

Session Number 10

# ***Workflow Panel Discussion***

*Ventura County Community College District*  
*Bill Pearce – Principal Consultant, SIG*

3CBG

By the Sea 2009



# Overview

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VCCCD has been utilizing Workflow for a number of years, but the usage has increased greatly since we brought up Luminis (MyVCCCD.) We have created a process to maintain users and roles in Workflow via Banner. We are also using a technique presented at Summit 2009 to populate dropdown boxes in Workflows. We will also discuss briefly access to Workflow via Luminis, and show a simple Workflow example.

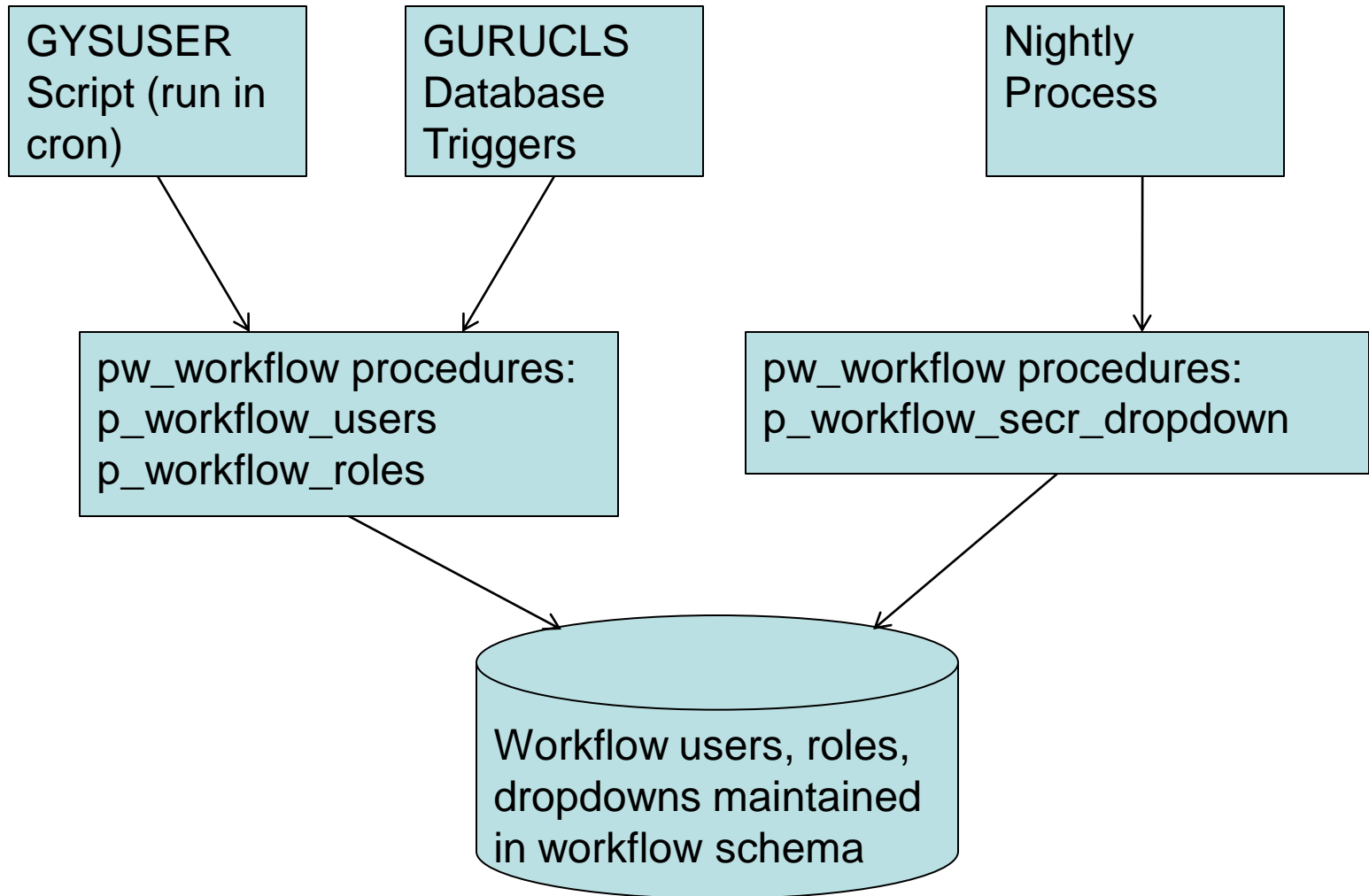


# Topics

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- Workflow Maintenance from Banner
  - Process Flow
  - GYSUSER Script
  - GURUCLS Database Triggers
  - Sample Screenshots
  - Populate dropdown boxes
- Workflow Channels in Luminis
- A simple Workflow example
- Questions?

# Process Flow





# GYSUSER

- 
- Runs every 5 minutes in cron
  - New Non-Student Employees, Third Party ID change
    - Creates workflow user, generic roles
    - Districtwide role wfuser, by location wfuser\_XXX
  - Terminated Employees (All)
    - Terminates workflow user and all roles
  - Re-instated Non-Student Employees
    - Activates workflow user, generic roles



# GURUCLS Database Triggers

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- After insert
  - Creates role from WF\_xxxx user class assignments
  - Example – security class WF\_PURCH\_DEPT creates role Purch\_Dept in workflow
- After delete
  - Terminates workflow role equivalent to security class
- Location change
