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## Common User Workflow Questions:

- 1. I see work sitting on my worklist – what do I do?**
  - a. Work sitting on a worklist is ready for the user to complete. Click on the workitem to launch it and begin work. The first column on the worklist indicates the workflow name; the second column is the workflow step or “activity” name.
- 2. I see work on my worklist but it says it’s still performing!!**
  - a. The performing status in the first column of the worklist indicates that you started the work, but never hit workflow complete button to indicate that the workflow item is complete.
- 3. I hit workflow submit in Banner, but my work is still sitting there!**
  - a. Hit the browser refresh button to refresh the worklist. The worklist is dynamic. Once work is complete, the work will disappear from the worklist.
- 4. I hit Exit and left Banner before I hit Workflow submit – what do I do?**
  - a. The work will still be waiting on the worklist. Start the work again to open Banner, do next block to populate fields, hit Workflow Submit to tell workflow the work is completed.
- 5. My work is gone – How do I know what happened!!**
  - a. Workflow status search will have a record of all workflows that have started. Click on the workflow status option and search for your workflow. When the workflow names appear, click on the name to see the status.

## Introduction to Workflow

### Basic Workflow concepts:

- Workflow is an automation of a business process. When one step of the process is complete, workflow advances to the next step.

- Each user has privileges in workflow. These privileges are called “roles”. Each role is associated with one or more users. Each user can have multiple roles.
- Work is distributed by role. Everyone in a particular role will receive work to do on his or her worklist. Only one person will be able to complete the work.
- When you logon to workflow using your user id, you will see a worklist. The worklist is the work that has been sent to your user ID because of the roles associated with your user id.
- Logging on to workflow will let you know if you have work to complete.

## Things you need to know:

This document will provide generic instructions for the following:

- Log on to workflow
- Respond to work
- Start a workflow manually via a short cut
- View status of a workflow

## 1 Log on to Workflow

1. Open a browser and browse to your campus home page.
2. Log in with your Flashline ID and password, and click go.
3. Click the Action Items tab.
4. Scroll down to locate the Worklist channel.
5. Click ‘Open SCT Workflow’.

## 2 Respond to Work

### When you open workflow, you will be on the Worklist

Worklist is a “to do” list – work you see is sent you because your user id has a role associated with it.

**NOTE: All users in the role associated with a workitem will see that item on their worklist until someone claims it. When you open a worklist document, you claim the document and it disappears from the worklist of other users. To put the document back on their worklist, you must release it as specified in the ‘Additional Items’ section below.**

- 1 Open the Worklist on the home page, click **Worklist**.

Note: Users with same roles will all receive the same work. Work is sent to all users with a specific role. Sometimes, it is only sent to one person with that role.

The status of the workitem will show as “Ready”. **The first person that starts the work will take it away from all the other users. This is called “reserving” the work. When the work is reserved or started, the workitem status shows as “Performing”. To release the work back to all other users, there is a “release” option to change the status back to “Ready”.**

The status will remain “Performing” until the user completes the work. “Completing” the work in Banner is done by clicking the “workflow submit” button. Work not in Banner is generally done by clicking the “Complete” button that us generally enabled.

When the activity is complete the workflow goes to the next step.

- 2 Click on the workitem on your worklist to start the activity.
- 3 Workflow will launch your work – open a workflow window, web page or launch Banner.

Note: When workflow launches Banner, your WF logon ID and password will be used to log you onto Banner. Banner will automatically open for you, open the form you need to be on and populate the key information automatically.

- 4 Complete your work as defined by your business process. When you have completed your work, proceed to the next step. If you have not completed your work and wish to “reserve” it for later, click the “workflow release” button or click on save and close button.
- 5 If the workitem has directed you to Banner, be sure to click the Workflow Submit button to submit your data. Banner should return to the GUAGMNU. If you are not returned to Workflow, click the Workflow button on the Taskbar to bring Workflow to the front Return your worklist.
- 6 In Workflow, if you worklist has not changed, click the *Worklist* option in the Home tab at the top of the navigation options on the left side of the window or use your browser refresh button.


### 3 Additional Options

Note: These are options available to you but may not be required for processing.



Click the magnifying glass at the end of the workitem line to view options/details for the workitem and workflow.

