Banner Workflow: Teaching Effort
Approver Procedure Guide

Version: October 2013
# Table of Contents

**Banner Workflow:** What is a Workflow? ................................................................................................................................. 1

**Teaching Effort web form:** What is it? ................................................................................................................................. 2

**Getting Started:** Accessing Banner Workflow ................................................................................................................. 3

**Banner Workflow:** My Worklist Channel ............................................................................................................................. 5

**Banner Workflow:** Worklist .................................................................................................................................................. 6

**Banner Workflow:** Worklist Work Items ............................................................................................................................. 7

**Banner Workflow:** Work Item Decision Actions .................................................................................................................. 8

**Banner Workflow:** Work Item Complete/Save/Cancel ......................................................................................................... 10

**Banner Workflow:** Show Reserved Items ........................................................................................................................... 12

**Banner Workflow:** My Processes ......................................................................................................................................... 14

**Banner Workflow:** Setting a Proxy .................................................................................................................................... 16

**Banner Workflow:** Approver E-mail Notifications .............................................................................................................. 18

**Frequently Asked Questions** ............................................................................................................................................... 22

**Banner Workflow:** Assistance ............................................................................................................................................ 23
Banner Workflow: What is a Workflow?

Teaching Effort web form: what is it?

The Teaching Effort web form is an online form attached to a Banner Workflow that allows the College to process and approve certain adjunct contract and additional pay information online. Departments no longer need to submit any paper forms for returning adjunct contracts or requests for additional pay.

All academic departments use the Teaching Effort web form for:

- Adjunct Contracts (for current/returning adjunct faculty)
- Request for Additional Pay (for current roster faculty and staff with teaching duties).

Summary of Process:

A. **INITIATE**: Department administrative assistants initiate the Teaching Effort web form.
   1. Initiators log in to MyCharleston \( \rightarrow \) click MyForms tab
   2. Choose the appropriate Teaching Effort web form.
   3. Complete the online form.
   4. Click Submit. This information will be electronically sent to the approval personnel within the requested program/department via Banner Workflow.

B. **APPROvals**: Approvers review the Teaching Effort request and move it along the approval chain.
   5. Approvers automatically receive email notification when a new request is submitted.
   6. Approvers log in to MyCharleston \( \rightarrow \) click MyWorkflow tab.
   7. Choose the appropriate Teaching Effort request and Open Workflow.
   8. Indicate approval decision and click Complete (add comments if not approved or using the abstain option).

C. **COMPLETED**: Teaching Effort request is sent along the approval chain and is approved or not approved with comments.
   9. Initiators receive email notification when the Teaching Effort request is sent to approvers and when it is reviewed and approved.
   10. The final stop is the Human Resources office. Finalized documents will be available for viewing in BDMS by department chairs and those department administrative assistants with proper BDMS access.
Teaching Effort web form: What is it?

- In the past we have used two different paper forms to initiate either an adjunct contract or a request for additional pay for roster faculty and staff teaching outside their normal duties. The Teaching Effort interactive form is an online form attached to a Banner Workflow that allows us to process this information without the paper forms of the past.

- Administrative assistants in the academic departments will initiate the web form and start it on the approval path by logging in to MyCharleston and accessing the MyForms tab. They will complete the web form and click Submit. This information will then be electronically delivered to the appropriate approval personnel within the requested program/department via Banner Workflow.

- E-mail notifications will be sent to the originator and the approvers as the request moves along the approval chain. The originator will also receive a confirmation e-mail once the review and approval process is complete.
Getting Started: Accessing Banner Workflow

- The **Banner Workflow** tab is located in **MyCharleston** (my.cofc.edu).

- **Banner Workflow** is not available from the off-campus network. Approvers will still be able to see their **Worklist** on the **My Workflow** tab in **MyCharleston** but must be on campus or remoted in to the campus network via VPN to access the work items.

- The recommended web browser for **Banner Workflow** is Internet Explorer. You may need to make a few changes to your Internet Explorer security settings before you begin using **Banner Workflow**.

- Open **Internet Explorer**.

- Click the **Tools** menu.

- Select **Internet Options**.

- Click the **Privacy** tab.

- Click the **Sites** button.
Getting Started: Accessing Banner Workflow

- In the **Address of website** block, type `cofc.edu` and click the **Allow** button. Next, type `cougars.int` in the **Address of website** block and click the **Allow** button.

