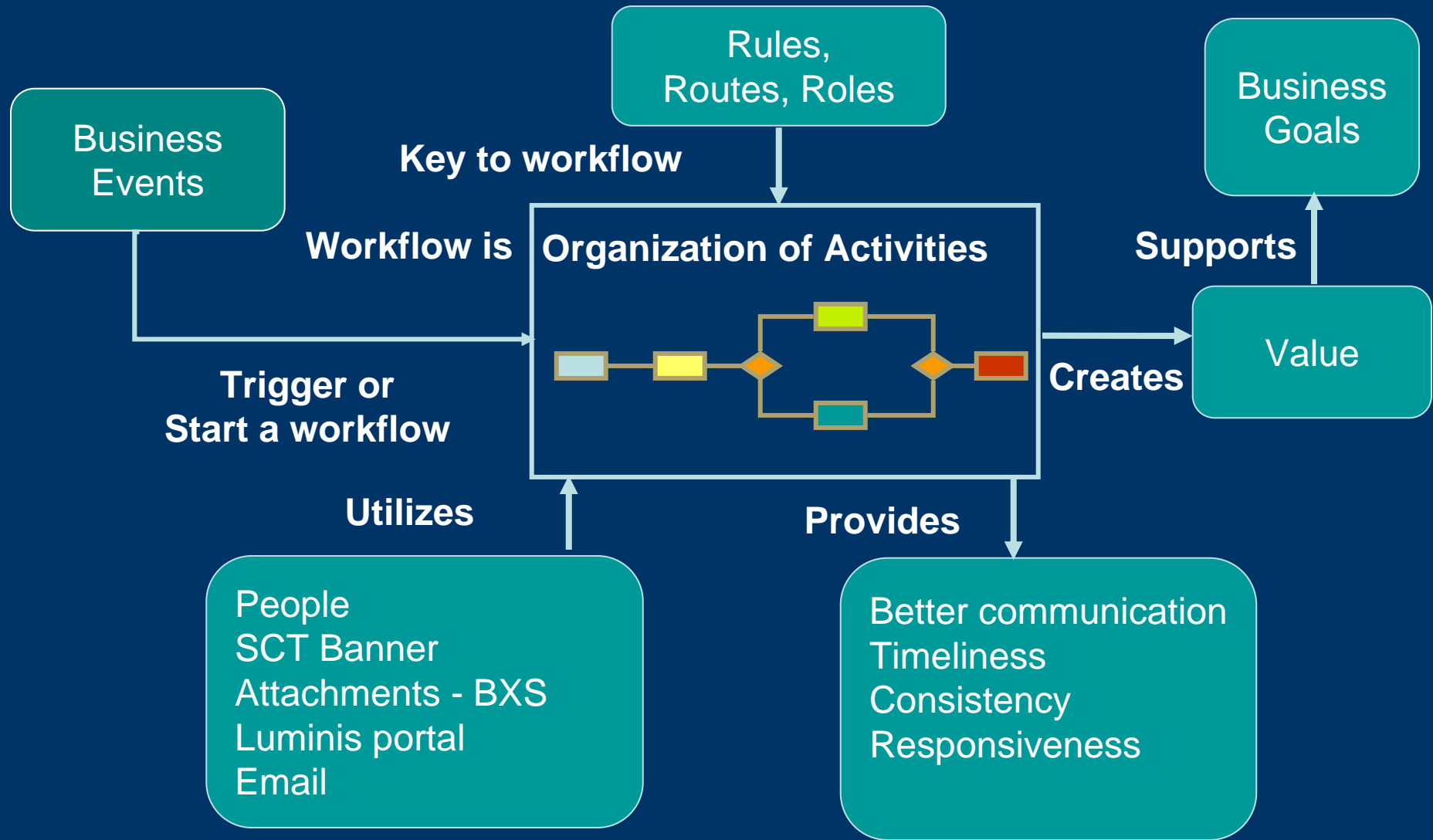
Determining what to do next

0 Days

To move the paper across campus!

With workflow = fast, efficient, satisfying

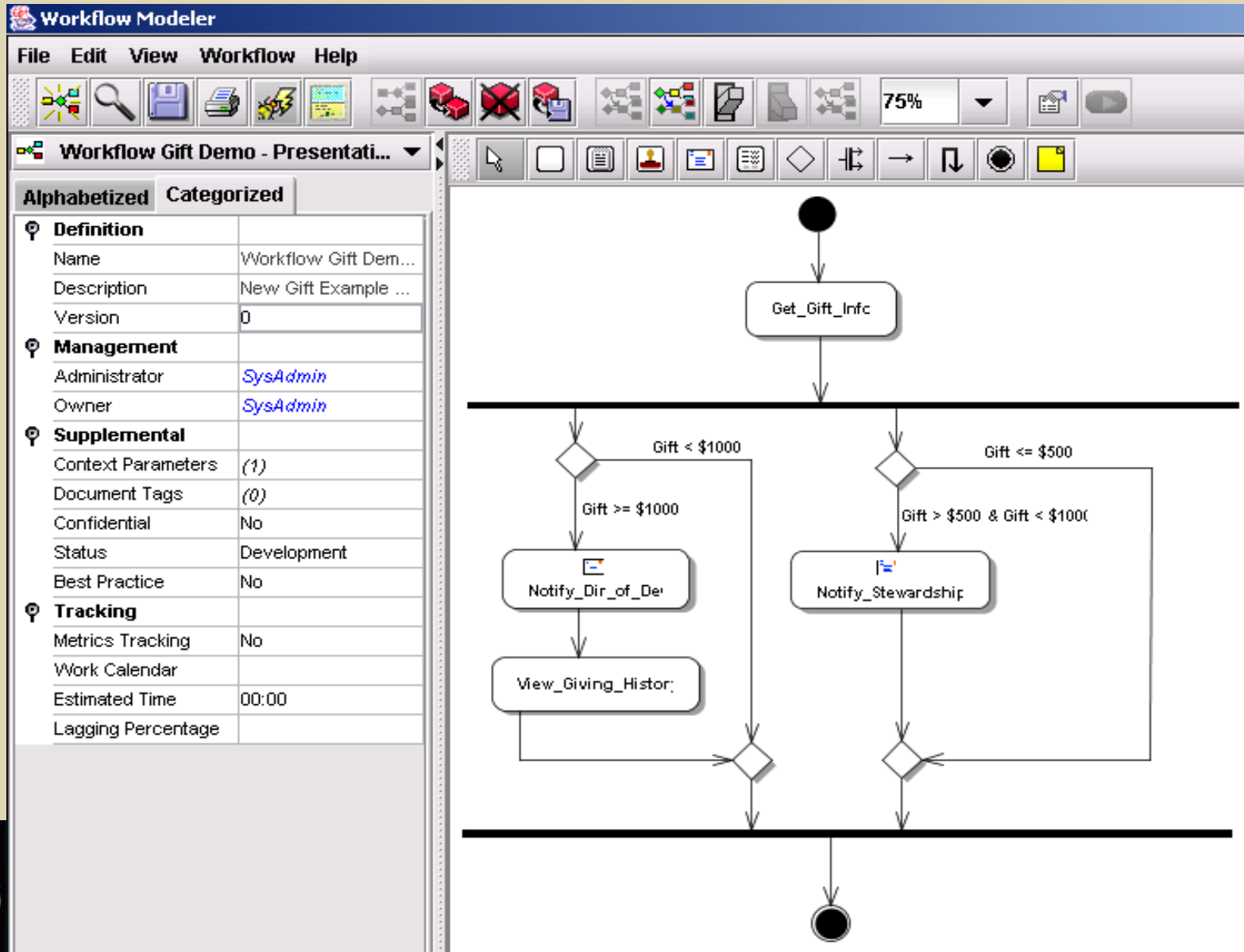
Workflow... is the movement of work between role players



