

Why Workflow is Faster Than You Are.

“Using Workflow to Automate Adjunct Faculty Contract Approvals”

Pima County Community College District

Monday April 12, 2010
Session ID 0164

Presenters

Barry Gillaspie, Director of Development Services IT

Michael Tulino, Director of Enrollment Services & Registrar

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Craig Winters, Assistant Registrar, Systems & Enrollment

Session ID 0164 Presenters 2

Session Rules of Etiquette

- **Please turn off your cell phone**
- **If you must leave the session early, please do so as discreetly as possible**
- **Please avoid side conversation during the session**

Thank you for your cooperation!

Session ID 0164 Session rules 3


Today's Topics

- Introduction
- Preparing for Workflow
- Creating the Workflow
- Implementation and Training
- Lessons Learned
- Summary
- Questions

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Topics

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Introduction

Why Workflow is Faster Than You Are
Pima County Community College District

General Information - Pima Community College

- Founded in 1969
- Annual enrollment of 71,070 (2008/2009)
- Served 369,334 students in the past five years
- 1,183 Adjunct Faculty employed in Fall 2009
- Offering 184 transfer & occupational programs
- Seven academic term codes in Banner
- Multi-campus college district
 - One district office
 - Six campuses
 - Four education centers
 - 180 teaching locations in Pima County

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Introduction

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Purpose and Benefit

- **To share methods and procedures utilized to streamline and improve efficiency in processes for the issuance and approval of Adjunct Faculty Contracts**
- **Benefits of attending:**
 - Considerations in project administration and technical development
 - Considerations in team building and communication
 - How we achieved improved consistency in the processing of materials and information
 - Technical considerations with complex workflows
 - Thoughts on training
 - Maintenance, the never ending story

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Introduction

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Considerations

- **Easing your institution into Workflow**
 - Considerations and baby steps
 - A mandate – sink or swim
- **The project team and project management**
 - A champion
 - The core team
 - User involvement
- **Communication**
 - Management
 - The core team
 - Clients
 - Staff
 - Faculty

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Introduction

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Preparing for Workflow

Why Workflow is Faster Than You Are
 Pima County Community College District

Driving Factors – Reasons for Change

Previous “paper-based” contract approval process was:

- Inconsistent - handled differently at each campus
- Confusing for adjuncts and staff
- Slow, slow, slow
- Lacked tracking capability
- Resulted in duplication of efforts and wasted time
- Expensive and wasteful (paper)
- Prone to mistakes and oversights

Components of Our Business Process Analysis

Meet to plan and plan to meet! – Time spent up front goes a long way

- Draft flowchart of process “knowns” as starting point for discussions
- Fact finding meetings with key personnel (VPs, Division Deans, Schedulers, CDAS)
 - Represented individuals who had some approval participation
 - **These groups** defined the components of the process flow
- Compiled critical needs, drafted and distributed updated process flowchart
 - Asked, “Did we hear you correctly?”
- Started building workflow

Components of our Business Process Analysis

- Elicited feedback from campus personnel along the way
- Brought focus group of key campus personnel together to “beta-test”
 - Cross-section of technically-inclined individuals and critical thinkers
- Added to workflow design per focus group’s recommendations
 - But were careful not to open all doors again
- Completed workflow design and all associated components

Results of our BPA and Workflow Design

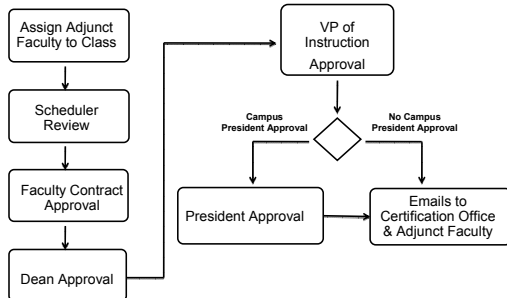
- Delivered “their process” in electronic format
- Fostered collaboration between campuses
- Brought disparate processes together based on commonalities
- Designed for maximum flexibility where possible
- Created up-to-the-minute tracking capability and reports

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Preparing for Workflow

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Adjunct Faculty Contract Approval Workflow Flowchart



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Preparing for Workflow

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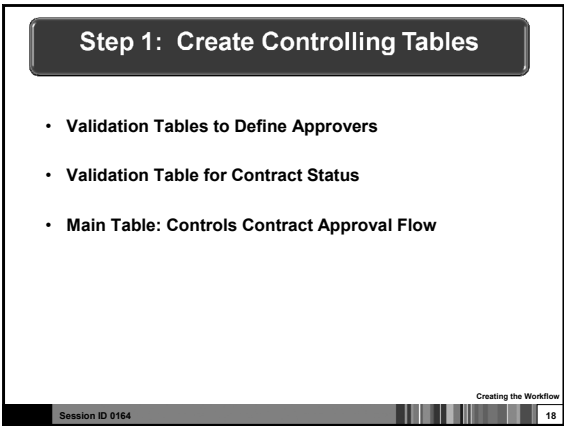


