Workflow Administrator Training
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- Workflow is the electronic process of approving forms.
- Access gained through Employee Self Service.
- Over 200 form-types now processed through Workflow.
All forms ultimately reside in the application of origin.
Workflow Administrators

- If you are designated as an **Org** Workflow Administrator, you can set up workflow paths for the Org and below or grant Workflow Administrator rights to your department levels.

- If you are designated as a **Dept** Workflow Administrator (receiving your rights from the Org), you can set up workflow paths for the Dept and/or Sublevel or grant Workflow Administrator rights to others at department level.
Setting Workflow Administrator Access

- From the **Administration** tab, click **Secondary Security**.
On the “Secondary Security Authorization” screen, click the down arrow in the Application field to indicate which application (in this case **WKFLW ORG/DEPT**) you are granting access and enter the name of the individual you want to grant workflow access rights. Click **Continue** button.
Authorize Access

- The next screen will be the authorization screen for that individual. You will only see what Org/Dept you are authorized to establish.
  - “Work” access indicates the individual can use the application for that unit;
  - “Admin” access indicates that the individual can not only use the application for that unit, but can also authorize others to use the application.
  - “No” access is the default assignment.
- Click the radio button next to the access you wish to grant; then click the Continue button at the bottom of the screen.
## Authorize Access for COWLES, PATRICIA R

### CHOOSE APPLICATION

**Application Name:** WKFLW ORG/DEPT

### CURRENT APPLICATION: WKFLW ORG/DEPT

You may add or remove security authorization by selecting the appropriate radio button for that unit.

- **Work Access** - indicates that an individual can use the application for that unit.
- **Admin Access** - indicates that an individual can not only use the application for that unit, but can also authorize others to use the application.

<table>
<thead>
<tr>
<th>ORG 05</th>
<th>ADMIN ACCESS</th>
<th>WORK ACCESS</th>
<th>NO ACCESS</th>
</tr>
</thead>
<tbody>
<tr>
<td>DEPT 05 0300</td>
<td>ADMIN ACCESS</td>
<td>WORK ACCESS</td>
<td>NO ACCESS</td>
</tr>
<tr>
<td>DEPT 05 0303</td>
<td>ADMIN ACCESS</td>
<td>WORK ACCESS</td>
<td>NO ACCESS</td>
</tr>
<tr>
<td>DEPT 05 0305</td>
<td>ADMIN ACCESS</td>
<td>WORK ACCESS</td>
<td>NO ACCESS</td>
</tr>
<tr>
<td>DEPT 05 0307</td>
<td>ADMIN ACCESS</td>
<td>WORK ACCESS</td>
<td>NO ACCESS</td>
</tr>
<tr>
<td>DEPT 05 0308</td>
<td>ADMIN ACCESS</td>
<td>WORK ACCESS</td>
<td>NO ACCESS</td>
</tr>
<tr>
<td>DEPT 05 0309</td>
<td>ADMIN ACCESS</td>
<td>WORK ACCESS</td>
<td>NO ACCESS</td>
</tr>
<tr>
<td>DEPT 05 0310</td>
<td>ADMIN ACCESS</td>
<td>WORK ACCESS</td>
<td>NO ACCESS</td>
</tr>
<tr>
<td>DEPT 05 0311</td>
<td>ADMIN ACCESS</td>
<td>WORK ACCESS</td>
<td>NO ACCESS</td>
</tr>
<tr>
<td>DEPT 05 0315</td>
<td>ADMIN ACCESS</td>
<td>WORK ACCESS</td>
<td>NO ACCESS</td>
</tr>
</tbody>
</table>

[Reset] [Continue]
After clicking the Continue button you will be taken back to the Security Authorization screen where your changes are noted as saved; you can now enter another individual or go back to the main Workflow menu to set up the Workflow Path.

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For access to secondary applications, an individual must have access to HR Self Service. For access to HR-Related secondary applications, an individual must have access to the HR Data Access Applications.