Gift Stewardship Process

- Scenario:
 - Modified SCT Workflow example for event giving process
 - Gift acknowledgement back to the donor is time sensitive
- Target Area:
 - Advancement
- Role Players:
 - Director of Development
 - Stewardship

Gift Stewardship Process



Gift Stewardship Process

- Highlights:
 - Initiated by a Banner event:
 - New gift on Banner Gift page (AGAGIFT)
 - Parallel activities based upon dollar value of the gift
 - A fully automated process with no human intervention
 - An interactive process with notifications to the Director of Development and launching of SCT Banner Giving History page (APAGHIS)

Workflow Value

SCT Workflow clients can:

- Pick the problems they want to solve
- Design their own solutions
- Define their own measurements of success
- Measure and monitor performance objectively
- Improve organizational performance
- Elevate staff morale

What is Imaging?

What =

...the creation, organization, applied use, and management of (digital) representations of documents as replacements for the original (paper) documents for financial, legal, or operational benefit

Why =

...for financial, legal, or operational benefit

What is Imaging?

SCT Banner XtenderSolutions:

- SCT Banner module for imaging and document management
- Built on industry-leading, proven, and scalable XtenderSolutions platform
- Single point of access to database and document-based information
- Document retrieval and filing from familiar SCT Banner pages
- Single logon to SCT Banner pages and document records
- Shared authentication and integrated security management
- Automatic updating of Admissions checklist and Financial Aid tracking
- Common database and user interfaces
- Shared business processes with SCT Workflow

= Less work for you, your team, and your support groups!



ID: SJGRIM Grim, Stephen J.

Term:

Application Curricula Fees, Mail Submission, Withdrawal Data Checklist Sources, Interests, Comments Contacts, Cohorts, Attributes

Application

Entry Term: 200530 Summer 1 2005

Application Number: 1

Application Date: 14-JAN-2005

Admission Type: ST Standard

Student Type: 0 Undeclared

Residence: 0 Undeclared

Site: 001 Downtown Site

Full Time or Part Time: F Full Time

Outstanding Requirements: Y

Application Status: I Incomplete items outstanding

Application Status Date: 14-JAN-2005

Maintained By: S SYSTEM

Application Decision:

Application Decision Date:

Maintained By:

Curricula Summary - Primary

Priority: 1 Catalog Term: 200530 Level: UG Undergraduate

College: 00 No College Designated

Term: 200530 Program: ASBA Campus:

Degree: BA Bachelor of Arts

Field of Study Summary

Priority: 1 Type: MAJOR

Department:

Term: 200530 Field of Study: EDUC Education

Attached to Major:

Priority: Type:

Department:

Term: Field of Study:

Attached to Major:

Entry term; press LIST for valid codes, DUPLICATE ITEM for prospect summary.

Record: 1/1 ... <OSC>

ID: SJGRIM

Document Retrieval

Document Attachment

Application Curricula ... scts, Cohorts, Attributes

Application

Entry Term: 200530 Summer 1 2005	Application Number: 1	Application Date: 14-JAN-2005
Admission Type: ST Standard	Application Status: I Incomplete items outstanding	
Student Type: 0 Undeclared	Application Status Date: 14-JAN-2005	
Residence: 0 Undeclared	Maintained By: S SYSTEM	
Site: 001 Downtown Site	Application Decision:	
Full Time or Part Time: F Full Time	Application Decision Date:	
Outstanding Requirements: Y	Maintained By:	

Curricula Summary - Primary

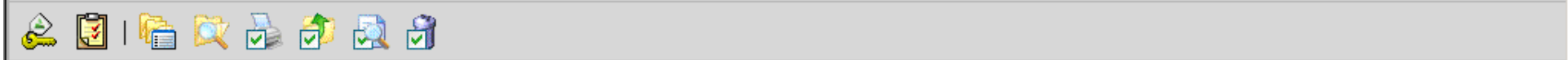
Priority: 1	Catalog Term: 200530	Level: UG Undergraduate	College: 00 No College Designated
Term: 200530	Program: ASBA	Campus:	Degree: BA Bachelor of Arts

Field of Study Summary

Priority: 1	Type: MAJOR	Department:
Term: 200530	Field of Study: EDUC Education	Attached to Major:
Priority:	Type:	Department:
Term:	Field of Study:	Attached to Major:

Entry term; press LIST for valid codes, DUPLICATE ITEM for prospect summary.