- Check the status of the workflow
- **Release the work item back to other users**
- Add/review notes
- Add/review attachments

1. On the Workitems Details page, select Status  to view the progress of your workflow. A diagram of your model will open. The diagram has the following indicators:
  - i. Completed activities have a green checkmark
  - ii. Current activities flash red box with a "running man" icon
2. Click the Release option to reset the reserved item from “performing” status to “ready”.
3. Click the Complete option to complete the item – this should only be done if the work has really been completed.
4. Click the Notes tab at the bottom of the page to add or review notes for the workitem or the workflow.
5. Click the Attachment tab at the bottom of the page to review/delete/add attachments to the workflow.
6. Click **Worklist** at the top of the options list on the left side of the window to return to the home page.








## 4 Review workflow status

If you wish to see the status of a workflow that is in your worklist, click on the magnifying glass on the right side of the screen. If the item does not appear on your worklist, you may select the Workflow Status Search option to find the workflow.

- 1 In the navigation bar on the left of the window, select *Workflow Status Search*.
- 2 A search criteria window appears, enter the full or partial name of your workflow in the Workflow Specific Name field. Partial name can be entered using asterisk (\*) or percent (%) as wild card characters. Click **Search** to search for your workflow. (Leave all criteria blank and select Search to see all workflows.) The workflow can also be searched by workflow model name, date, status.
- 3 Results of the search will be listed at the top of the screen. Click on the desired Workflow to see the progress. When the picture is opened, every activity should be marked complete. Change the percentage in the tool bar above the model picture to zoom in/out.
- 4 Clicking on a workflow will result in the Workflow status screen appearing. The workflow status screen contains two items:
  - a. Workflow status – view the status of a workflow in a flow chart
    - i. Completed activities are marked with a check mark.
    - ii. Performing activities are marked with a running man.
    - iii. If a workflow activity is stalled, and alert will appear at the top of the screen with the activity name listed.
  - b. Workflow details – view all of the fields on a workflow, and add notes to a workflow.
- 5 Clicking on a workflow activity on the 'Workflow Status' tab will cause the client to display two additional tabs that contain details about the specific activity. A dialog box will also appear that contains buttons that allow you to take action on an activity:


### Activity Buttons:

**NOTE: All activity buttons may not be available to all users. Some are reserved for administrators and owners.**

|   |                              |   |
|---|------------------------------|---|
|  | <b>Start</b>                 | Click Start to begin work on the selected work item.  |
|  | <b>Reserve</b>               | Click Reserve to reserve a work item to perform at a later time.  |
|  | <b>Complete</b>              | Click Complete to inform SCT Workflow that your work on the work item is finished.  |
|  | <b>Skip</b>                  | Click Skip to stop your work on a work item and advance to the next work item in the workflow.  |
|  | <b>Release</b>               | Click Release to change the status of a workflow that you have reserved back to Ready, making it available to all users with the associated role. |
|  | <b>Status</b>                | Click Status to view the Workflow Status page where you can modify the status of a workflow or activity.  |
|  | <b>Stop Workflow Request</b> | Click Stop Workflow Request to stop the workflow instance.  |

## 5 Create a proxy

1. Log in to Flashline.
2. Click the 'My Action Items' tab.
3. In the 'My Worklist' channel, click the 'Open SCT Workflow'
4. Click the 'User Information' link under 'User Profile'
5. Scroll down to the 'My Proxies' section and click the 'Add Proxy' button.
6. Select the Role that you would like to proxy and click the 'Add Proxy Details' button.
7. Select the kent.edu username of the person who you would like to have as your proxy. If this person doesn't appear in this list, contact the Help Desk at 2HELP and open a ticket. You will need to request that your proxy is added to the role you are selecting.
8. Select an 'Effective From' date and an 'Effective To' date. (NOTE: Both are required fields)
9. Select the types of documents you would your proxy to see: Confidential or Non-Confidential. To allow your proxy to see both, you can select both, but at least one must be selected.

NOTE: When an activity appears on a user's worklist due to a proxy relationship, this icon  is displayed to alert the user that this work item would normally be performed by another user.

