ILLINOIS INSTITUTE OF TECHNOLOGY

Office of Technology Services

Banner Workflow Basics: Guide and Tutorial

Contents

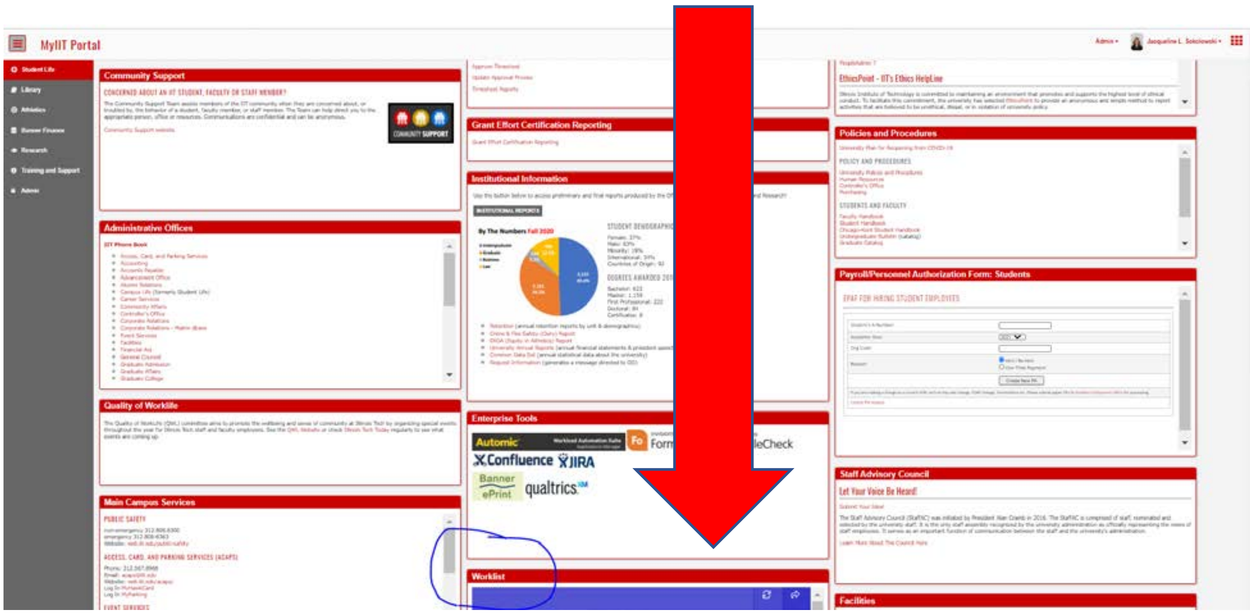
Illinois Tech uses Banner Workflow to automate, simplify, and direct the flow of information at Illinois Tech to track approvals, send communications, and update Banner automatically. With Banner Workflow, you can execute institution-wide workflows and track their progress.

Banner Workflow consists of the following basic operations:

- Start a Workflow
- View Worklist
- Workflow Status Search
- View Workflow Alerts

Accessing Banner Workflow

- From your browser, open up MyIIT
- Click on the Login button and enter your MyIIT username and password.
- Go to the Work Tab and find the Banner Worklist.

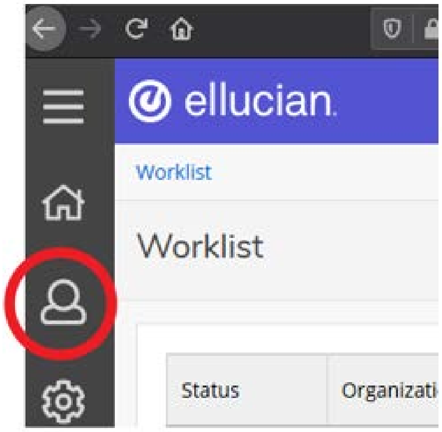


If you do NOT see this channel in the portal, please email supportdesk@iit.edu so OTS can review the security access.