Creating the Workflow

Why Workflow is Faster Than You Are
Pima County Community College District







Step 1: Create Controlling Tables

Maintenance Screen - Schedulers

Scheduler Summary

Scheduler Summary

Search Display 15

Name	Campus Description #	Division	Primary Scheduler	Status
Tapatillo, Celia S	Public Safety Institute	CC Business/Industry Training - 3BIT	Yes	Active
Montano, Diana M	West	WC Business, Computer, Soc Sci - 1BCS	Yes	Active
Fisher, Teresa G	West	WC Health Related Professions - 1HRP	Yes	Active
Chacon, Evangeline F	West	WC Science and Technology - 1STY	Yes	Active
Howell, Cheryl L	West	WC Communication - 1ACM	Yes	Active
Montano, Diana M	West	WC Fitness and Sport Science - 1FSS	Yes	Active
Longacre, Sheila K	West	WC Nursing - 1NRS	Yes	Active
McVean, Karen A	West	WC Student Development - 1STU	Yes	Active

Spread Sheet

Creating the Workflow

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Step 1: Create Controlling Tables

Status Codes

1 New	Initial Value added with insert of record via trigger on SJAASGN
2 Ready	Contract available to faculty, email has been sent and is waiting for faculty review
3 Accepted	Faculty Accepted
4 Declined	Faculty Declined
5 In Progress	In Approval process
6 Final Approval	Approved by VPI or Campus President
7 Not Approved	Not approved by Dean, VPI or Campus President
8 Redo	Rewrite of contract needed - will restart workflow 1 and 2
9 Review	Scheduler review workflow has started
10 Inactive	Faculty no longer assigned to CRN
11 Approve	Approved by Dean, VP or Campus President (approver status only)
12 Later	Option by Dean, VP or Campus President (approver status only)
13 Stopped	Workflow Cancelled

Creating the Workflow

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Step 1: Create Controlling Tables

Controlling Table for Contract Approvals

Column Name	ID	Pk	Null?	Data Type
WABCON_TERM_CODE	1	N	N	VAR-CHAR2 (6 Char)
WABCON_CRN	2	N	N	VAR-CHAR2 (8 Char)
WABCON_PERSON	3	N	N	NUMBER (9)
WABCON_ASSIGNED_DATE	4	N	N	DATE
WABCON_PERSON	5	N	N	VAR-CHAR2 (6 Char)
WABCON_FUEL_CODE	6	N	N	VAR-CHAR2 (6 Char)
WABCON_ORGN_CODE	7	N	N	VAR-CHAR2 (6 Char)
WABCON_ACT_CODE	8	N	N	VAR-CHAR2 (6 Char)
WABCON_PROG_CODE	9	N	N	VAR-CHAR2 (6 Char)
WABCON_STATUS_CODE	10	N	N	NUMBER
WABCON_STATUS_DATE	11	N	N	DATE
WABCON_REVIEW_DATE	12	N	N	DATE
WABCON_CONTRACT_STATUS_FAC	13	N	N	NUMBER
WABCON_FAC_LOSON	14	N	N	VAR-CHAR2 (30 Char)
WABCON_FAC_STATUS_DATE	15	N	N	DATE
WABCON_SCHED_LOSON	16	N	N	VAR-CHAR2 (30 Char)
WABCON_SCHED_STATUS_DATE	17	N	N	DATE
WABCON_SCHED_CONTRACT_COMMENT	18	N	N	VAR-CHAR2 (2000 Char)
WABCON_SCHED_INTERNAL_COMMENT	19	N	N	VAR-CHAR2 (2000 Char)
WABCON_CONTRACT_STATUS_DEAN	20	N	N	NUMBER
WABCON_DEAN_LOSON	21	N	N	VAR-CHAR2 (30 Char)
WABCON_DEAN_STATUS_DATE	22	N	N	DATE
WABCON_DEAN_INTERNAL_COMMENT	23	N	N	VAR-CHAR2 (2000 Char)
WABCON_CONTRACT_STATUS_VP	24	N	N	NUMBER
WABCON_VP_LOSON	25	N	N	VAR-CHAR2 (30 Char)
WABCON_VP_STATUS_DATE	26	N	N	DATE
WABCON_VP_INTERNAL_COMMENT	27	N	N	VAR-CHAR2 (2000 Char)
WABCON_CONTRACT_STATUS_PRES	28	N	N	NUMBER
WABCON_PRES_LOSON	29	N	N	VAR-CHAR2 (30 Char)
WABCON_PRES_STATUS_DATE	30	N	N	DATE
WABCON_PRES_INTERNAL_COMMENT	31	N	N	VAR-CHAR2 (2000 Char)
WABCON_ACTIVITY_DATE	32	N	N	DATE
WABCON_USER_ID	33	N	N	VAR-CHAR2 (30 Char)
WABCON_ENTRY_TIME_TOTAL_LOAD	34	N	N	NUMBER
WABCON_ENTRY_TIME_TOTAL_SECT	35	N	N	NUMBER

Creating the Workflow

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Step 2: Develop PL/SQL Package for Banner Web

- Develop PL/SQL package
- Register the procedure from the new custom package in Banner Web

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Creating the Workflow

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Step 2: Develop PL/SQL Package for Banner Web

Pima Community College

Personal Information Student Services & Financial Aid Employees **Web Tailor Administration**