  - Creates new location role, doesn't disable old



# User and generic roles created (employee hired at MC)

Logon ID:

Last Name:

First Name:

Middle Name:

Email:

Effective From:  ...

Effective To:  ...

Enabled:  ▾

⌵ **Authentication**

⌵ **Notifications**

⌵ **Launching**

Role Name	Effective From	Effective To
<a href="#">wfuser</a>	01-Oct-2009 09:55:01 AM	
<a href="#">wfuser_mc</a>	01-Oct-2009 09:55:01 AM	



# PEAEMPL Home Org changes from MC to DAC

VCCCD	wfuser
VCCCD	wfuser_dac
VCCCD	wfuser_mc





# User assigned to WF\_xxxx security classes

Objects granted directly to the User or Class

JMOORPARK

Object Name

Role Name

7.5A (TEST)

User in Class	Class Code
<input checked="" type="checkbox"/>	WF_PURCH_DEPT
<input type="checkbox"/>	WF_PURCH_EMERG_PO
<input type="checkbox"/>	WF_PURCH_NEW_VENDOR
<input type="checkbox"/>	

Show Classes



# Corresponding roles in workflow

Logon ID:

Last Name:

First Name:

Middle Name:

Email:

Effective From:  ...

Effective To:  ...

Enabled:  ▾

✧ **Authentication**

✧ **Notifications**

✧ **Launching**

Role Name	Effective From	Effective To
Purch_Dept	01-Oct-2009 01:11:47 PM	
Purch_Emerg_PO	01-Oct-2009 01:11:50 PM	
Purch_New_Vendor	01-Oct-2009 01:11:53 PM	
wfuser	01-Oct-2009 09:55:01 AM	
wfuser_mc	01-Oct-2009 09:55:01 AM	



# User deleted from WF\_xxxx security classes

Objects granted directly to the User or Class

JMOORPARK

Object Name

Role Name

IA (TEST)

User in Class	Class Code
YES	WF_PURCH_DEPT
	WF_PURCH_EMERG_PO
	WF_PURCH_NEW_VENDOR

Show Classes



# Roles ended in workflow

Logon ID:

Last Name:

First Name:

Middle Name:

Email:

Effective From:

Effective To:

Enabled:  ▼

✧ **Authentication**

✧ **Notifications**

✧ **Launching**

Role Name	Effective From	Effective To
<a href="#">Purch_Dept</a>	01-Oct-2009 01:11:47 PM	
<a href="#">Purch_Emerg_PO</a>	01-Oct-2009 01:11:50 PM	01-Oct-2009 01:20:44 PM
<a href="#">Purch_New_Vendor</a>	01-Oct-2009 01:11:53 PM	01-Oct-2009 01:20:46 PM
<a href="#">wfuser</a>	01-Oct-2009 09:55:01 AM	
<a href="#">wfuser_mc</a>	01-Oct-2009 09:55:01 AM	



# Employee is terminated

Employee PEAEMPL 7.2 (TEST)

ID: 900605212  Jesse Moorpark

**General Employee** United States Regulatory Canadian Regulatory

**Employee Status:** Terminated

**Employee Class:** ZZ  Non-Employees

**Employee Group:**

**Leave Category:** NL  No Leave Accrual

**Benefit Category:** NB  No Benefits

**Part or Full Time Status:** Other



# User and all roles ended in workflow

Logon ID:

Last Name:

First Name:

Middle Name:

Email:

Effective From:  ...

Effective To:  ...

Enabled:  ▾

✧ **Authentication**

✧ **Notifications**

✧ **Launching**

Role Name	Effective From	Effective To
<a href="#">Purch_Dept</a>	01-Oct-2009 01:11:47 PM	01-Oct-2009 01:35:01 PM
<a href="#">Purch_Emerg_PO</a>	01-Oct-2009 01:11:50 PM	01-Oct-2009 01:35:01 PM
<a href="#">Purch_New_Vendor</a>	01-Oct-2009 01:11:53 PM	01-Oct-2009 01:35:01 PM
<a href="#">wfuser</a>	01-Oct-2009 09:55:01 AM	01-Oct-2009 01:35:01 PM
<a href="#">wfuser_mc</a>	01-Oct-2009 09:55:01 AM	01-Oct-2009 01:35:01 PM



# Employee is re-activated

Employee PEAEMPL 7.2 (TEST)

ID: 900605212 Jesse Moorpark

General Employee United States Regulatory Canadian Regulatory

**Employee Status:** Active

**Employee Class:** ZZ Non-Employees

**Employee Group:**

**Leave Category:** NL No Leave Accrual

**Benefit Category:** NB No Benefits

**Part or Full Time Status:** Other



# User and generic roles re-instated (not security class roles)

Logon ID:

Last Name:

First Name:

Middle Name:

Email:

Effective From:

Effective To:

Enabled:

⌵ **Authentication**

⌵ **Notifications**

⌵ **Launching**

Role Name	Effective From	Effective To
<a href="#">Purch_Dept</a>	01-Oct-2009 01:11:47 PM	01-Oct-2009 01:35:01 PM
<a href="#">Purch_Emerg_PO</a>	01-Oct-2009 01:11:50 PM	01-Oct-2009 01:35:01 PM
<a href="#">Purch_New_Vendor</a>	01-Oct-2009 01:11:53 PM	01-Oct-2009 01:35:01 PM
<a href="#">wfuser</a>	01-Oct-2009 09:55:01 AM	
<a href="#">wfuser_mc</a>	01-Oct-2009 09:55:01 AM	





# Dropdown list in Workflow

## Approval Routing

**If routing to Contract Admin, choose Contr Admin Name and None.**

**If routing to a Dean/Manager, choose None and Dean/Manager Name.**

**If routing directly to a VP, choose None and None.**

\* Route to Contr Admin:

Gorback, Karen	▲
Johnson, Susan	
Pearce, Bill	
Sanchez, Ramiro	☰
Walker, Rebekah	▼

\* Route to Dean/Mgr:

None	▲
Bricker, Susan	
Fuhrmann, David	
Pearce, Bill	
Untalan, Heather	▼



# User CWEINGART added to Contract Admin Security Class

**Objects granted directly to the User or Class**

CWEINGART

**Object Name**  **Role Name**

7.5A (TEST)