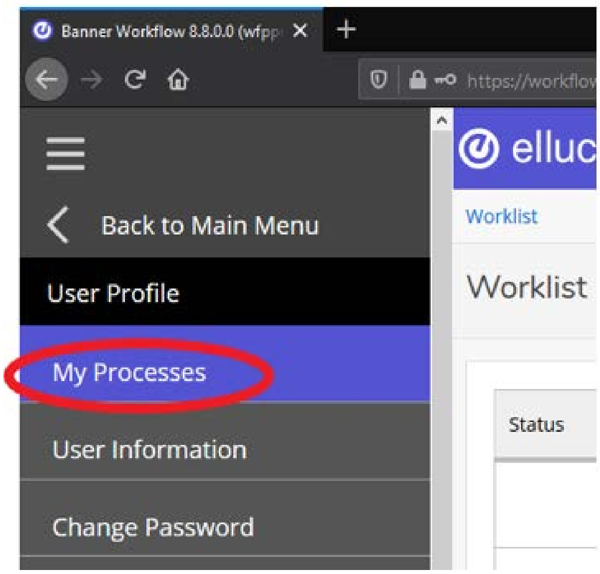
Start a Workflow

Workflows can be started either manually within Banner Workflow or programatically from outside Banner workflow using a scheduling tool. Below are instructions on how to start a workflow manually.

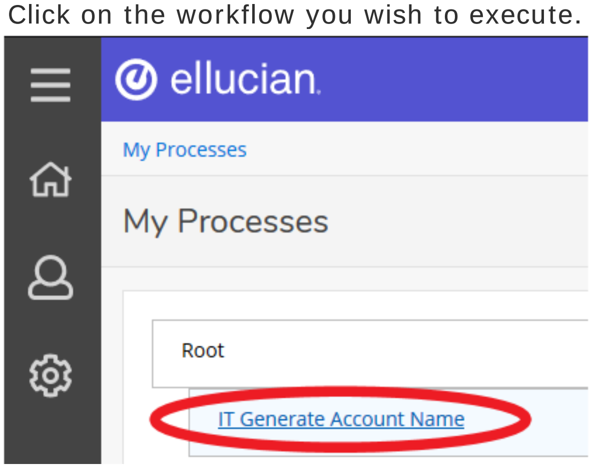
1. Click on the person icon.