Search RETURN TO THE MAIN MENU SITE MAP HELP EXIT

Web Tailor

- Customize a Web Menu or Procedure
- Customize a Web Module
- Customize a Set of Information Text
- Customize a Graphic Element
- Update User Roles
- Customize a Web Module
- Customize Web Rules
- Customize Web Tailor Parameters
- Customize a Login Return Location
- Customize Web Tailor Overrides
- Customize Global User Interface Settings
- Site Preferences
- Placement Recommendation Maintenance

RELEASE: 7.4

BANNER 12T HIGHER EDUCATION

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Creating the Workflow

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Step 2: Develop PL/SQL Package for Banner Web

Pima Community College

Personal Information Student Services & Financial Aid Employees **Web Tailor Administration**

Search RETURN TO THE WEB TAILOR MENU SITE MAP HELP EXIT

Customize a Web Menu or Procedure

Click Create to add a new menu or procedure.

Create

Select a menu or procedure from the following list and click Customize Web Menu or Procedure:

Search by Name: OR Search by Description:

Select one of the available procedures

Procedure Name	Procedure Description	Enabled	Source
A_Menu	Test Menu	Y	B
HWSPED	Class Schedules	Y	L
amenu_P_AdminMenu	Student Records	Y	L
amenu_P_EdTaxCredits	Educational Tax Credits Info	Y	L
amenu_P_FinAid	Financial Aid	Y	L
amenu_P_FAAdMenu	Award Information Menu	Y	L
amenu_P_FacAdMenu	Advisors Menu	Y	L
amenu_P_FacAdMenu	Faculty & Advisors Menu	Y	L
amenu_P_FacMenu	Faculty (Advisors) Student Menu	Y	L
amenu_P_GenMenu	Personal Information Menu	Y	L
amenu_P_HighMenu	High Menu amenu_P_HighMenu	Y	L

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Creating the Workflow

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Step 2: Develop PL/SQL Package for Banner Web

Pima Community College

[Personal Information](#) [Student Services & Financial Aid](#) [Faculty Services](#) [Employee](#) [Finance](#) [Banner Web/PL/SQL Administration](#)

Search []

Customize a Web Menu or Procedure

Please make your changes to the information below, then click Save Changes.
- Indicates a required field.

Local

Page Name:

Page Description:

Module:

Comment:

Enabled Indicator:

Non Secured Access Allowed:

Web Page Caching Override:

Page Title:

Header Text:

Header Graphic:

Page CSS URL:

Map Title:

Help Link URL:

Help CSS URL:

Back Link URL:

Back Link Text:

Back Link Image:

Back Link Menu Indicator:

Admin Secured:

plsql_package_contract

plsql Package Contract

Common

☒

☐

Use System Setting

Select

plsql_package_contract

Return to Menu

Select

☒

☐

Preview Image

Preview Image

Session ID 0164

Creating the Workflow

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Step 2: Develop PL/SQL Package for Banner Web

Back Link Image:

Back Link Menu Indicator:

Admin Secured:

Associated Roles

Local Role

☐ All Web Users

☐ Alumni

☐ Banner Channel Administration

☐ EPAP Administrator

☐ Effort Certification Administrator

☐ Employee

☒ Executive

☒ Faculty

☐ Faculty Compensation Administrator

☐ Finance Data Teller

☐ Finance user

☐ Financial Aid user

☐ HR Manager

☐ Labor Redistribution Initiator

☐ Master Salary Planner

☐ PDA ADMIN

☐ PDA USER

☐ Student

☐ Web Teller Administrator

☐ Web for Executives Administrator

Customize Menu Items

Customize Information Text

Submit Changes

Reset All Fields

Delete Local Web Menu or Procedure

Preview Image

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Creating the Workflow

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Step 3: Develop SQL Scripts to Initiate Workflows

• Develop Scheduler Review Workflow Script

• Develop Approver Workflow Initiation Script

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Creating the Workflow

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```
CREATE OR REPLACE PROCEDURE BANINIST.F_A33_Faculty_Contract_WF
IS
v_Faculty
-- sz_sv_faculty_contract
v_sz_faculty_contract
v_sz_faculty_instrn generate_instr_pt_contract_indvTYFE;

--flow variables
v_parms
getpara t_parmsertlist;
event_code
getvnsa getvnsa_codeTYFE;
v_firstname
varchar(100) % null;
v_id
varchar(9) % null;
v_subj
subject subject_subj_codeTYFE;
v_crs
subject subject_crsn_subjTYFE;
p_tera_code
varchar(8) % null;
v_crsn
varchar(5) % null;
p_pidn
spiden spiden_pidnTYFE;
p_casus_desc
STVCASE STVCASE_DESCTYFE;
v_division_desc
STVDIVS STVDIVS_DESCTYFE;

--new p-facts
CURSOR v_CUR IS
SELECT
VABCON_TERM_CODE,
VABCON_PIDN
FROM VABCON_LINK v_goreal g_sz_sv_faculty_instrn_asmn
WHERE VABCON_PIDN = v_goreal_pidn
AND PIDN = VABCON_PIDN
AND TERM_CODE = VABCON_TERM_CODE
AND CRN = VABCON_CRN
and VABCON_STATUS_CODE IN (1,8)
and goreal_email_code = 'P' and
goreal_status_ind = 'A'
and first_meeting_ind = 'Y'
and generate_instr_pt_contract_ind = 'Y';
```

Creating the Workflow

[illegible]

Creating the Workflow

[illegible]

Creating the Workflow