User in Class	Class Code
<input checked="" type="checkbox"/>	WF_PERS_SVCS_ADMIN
<input type="checkbox"/>	WF_PURCH_NEW_VENDOR
<input type="checkbox"/>	
<input type="checkbox"/>	

Show Classes



# User TCOBOS added to Dean/Manager Security Class

Objects granted directly to the User or Class

TCOBOS

Object Name

Role Name

R 7.5A (TEST)

User in Class	Class Code
<input checked="" type="checkbox"/>	WF_DIRECTORGENERALSERVICES
<input type="checkbox"/>	WF_PERS_SVCS_MGR
<input type="checkbox"/>	WF_PURCH_DEPT
<input type="checkbox"/>	WF_PURCH_EMERG_DE

Show Classes



# Procedures run in nightly process

```
14:08:31 SQL-TEST-BANINST1> 1
1  begin
2
3  pw_workflow.p_workflow_secr_dropdown('personal services contract','personalsvcsform',
4      'route_to_admin','wf_pers_svcs_admin', 'None');
5
6  pw_workflow.p_workflow_secr_dropdown('personal services contract','personalsvcsform',
7      'route_to_mgr','wf_pers_svcs_mgr', 'None');
8
9  pw_workflow.p_workflow_secr_dropdown('personal services contract','contradminappr',
10     'route_to_mgr','wf_pers_svcs_mgr', 'Disapproved');
11
12* end;
14:08:33 SQL-TEST-BANINST1> /

PL/SQL procedure successfully completed.
```



# Dropdown list updated in Workflow

## Approval Routing

**If routing to Contract Admin, choose Contr Admin Name and None.  
If routing to a Dean/Manager, choose None and Dean/Manager Name.  
If routing directly to a VP, choose None and None.**

Route to Contr Admin:

- Johnson, Susan
- Pearce, Bill
- Sanchez, Ramiro
- Walker, Rebekah
- Weingart, Chedva**

Route to Dean/Mgr:

- None
- Bricker, Susan
- Cobos, Teresa**
- Fuhrmann, David
- Pearce, Bill

# Production Workflow Channels (SSO)



[My Account](#)  
[Content Layout](#)  
[Portal Admin](#)

Welcome **Bill Pearce**  
You are currently logged in.

**My College** | **Faculty** | **Work Life** | **Employee Information** | **Banner Testing** | **My Tab**

## My Applications



### Banner Applications

[Banner](#)  
[Report Viewer](#)  
[Backoffice](#)

### Webstar

[Main Menu](#)  
[Personal Information](#)  
[Faculty Services](#)  
[Employee Services](#)  
[Advisor Menu](#)

### External Applications

[Blackboard Vista](#)

[Application Downloads](#)

## Personal Alerts

[Turnitin Training Materials](#)  
[MyVCCCD Course Studio Workshop, Oct. 5, 11AM-12PM](#)  
[Desire2Learn \(for Blackboard Users\) 10/5, 1PM-5PM](#)  
[TechEd 2010 - Final Call for Presentations](#)

## District-wide Announcements

[Oxnard College Student Services and Administration Building De](#)

## My Workflow Worklist

Organization	Workflow Name
VCCCD	<b>3CBG Sample Workitemt</b> Performing

## Portal News - Employee



### Portal News

- [9/8/09 - Student Tab](#)
- [8/28/09 - Login Page Re-design](#)
- [8/26/09 - Print Rosters Link added](#)
- [8/25/09 - New link to Instructor's Detailed Schedule](#)
- [8/10/09 - New RSS feeds](#)

### Coming Soon

- [High Priority Personal Alerts](#)

## My Workflow Processes

VCCCD

[Purchasing: Emergency P.O.](#)  
[Purchasing: New Vendor](#)  
[Service Request: District IT](#)  
[Service Request: MC IT](#)  
[Service Request: OC IT](#)  
[Service Request: VC IT](#)