2. Click on the "My Processes" link.

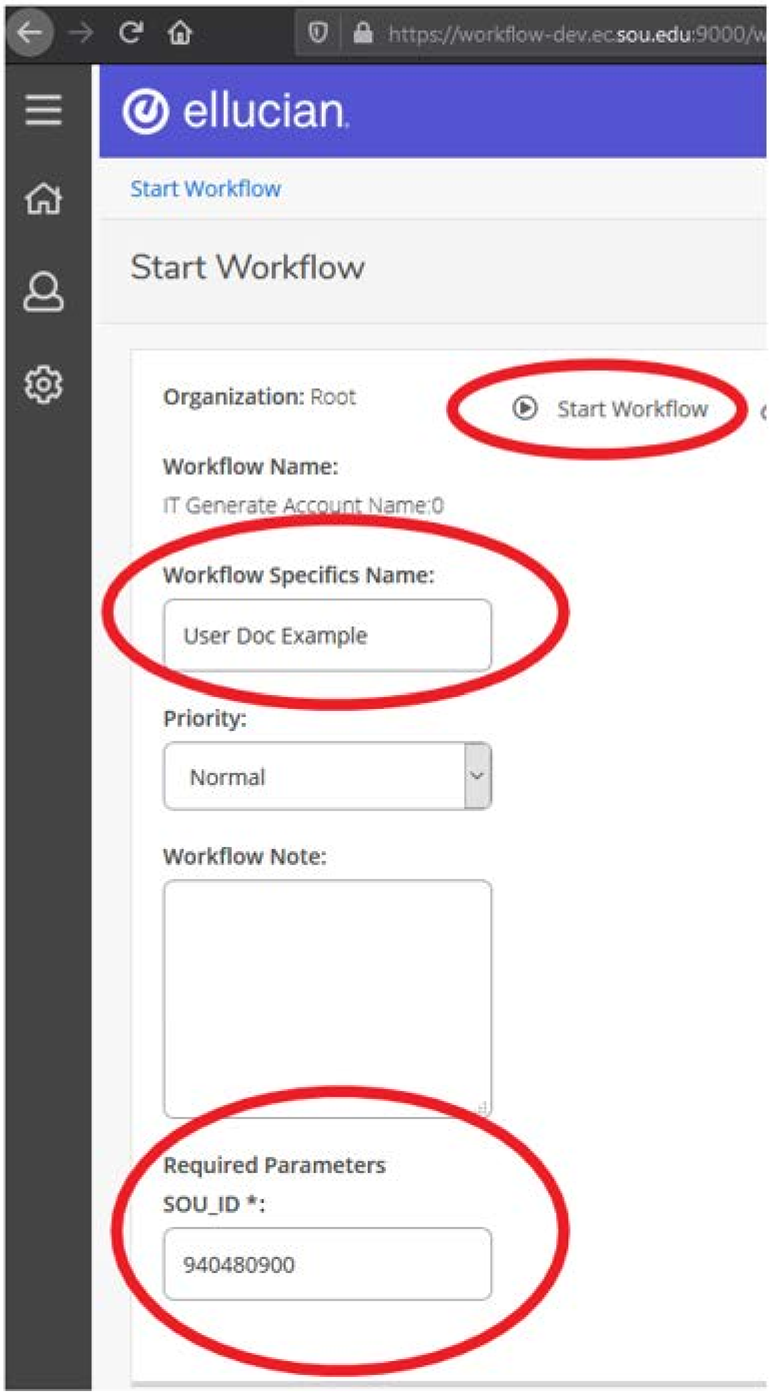


3. Click on the workflow you wish to execute.



4. Enter workflow information and start the workflow.

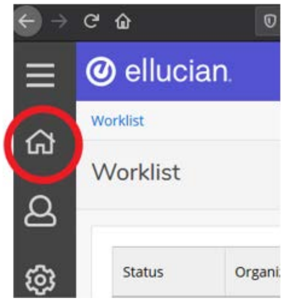
a. Enter a "Workflow Specifics Name". It is not required, but it will make it easier to find later.
b. Enter all required/desired data entry items.
c. Click on the "Start Workflow" link.



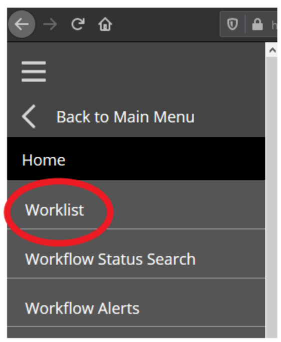
View Worklist

The workflow list is a list of all workflows that a person has access to through the roles they are assigned. The list can be large so the search functionality is useful in filtering down the list of workflows.

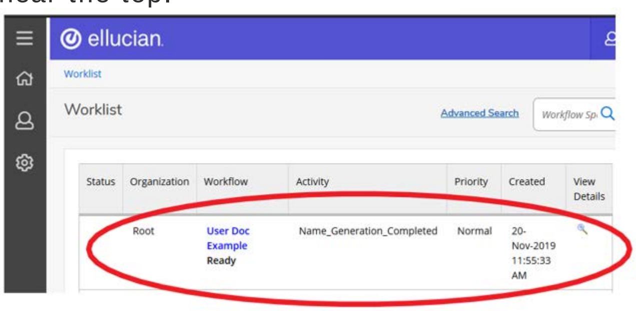
1. Click on the home icon.



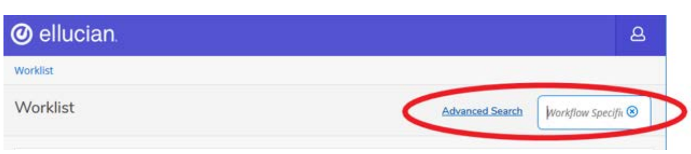
2. Click on the "Worklist" link.