- This application allows you to manage security for other employees to secondary applications such as the Graduate Reappointment Application and AP/PO PeopleSoft Web Applications.
- You will be granting/removing security only for those orgs/departments that you select on the following screen.
- Please select the Employee and Application for whom you wish to authorize security.
Establishing Workflow Paths

Under the Workflow tab, Administrative Options header, click on Edit/Maintain Workflow Groups
On the Workflow Groups screen, there are two major types of forms:

- **Standard Workflow Forms** (e.g., Purchase Requisitions, Fleet Services, and various HR transaction forms)
- **Employee/Supervisor Forms** (e.g., Employee Time Records, Pcard, Travel Expense)

Clicking on the plus (+) sign next to each form-type will expand the list(s) for that form-type.
Workflow Path Types

- Standard Forms
  - Preqs, HR forms, ProTrav (student/nonemp)
  - Pre-determined paths established

- Employee/Supervisor Forms
  - ProTrav (fac/staff), time reporting
  - List of supervisors optional
  - May set post-supervisor
Standard Workflow Forms

To establish a workflow group for a particular form, click on a form in the left panel.

Workflow Form Types:
- Standard Workflow Forms
  - Accounts Payable / Travel
  - Facilities Management
  - Human Resources
    - Special Compensation
    - Adjunct Support
    - Appointment
  - Appt - Biweekly Hour-Student
  - Appt - Biweekly Student
  - Appt - Biweekly Workstudy

Please choose a specific form type from the list on the left side of this screen to see further workflow group maintenance options.
This tool requires IE 5 (or later) or Netscape 6.1 (or later).
Click here for a frameless version of this tool (IE4, Netscape 4).

The right panel will now give you the option to Add New Workflow Group to that particular form you selected. Click the blue link.
The right panel now displays **Establish Workflow Group** for the form you checked. Noted is the Org you have access to. Enter the level you wish to establish (org, org/dept, org/dept/subdept). Click **Continue**.

** Workflow Form Types:**
- Standard Workflow Forms
- Accounts Payable / Travel
- Facilities Management
- Human Resources
- Special Compensation
- Adjunct Support
- Appointment
  - Appt - Biweekly Non-Student
  - Appt - Biweekly Student
  - Appt - Biweekly Workstudy
  - Appt - Faculty Complimentary
  - Appt - Faculty Regular
  - Appt - Faculty Temporary
  - Appt - Faculty VA
  - Appt - Fellowship
  - Appt - Graduate Assistant
  - Appt - House Staff
  - Appt - Mint Employee

**Appt - Biweekly Student**

Establish a Workflow Group

You have access to: Org 01; Org 02; Org 04; Org 05; Dept 05-0315; Org 09 Org 19; Org 20; Org 29; Org 33; Org 35; Org 39; Org 40; Org 43; Org 46; Org 51

Workflow Groups can be established for:
- Organizational Level (Enter ORG only below)
- Departmental Level (Enter ORG and DEPT only below)
- Sub-Level - At Org Discretion (Enter ORG, DEPT and SLEVEL below) (spaces in the sublevel will be replaced with underscores)

<table>
<thead>
<tr>
<th>ORG:</th>
<th>05</th>
<th>(REQUIRED)</th>
</tr>
</thead>
<tbody>
<tr>
<td>DEPT:</td>
<td>0315</td>
<td>(ONLY REQUIRED FOR DEPT/SLEVEL ROUTING)</td>
</tr>
<tr>
<td>SLEVEL:</td>
<td>IMFO</td>
<td>(ONLY REQUIRED FOR SLEVEL ROUTING)</td>
</tr>
</tbody>
</table>

[Reset] [Continue]
The right panel now displays what group you are establishing and for what form. Click the **Insert New** blue link.

Enter the name of the person you wish to add to that group.
The right panel display asks for you to Select the Authorization Type for this person/form. When setting up the first person in a workflow group, there are only two choices: Permitted or Required.

- Permitted means they “may” sign the form.
- Required means they “must” sign the form.

Select one and then click **Process Request.**
You are then taken back to the Edit screen showing the individual you just added and the type of approval granted; to add another person, click **Insert New** again.

**workflow form types:**
- Standard Workflow Forms
  - Accounts Payable / Travel
  - Facilities Management
  - Human Resources
  - Special Compensation
  - Adjunct Support
  - Appointment
  - Appt - Biweekly Non-Student

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**Edit SubLevel. 05/0315/IMFO / Appt - Biweekly Student.**

<table>
<thead>
<tr>
<th>ID</th>
<th>FULL NAME</th>
<th>APPROVAL</th>
<th>CLICK TO DELETE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1018468</td>
<td>HADDY, ELAINE A</td>
<td>Permitted</td>
<td>Delete</td>
</tr>
</tbody>
</table>

- **Copy/Clone** SubLevel: 05/0315/IMFO - Appt - Biweekly Student.
- **Return** to Options for Appt - Biweekly Student.
When adding additional people to the group, you will get four choices of authorization type. In addition to Permitted or Required, View Only and Edit/View are choices. Select the type and click **Process Request**.