```

--SET
SET pserver_i_idSystemLinkEnabled('VORGLOG') THEN
    exec sql commit;
    EXECUTE IMMEDIATE 'P_CheckEvent(' || VORGLOG || ',ADVFAC_APPROVE',1,20);

OPEN V_CUR;

FETCH V_CUR INTO p_itera_code, p_itera_p_guid, v_fullname, v_id, v_subj, v_err,
v_campus_desc, v_division_desc;
EXIT WHEN v_CUR%NOTFOUND;

--Insert Record
v_Parameters() para_val:= 'ADVFAC_APPROVE';
v_Parameters() para_val:= 'GET BANNER';
v_Parameters() para_val:= 'Approval processes for Campus || v_campus_desc || and Division ||
v_v_division_desc ||';
v_Parameters() para_val:= p_itera_code;
v_Parameters() para_val:= p_itera_p_guid;
v_Parameters() para_val:= v_fullname || Course || v_subj || v_err || CDR || p_itera_code;
v_Parameters() para_val:= p_itera_code;
v_Parameters() para_val:= p_itera_code;

V_CURSOR.Next_Param_List(event_code v_Parameters);

--Insert Record
UPDATE VACRON_LINK
SET VACRON_STATUS_CODE = 5,
VACRON_ACTIVITY_DATE = SYSDATE,
VACRON_USER_ID = APPROVALS,
VACRON_TERM_CODE = p_itera_code,
VACRON_TERM_CODE = p_itera_code,
VACRON_TERM_CODE = p_itera_code;

COMMIT;

END XXXXX;

CLOSE V_CUR;

END XXX;

EXCEPTION WHEN OTHERS THEN NULL;

END P_Adi_Faculty_Contract_Date_WF;

```

Creating the Workflow

- **Build Scheduler Review Workflow**
- **Build Approver Workflow**

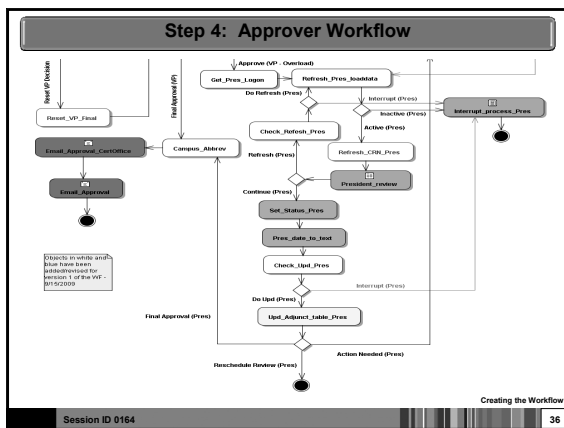
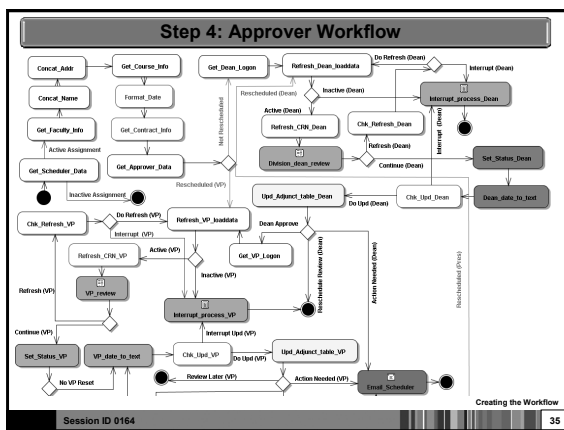
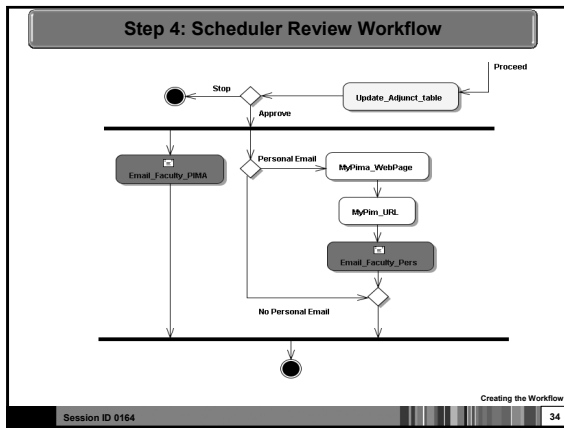
Creating the Workflow