- Click **OK** on this screen and the Internet Options screen.

- Login to **MyCharleston** (my.cofc.edu).

- Select the **My Workflow** tab.

- This will open a page containing three channels:
  - **My Worklist**
  - **My Workflow Alerts** (this channel will not be used).
  - **My Processes**
Banner Workflow: My Worklist Channel

- The **My Worklist** channel on the Workflow tab will contain a snapshot of pending requests (Teaching Effort, POSM, RO Faculty Forms --depending on your role(s) for your department/program).

- Click on the individual item you want to work with or –

- Open your complete **Worklist** in **Banner Workflow** by clicking the **Open Workflow** link in the lower right hand corner of the channel box to begin reviewing/processing any action requests.
Banner Workflow: Worklist

- The Worklist is the first page that is displayed in Banner Workflow. The Worklist organizes requests for the role(s) that the Approver is assigned to manage. All users who are assigned a role will see the work items for that role in their Worklist. Each work item represents a unit of work for a single workflow activity.

Worklist Display

- The Worklist displays the following five columns that can be sorted in ascending or descending order:
  - Organization - The Organization column displays the organization name.
  - Workflow - The Workflow column displays the workflow instance name.
  - Activity - The Activity column displays the activity request name.
  - Priority - The Priority column displays the priority of the workflow instance.
  - Created - The Created column displays the workflow item creation date and time.

- To sort on a specific column, simply click the column name. An arrow will appear next to the sorted column indicating whether the sort was performed in ascending or descending order.
Banner Workflow: Worklist Work Items

Launching a Work Item

- To launch a work item from your Worklist, click the link that appears in the Workflow column of the Worklist. When a work item is completed, the workflow will automatically advance to the next activity in the process.

<table>
<thead>
<tr>
<th>My Worklist</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization/Office Name: Teaching Effort Main - Program Director / Chair - ENGL-ENGL - Kelly Owen</td>
</tr>
<tr>
<td>Action: Ready</td>
</tr>
<tr>
<td>Status: Ready</td>
</tr>
<tr>
<td>Activity: Prog Dir Chair Approval</td>
</tr>
<tr>
<td>Due Date: 10-Aug-2013 09:50:47 AM</td>
</tr>
<tr>
<td>Details:</td>
</tr>
<tr>
<td>Activity: Prog Dir Chair Approval</td>
</tr>
<tr>
<td>Due Date: 14-Aug-2013 03:35:28 PM</td>
</tr>
<tr>
<td>Details:</td>
</tr>
<tr>
<td>Activity: Prog Dir Chair Approval</td>
</tr>
<tr>
<td>Due Date: 14-Aug-2013 12:54:06 PM</td>
</tr>
</tbody>
</table>

Work Item Details

- Once you have launched a work item from your Worklist, a page will open containing detailed information about the selected request.
Review and Decision Actions

- After reviewing the detailed information regarding the request, indicate your decision by choosing one of the radio buttons in the Decision Action box.
Banner Workflow: Work Item Decision Actions

- **Approved**
  - Select this radio button if you are approving the request and sending it to the next step in the workflow.
  - Click **Complete**

- **Not Approved**
  - Select this radio button if you are denying the Request.
  - Provide your reason(s) for the denial in the **Comments** box below the Decision box. Your comments will be e-mailed to the originator.
  - Click **Complete**.

- **Abstain** (for conflict of interest including nepotism)
  - Select this radio button if you are passing the Request to the next approver with no action.
  - Provide your reason(s) for abstaining from the approval process in the **Comments** box below the Decision box. Your comments will be e-mailed to the originator.
  - Click **Complete**.
Banner Workflow: Work Item Complete/Save/Cancel

Complete, Save & Close or Cancel Buttons

- Once you have started or indicated your Decision regarding the request you may select one of the following options:

- **Complete**
  - Approved: Select Complete if you are ready for your approval to be forwarded on for further approvals and action.
  - Not Approved: Select Complete if you are ready for your denial Comments to be e-mailed to the originator.
  - Abstain: Select Complete if you are ready for the workflow to proceed and for your Comments to be e-mailed to the originator.