Record: 1/1 ... <OSC>



Query Results for Application 'B-S-ADMN'

Document 1 - 5 of 5

<input type="checkbox"/>	ID	PIDM	DOCUMENT TYPE	LAST NAME	FIRST NAME	SSN	BIRTH DATE	TERM CODE	APPLICATION NUMBER	ADMISSIONS REQUIREMENT
<input type="checkbox"/>	SJGRIM	3500	ESSAY	GRIM	STEPHEN	999-89-9999	01-Aug-1967	200530	3	AGEP
<input type="checkbox"/>	SJGRIM	3500	TRANSCRIPT INFO	GRIM	STEPHEN	999-89-9999	01-Aug-1967	200402	2	AP25
<input type="checkbox"/>	SJGRIM	3500	PHOTO	GRIM	STEPHEN	999-89-9999	01-Aug-1967	200402	1	AGEP
<input type="checkbox"/>	SJGRIM	3500	ESSAY	GRIM	STEPHEN	999-89-9999	01-Aug-1967	200402	2	ESSY
<input type="checkbox"/>	SJGRIM	3500	PHOTO	GRIM	STEPHEN	999-89-9999	01-Aug-1967	200402	1	AP25

PERSONAL ESSAY

I have always considered one of my greatest sources of strength to be continual intellectual challenge posed by a talented instructor. Thus far in my academic career, I have been fortunate enough to study under some very wise teachers – teachers who understood that I am not one to shrink from any challenge; I am more willing than most students my age to take on additional work to better myself.

My public elementary school education was supplemented by steady exposure to the Arts and Science under the tutelage of my parents, both research scientists for the United States Government.

As a High School Freshman, I placed out of the Freshman AP Calculus and Biology programs, effectively skipping two academic years worth of instruction. Now as a senior, I am enrolled in a cooperative program between Whasamatta High School and Somother Community College that allows me to satisfy my High School Diploma with first year college courses. I am, at this time, a straight A student ranked number one in my class of 300 students.

In addition to my academic standing, I have also enjoyed moderate success in my extracurricular activities at Whasamatta High School. This fall I placed third in the conference Cross Country championship. I am also a member of the Track team, frequently placing in the top three in the 400 meter, and 800-meter events. I hope to continue my competitive running at SCT State University.

I intend to pursue Biology and Computer Science as a double major at SCT State University. My ultimate goal is to put this education to work in the field of BioInformatics. This emerging field of study has broad implications in areas of genomic study that are, at present, unrealized. I



Query Results for Application 'B-

Document 1 - 1 of 1

<input type="checkbox"/>	ID	PIDM	DOCUME
<input type="checkbox"/>	000000094	781	PASSPOR



How Does 2 + 2 = 5?

- Workflow comes with baseline integrations:
 - Workflow work items appear in Luminis channel worklist
 - Workflow can launch Banner on single sign-on
 - Banner and Luminis can initiate Workflow processes
- Imaging comes with baseline integrations:
 - Imaging can be launched from Banner on single sign-on
 - Imaging can be launched from Luminis on single sign-on
 - Imaging can update Banner

How Does $2 + 2 = 5$?

How Does $2 + 2 = 5$?