```

graph TD
    Start(( )) --> GetFaculty[Get_Faculty_Name]
    GetFaculty --> ConcatName[Concat_Name]
    ConcatName --> ConcatAddr[Concat_Addr]
    ConcatAddr --> GetContract[Get_Contract_Data]
    GetContract --> GetSection[Get_Section_Info]
    GetSection --> GetScheduler[Get_Scheduler_Login]
    GetScheduler --> GetCRM[Get_Curr_CRM_Data]
    GetCRM --> CalcLoad[Calc_Load_data]
    CalcLoad --> Inactive{Inactive}
    Inactive -- Inactive --> HallProcess[Hall_Process]
    HallProcess --> End(( ))
    Inactive -- Active --> SchedulerReview[Scheduler_review]
    SchedulerReview --> Refresh{Refresh}
    Refresh -- Refresh --> ChkStatusRefresh[Chk_Status_Refresh]
    ChkStatusRefresh --> ResetRefresh[Reset_Refresh]
    ResetRefresh --> GetCRM
    Refresh -- Continue --> SetScheduler[Set_Scheduler_Status]
    SetScheduler --> ConvertDate[Convert_date_to_text]
    ConvertDate --> ChkStatusUpdate[Chk_Status_Update]
    ChkStatusUpdate --> Interrupt{ }
    Interrupt -- Interrupt --> SchedulerReview
    Interrupt -- Proceed --> HallProcess
  
```

Changes for version 1 are activities: withdrawable activities - 9/15/2009

Creating the Workflow



Step 5: Build Report

Adjunct Faculty Contract Status Report

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Creating the Workflow

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Step 5: Report

PimaCommunityCollege

Report Run Date: 15-Jan-2010 9:15 AM

Adjunct Faculty Contract Status

Term: 201000 Spring 2010

ID	Name	Offering	Hours	#CRN	1	Load	4.00	Primary	Contract Status	Review Date	Faculty Stat.	Date	Dean Stat.	Date	VP Stat.	Date	Pres. Stat.	Date	Unstat.
24102	AP0100	1	4.00	4.00	11	In-Progress	11/24/09	Accept	1/14/10										
ID	Name	Fabiola, Richard	#CRN	3	Load	11.00	Primary	Contract Status	Review Date <td>Faculty Stat. <td>Date <td>Dean Stat. <td>Date <td>VP Stat. <td>Date <td>Pres. Stat. <td>Date <td>Unstat.</td> </td></td></td></td></td></td></td></td>	Faculty Stat. <td>Date <td>Dean Stat. <td>Date <td>VP Stat. <td>Date <td>Pres. Stat. <td>Date <td>Unstat.</td> </td></td></td></td></td></td></td>	Date <td>Dean Stat. <td>Date <td>VP Stat. <td>Date <td>Pres. Stat. <td>Date <td>Unstat.</td> </td></td></td></td></td></td>	Dean Stat. <td>Date <td>VP Stat. <td>Date <td>Pres. Stat. <td>Date <td>Unstat.</td> </td></td></td></td></td>	Date <td>VP Stat. <td>Date <td>Pres. Stat. <td>Date <td>Unstat.</td> </td></td></td></td>	VP Stat. <td>Date <td>Pres. Stat. <td>Date <td>Unstat.</td> </td></td></td>	Date <td>Pres. Stat. <td>Date <td>Unstat.</td> </td></td>	Pres. Stat. <td>Date <td>Unstat.</td> </td>	Date <td>Unstat.</td>	Unstat.	
24103	AP0102	1	4.00	11.00	10	In-Progress	11/13/09	Accept	1/15/10										
ID	Name	Gallegos, Salvador	#CRN	1	Load	3.00	Primary	Contract Status	Review Date <td>Faculty Stat. <td>Date <td>Dean Stat. <td>Date <td>VP Stat. <td>Date <td>Pres. Stat. <td>Date <td>Unstat.</td> </td></td></td></td></td></td></td></td>	Faculty Stat. <td>Date <td>Dean Stat. <td>Date <td>VP Stat. <td>Date <td>Pres. Stat. <td>Date <td>Unstat.</td> </td></td></td></td></td></td></td>	Date <td>Dean Stat. <td>Date <td>VP Stat. <td>Date <td>Pres. Stat. <td>Date <td>Unstat.</td> </td></td></td></td></td></td>	Dean Stat. <td>Date <td>VP Stat. <td>Date <td>Pres. Stat. <td>Date <td>Unstat.</td> </td></td></td></td></td>	Date <td>VP Stat. <td>Date <td>Pres. Stat. <td>Date <td>Unstat.</td> </td></td></td></td>	VP Stat. <td>Date <td>Pres. Stat. <td>Date <td>Unstat.</td> </td></td></td>	Date <td>Pres. Stat. <td>Date <td>Unstat.</td> </td></td>	Pres. Stat. <td>Date <td>Unstat.</td> </td>	Date <td>Unstat.</td>	Unstat.	
24172	AP0301	14	3.00	3.00	5	Later	1/28/10	Accept	1/28/10	Approve	1/4/10	trough	1/13/10	trough					
ID	Name	Hendrick, Brian	#CRN	3	Load	8.00	Primary	Contract Status	Review Date <td>Faculty Stat. <td>Date <td>Dean Stat. <td>Date <td>VP Stat. <td>Date <td>Pres. Stat. <td>Date <td>Unstat.</td> </td></td></td></td></td></td></td></td>	Faculty Stat. <td>Date <td>Dean Stat. <td>Date <td>VP Stat. <td>Date <td>Pres. Stat. <td>Date <td>Unstat.</td> </td></td></td></td></td></td></td>	Date <td>Dean Stat. <td>Date <td>VP Stat. <td>Date <td>Pres. Stat. <td>Date <td>Unstat.</td> </td></td></td></td></td></td>	Dean Stat. <td>Date <td>VP Stat. <td>Date <td>Pres. Stat. <td>Date <td>Unstat.</td> </td></td></td></td></td>	Date <td>VP Stat. <td>Date <td>Pres. Stat. <td>Date <td>Unstat.</td> </td></td></td></td>	VP Stat. <td>Date <td>Pres. Stat. <td>Date <td>Unstat.</td> </td></td></td>	Date <td>Pres. Stat. <td>Date <td>Unstat.</td> </td></td>	Pres. Stat. <td>Date <td>Unstat.</td> </td>	Date <td>Unstat.</td>	Unstat.	
23946	SP0214	W	0.00	0.00	7	End Approval	12/17/09	Accept	12/18/09	Approve	12/21/09	whistle	12/21/09	trough					
23945	SP0215	W	0.00	0.00	6	End Approval	12/18/09	Accept	12/18/09	Approve	12/21/09	whistle	12/21/09	trough					

