Banner Document Management and Workflow Update

Mike LaFortune - Ellucian
Agenda

- Banner Document Management Updates
  - BDM 8.4 MEP
  - Prospective Student Document Upload
  - Advance Document Management Cohabitation
  - AX 6.5 SP2
  - Context Rules Auditing
  - Banner Document Retention
  - BDM 9
  - QSP / InputAccel Exchange Developments
  - AX Connector

- Banner Workflow 8.1
But first…. 

- [http://www.youtube.com/embed/Ns7Z8ag4oSY](http://www.youtube.com/embed/Ns7Z8ag4oSY)
Who is this guy?

- **Work Life:**
  - Product Manager for Content Management
  - 15 years with Ellucian (SCT) in Higher Ed
  - Tours in document management, imaging, workflow, integration, student services and web publishing
  - Attended GA Summit #1,2,3,…!

- **Personal Life:**
  - Fabulous actress and artist wife and brilliant nine year-old son
  - Travel, surfing, outdoor family fun
  - Art and cultural development chair for Florida’s Space Coast
Who is this guy?

- **Work Life:**
  - Product Manager for Content Management
  - 15 years with Ellucian (SCT) in Higher Ed
  - Tours in document management, imaging, workflow, integration, student services and web publishing
  - Attended GA Summit #1,2,3,…!

- **Personal Life:**
  - Fabulous actress and artist wife and brilliant nine year-old son
  - Travel, surfing, outdoor family fun
  - Art and cultural development chair for Florida’s Space Coast
01 Banner Document Management (BDM)
Banner Document Management

- BDM 8.4 MEP – Available Today
  - Improved MEP support based on Oracle VPD
  - Reuses Banner MEP architecture for data and security
  - Optional segmentation of BDM elements:
    - Document access
    - Banner data (lookups, validation, drop downs)
    - Document storage paths
    - Scanned batches
  - Context set through Banner or direct AX login
Prospective Student Self-Service Document Upload

- Adds functionality to Admissions Self-Service
- Applicants upload supplementary documents
- Student Admissions checklists are updated
- Documents are indexed into BDM
- Delivered via Services, not baseline Admissions SSB
- Contact us for delivery details
Welcome to MySunGard University.

This secure site provides students, faculty, staff, and other university affiliates with single sign-on access to multiple sources of campus information and services. MySunGard University provides you with full Intranet and Internet services making it easier for you to do "business" with the university. Enjoy!

What's Inside?

- Personal course data and information
- Network with advisors, faculty and peers
- Online library research
- Email, calendaring, and address books: Manage your personal, course and school email, tasks and calendars
- Communities and Collaboration: Create, manage and join group homepages for clubs, affiliations and interests
- Registration, grades, academic profile, transcripts, financial aid, pay fees & more

Languages
- English
- Spanish
- French
- Russian
- Nederlands
- Svenskt
- Italiano
- Urdu
- Chinese
(Simplified)
- Deutsch
- Japanese
- Croatian
- Czech
- Polish
Application Checklist

Begin filling out the application sections below. A checklist is provided to help you complete it in a logical format. Also note that there is HELP in the upper right hand corner should you have questions. You can complete each section in any order you wish.

Select Application is Complete when you have completed the application. The Application will be verified for accuracy. If an error is found you will be directed to the field in question to correct. Once corrected click on the submit changes button again. Select Finish Later if you would like to finish your application later.

- Applicant Name
- Contact Information
- Personal Information
- Parent/Guardian Info
- Study Abroad Program Info.
- Academic Information I
- Academic Information II
- Health & Wellness Info.
- Essay
- Travel Credentials
- Supporting Documents
- Applicant Signature

Application is Complete  Finish Later
Supporting Documents (Checklist item 11 of 12)

Browse to a document you would like to upload and click the “Upload” button. Note that you cannot upload more than x bytes (configured as a webt tailor parameter) and can only upload jpg images, MsWord files, text files and pdf files. Please also note that if you upload a file that has the same name as an existing uploaded file and you associate it to the same document type, the original file will be replaced.