Luminis

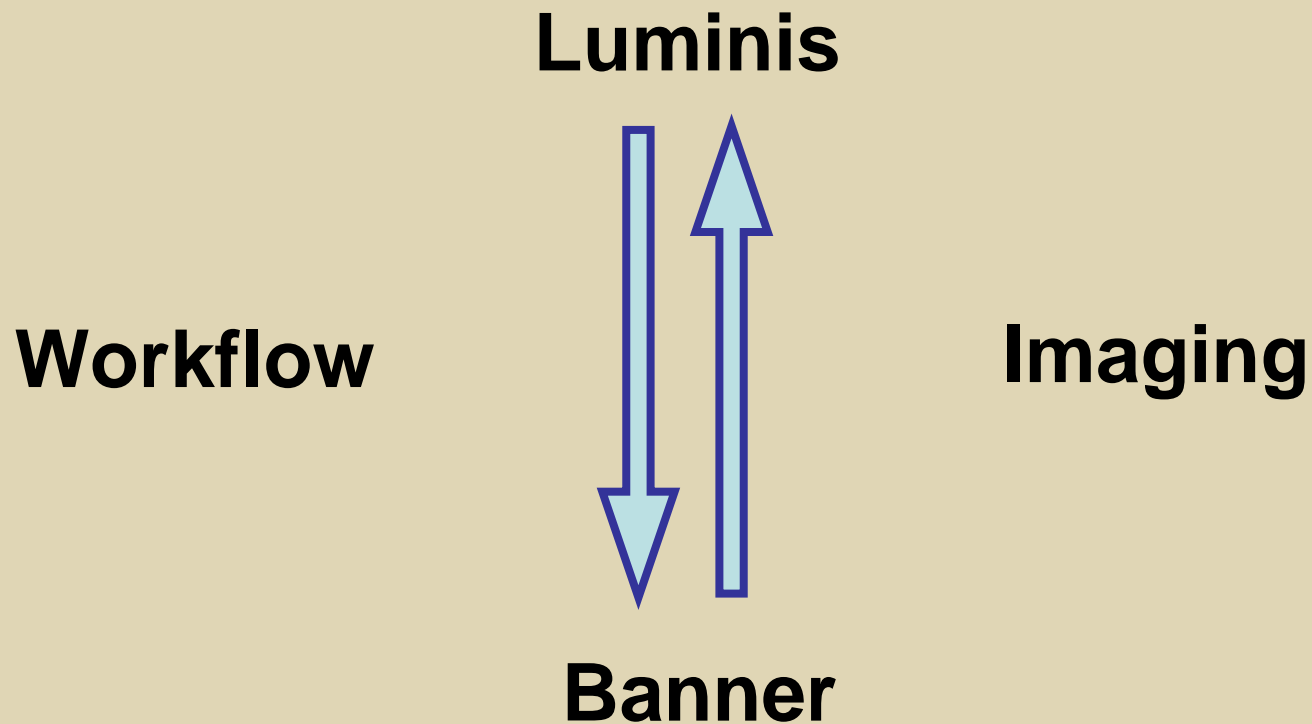
Workflow

Imaging

Banner

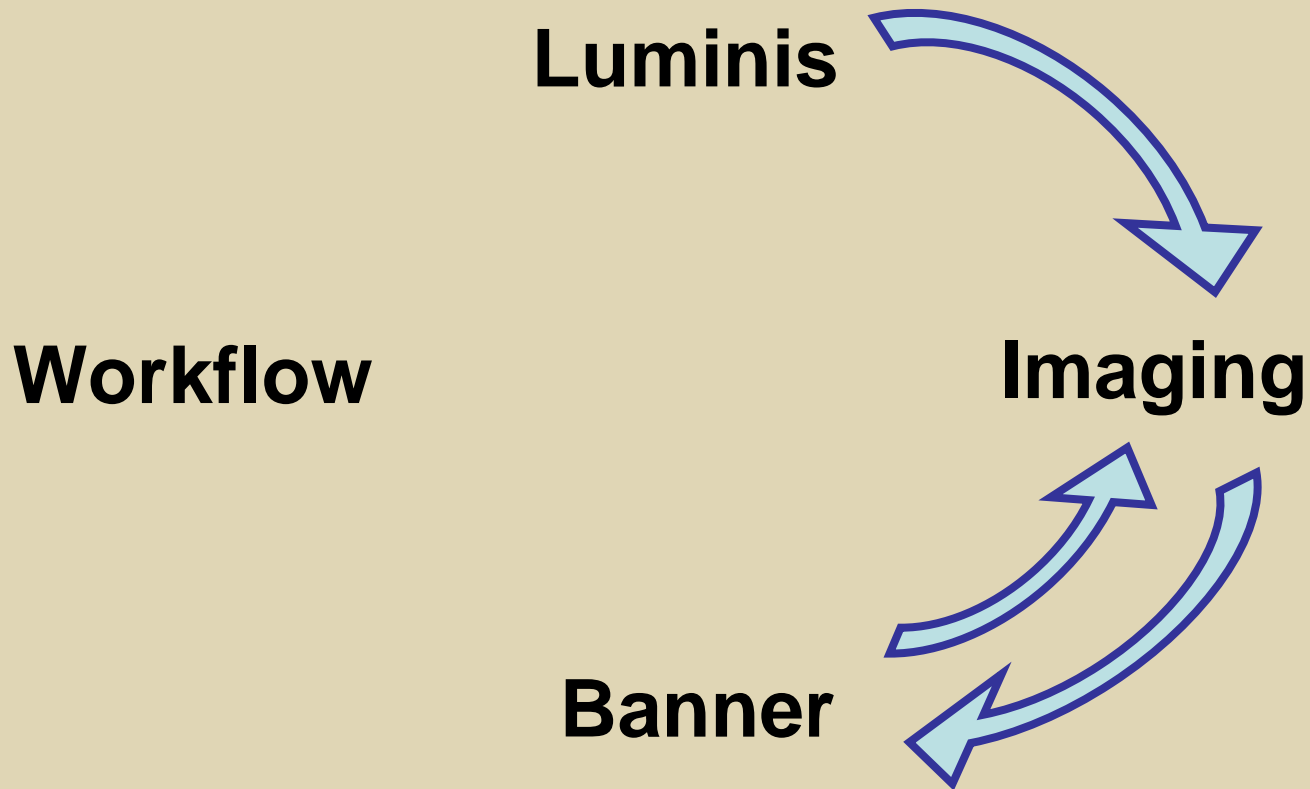
Baseline Tools

How Does 2 + 2 = 5?



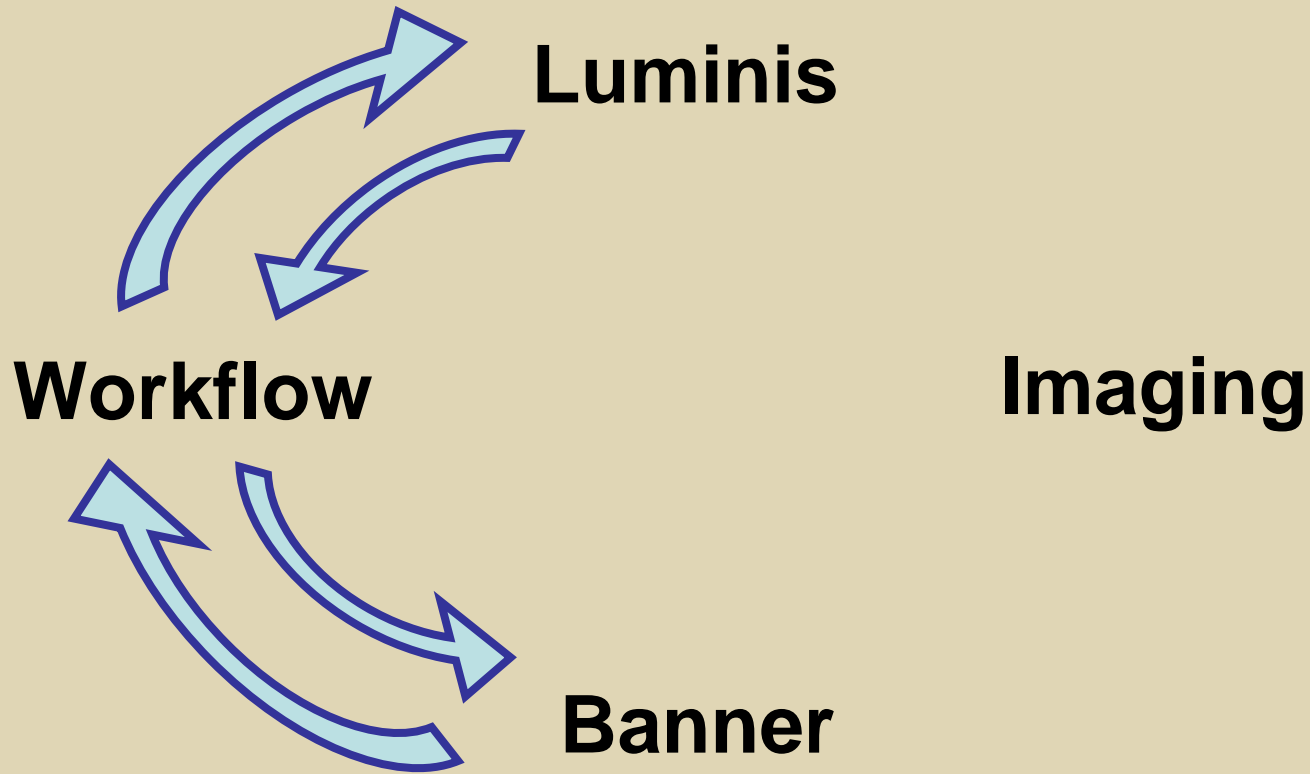
Baseline Banner and Luminis Integrations

How Does 2 + 2 = 5?



