

PENNSYLVANIA STATE UNIVERSITY  
Administrative Information Services

## Got Workflow?

Richard Dumm & Beth Hayes

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## Glossary

**Business Process** -- A set of one or more linked procedures or activities which collectively realize a business objective or policy goal, normally within the context of an organizational structure defining functional roles and relationships.

**Business Process Analyst** -- deals with the more-tactical aspects of discovering, validating, documenting and communicating business-process-related knowledge through modeling, simulating and analyzing current and future states. Focus is on business outcomes versus technical 'how to'.

**Process** -- A formalized view of a business process, represented as a coordinated (parallel and/or serial) set of process activities that are connected in order to achieve a common goal.

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## Glossary (cont.)

**Process Design Team** -- Established for each Workflow process. Membership includes Process Steward, business rules experts, stakeholders, users and Workflow application developer.

**Process Steward (Owner)** -- is responsible for overseeing the business rules associated with the process to ensure adherence to University policy. Participates on Process Design Team.

**Role-based Approval** -- utilizes an approval path based on roles (Dean, Budget Admin, Financial Officer, etc.) that are required by policy for the approval of financial, academic and administrative processes.

**Role Steward** -- oversees and maintains central, policy-based roles and associated attributes for financial, academic and administrative areas within their authority. Designate and authorize Role Assigners.

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## Glossary *(cont.)*

**Role Assigner** – Identifies and assigns approval roles and authority to PSU employees for processes for which they will serve as an approver within their area of authority.

**Workflow** -- The automation of a business process, in whole or part, during which documents, information or tasks are passed from one participant to another for action, according to a set of procedural rules.

**Workflow Application** -- A general term for a software program that interacts with a workflow enactment service, handling part of the processing required to support a particular activity (or activities).

**Worklist** -- A list of work items associated with a Workflow user who serves in an approval role. The worklist is displayed upon login to the Workflow system via a Web browser.

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## Workflow Information

Business Process Trends  
<http://www.bptrends.com/index.cfm>

Workflow Management Coalition  
<http://www.wfmc.org/index.html>

Business Process Management Institute  
<http://www.bpm-institute.org/>

The Resource for Business Process Management  
<http://www.bpm.com/>

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## Got Workflow?

Demonstration:

*“Undergraduate Education Research  
 Student Travel Funds Request”*

Workflow Process

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## Got Workflow?

### Student Travel Funds Request

- Funds are available for Student Travel
- Academic Workflow
- Faculty Mentor Initiates
- Manual paper process – 2 to 3 weeks

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## Got Workflow?

### Electronic Workflow

- Role based approvals
- Manual paper process to electronic routing
- Reduce time from 2-3 weeks to 2-3 hours
- Electronic confirmations delivered to all parties at end of process

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## Workflow Contacts and Information

**Beth Hayes, Project Manager**  
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**Rich Dumm, Manager, Open Standards Development Group**  
[rdd4@psu.edu](mailto:rdd4@psu.edu), 865-1754