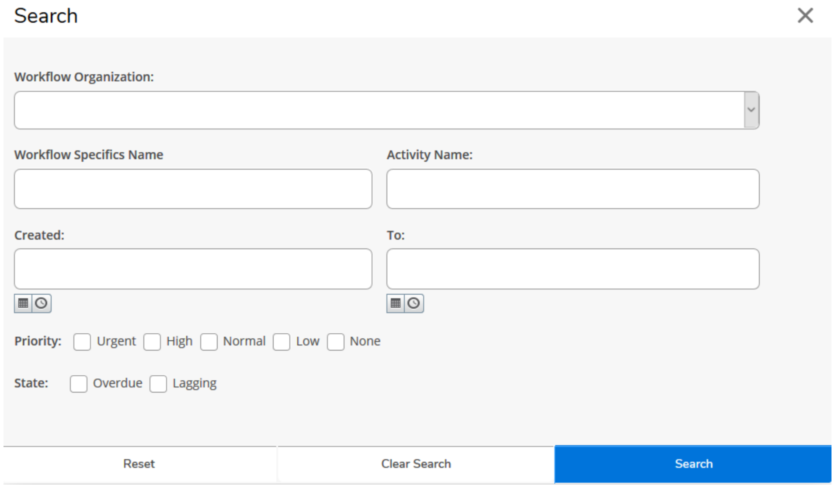
3. If you have just completed “Start a Workflow” you should see the workflow at or near the top.



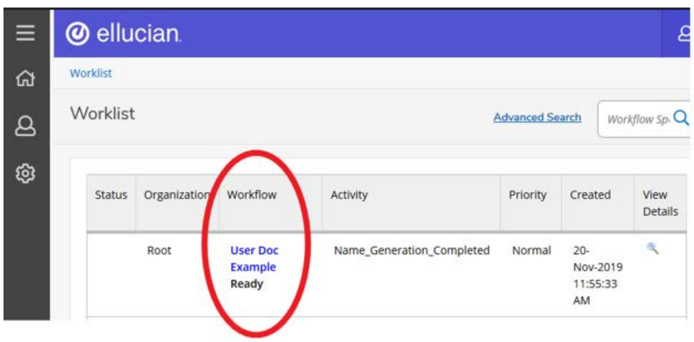
4. If you don't see the workflow you want you can search for it.



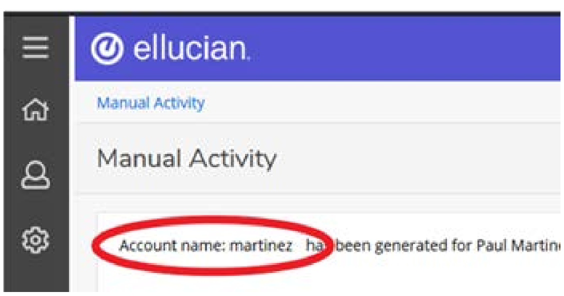
5. Click on the "Advanced Search" link for more explicit searching options.



6. Click on the workflow.



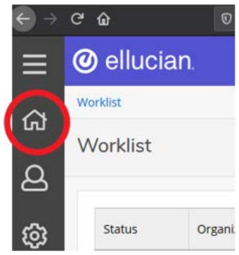
7. The output for the workflow is shown below. For the workflow "IT Generate Account Name" the output will be the same as what is in the email that is sent out.



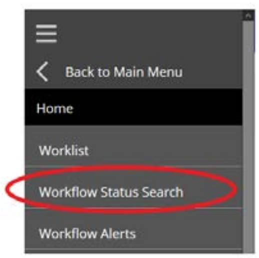
Workflow Status Search

The Workflow Status Search is a way to search all workflows and to see detailed information about them. The status of the workflow can also be changed here by for instance stopping the workflow or by changing the status of an activity.