Creating the Workflow

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Adjunct Faculty Contract Approval Workflow Flowchart

Assign Adjunct Faculty to Class

Scheduler Review

Faculty Contract Approval

Dean Approval

VP of Instruction Approval

Campus President Approval

No Campus President Approval

President Approval

Emails to Certification Office & Adjunct Faculty

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Creating the Workflow

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Scheduler Review Worklist

Home

Worklist

Workflow Status Search

Workflow Alerts

User Profile

My Processes

User Information

Change Password

Administration

Business Component Catalog

Enterprise Management

User Management

Task Management

Business Events

Task Calendar

Process Monitoring

Apper Workflow Modeler

Workflow System Administration

Organization: Workflow

Event: Scheduler review for Campus Event and Division WC Health Related Professors for Donald Wahl Course: DAE160 CRN: 10299

Ready

10/11/2010

Scheduler review

Priority: Normal

Created: 20-Sep-2010 10:05:56 PM

1 - 1 of 1

First

Previous

Next

Last

Go to page: 1/2

Show Reserved Items

Session ID 0164

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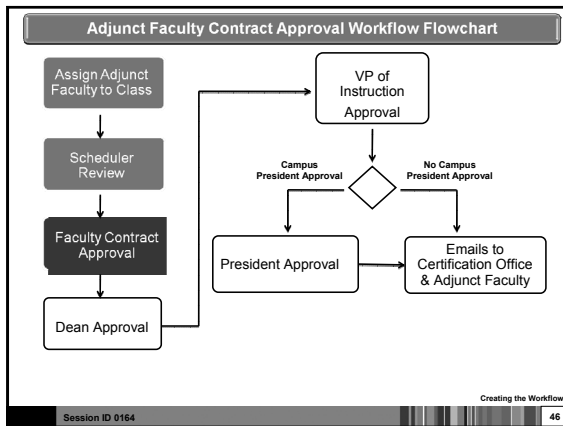
Scheduler Review	
Name Student Student Status Search Student ID#	Student Scheduler Review
Home Home > Scheduler Review	
-----Faculty Information-----	
User Profile No Username User Management Change Password	Faculty Name Faculty ID# PPRN Email Address Personal Email Address Address Phone Faculty Employee Type Position Number Fund Organization Account Program Check Distribution Total Payment Campus Division Department CRR Subject Course No Course Title CRR Start Date CRR End Date Course Meeting Times Credit Hours Enrolled Count
Administration General Management Branch Management Role Management Role Management Business Events Web Calendar Intranet Monitoring Access Windows Monitor Scheduler Setup	Faculty Name Faculty ID# PPRN Email Address Personal Email Address Address Phone Faculty Employee Type Position Number Fund Organization Account Program Check Distribution Total Payment Campus Division Department CRR Subject Course No Course Title CRR Start Date CRR End Date Course Meeting Times Credit Hours Enrolled Count

Session ID 0164

Creating the Workflow

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Schedule Review	
-----Load Hour Information-----	
Faculty:	Wahl, Donald
Subject:	DAE
Course:	160
Course Load Hours:	1
Entry Time Load:	9.49
Current Term Load:	9.49
Current Term Section Count:	4
Previous Term Load:	
Previous Term Section Count: 0	
-----Comment Section-----	
Your Internal Comments:	<div style="border: 1px solid black; height: 40px; width: 100%;"></div>
Comments for Contract:	<div style="border: 1px solid black; height: 40px; width: 100%;"></div>
<p>* Scheduler Decision:</p> <p><input checked="" type="checkbox"/> Refresh (For current enrollment count and load data)</p> <p><input type="checkbox"/> Approve (Set approval review date below)</p> <p><input type="checkbox"/> Stop (Stop the process, adjust as needed)</p> <p>Set Approval Review Date: 22-Jan-2010 02:02:11 PM</p> <p>Use calendar widget at end of field to select date.</p> <div style="text-align: center; margin-top: 10px;"> Complete Save & Close Cancel </div>	



Adjunct Faculty Approval Email Notification

From: PIMA_Automated@pima.edu [mailto:PIMA_Automated@pima.edu]
Sent: Friday, January 22, 2010 2:06 PM
To: Wahl, Donald
Subject: Pima Adjunct Contract Approval Required

Congratulations! An adjunct faculty contract (Fall 2009, DAE 160, CRN 10299) is ready for your review and approval. To approve your contract, follow these instructions:

- 1) Click on the '@ Work' tab.
- 2) Click on 'My Adjunct Contracts' in the 'Quick Links - @ Work' section.
- 3) Approve (or decline, if applicable) your contract.
- 4) Click the Submit button.

Pima Community College

Creating the Workflow

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"MyPima" Adjunct Faculty Contracts Menu Item

Pima Community College

Advanced Information Student Services & Financial Aid Faculty Services **Faculty** Pima Community Administration

Search: RETURN TO MENU SITE MAP HELP LOGIN

Faculty & Advisors

- **Faculty** Student Information System users Statement of Confidentiality
- **Faculty & Advisors** Student Issues
- **View Basic Student Information** Drop/add courses, perform overrides, View/print unofficial transcripts.
- **Term Selection** Stop here first to select a term to use while you're within the Faculty Module.
- **CRN Selection** Select a CRN that has been assigned to you as an instructor for the selected term.
- **Faculty Detail Schedule** A detailed display of your schedule for the selected term.