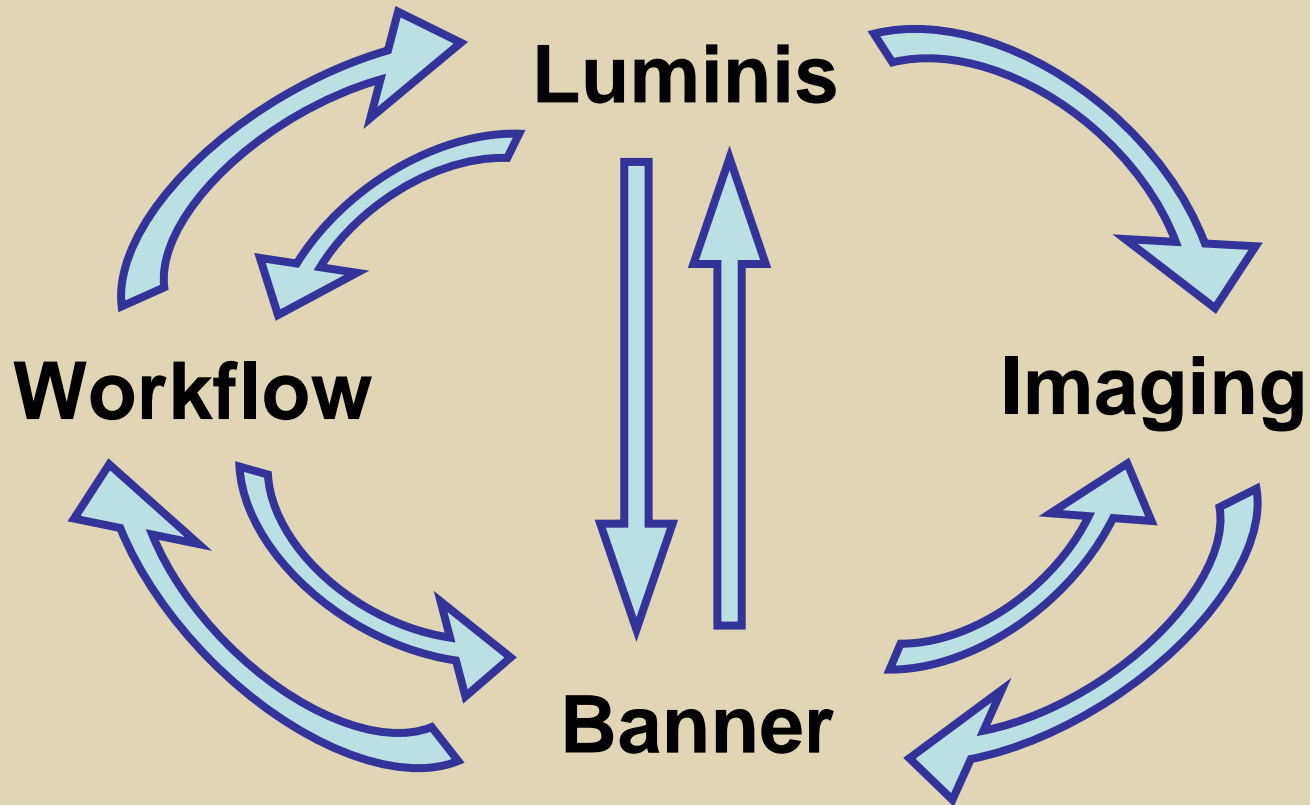
Baseline Imaging Integrations

How Does 2 + 2 = 5?



Baseline Workflow Integrations

How Does 2 + 2 = 5?



Total Baseline Integrations

What if I Have Banner?

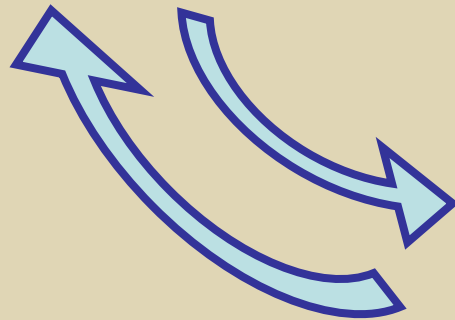
- I need to customize processes to meet my needs, but I don't want to modify baseline Banner
- I need to be able to look at Banner pages and documents together in context
- I need to notify people and be notified of activities

What if I Have Banner?

Luminis

Workflow

Imaging



Banner

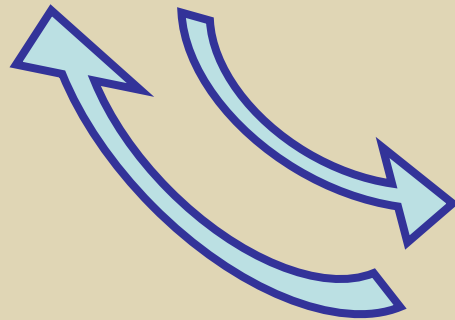
Customization

How Does 2 + 2 = 5?