**Workflow Form Types:**
- Standard Workflow Forms
- Accounts Payable / Travel
- Facilities Management
- Human Resources
- Special Compensation
- Adjunct Support
- Appointment
  - Appt - Biweekly Non-Student
  - Appt - Biweekly Student
  - Appt - Biweekly Workstudy
  - Appt - Faculty Complimentary
  - Appt - Faculty Regular
  - Appt - Faculty Temporary
  - Appt - Faculty VA
  - Appt - Fellowship
  - Appt - Graduate Assistant

You are authorizing 1026214 / MEYER, LARRY A for access to the **Appt - Biweekly Student** in **Sublevel 05/0315/IMFO**:

1) Please Select Authorization Type:

- [ ] View only access to this form type;
- [ ] Edit/View only access to this form type;
- [ ] This Person is permitted to authorize forms;
- [ ] This Person's authorization is required.

2) Click to store information for this review:

**Process Request**
Cloning Workflow Paths

Once you have completed establishing the path for one form and you have been returned to the Edit screen, you can Clone/Copy that same path to other forms.

Click the **Copy/Clone** blue link.
The next screen will display an entire list of forms to which you can copy/clone this path. You can either select individual forms by checking next to them or select All forms by clicking the green box at the top. Scroll to the bottom and click Copy/Clone.

Workflow Form Types:

- Standard Workflow Forms
- Accounts Payable / Travel
- Facilities Management
- Human Resources
- Special Compensation
- Adjunct Support
- Appointment
  - Appt - Biweekly Non-Student
  - Appt - Biweekly Student
  - Appt - Biweekly Workstudy
  - Appt - Faculty Complimentary
  - Appt - Faculty Regular
  - Appt - Faculty Temporary
  - Appt - Faculty VA

You have chosen to clone the SubLevel: 05/0315/IMFO / Appt - Biweekly Student group:

<table>
<thead>
<tr>
<th>ID</th>
<th>FULL NAME</th>
<th>APPROVAL TYPE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1018468</td>
<td>HADDY, ELAINE A</td>
<td>Permitted</td>
</tr>
<tr>
<td>1026214</td>
<td>MEYER, LARRY A</td>
<td>Permitted</td>
</tr>
</tbody>
</table>

Below, please choose the targets for this process, by checking the boxes to their left. The groups chosen below will be updated to include only the above individuals.

(Or click here to return to Options for Appt - Biweekly Student.)

<table>
<thead>
<tr>
<th>Target Form Description</th>
<th>Current Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adjunct Support - Faculty Temp</td>
<td>(does not yet exist)</td>
</tr>
<tr>
<td>Appt - Biweekly Non-Student</td>
<td>(does not yet exist)</td>
</tr>
<tr>
<td>Appt - Biweekly Workstudy</td>
<td>(does not yet exist)</td>
</tr>
</tbody>
</table>

Clone/Copy  
Reset Form
The next screen will display that your Copy/Clone was successful.

NOTE:
You can also get to the Copy/Clone option from the main Edit/Maintain workflow screen.

Workflow Form Types:
- Standard Workflow Forms
  - Accounts Payable / Travel
  - Facilities Management
  - Human Resources
    - Special Compensation
    - Adjunct Support
    - Appointment
      - Appt - Biweekly Non-Student
      - Appt - Biweekly Student

You have chosen to clone the SubLevel: 05/0315/IMFD / Appt - Biweekly Student group:

<table>
<thead>
<tr>
<th>ID</th>
<th>FULL NAME</th>
<th>APPROVAL TYPE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1018456</td>
<td>HAPPY,ELAINE A</td>
<td>Permitted</td>
</tr>
<tr>
<td>1026214</td>
<td>MEYER,LARRY A</td>
<td>Permitted</td>
</tr>
</tbody>
</table>

Groups successfully cloned.
Below, please choose the targets for this process, by checking the boxes to their left. The groups chosen below will be updated to include only the above individuals.
(Or click here to return to Options for Appt - Biweekly Student.)
Employee/Supervisor Forms

- When selecting Employee/Supervisor forms, the right panel will display two options: Establish/Edit Supervisor List….and …. Establish/Edit Post-Supervisor …. The post-supervisor setting only needs to be set for those departments requiring additional signatures beyond the supervisor. The post-supervisor group is established just like Standard Forms.