- **Faculty Schedule by Day and Time** A matrix display of your schedule for the selected term.
- **Print Class List** A detailed listing of students for the selected CRN.
- **Summary List of students for the selected CRN** A summary list of students for the selected CRN.
- **Final Grades** Enter final grades for the selected CRN.
- **Summary Class List with Placement Recommendations** A summary list with placement recommendations for reading, writing and math.
- **CONFIDENTIAL** - Not for release to third parties.
- **Auto Day Attendance Reporting** 45th day reporting of student withdrawals.
- **Registration Overrides** Allows assignment of registration permissions/overrides.
- **Registration Add/Drop** Add/Drop a student for any course for any term, with the student's permission.
- **Student Academic History Class List from Term Reports** Student does not include placement recommendations for math, reading, writing and ESL. Academic history, transfer courses and classes in progress will include term, course and grades for math, reading and writing. Classified groups will be listed in one class.
- **Student Academic Profile from Term Reports** The report will call up all academic history, courses in progress, placement recommendations, holds, program, education level and address for a specific student.
- **Student Academic History Class List from Term Reports in Excel Format** Student class list from Term Reports in excel format. Includes student ID, address and phone number.
- **Adjunct Faculty Contracts** Create/terminate/transfer contracts for electronic signature.

Creating the Workflow

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Administrator Worklist

Home

Worklist

Workflow Status Search

Workflow Alerts

Worklist

Workflow

Approval process for Campus West and Division WC Health Related Professions for Donald Wahl Course: DME160 CRC: 10299

Ready

Activity

Duration: 00m 10sec

Priority

Normal

Created

22-Jan-2010 10:10:12 PM

User Profile

My Processes

User Information

Change Password

1 of 1

First

Previous

Next

Last

Go to page:

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Show Reserved Items

Administration

Business Component Catalog

Enterprise Management

User Management

File Management

Business Events

Work Calendar

Process Realization

Enter Workflow Model

Workflow System Administration

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Creating the Workflow

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[illegible]

Administrator Worklist Approval	
-----Load Hour Information-----	
Faculty:	Wahl, Donald
Subject:	DAB
Course:	160
Course Load:	1
Entry Time Load:	9:49
Current Term Load:	9:49
Current Term Section Count:	4
Previous Term Load:	
Previous Term Section Count:	0
-----Comment Section-----	
Scheduler:	dwahl
Comments from Scheduler:	None
Comments for Contract:	None
Your Internal Comments:	None
<input type="checkbox"/> Division Dean Decision <input type="checkbox"/> Refresh data before making a decision <input type="checkbox"/> Review Later (set date below) <input type="checkbox"/> Approve <input type="checkbox"/> Not Approved (Action needed - add internal comments above when necessary)	
Next Review Date:	22-Jan-2010 02:02:11 PM
(Use calendar widget at end of field to select date)	
<input type="button" value="Complete"/> <input type="button" value="Save & Close"/> <input type="button" value="Cancel"/>	

Administrator "Contract Not Approved" Email to Scheduler

From: PIMA_Automate@pima.edu [mailto:PIMA_Automate@pima.edu]
Sent: Friday, January 22, 2010 2:14 PM
To: Wahl, Donald
Cc: Wahl, Donald
Subject: Adjustments Needed - Adjunct Contract Wahl, Donald (DAE 160, 201010, CRN 10299)

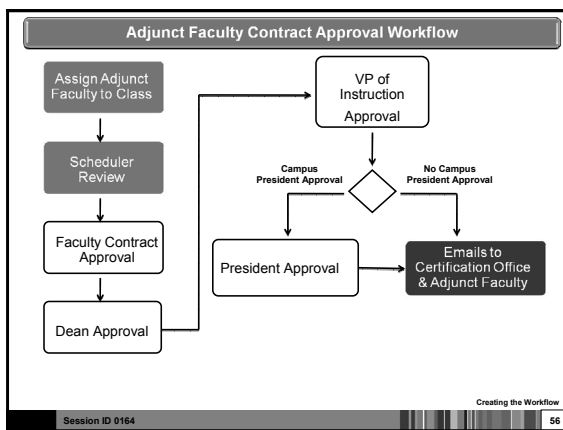
The following adjunct faculty contract has not been approved. See comments below:

Faculty Name: Wahl, Donald
 Course Prefix: DAE
 Course Number: 160
 CRN: 10299
 Term: 201010

Comments from Contract: None
 Comments from Div Dean: Cannot approve contract for this adjunct. Please remove from class.
 Comments from VP of Instruction: None
 Comments from Campus President: None

Creating the Workflow

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Email to Contracts and Certification Office

From: PIMA_Automate@pima.edu
To: Faculty Certification
Sent: Wed 2/23/2010 7:28 AM

Subject: Adjunct Faculty Contract Approval

All approvals received to process the following adjunct faculty contract:

Faculty Number: [Redacted]
 Faculty Name: Robert [Redacted]
 Position: CCADIF
 Contract Type: AD
 Contract Start Date: 19-JAN-10
 Contract End Date: 04-MAY-10
 Payroll ID: BR
 Course: ACC 101
 CEN: 90014
 Total Pay Amount: \$1,100.00
 Fund: 010010
 OLE: CCENWF
 Account: 60113
 Program: LACCC
 Load Hours: 3
 Entry Load Hours** 3