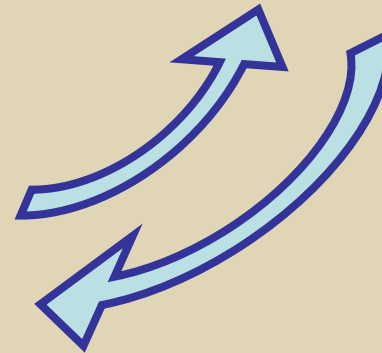
Luminis

Workflow

Imaging

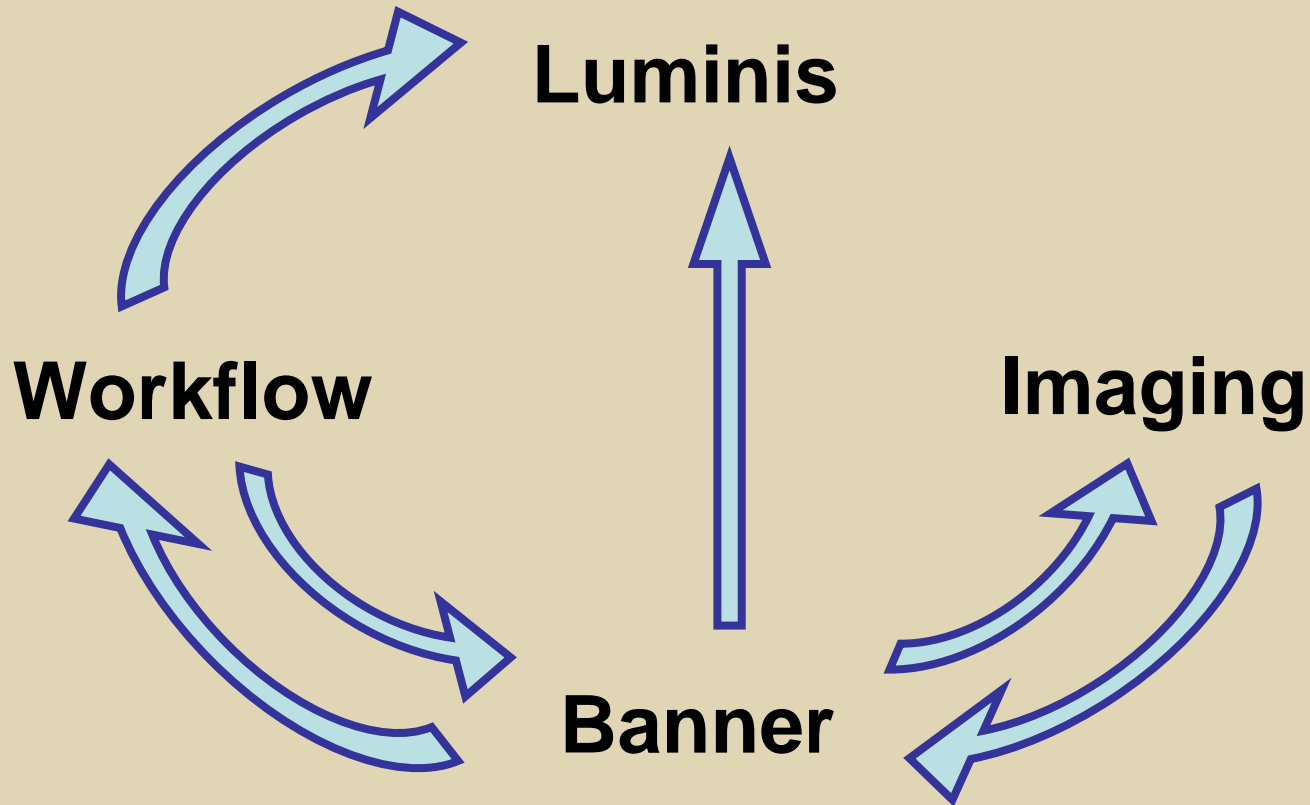


Banner



Customization + Docs and Data

How Does 2 + 2 = 5?

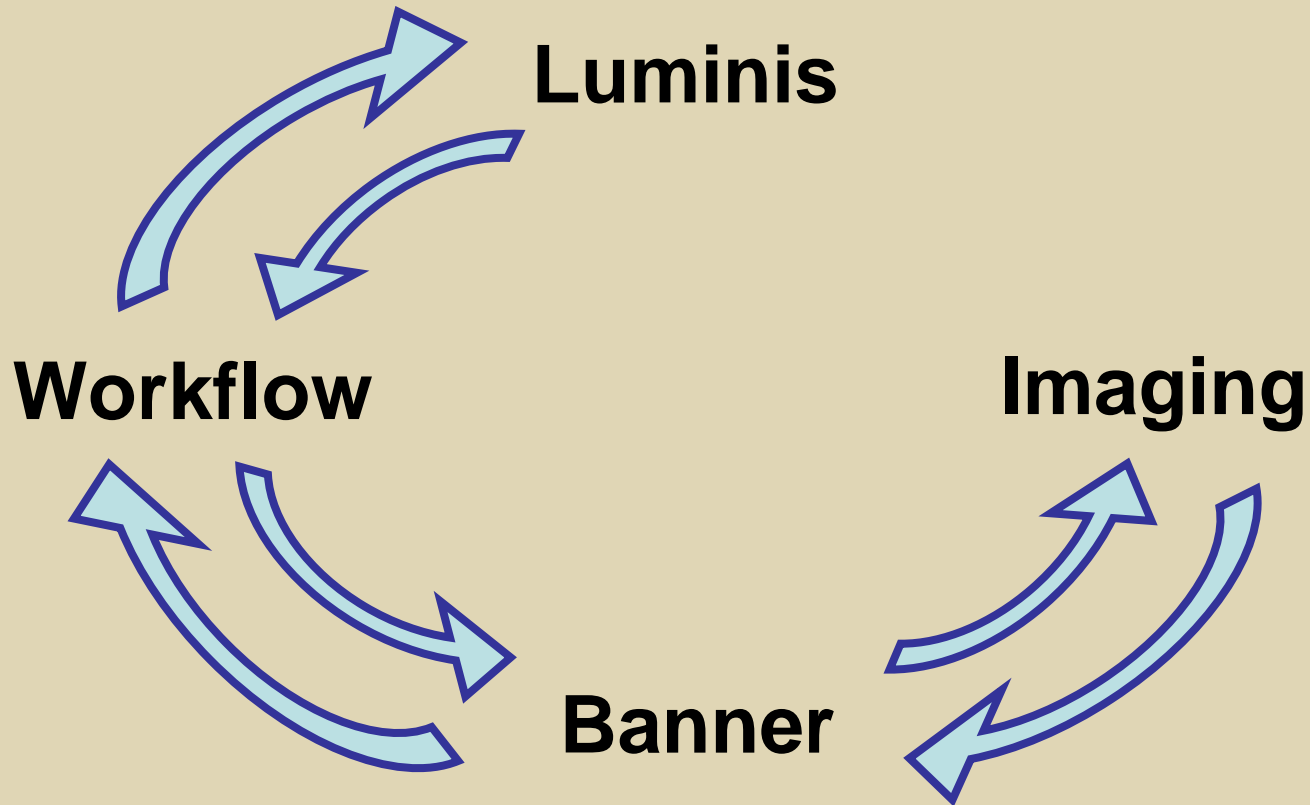


Customization + Docs and Data + Notification

What if I Have Imaging?

- I need action!
- I need data and documents sent to me proactively
- I need to document and define our document processes before the paper disappears
- I need to capture the wisdom of ideal document processes before our experienced workforce retires

How Does 2 + 2 = 5?



Action + Process Definition + Documentation

What if I Have Workflow?

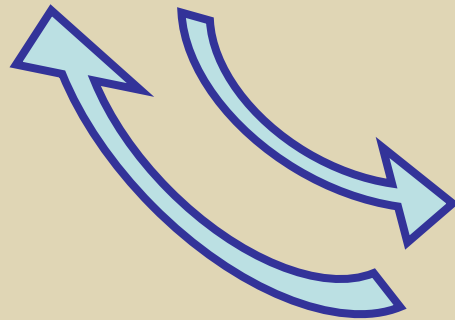
- I need documents as well as data in context
- I need “low-hanging fruit” for quick wins in process improvement and efficiency projects
- I need examples of where process efficiency and job improvement coincide (rather than collide)

How Does 2 + 2 = 5?