# For SSO to work, External Authentication must be Immutable ID - We use Third-Party ID

Logon ID:	<input type="text" value="bpearce"/>
Last Name:	<input type="text" value="Pearce"/>
First Name:	<input type="text" value="Bill"/>
Middle Name:	<input type="text"/>
Email:	<input type="text" value="bpearce@vcccd.edu"/>
Effective From:	<input type="text" value="01-Jun-2004 12:00:00 AM"/> <input type="button" value="..."/>
Effective To:	<input type="text"/> <input type="button" value="..."/>
Enabled:	<input type="text" value="Yes"/> ▼
<b>Authentication</b>	
<input type="radio"/>	Workflow Authentication
<input checked="" type="radio"/>	External Authentication
	<input type="text" value="bpearce"/>

# Worklist is in-frame

[Back to Work Life Tab](#)

## VCCCD - Request for Personal Services Contract

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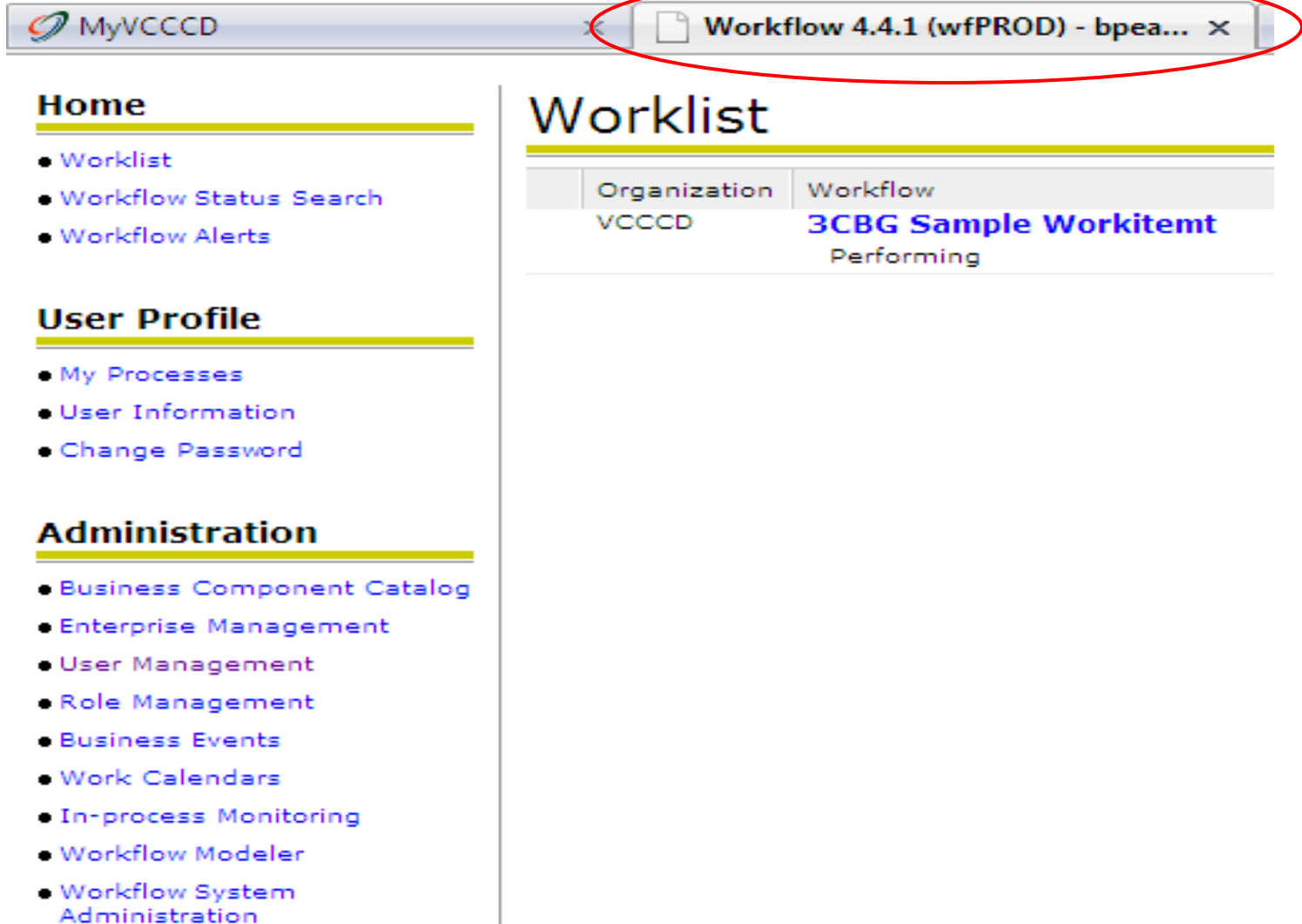
Org Code/Desc: 72006  
Contr Admin Approver: None  
Mgr/Dean Approver: None  
VP Approver: None  
President Approver: None  
Buyer Review: None  
Purchasing Approver: None  
Grant Approver: None  
VC HR Approver: None  
VC Business Approver: None  
Approval Status: Initial Entry - No Approvals Yet  
Last Approver:  
Disapproval Reason:

The Request for Personal Services Contract must be completed by a VCCCD employee (not the contractor). Prior to completion of this form, review VCCCD 'TABLE OF FORMS FOR PAYMENT OF PERSONAL SERVICES', District-wide form No. 14017, to determine if a Request for Personal Contract needs to be submitted. Some services are predetermined as independent contractors and may be exempt from the Personal Services Contract procedures and process. If the total amount of the agreement is to be \$500 or less, a Personal Services Contract is not required.

The information provided on this Request for Personal Services Contract form will serve as the basis for an independent contractor, consultant or professional service. Please answer all questions in detail and be as specific as possible. When completed, attach this form and the IRS 20 Questions Pre-Hire Worksheet to a VCCCD Requisition form. Evaluation and approval of these forms must be completed prior to contractor beginning any work and issuance of a Personal Services Contract.



# Open Workflow is out-of-frame



The screenshot shows a web browser window with the MyVCCCD logo on the left. The browser's address bar contains the text "Workflow 4.4.1 (wfPROD) - bpea..." and is circled in red. The main content area is divided into two columns. The left column has three sections: "Home" with links for Worklist, Workflow Status Search, and Workflow Alerts; "User Profile" with links for My Processes, User Information, and Change Password; and "Administration" with a list of links including Business Component Catalog, Enterprise Management, User Management, Role Management, Business Events, Work Calendars, In-process Monitoring, Workflow Modeler, and Workflow System Administration. The right column is titled "Worklist" and contains a table with one row of data.

Organization	Workflow
VCCCD	<b>3CBG Sample Workitem</b> Performing

# Access to Test Instances (not SSO)



[My Account](#)  
[Content Layout](#)  
[Portal Admin](#)

Welcome **Bill Pearce**  
You are currently logged in.

[My College](#)

[Faculty](#)

[Work Life](#)

[Employee Information](#)

[Banner Testing](#)

[My Tab](#)

## Banner Testing



### Testing (TEST)

- [Banner](#)
- [Report Viewer](#)
- [Back Office](#)
- [webSTAR](#)
- [webSTAR \(Skip Wizard\)](#)
- [WorkFlow](#)

