



ILLINOIS INSTITUTE OF TECHNOLOGY

Office of Technology Services

Banner Workflow Basics: Guide and Tutorial

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Illinois Tech - Banner Workflow

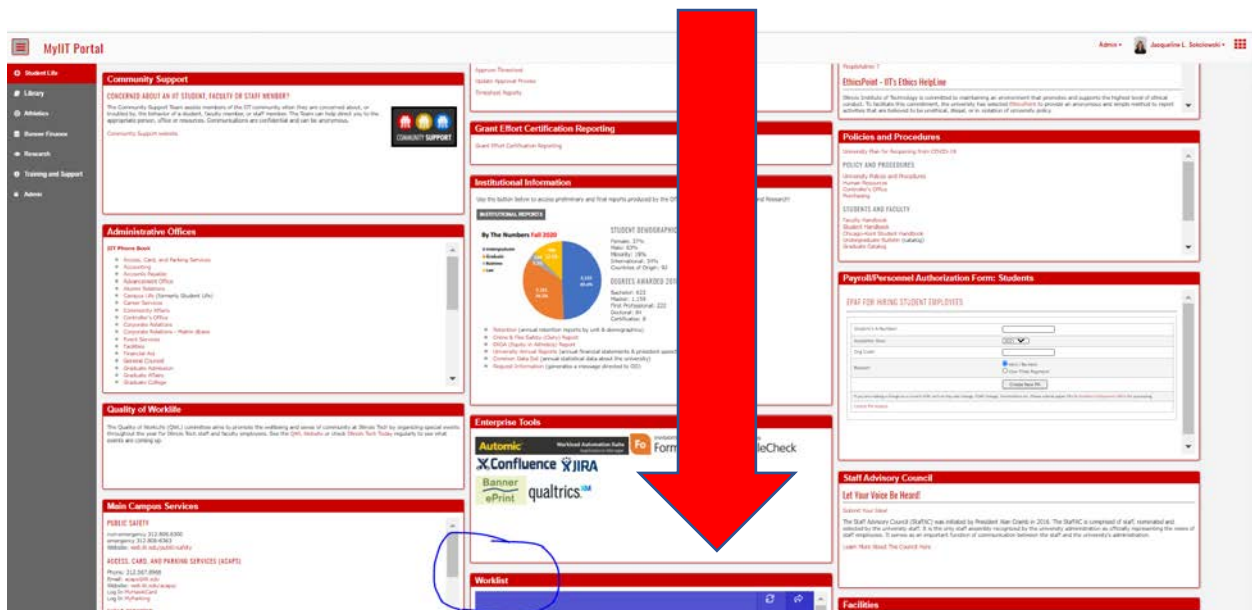
Illinois Tech uses Banner Workflow to automate, simplify, and direct the flow of information at Illinois Tech to track approvals, send communications, and update Banner automatically. With Banner Workflow, you can execute institution-wide workflows and track their progress.

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.

A screenshot of the MyIIT Portal interface. The page is divided into several sections. On the left, there is a navigation menu with options like Library, Admin, Banner Finance, Research, Training and Support, and Admin. The main content area is filled with various widgets and links. A large red arrow points downwards from the top center of the page towards the 'Worklist' tab at the bottom. The 'Worklist' tab is highlighted with a blue circle. Other visible sections include 'Community Support', 'Administrative Offices', 'Quality of Worklife', 'Enterprise Tools', 'Banner Workflow', 'Banner Certification Reporting', 'Institutional Information', 'Policies and Procedures', 'Payroll/Personnel Authorization Form: Students', and 'Staff Advisory Council'.

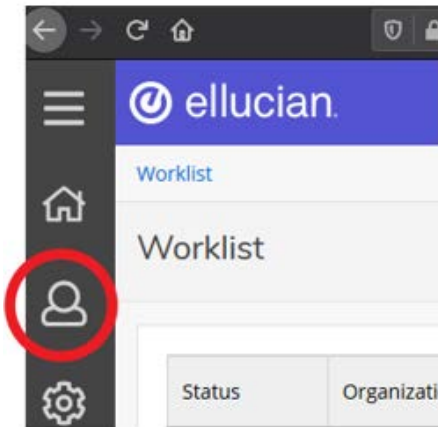
If you do NOT see this channel in the portal, please email supportdesk@iit.edu so OTS can review the security access.