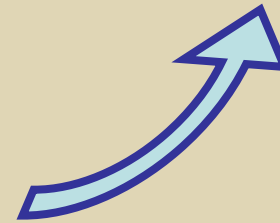
Luminis

Workflow

Imaging

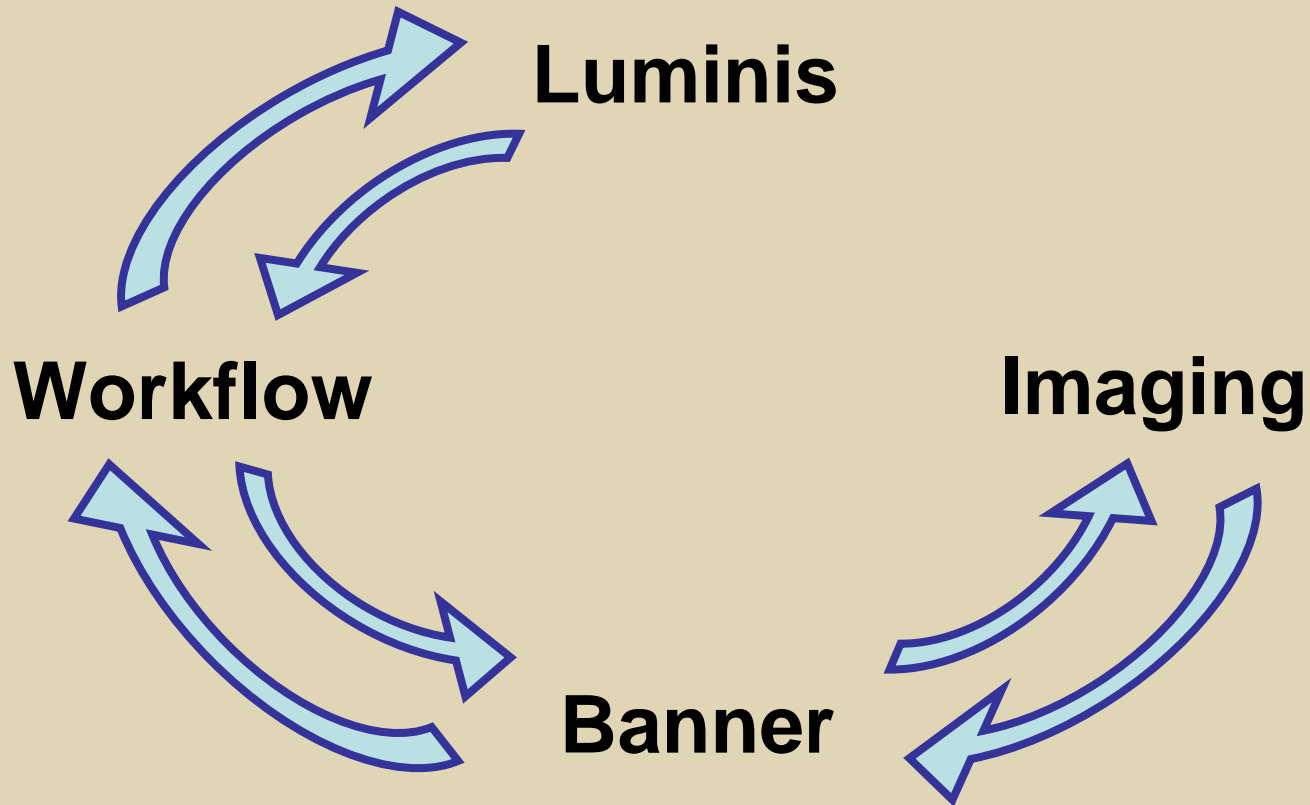


Banner



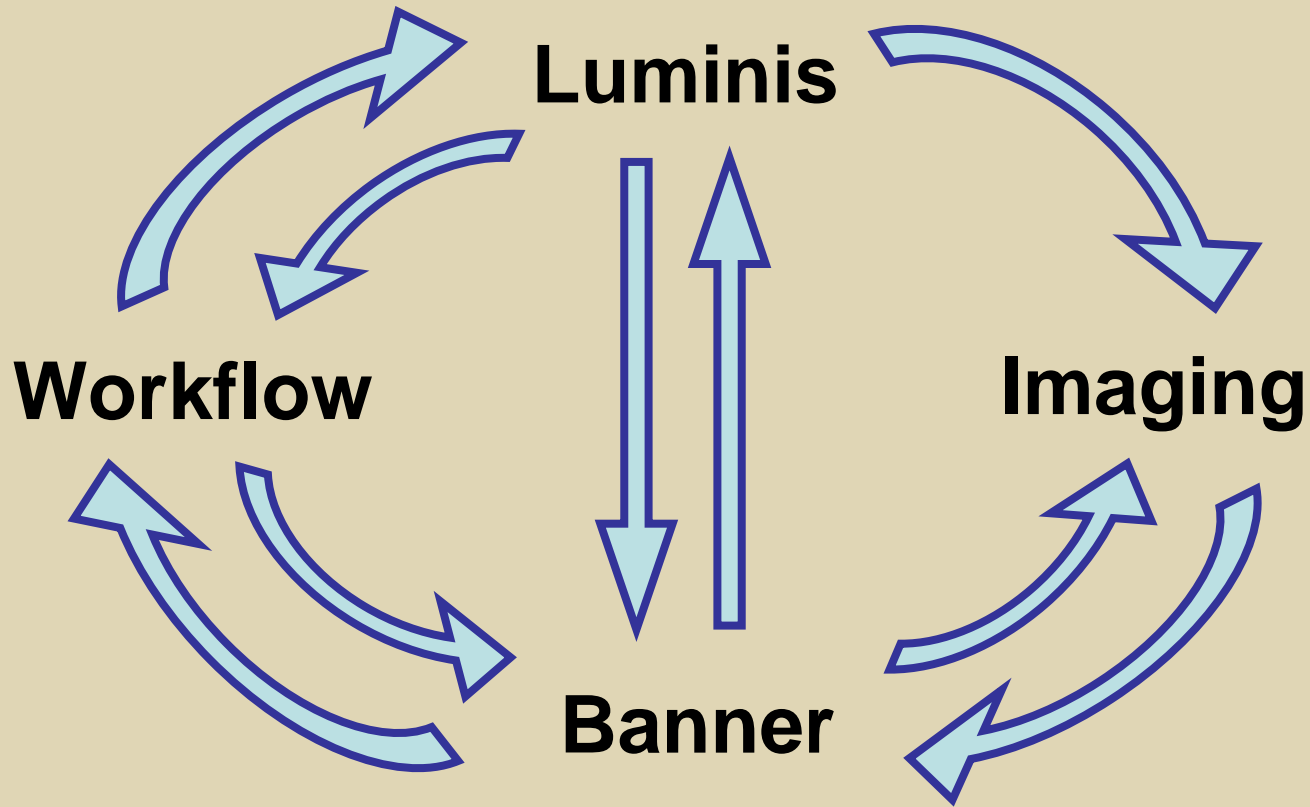
Docs and Data

How Does 2 + 2 = 5?