** Entry Load Hours equal to load hours at time of entry. Refer to Banner for current load hours.

Comments from Scheduler: GV - Co. w/ GEICO Edy avoided has been previously approved by Nancy E. & Schia L on 02/01/10

Comments from Contract: None
 Comments from Div Dean: None
 Comments from VP of Instruction: None
 Comments from Campus President: None

Creating the Workflow

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Email to Adjunct Faculty – Final Approval

From: PIMA_Automated@PIMA.EDU

To: Wiah, Donald

Cc:

Subject: Approved Adjunct Faculty Contract

Congratulations! Your adjunct faculty contract (Fall 2009, DAE 160, CRN 10299) has been approved. To view your contract


- 1) Click on the '@ Work' tab
- 2) Click on 'My Adjunct Contracts' in the 'Quick Links - @ Work' section.

Pima Community College

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Creating the Workflow

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Implementation and Training

Why Workflow is Faster Than You Are
Pima County Community College District

Implementation

- Academic Term Crossover Issues
- Establish Standards and Procedures
- Determine Roles and Responsibilities
- Establish First Responder Team & Support Procedures
 - Add/maintain users and roles
 - Support infrastructure
 - Monitor production
- Train and Prepare Users

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Implementation & Training

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Training

Specialized Training Format

- First Responder
- Campus Schedulers
- Campus Teams
- Campus Presidents
- Follow Up Advanced Training for Schedulers

Training Documentation

- Pima Adjunct Faculty Process
- FAQ

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Implementation & Training

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Training

Training Session Objectives:

- Understand how Adjunct Faculty process works
- Learn how workflow works
- Understand employee's role in the process

Training Agendas:

- Introductions
- Session objectives
- Project objectives
- Workflow overview and demonstration
- Adjunct Faculty process overview
- Hands on training
- Miscellaneous items

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Implementation & Training

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Training


PIMA Adjunct Faculty Process "cheat sheet"

- Open email sent from workflow
- Click on the link to open workflow
- Login to Workflow using your Banner User Logon and password
- A user window will appear displaying data
- Data MUST be entered in each field preceded by an asterisk (*) (scroll down to see all the data).
 - FOAP
 - Decision – Refresh, Review Later, Approve, Not Approved, Final Approval, President Review
- Optionally – enter comments as needed.
- Once all the required fields have been entered, the user must click on one of the buttons on the bottom of the form:
 - Complete – this indicates the user has completed the work
 - Save & Close – This indicates the user has started but not completed the work. The user's responses will be saved. The user may return to the work on the worklist and click the "Complete" button when the work is complete.
 - Cancel – This clears all the user responses. The user may return to the work on the worklist and click the "complete" button when the work is complete.

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Implementation & Training

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Lessons Learned

Why Workflow is Faster Than You Are
Pima County Community College District

Lessons Learned

- Be flexible and accept that changes will be inevitable
- Plan to have your consultant on after implementation
- Recognize that your BPA will not reveal everything
- Prepare for significant maintenance after implementation
- Have access to people that can make decisions
- Identify and involve technically savvy staff up front
- Offer follow-up training on best practices
- Create a knowledge base of troubleshooting responses

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Lessons Learned 65



Summary

Why Workflow is Faster Than You Are
Pima County Community College District

Summary

- Project Administration
- Discovery/ BPA
- Design and Testing
- Communication
- Training
- Post-Implementation/Maintenance

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Questions

- Please go to the nearest microphone to ask your questions
- Please state your name and what institution you are from

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Contact Information

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- Don Wahl dwahl@pima.edu
- Craig Winters cwinters@pima.edu

For a copy of today's presentation, download at:
www.pima.edu/admin/presentations

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Thank You!

**Please complete the online
class evaluation form:**

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