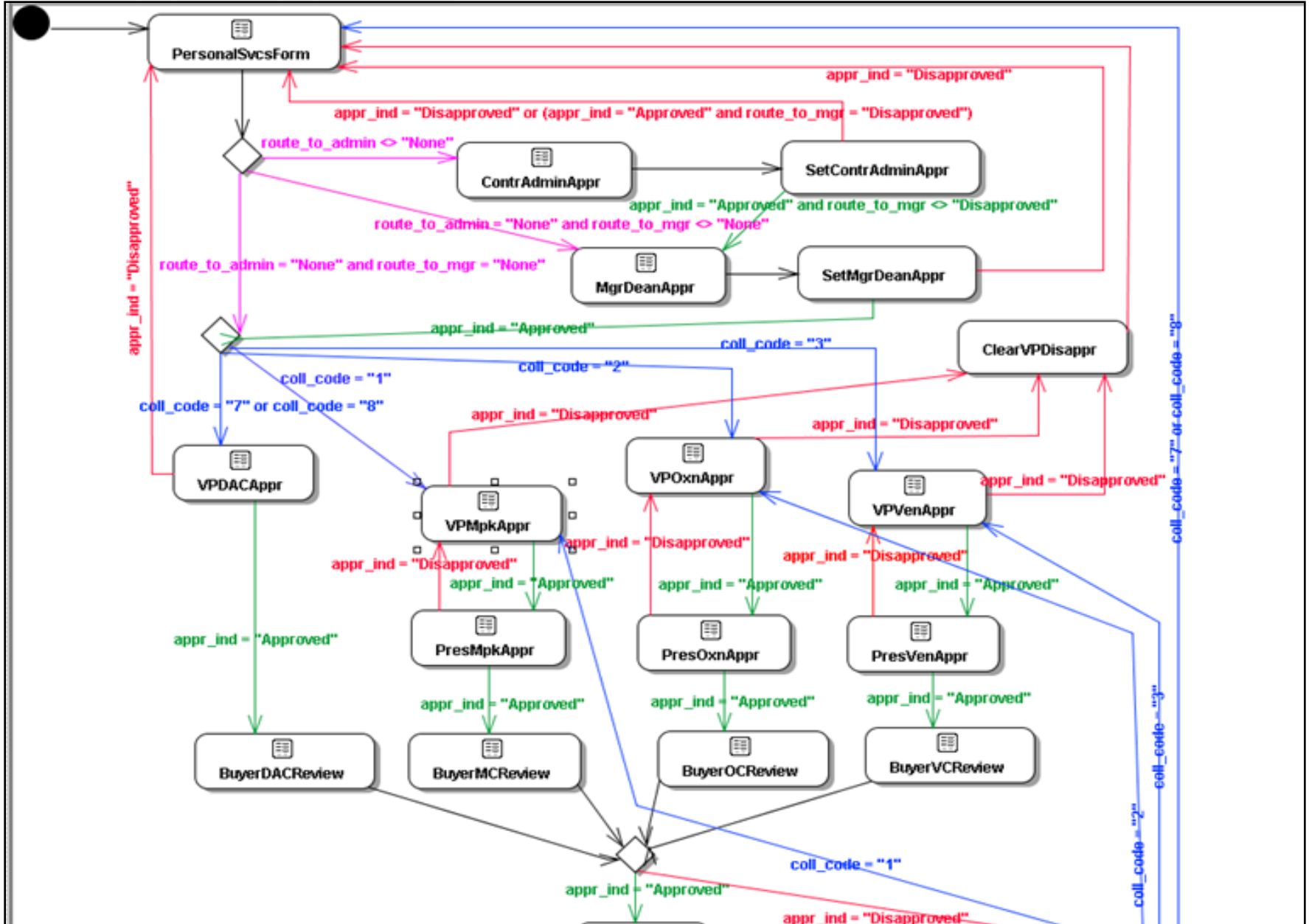
### PreProduction (PPRD)

- [Banner](#)
- [Report Viewer](#)
- [Back Office](#)
- [webSTAR](#)
- [webSTAR \(Skip Wizard\)](#)
- [WorkFlow](#)