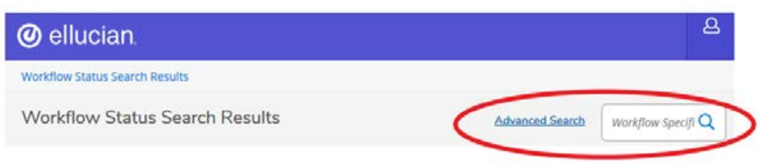
1. Click on the home icon.



2. Click on the "Worklist" link.

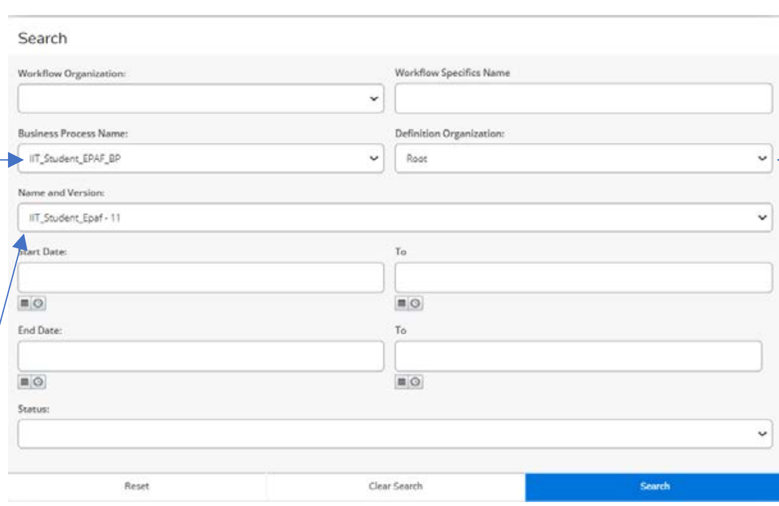


3. Enter search criteria. The detailed search window comes up by default. After the initial search is done you have the generic search box on the upper right along with the "Advanced Search" link to view the detailed search window.



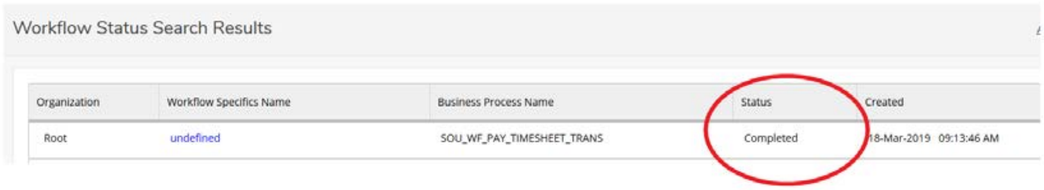
Always enter the business process name – which is the workflow name.

Enter Name and Version of workflow to optimize search results.



Always enter Root under Definition Organization.

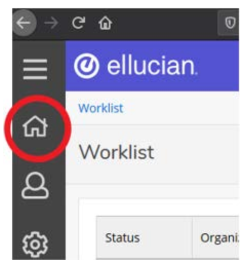
4. Review the status of the workflow.



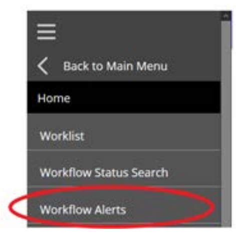
View Workflow Alerts

Workflow Alerts is a way for users who are assigned to the role owning the workflow that errored to see errors.

1. Click on the home icon.



2. Click on the "Worklist" link.



3. Review Alerts to understand the issue the workflow is having.

- Alerts will explain why a workflow is not completing or stuck in the queue.
- Errors are specific to the workflow created, examples include:
    - EPAF – missing supervisor

  - EPAF – issue with position control
  - Student Withdrawal – Missing advisor

Online Help

1. Click on the person icon on the upper right corner of the screen. Your user name will be next to the person icon.
2. Click on the "Help" link.
3. Browse to the help topic you are interested in.