- **Save & Close**
  - If you choose to save your work and return to it at a later time, select the Save & Close button. The **Work Item** will be reserved in your **Worklist** until you reselect it. Other Workflow approvers in your department/program will not be able to see this Work Item on their Worklist unless you Release the Work Item. Please refer to the Banner Workflow: Show Reserved Items section of this manual for additional information on reserved work items.
  - To Release a Work Item, click on the magnifying glass at the end of the Work Item on the Work List.

### Worklist

<table>
<thead>
<tr>
<th>Organization</th>
<th>Workflow</th>
<th>Activity</th>
<th>Priority</th>
<th>Created</th>
</tr>
</thead>
<tbody>
<tr>
<td>Root</td>
<td>Teaching Effort North - Program Director / Chair - ACLS-BLAW - Lauren Schoenheit</td>
<td>Prg On Chair Approval</td>
<td>Normal</td>
<td>14-Aug-2013 03:26:26 PM</td>
</tr>
<tr>
<td>Root</td>
<td>Teaching Effort North - Program Director / Chair - ACLS-BLAW - Lauren Schoenheit</td>
<td>Prg On Chair Approval</td>
<td>Normal</td>
<td>14-Aug-2013 12:54:05 PM</td>
</tr>
</tbody>
</table>

Show Reserved Items
Banner Workflow: Work Item Complete/Save/Cancel

- Click **Release**. (Do not click any of the other icons. This can cause damage to the Workflow.)

  ![Workflow Options](image)

- **Cancel**

  - Select this button if you would like to return to the **Worklist**. Any data you have entered on the **Work Item** will not be saved. The **Work Item** will be reserved in your **Worklist** until you reselect it. Other Workflow approvers in your program/department will be unable to see this **Work Item** on their **Worklist** unless you **Release** the **Work Item**. Please refer to the **Banner Workflow: Show Reserved Items** section of this manual for additional information on reserved work items.
Banner Workflow: Show Reserved Items

Show Reserved Items

- The **Worklist** will display all available work items (items that have **not** been reserved by another Approver) for the role(s) that the user is assigned to manage. Worklist items reserved by another Workflow Approver will not appear on your Worklist unless they are released by the Approver who reserved it.

- A work item becomes **reserved** by an Approver when:
  - The Approver opens a Worklist item and clicks the **Cancel** button or
  - The Approver opens a Worklist item and uses the **Save & Close** button.

- To view all work items **you** have reserved, click **Show Reserved Items**. Other Approvers in your department/program will not be able to see these work items on their Worklist unless you **Release** the work item.
Banner Workflow: Show Reserved Items

- To release a work item, click on the magnifying glass at the end of the work item on the Worklist.

  ![Worklist Screenshot]

  - Click **Release**. *(Do not click any of the other icons. This can cause damage to the Workflow.)*
Banner Workflow: My Processes

My Processes

The My Processes page provides Workflow Approvers with links to request/view the following information items:

- **CofC_TE_Status**: This link provides Approvers with the ability to research the status of a Teaching Effort request for a given CWID and Term. Once the status request is submitted, the Approver will receive an e-mail containing a data transcript of the teaching effort request, reviewer decisions and comments.

- **My Processes** can be found in two places:
  
  - On the My Processes channel on the Workflow tab in MyCharleston
  
    ![Banner Workflow: My Processes](image)

  - On the User Profile link list in Banner Workflow.

![Banner Workflow: My Processes](image)
Banner Workflow: My Processes (CofC_TE_Status)

- After clicking **Start Workflow**, you will see the following message:

  The workflow was started successfully.

  **OK**

- Click **OK**. You will receive an e-mail containing information about the request including the name of the workflow step it is currently on. In some cases, if there are multiple Teaching Effort forms for this individual for this term, you may receive more than one e-mail in response to your request. *(Note: This e-mail will be automatically generated by workflow@cofc.edu. Please do not reply to this e-mail address. It is not set up to receive incoming messages.)*
Banner Workflow: Setting a Proxy

If you are going to be unavailable to perform approvals for an extended period of time you can establish a proxy, someone to approve the workflows in your absence. **Note: Before you can use this function, the person you wish to proxy to must be established as proxy eligible for a specific role. To have someone made proxy eligible, please send a request to the Helpdesk specifying the rolename and the name of the user you are adding.**

To set a proxy when the person has been made proxy eligible:

- Log in to MyCharleston and open the My Workflow tab. Click on **Open Workflow**. Banner workflow will open in a new window.