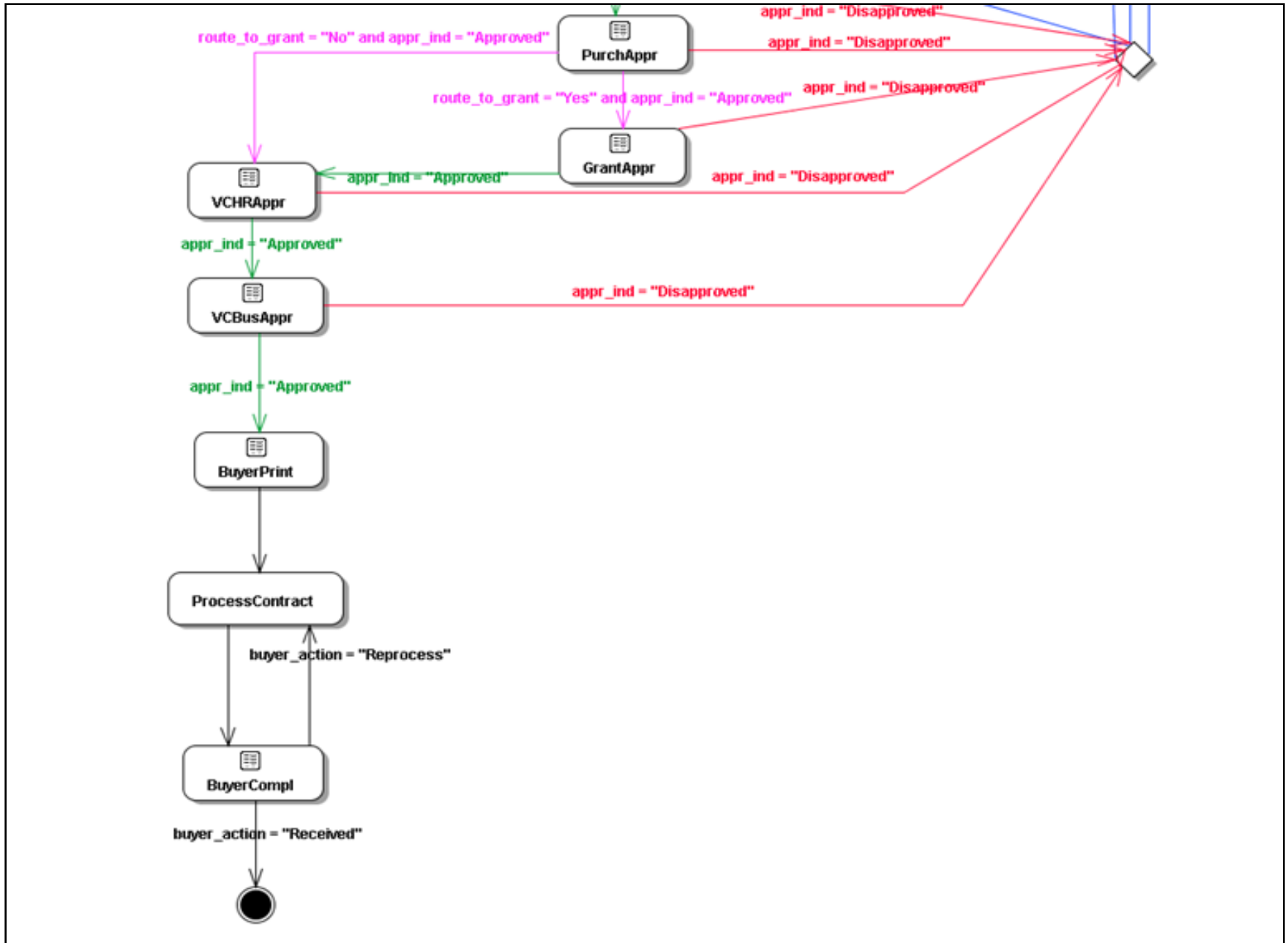
### Upgrade (UPGR)

- [Banner](#)
- [Report Viewer](#)
- [Back Office](#)
- [webSTAR](#)
- [webSTAR \(Skip Wizard\)](#)
- [WorkFlow](#)

# Simple Workflow Example Page 1



# Simple Workflow Example Page 2





# Questions?