Start a Workflow

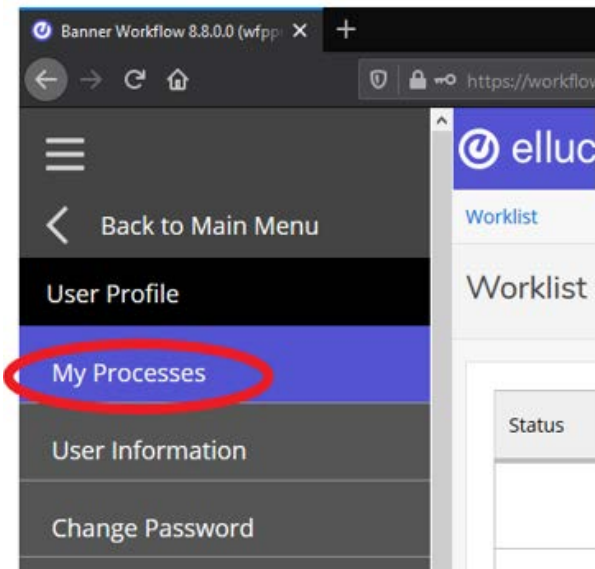
Workflows can be started either manually within Banner Workflow or programmatically from outside Banner workflow using a scheduling tool. Below are instructions on how to start a workflow manually.

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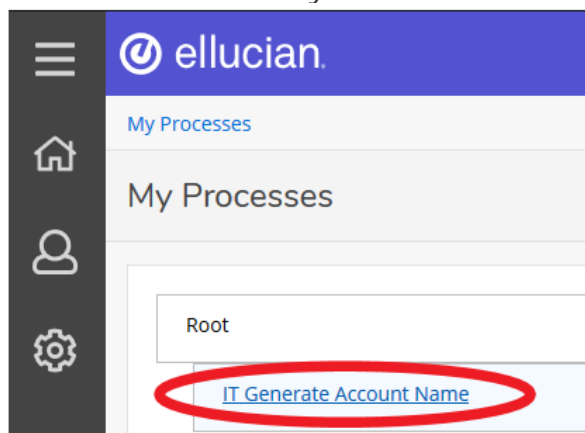
1. Click on the person icon.



2. Click on the "My Processes" link.



3. Click on the workflow you wish to execute.



4. Enter workflow information and start the workflow.

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

The screenshot shows the 'ellucian' web application interface for starting a workflow. The browser address bar shows the URL: <https://workflow-dev.ec.sou.edu:9000/w>. The page title is 'Start Workflow'. The main content area includes the following fields and controls:

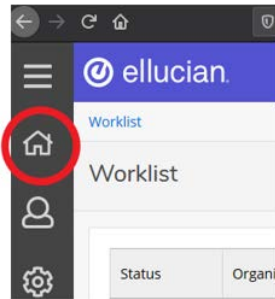
- Organization:** Root
- Workflow Name:** IT Generate Account Name:0
- Workflow Specifics Name:** User Doc Example
- Priority:** Normal
- Workflow Note:** (Empty text area)
- Required Parameters:**
 - SOU_ID *:** 940480900

Three red circles highlight the 'Start Workflow' button, the 'Workflow Specifics Name' field, and the 'Required Parameters' section.

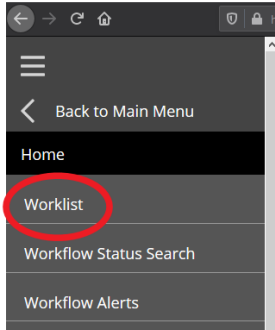
View Worklist

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.

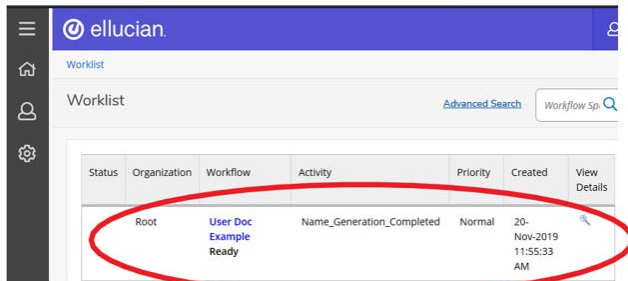
1. Click on the home icon.



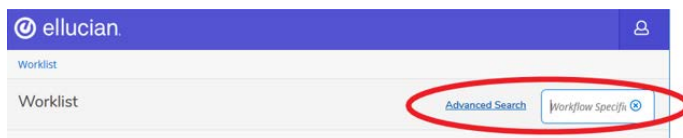
2. Click on the "Worklist" link.



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.



