Making Workflow Work For You

Debbie S. Williamson
Sonny Monfort
Georgia Institute of Technology
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!
Why Workflow?

- Eliminate manual work
- Better utilize Banner and other applications
- Eliminate paper
- Ease the pain of budget cuts
- Uses outside Banner
The Technical Side

- **Hardware**
  - Sun Microsystems sun4u Sun Fire V240
    - 2 CPU, 8G ram running Solaris 9
  - Same type of server we use for serving Banner INB and Self Services – we use 4 for Banner

- **Software** – You own it; you should use it.

- **DBA resource**

- **“Trigger” resource**
The Functional Side

- Who is currently involved
  - Registrar’s Office
  - Financial Aid
  - Undergraduate Admissions
  - Graduate Admissions
First Steps

- Pick something easy
- If you can’t put it on paper…..
- Evaluation of current processes
  - Because we always have done it this way
  - Can we do it better?
- One office or cross-office process?
Workflow Training

- Technical Training
  - Server training
  - Administration training

- Functional Training
  - Users and roles
  - Using the modeler
Sample Workflows

- **Banner workflows**
  - Changes to degree candidate records
  - Changes to student information
- **Non-Banner workflows**
  - Request for time off
  - Request for data tracking
- **Think PeopleSoft and other databases**
Requires a trigger
I need a trigger...

- Here are some samples of what the technical staff will provide...
Banner / Workflow ID: dw20

* First Name: 

* Last Name: 

Date of Request: 14-Sep-2005 12:00:00 AM

* Time-Off Start Date: 

* Time-off End Date: 

* Reason
  - Sick Leave
  - Vacation
  - Extended Family Leave
  - Other - Enter Below

Comments / Reasons: None

* Supervisor: Debbie Williamson

Complete  Save & Close  Cancel
Your request for time-off has been submitted. You will receive an email from your supervisor when a decision has been made regarding your request.

Thanks for using the on-line system.
Debbie Williamson has requested time-off for the following dates: 21-Sep-2005 through 23-Sep-2005. Please log into your WorkFlow worklist to complete the time-off request form. Click Here to open worklist. Thanks.
<table>
<thead>
<tr>
<th>Workflow</th>
<th>Activity</th>
<th>Priority</th>
<th>Created</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request For Leave</td>
<td>supervisor form</td>
<td>Normal</td>
<td>14-Sep-2005 03:09:57 PM</td>
</tr>
</tbody>
</table>

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

Show Reserved Items
First Name: Debbie
Last Name: Williamson
Date of Request: 14-Sep-2005 12:00:00 AM
Time-Off Start Date: 21-Sep-2005 12:00:00 AM
Time-off End Date: 23-Sep-2005 12:00:00 AM

Reason
- Sick Leave
- Vacation
- Extended Family Leave
- Other - Enter Below

Comments / Reasons: Attend Georgia Summit

Supervisor: Debbie Williamson

* Supervisor's Comments / Reasons: None

* Approval Date: 14-Sep-2005 12:00:00 AM
Supervisor’s reply to employee.

From: debbie.williamson@registrar.gatech.edu
Reply-To: debbie.williamson@registrar.gatech.edu
To: debbie.williamson@registrar.gatech.edu
Subject: Your request for time-off starting 21-Sep-2005 through 23-Sep-2005
Date: Wed, 14 Sep 2005 15:15:39 -0400 (EDT)

Debbie,

Your request for time off has been reviewed as of 14-Sep-2005. I have 'Approved' your request. Should you have any questions, please contact me. Any comments are listed below.

Comments: Good luck with your presentation.

---

Supervisor’s reply to employee.
Helpful Hints

- After putting on paper, have someone else read it (you may leave out steps)
- May not be "workflow worthy"
- Meet together to discuss and write
- Start with something easy
- Have a naming convention
Timeline of Events

- September 7, 2004 – Meeting to discuss Workflow (SCT consultant)
- March 2005 – Server purchased; Workflow installed in test environment
- March 31 – meeting with supervisors to determine who will be involved
- April/May 2005 – Meetings with Workflow Group
Timeline - continued

- May 31, 2005 – Server Administration Training (remote)
- June 2-3, 2005 – Technical Training (remote)
- June 6 – 9, 2005 – Functional Training (SCT)
- July – August 2005 – Workflow individual work
- September 2005 – Second Functional Training
Workflow Channel

- Using Workflow with Luminis
- Monitoring
  - “Lagging” processes
What Workflow Can’t Do

- Make your employees come to work on time
- Resolve personnel issues
- Improve a “bad” business process
QUESTIONS???

- Debbie Williamson
  - debbie.williamson@registrar.gatech.edu

- Sonny Monfort
  - sonny.monfort@oit.gatech.edu