- From the menu on the left, click **User Information**.

- The User Information screen shows your workflow profile and the roles that have been assigned to you. Locate the role for which you want to establish a proxy.

- **Select Add Proxy.**
Banner Workflow: Setting a Proxy

- Choose the individual from the **User** drop-down box.
- Select a start date (**Effective From**) for the assignment.
- Select an end date (**Effective To**) of the assignment.

- Click **Save**.
Banner Workflow: Approver E-mail Notifications

- Workflow Approvers will receive an e-mail when a Teaching Effort form is ready for their review and action.

<table>
<thead>
<tr>
<th>From</th>
<th>Subject</th>
<th>Received</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="mailto:workflow@cofc.edu">workflow@cofc.edu</a></td>
<td>Workflow Task Approval - Teaching Effort...</td>
<td>Mon 8/19/2013 10:27...</td>
</tr>
<tr>
<td>Walter, Mike</td>
<td>RE: Teaching Effort form</td>
<td>Mon 8/19/2013 10:00...</td>
</tr>
<tr>
<td>Emelianoff, Ana</td>
<td>RE: IR-NIR forms</td>
<td>Mon 8/19/2013 9:58...</td>
</tr>
<tr>
<td>Caveny-Noecker, Deanna M.</td>
<td>Re: approvals of teaching effort forms</td>
<td>Mon 8/19/2013 7:53...</td>
</tr>
</tbody>
</table>

- Approvers will then log in to Workflow to view the Teaching Effort and take action.
MS Outlook: Setting Rules for E-mail Notifications

- Microsoft Outlook allows users to create rules to have e-mail messages do something before they are read. As a Workflow Approver, you may receive e-mails from a variety of Webform workflows. You may not want to read these e-mails as soon as they appear in your Inbox. You have the option of automating how these e-mails are handled by setting up Inbox rules to direct these messages to an identified folder. Here are some instructions for Outlook 2010 users (or you can click the Help icon in Outlook---it is the blue circle with a white question mark in the upper right hand corner of the screen).

- Create a folder where you want the e-mail to be sent. Right mouse click on your Mailbox and select New Folder.

Choose a name for the folder (something you will recognize) and click OK.
MS Outlook: Setting Rules for E-mail Notifications

- On the **Home** tab, click **Rules**. Select **Manage Rules & Alerts**…

![Image of Outlook window showing rules and alerts]

- Click on **New Rule**.

![Image of Outlook window with Rules Wizard]

- Under **Stay Organized**, select **Move messages from someone to a folder**.
MS Outlook: Setting Rules for E-mail Notifications

- In the Step 2 box, click the link for **people or public group**.

  ![Step 2: Edit the rule description (click an underlined value)](image)

  Apply this rule after the message arrives
  from **people or public group**;
  move it to the **specified folder**
  and stop processing more rules

  **Example:** Move mail from my manager to my High Importance folder

- Type **workflow@cofc.edu** (for Teaching Effort notifications and TE Status requests) in the **From** box. Click **OK**.

- In the Step 2 box, click the link for **specified folder**.

  ![Apply this rule after the message arrives](image)

  from **workflow@cofc.edu**
  move it to the Teaching Effort Workflows folder
  and stop processing more rules

- Click **Finish**.

**Note:** This is a very basic rule setup. Please feel free to further customize this rule if necessary.
Frequently Asked Questions

Q: May I use the Teaching Effort form to process all of my adjunct contracts?
A: The Teaching Effort form can only be used for current employees, after the faculty member has been added to Banner and received a CWID.

Q: How long will it take for a submitted Teaching Effort form to appear in the My Worklist of the first approver?
A: It will take fifteen (15) minutes or less for an item to move from initiator to first approver or from one approver (once acted on) to the next approver.

Q: I'm going on vacation. How can someone else perform the approval step in my absence?
A: Workflow contains a facility for establishing a proxy. See “Setting a Proxy” on pages 16 & 17.
Getting Help

- If you encounter any technical difficulties when using Banner Workflow, please contact the College of Charleston Help Desk (helpdesk@cofc.edu or 843-953-3375).

- If you have any further questions about the Teaching Effort web form, please e-mail: murphyb@cofc.edu