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

Search ×

Workflow Organization:

Workflow Specifics Name: Activity Name:

Created: To:

Priority: Urgent High Normal Low None

State: Overdue Lagging

6. Click on the workflow.

Status	Organization	Workflow	Activity	Priority	Created	View Details
	Root	User Doc Example Ready	Name_Generation_Completed	Normal	20-Nov-2019 11:55:33 AM	

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.

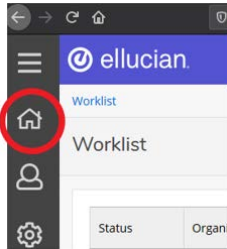
Manual Activity

Account name: martinez has been generated for Paul Martin

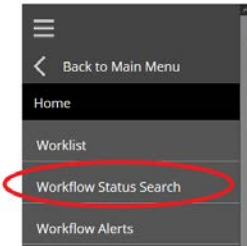
Workflow Status Search

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.

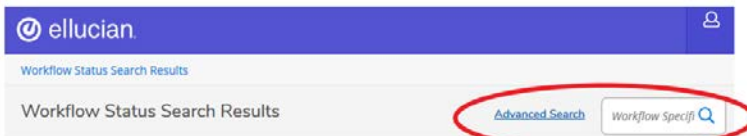
1. Click on the home icon.



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.



Search

Workflow Organization:	Workflow Specifics Name
Business Process Name:	Definition Organization:
Name and Version:	
Start Date:	To
End Date:	To
Status:	

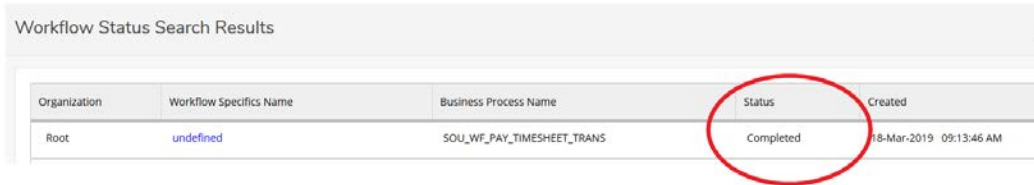
Reset Clear Search Search

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.

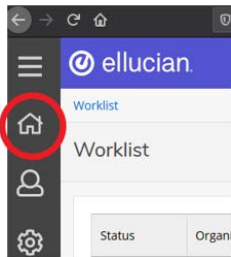


Organization	Workflow Specifics Name	Business Process Name	Status	Created
Root	undefined	SOU_WF_PAY_TIMESHEET_TRANS	Completed	18-Mar-2019 09:13:46 AM

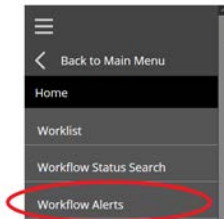
View Workflow Alerts

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

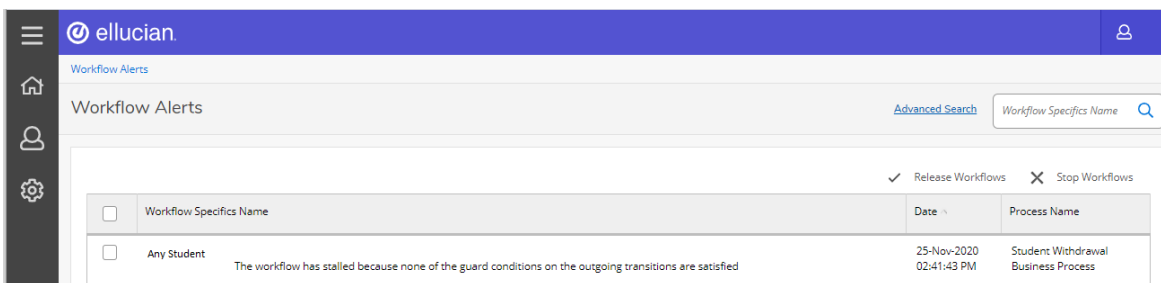
1. Click on the home icon.



2. Click on the "Worklist" link.



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



A screenshot of the 'Workflow Alerts' page in the application. The page has a blue header with the 'ellucian.' logo and a user profile icon. Below the header, there is a search bar for 'Workflow Specifics Name' and a search icon. The main content area shows a table with workflow alerts. The table has columns for 'Workflow Specifics Name', 'Date', and 'Process Name'. There are also checkboxes for 'Release Workflows' and 'Stop Workflows'.

Workflow Specifics Name	Date	Process Name
Any Student The workflow has stalled because none of the guard conditions on the outgoing transitions are satisfied	25-Nov-2020 02:41:43 PM	Student Withdrawal Business Process

- 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

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- 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.