File:  
Browse  

Document type:
- Passport (Required)
- Copy of Valid Driver’s License
- Official SAT/ACT Scores
- Passport (Required)
- Personal Essay (Required)
- Visa Papers (Required)

Upload

Checklist  Continue  Finish Later

Return to Checklist without saving changes

RELEASE: 8.3
Banner Document Management

- Advance Document Management Cohabitation
  - BDM and ADM share AX server and Oracle database
  - Simplified deployment, lower implementation cost
  - Reference configuration provided by Ellucian

- AX Unique Key Flag, now optional
  - Unique Key configuration no longer mandatory
  - Provides more choice in document and page indexing
Banner Document Management

- AX 6.5 SP2 – End of Sept 2012
  - EMC fixes and extended support (June 2015)
  - Additional “merge” control in automated import and capture
  - Currently in controlled release customer review

  - Optional logging of context rules execution (no PII)
  - Increases understanding of what rules are actually used vs. latent
  - Data capture for Ellucian Banner 9 and BDM 9 design
Banner Document Management

- Banner Document Retention – Q1 2013 (80%)
  - Configurable rules-based document disposition
    - Use Banner data and/or AX metadata
    - Eg… If enrolled, then retain document for 2 years after graduation or last activity date, otherwise 1 year after receipt
  - Disposition Date added to baseline BDMS metadata
  - Delete or export documents and metadata
  - Shareable rules objects – eg… Shared Code Repository
Banner Document Management

- Banner 9 / BDM 9 – date tbd
  - Currently in architecture and design review
  - Simplified components and reuse across systems

- QSP / InputAccel Exchange Developments
  - All AX Image Capture customers can move to EMC QuickScan Pro at $0 license before April 2013
  - Exploring with EMC date flexibility
  - Exploring with EMC ability to swap for InputAccel components for greater capture automation and value
Banner Document Management

- **AX Connector**
  - Simple, non-programmatic AX integration with any system
  - Improves upon previous AX Integration Module (AXIM)
  - Easy screen and page recognition for indexing or query
  - Virtual Print directly to AX
  - Rapid deployment to Windows PC users
Collaboration and Community
Welcome to the Banner Document Management Suite Community

Featured Posts

Your Input Requested – Document Retention Management Survey
by Mike LaFortune, SGHE - SunGard Higher Education on 02/06/2012 06:52 PM 3 comments, 68 views
Categories: Retention Management, Imaging, Document Management
Custom Topics: bdmn, ax, document retention management
Hello Everyone.

As we delve into the details of document retention and disposition challenges on campus, we would like feedback from you on what matters to your processes and policies. In particular, we are currently looking at specifics on what Banner data matters in evaluating whether to retain or dispose of a document.

You can help us by taking a moment to complete a short survey so we can build better solutions for you in this area. You...

Banner Document Management Suite Community Source is now live!
by Holly Slocum - Kent State University, Kent Campus, Kent, OH on 11/6/2011 07:30 AM 1 comment, 110 views
We are pleased to announce that Banner Document Management Suite is the newest community in the Community Source Initiative! In this community you will find a place to submit your institution's modifications, not only to share with other institutions but also to possibly go baseline, relieving you of the maintenance behind those mods. There will also be a code repository for sharing code and collaborating with other institutions as many of us...
BDMS Commons Community

- BDMS Commons:  
  www.edu1world.org/CommonsBannerBDMS

- Discussions about document management, imaging, document processing and related topics

- Email updates and RSS feeds

- Community Source and Shared Code Repository
  - Administrative and migration tools

- 2100+ customers and Ellucian staff and growing
Everything’s a Process

A Google search for Sock Matching Strategies returns 13,100,000 results
We’ll waste about 1 month of our life just looking for matching socks!
Banner Workflow 8.1

- Technical Currency
  - Support for Weblogic Fusion Middleware 11g
  - Support for Java6
  - Updated Browser Support
  - BEIS 8.1.5 CAS Support
  - Oracle Tech Type Driver updated
- Dynamic Roles
- Dynamic Data Sources
- Dynamic Choices for Custom Activity Form Controls
- JavaScript Support in Custom Form Activities
- Improved Upgrade Process
- Improved Cross-site scripting vulnerability filtering
WF 8.1 – Technical Currency

- **Support for Weblogic Fusion Middleware 11g**
  - With this release, Banner Workflow can be installed to run on Weblogic Fusion Middleware 11g. This aligns Banner Workflow with the server support options for other SunGard Higher Education solutions. This release also deprecates the support of Oracle Application Server

- **Support for Java 6**
  - This release updates the Java support the the most current 6.x release available for OSX and Windows. This includes both the server supported version as well as the client version that is used for launching the Modeler. Defects: 1-PNMQYE, 1-C3UB2X

- **Updated Browser Support**
  - This release will update our browser support options to support IE8, and Current Firefox and Safari browsers.
WF 8.1 – Technical Currency

- Improved upgrade process
- New signed certificate
- Improved Cross-site scripting vulnerability filtering
- BEIS 8.1.5 CAS Support
- Oracle Tech Type Driver updated
WF 8.1 – Dynamic Roles