Docs and Data + Quick Wins

How Does 2 + 2 = 5?

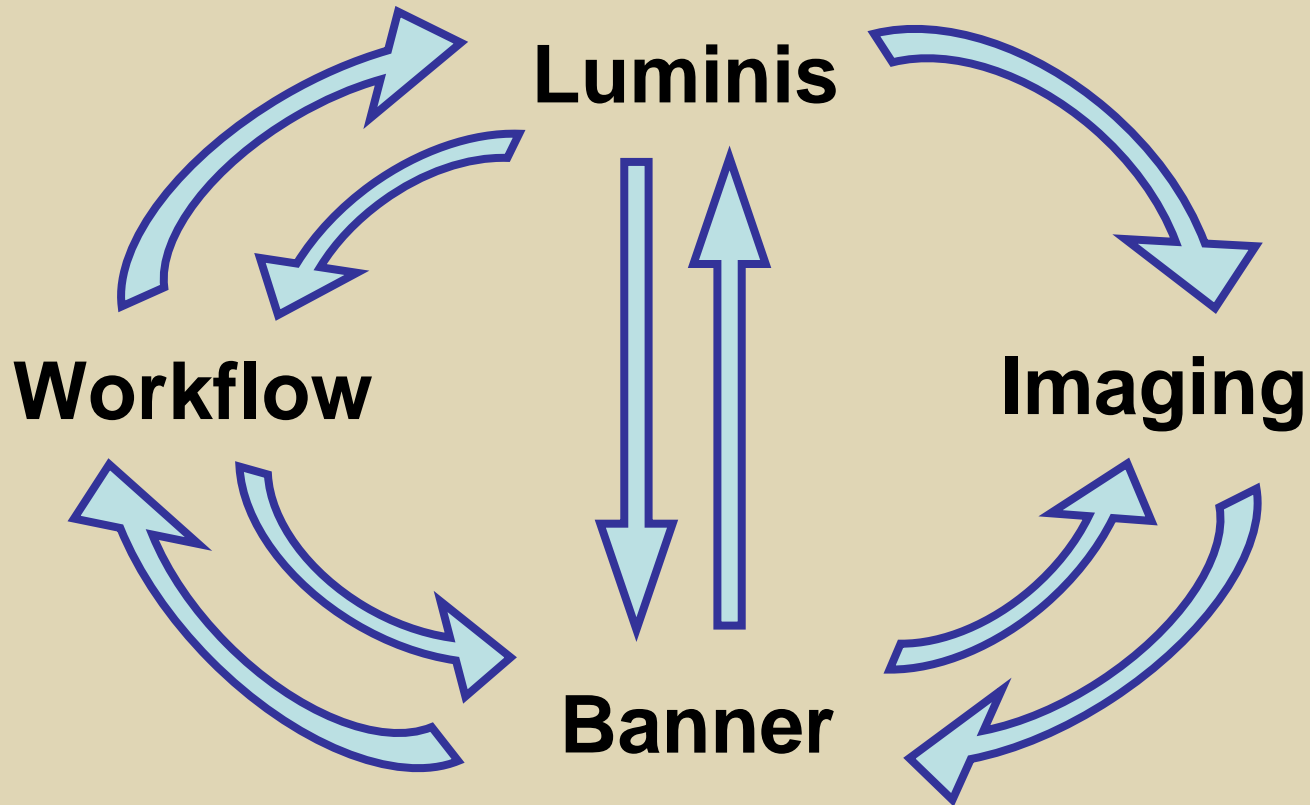


Docs and Data + Quick Wins + Process / Job Efficiency

What if I Have Luminis?

- I need to consolidate my resource interfaces into Luminis to maximize the value of the portal
- I need resources that easily plug into Luminis
- I need to drive constituents to use the resources I provide in Luminis through Luminis

How Does 2 + 2 = 5?



Resources in Portal + Plug-In + Constituent Value

What Can I Do Today?

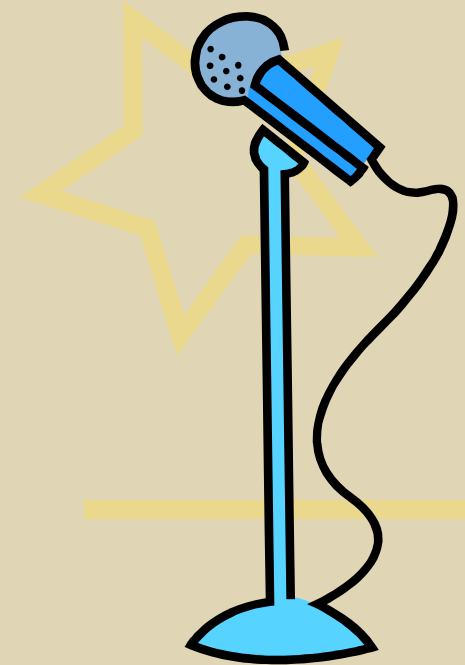
- Use BXS event integration with Banner to trigger Workflow processes and notifications
- Use Workflow integration with Banner to send staff data and documents in a single context
- Use Luminis integration with BXS, Workflow, and Banner for a common resource interface
- Use Workflow integration with Luminis to drive usage
- Use all four tools to boost job and process efficiency

Summary

- Leverage baseline integrations between our solutions
- Link our solutions where integration makes $2 + 2 = 5$
- Use the tools you have today even before expanding into new areas with us
- Pick a linked project and get started!

Questions & Answers

- Please use the microphone to ask questions of the presenter
- Please use the comments field of your evaluation form for detailing session feedback AND document workflow needs at your institution



Thank You!

Mike LaFortune

mike.lafortune@sungardhe.com

Please complete the on-line Evaluation Form

Evaluation Code 687

Without limitation, SunGard, the SunGard logo, Banner, Campus Pipeline, Luminis, PowerCAMPUS, Matrix, and Plus are trademarks or registered trademarks of SunGard Data Systems Inc. or its subsidiaries in the U.S. and other countries. Third-party names and marks referenced herein are trademarks or registered trademarks of their respective owners.

© 2006 SunGard. All rights