- There are three options for establishing Supervisor Lists to approve online forms (the first two will give a choice for the employee to select the appropriate supervisor):
  - Establish a list of possible supervisors at the subdept level (ex., 05-0315-IMFO)
  - Establish a list of possible supervisors at the dept. level (ex., 05-0315).
  - Establishing no list of supervisors. In this case, the employee will type in the name of their supervisor when processing a form. This requires no setup by the Workflow Administrator.
To establish a Supervisor List, select the form in the left panel and then click **Establish/Edit Supervisor Lists** for this form.

- **Establish/Edit Supervisor Lists for the Form**
  - When entering the form into workflow, the employee will be prompted to choose the first approver from a list of supervisors. This setup is only required if you wish to display a list of supervisors for the employee.

- **Establish/Edit Post-Supervisor Routine for the Form**
  - Once the supervisor has approved the form, the form will continue with regular workflow routing (starting at the department level) if any has been set up.

Click the blue **Add New Supervisor List**.
Enter the level you wish to establish the list.

ProTray - Cash Adv, Fac/Staff
Establish a Supervisor List
You have access to: Org 01; Org 02; Org 04; Org 05; Dept 05-0315; Org 06; Org 19; Org 20; Org 29; Org 33; Org 35; Org 39; Org 40; Org 43; Org 46; Org 49;
Supervisor Lists can be established for:
Departmental Level (Enter ORG and DEPT only below)
Sub-Department Level (Enter ORG, DEPT and SLEVEL below)

<table>
<thead>
<tr>
<th>ORG: (REQUIRED)</th>
</tr>
</thead>
<tbody>
<tr>
<td>DEPT: (REQUIRED)</td>
</tr>
<tr>
<td>SDEPT: (ONLY REQ'D FOR SDEPT LIST - MUST BE 5 DIGITS)</td>
</tr>
</tbody>
</table>

Insert new name

Edit Sub-Department: 05/0315/00015 / ProTray - Cash Adv, Fac/Staff.

<table>
<thead>
<tr>
<th>ID</th>
<th>FULL NAME</th>
<th>CLICK TO DELETE:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Click to Insert New</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Copy(Clone Supervisor List: Sub-Department: 05/0315/00015 - ProTray - Cash Adv, Fac/Staff .
- Return to Options for Supervisor List: ProTray - Cash Adv, Fac/Staff .
When you establish a supervisor you don’t get a choice of type of authorization as these forms Require supervisor signature. Click Process Request.

You are authorizing 1018468 / HADDY, ELAINE A as a supervisor for employees using the ProTrav - Cash Adv, Fac/Staff in SubLevel: 05/0315/00015:

Click to store this person as a supervisor:

Process Request

Repeat this process for every supervisor you wish to list.
Mass Change

- Transfer Workflow forms from one person to another
- Remove a person from the path without transferring
- Can be selective on forms
From the Administrative Options section under the Workflow tab, select **Workflow Mass Change**
Indicate whether you are **Transferring** workflow forms and responsibilities from one person to another or whether you are **Removing** workflow authorization from one employee without transferring to another. Enter the name of the person you are relinquishing authorization.

**Mass Change**

Change Workflow Options For One Employee

1) PLEASE SELECT ONE OF THE FOLLOWING MASS CHANGE OPTIONS:

- Transfer workflow forms and responsibilities from one employee to another.
- Remove workflow authorization from one employee without transferring to another.

2) TO BEGIN, PLEASE SELECT THE EMPLOYEE THAT WILL BE RELINQUISHING WORKFLOW RESPONSIBILITIES.

Employee ID: 

Last Name: 

First Name: 

[Reset] [Continue]
The name of the employee will be displayed verifying this is the person you wish to remove from the Workflow group. Click Continue.

Enter the name of the replacement employee. Click Continue.
After verifying the replacement person, the next screen displays the groups and forms that are being transferred.

You can then individually select the forms you wish to re-assign or check the **All Forms Checkbox** to do all forms.
A confirmation screen will follow. NOTE: There is no automatic notification to the person re-assigned the forms so they will need to be notified by the Workflow Administrator.

You have transferred Workflow forms and responsibilities from KRANTZ, CARLA J to COWLES, PATRICIA R. Please inform COWLES, PATRICIA R of this change as they will receive no other notification that they may have new forms to approve.

Please click here to return to the main workflow administration page.
Viewing Workflow Groups/Hierarchy

- From the Workflow tab, under the heading Form Reports you have the ability to view forms/workflow groups several different ways.
  - By form
  - By employee
  - By level
Questions?

workflow@uiowa.edu