## 6 Monitoring Workflows

### Workflow Status

Workflow status displays a picture of the workflow with the current status of the workflow. All workflows that have started will appear in Workflow Status unless they have been deleted/purged. The workflow status search window provides a filter to search for a particular workflow or group of workflows. Search fields:

- Workflow specifics name – Name of the workflow. This should contain something specific for searching such as a number or name. The beginning of the name should be a constant so all will be listed together when a sorted.
- Workflow name - Name of the workflow model. This will display a list of all workflow instances for that model.
- Date ranges for start date and end date
- Status

If the workflow has an error, the workflow will also appear in the Workflow Alerts window.

### In-process Monitoring

(Note: Workflow models must be in **ACTIVE** status to appear on the In-Process monitoring page.)

This is a tool provided by workflow to list all workflows that have been started and are not yet completed. It allows the user to select individual models and identify statistics and the state of the process.

The user may view the page provided or may create an excel spreadsheet of the data. The spreadsheet has several pages each providing a different level of data.

## 7 Start a workflow from a shortcut

A shortcut is a way to start a workflow manually. This option is used if the workflow does not have an

automatic start. MOST USERS WILL NOT HAVE TO START A WORKFLOW FROM A SHORTCUT. Most workflows will be started automatically or from a web application in Flashline. Shortcuts are personalized for each user.

### To create a shortcut

1. In the navigation bar on the left of the window, select *Shortcut*.
2. Click on the Organize Business Process Shortcut button
3. The “Add Shortcut” box will appear. Select the drop down box at the end of the Business Process field to view and select the business process for which you would like to create a shortcut.
4. Optionally, add a shortcut name in the second field in the box.
5. Click the Add Business Process Shortcut button to add the shortcut for your user id.

### Start a workflow manually via a shortcut

- 1 In the navigation bar on the left of the window, select *Shortcut*.
- 2 Any shortcut you have created will be displayed. Click on the shortcut to start a workflow.
- 3 A Start Workflow window will appear with the following fields
  - a. **Workflow Name** – Default the name of the workflow model
  - b. **Workflow Specifics Name** – This is the actual name of the workflow that will appear in the worklist and used in the workflow status search to search for a workflow. It should contain some “specific” value to identify the workflow such as a name, id number....
  - c. **Priority** – select the appropriate priority for the workflow. Default is “Normal”.
  - d. **Notes** – Optionally add notes to the workflow
- 4 Once the workflow is started, a message window will appear indicating the workflow has started.
- 5 The workflow will then appear on the user’s worklist or in workflow status search.

## Workflow Terminology:

| Term                                    | Definition  |
|---|---|
| <b>Activity</b>                         | Step in a workflow. Associated with a component in the BCC or with a predefined object in the modeler tool bar (email, manual, approval objects)  |
| <b>Activity – Attribute (WF 4.2)</b>    | Workflow “data” that is used in a workflow – performer user id, workflow instance name and initiator user id. These workflow system items can be mapped to “workflow context” and used inside the workflow. |
| <b>Business Component Catalog (BCC)</b> | Repository of all external executable objects defined to workflow. These objects must be defined here prior to being used in a model.   |
| <b>Business Event - Definition</b>      | Something that happens outside of workflow to start the workflow automatically. This is done by updating the event tables in Banner generally through a database trigger or a script.                       |
| <b>Business Event – External</b>        | Business event status. Result of automatic starts of a workflow.  |
| <b>Component</b>                        | An executable (form, program, script...) launched in an activity in a workflow.   |

|                              |  |
|------------------------------|--|
|                              | This must be defined in the BCC to be used in the workflow.  |
| <b>Parameter - Component</b> | Data used at the individual steps in a workflow. Data that is passed between workflow context and the component. Parameters are defined at the component in the BCC. |
| <b>Parameter - Context</b>   | ALL data that is known to a workflow. This data is passed into the workflow via a business event or through component parameters.                                    |
| <b>Role</b>                  | Privilege that is associated with a user logon ID.<br>Roles are associated with users.<br>Roles determine what work each user will see.                              |
| <b>Workflow Instance</b>     | Each workflow that starts becomes an "instance" of the model. The instance is essentially each test or execution of the model.                                       |
| <b>Worklist</b>              | "To Do"/work items sent to users.  |
| <b>Workitem</b>              | Item/work on the worklist that must be completed by a user.  |