- Prior to 8.1, work could be directed to Users dynamically but Roles were stated at design time.
- Roles can now be specified via a context parameter and determined at execution time.
- For example:
  - Departmental Approvals from a group of folks
    - DEAN_MATH, DEAN_BIOL, etc…
  - Lose the Custom Activity “stacks”
    - Huge productivity gain
  - Remove Proxy misuse
WF 8.1 – Dynamic Roles

- New Dynamic Role option for a role based activity (Activity, Manual, Approval, Custom Form Activity)
WF 8.1 – Dynamic Roles

- Error Conditions
WF 8.1 – Dynamic Roles

- **Error Conditions**

- Can choose to route to another role on error
WF 8.1 – Dynamic Choices & Dynamic Data Sources

- Prior to 8.1, values in custom form drop downs and lists had to be supplied at design time
- Database queries can now provide values to Custom Activity controls, greatly expanding the use cases for custom forms

- For example:
  - Pull back user approval chain at run time
  - Select from validation tables
  - Display choices and data based upon process-specific information
WF 8.1 – Dynamic Choices & Dynamic Data Sources

- Dynamic Data Sources
WF 8.1 – Dynamic Choices & Dynamic Data Sources

- Dynamic Data Sources
WF 8.1 – Dynamic Choices & Dynamic Data Sources

- Dynamic Choices
  - Available on Drop Down and List controls
WF 8.1 – Dynamic Choices & Dynamic Data Sources

- Dynamic Choices with Input Parameters
WF 8.1 – Dynamic Choices Error Handling

1. If the result of the SQL query results in an empty list, show the below error:
   Dynamic data source <name> returned empty choice list for control <name>. Please contact your Administrator.

2. If the dynamic data source definition mapped to the control is not found:
   Data source mapped in dynamic data source <name> not found while resolving control <name>. Please contact your Administrator.

3. If the placeholders in the SQL do not match with the mapping in the control:
   SQL placeholders of dynamic data source <name> are no longer valid for control <name>. Please contact your Administrator.

4. If the activity's local parameters do not match with the mapping in the control:
   Activity parameter names have changed or have been removed. Dynamic data source <name> is not longer valid for control <name>. Please contact your Administrator.

5. If there is an error while executing the SQL query (could be because of syntax error):
   Error executing SQL query using dynamic data source <name> for control <name>. Please contact your Administrator.

6. If the work item has no parameters:
   SQL query for dynamic data source <name> used by control <name> could not be resolved as no work item parameters are available. Please contact your Administrator.

7. If there is a generic issue during processing:
   Error resolving dynamic data source <name> for control <name>. Please contact your Administrator.
WF 8.1 – Custom Form Javascript Support

- Custom Form Activities can use external JavaScript as well as CSS to enhance custom forms.
- For example:
  - Form styling
  - Form validation
  - Wizard forms
  - Google "jQuery form enhancements" for tons of ideas on this popular js library alone!
    - Be sure to share what you’ve done on the Commons and in the Code repository!
WF 8.1 – Custom Form Javascript Support

- Script tab to access page head and body
WF 8.1 – Custom Form Javascript Support

- Controls with Class and Id properties
WF 8.1 – Custom Form Javascript Support

- Example Usage – Form Validation
  - Add src Script links like found in examples on [http://docs.jquery.com/Plugins/Validation](http://docs.jquery.com/Plugins/Validation)

```html
<script type="text/javascript" src="http://code.jquery.com/jquery-latest.js"></script>
<script type="text/javascript" src="http://jzaefferer.github.com/jquery-validation/jquery.validate.js"></script>

<script>
$(document).ready(function(){
  $('form').validate();
});
</script>
```
WF 8.1 – Custom Form Javascript Support

- Example Usage – Form Validation
  - Add Script to call validate method
  - Add fields with the Class attribute specifying validation type like “url” or “required email”
WF 8.1 – Custom Form Javascript Support

- Example Usage – Form Validation
  - Enjoy new form validation capabilities!
WF 8.1 – Custom Form Javascript Support

- Example Usage – Rich Text Editor
  - Add the TinyMCE javascript library in a src Script tag and a new Script element with the following:

```html
<script type="text/javascript" src="http://www.tinymce.com/js/tinymce/jscripts/tiny_mce/tiny_mce.js"></script>
<script>
    tinyMCE.init({
        mode : "textareas",
        theme : "simple"
    });
</script>
```
WF 8.1 – Custom Form Javascript Support

- Example Usage – Rich Text Editor
  - Create a few other fields for your form, including a textarea and add the JavaScript to the script section.
WF 8.1 – Custom Form Javascript Support

