## 

## Workflow Process Analysis

#### Engagement Logistics

#### January 15-17, 2013

#### 8:30 AM – 4:30 PM EST

#### Onsite

#### Carolyn Clark, Senior Principal Consultant

#### Engagement Description

Workflow Process Analysis prepares an institution for the successful implementation of automated electronic business processes created with the Banner Workflow product.

Participants will learn to identify workflows that can be implemented to enhance the institution’s business processes. Once a workflow has been identified, participants will learn the techniques required to gather the necessary information and specifications needed to begin workflow development.

Ellucian consultants work closely with participants to develop a specific agenda for the WPA session which will include a list of candidate workflows for analysis.

#### Engagement Objectives

* Review of Workflow basics, including
  + Building a workflow model
  + Configuring workflow activities
  + Incorporating business rules in the workflow model
  + Sending emails and activity notifications
  + Starting workflow from external event
* By the end of the session, participants should be able to:
  + Apply the knowledge and experience to analyze the current state of the selected business processes and create one or more workflow models
  + Model workflows in the Banner Workflow application (Notes: Often times at least one workflow is modeled and tested)

#### Recommended Participants

* Functional and technical staff interested in learning Workflow Process Analysis
* Functional staff familiar with the business processes to be discussed
* Workflow analysts and developers who will be building the workflows
* Technical staff who will assist with building workflow triggers or supporting procedures

#### Pre-Requisites/Requirements

Before this engagement can take place, the following tasks, requirements, and engagement activities must have been completed:

* ***Implementation Leaders*** should be prepared with 4 or 5 business processes that they would like to review and automate. Business process owners and users most familiar with all aspects of the business process should also participate in the session. If possible physical documentation of the business process including previously created flow charts, diagrams, forms and other relevant items should be brought to the session by the business process owners.
* If Banner Workflow installation has been performed as part of an Ellucian service, the installation and setup requirements will have already been completed. **If Ellucian has not performed the installation, please contact the training consultant to have these prerequisites implemented:**
  + Banner Workflow installation will need to be completed and proper installation must be verified
  + Banner Workflow Training setup scripts and import files will need to be applied
* During training participants will need the following:
  + The Banner Workflow URL
  + The Banner URL
  + The WFUSER accounts created by the Banner Workflow Training setup scripts and import files
  + The password for the WFOBJECTS user
  + The password for the BANINST1 user (if troubleshooting is required)
  + The password for the SAISUSR user (if troubleshooting is required)
* Client training workstations must meet the following requirements prior to training:
  + Workflow compatible browser:
    - Microsoft Internet Explorer 8.x or 9.x
    - Firefox 14 or higher
  + 256 MB of RAM minimum
  + Java SE Runtime Environment 6
  + Banner Workflow uses Java Web Start technology to run client programs to support the graphical modeling of workflow and client launching from the browser. The first time a user attempts to use this functionality, they may be prompted to install a Java JRE if they do not already have a compatible one installed. If this is an issue, please contact the consultant prior to the training session.

#### Session Materials

The following training materials will be provided along with agenda:

* Banner Workflow Process Analysis PowerPoint Handout
* Banner Workflow Process Analysis Workbook
* Banner Workflow Requirements Template

These materials should be provided to training participants. If a hard-copy version is desired, it should be printed prior to the training session.

#### Proposed Agenda

The agenda allows time for analysis and development of workflow models for two business processes. The agenda may need to be adjusted depending on the complexity of the business processes selected.

#### Day 1

| Timeframe | Topic |
| --- | --- |
| 9:00 am – 12 noon  3 hours | **Banner Workflow Review**  Provide the basic concepts of Banner Workflow including building a simple workflow model.  **Users and Roles**   * Understanding roles and users * Understanding the user/role relationship * Understanding proxies   **Banner Workflow Modeler**   * Workflow modeling basics * Validating a workflow * Running a workflow |
| 1 hours | **Lunch** |
| 1:00 pm – 4:30 pm  3 ½ hours | **Banner Workflow Review…Continued**  **Workflow Status**   * Understanding the workflow status * Workflow metrics   **Banner Workflow Modeler**   * Understanding parallel activities * Understanding automated activities * Understanding performer rules * Understanding dynamic drop down lists * Understanding guard conditions |

#### Day 2

| Timeframe | Topic |
| --- | --- |
| 9:00 am – 12 noon  3 hours | **Introduction to Workflow Process Analysis**   * Demonstration of Workflow Process Analysis Methodology * Selection of Business Process |
| 1 hours | **Lunch** |
| 1:00 pm – 4:30 pm  3 ½ hours | **Workflow Design and Modeling**   * Modeling and technical tasks to develop workflow model and supporting Oracle objects |

#### Day 3

| Timeframe | Topic |
| --- | --- |
| 9:00 am – 12 noon  3 hours | **Workflow Design and Modeling…Continued**   * Modeling and technical tasks to develop workflow model and supporting Oracle objects |
| 1 hours | Lunch |
| 1:00 pm – 4:30 pm  3 ½ hours | **Workflow Design and Modeling…Continued**   * Testing   **Next Steps**  **Lessons Learned** |