- **Example Usage – Rich Text Editor**
  - Supplement an automatic form email for a student with a personal note from their advisor

![Image of Rich Text Editor and Email Properties window]
WF 8.1 – Custom Form Javascript Support

- Example Usage – Rich Text Editor
  - Enjoy Rich Text options using Javascript in your forms!
Community and Collaboration
Commons and Code Repository

http://www.edu1world.org/CommonsBannerWorkflow

- Search for code your campus could use
- Collaborate on projects with other schools
- Upload things you’d like to contribute to the community

http://csicode.sungardhe.com
How to’s in the Code Repository

Banner Workflow - Javascript in Custom Forms How-to Guide

Rich Text Editor

Created by: Joshua Aversa, Datatel + SGHE
Banner Workflow Version: 8.1

Introduction:
This example leverages a javascript library created by the folks at http://www.jquery.com/ that allows you to convert any textarea into a rich text editor. This is especially useful if you want to ask users to enter a rich text content form activity that gets inserted into an email in the text activity. For this example we'll follow the case where an advisor has been asked to personalize a message to a student that needs to see them to apply for graduation.

What you'll need:
1. Link to a library hosted at http://www.jquery.com/. For this example we are using the links provided in jQuery's examples though in production you may want to host the minimized versions of those files on a campus server so you ultimately control the availability and version of those files.

The two files being used as part of this example are:

2. While not illustrated below, you could also host a CSS file to style the validation messages. Be sure the class names don’t deviate from what’s required by the validation mechanism – otherwise you’ll need to specify validation through the script rather than through the class attributes.

Instructions:
1. Add a script to the Custom Form Activity and set the src attribute to
   http://www.jquery.com/javascripts/jquery.js. This ensures the loading of the jQuery library
   and the jQuery Validation plugin used in step 2.

2. Add a second js control to the Custom Form Activity and set the src attribute to
   http://www.jquery.com/javascripts/jquery-ui.js. Your Custom Form Activity should now look like this:

3. Add a 3rd js control, but this time open the script attribute to edit and add javascript directly rather than through a file include. This code is what finds the Form within the rendered page and attaches the validation

Field Validation

Created by: Joshua Aversa, Datatel + SGHE
Banner Workflow Version: 8.1

Introduction:
By using the standard jQuery plugin for Validation (http://docs.jquery.com/Plugins/Validation) you can quickly add standard validation to forms by leveraging the form element class attributes. This is an easy way to validate email addresses, urls, numbers, etc., to your Banner Workflow forms.

What you’ll need:
1. Link to the jQuery Library and to the jQuery Validation plugin. For this example we are using the public links provided in the jQuery Validation example, though in production you may want to host the minimized versions of these files on a campus server so you ultimately control the availability and version of these files.

The two files being used as part of this example are:
 a. http://code.jquery.com/jquery-1.7.1.min.js

2. While not illustrated below, you could also host a CSS file to style the validation messages. Be sure the class names don’t deviate from what’s required by the validation mechanism – otherwise you’ll need to specify validation through the script rather than through the class attributes.

Instructions:
1. Add a script to the Custom Form Activity and set the src attribute to
   http://code.jquery.com/jquery-1.7.1.min.js. This ensures the loading of the jQuery library
   and the jQuery Validation plugin used in step 2.

2. Add a second js control to the Custom Form Activity and set the src attribute to
   http://code.jquery.com/jquery.validate.js. Your Custom Form Activity should now look like this:

3. Add a 3rd js control, but this time open the script attribute to edit and add javascript directly rather than through a file include. This code is what finds the Form within the rendered page and attaches the validation
Workflows Used Wiki

- A Wiki section for the Commons that helps schools find others who have done X with Banner Workflow

- We are looking to create a small group of client volunteers to get this off the ground

- Please email joshua.aversa@ellucian.com if you are interested in participating
Professional Services
Workflow Services

- Installation
- Workflow Server/Application Administration Training
- Workflow Process Modeling Training
- SQL for Workflow Training
- Workflow Web Services Training
- Workflow Process Analysis (WPA)
- Workflow Production Readiness
- Workflow Technical Support
- Workflow MEP Support
But first….

- http://www.youtube.com/embed/Ns7Z8ag4oSY
Summary

- Banner Document Management Updates
  - Multi-Entity Improvements
  - QSP Exchange
  - AX 6.5 SP2 and Context Rules Auditing
  - AX Connector integration with any system
  - Banner Document Retention in Q1 2013 (80%)

- Banner Workflow 8.1
  - Dynamic Roles and Data Lookups
  - More powerful Custom Activity forms
  - Ability to meet wider range of business process needs