**Web site**  
<http://ais.its.psu.edu/workflow>

**Questions**  
[workflow@psu.edu](mailto:workflow@psu.edu)

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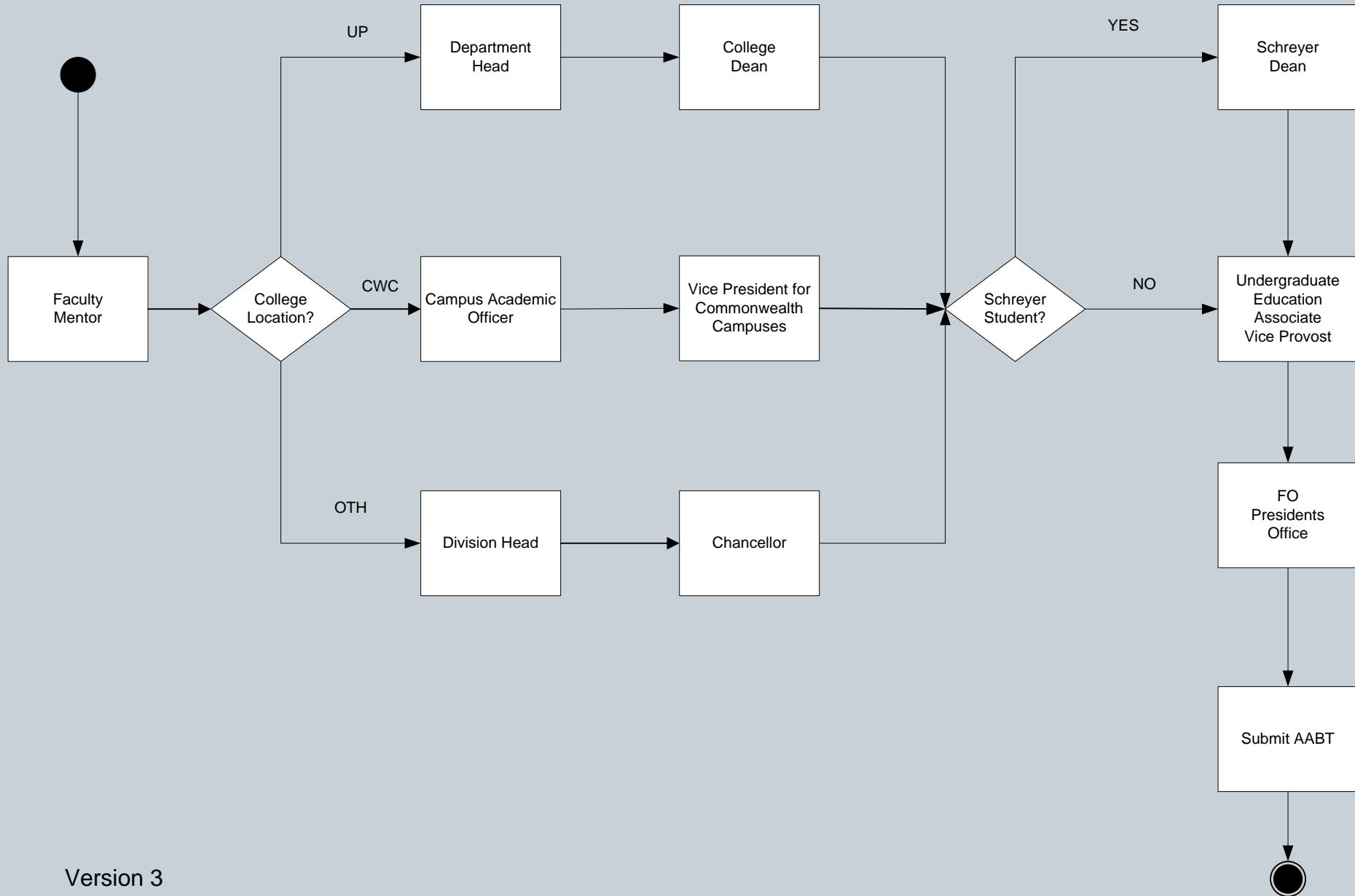
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# Undergraduate Education Research Travel Request - Process Flow

## Role Based Approval Paths



# From Paper:

PENNSSTATE



Undergraduate Education

(814) 863-1864  
FAX: (814) 863-7452

The Pennsylvania State University  
417 Old Main  
University Park, PA 16802

## Undergraduate Research Travel Request

Student Name: \_\_\_\_\_ Soc. Sec. No.: \_\_\_\_\_

College: \_\_\_\_\_ Major: \_\_\_\_\_

Campus Address: \_\_\_\_\_ Email: \_\_\_\_\_

Faculty Mentor: \_\_\_\_\_

Name of Conference: \_\_\_\_\_

Location: \_\_\_\_\_ Dates: \_\_\_\_\_

Title of Presentation: \_\_\_\_\_

Type of Presentation (check one): \_\_\_\_\_ Oral; \_\_\_\_\_ Poster; \_\_\_\_\_ Panel; \_\_\_\_\_ Other

If other, please specify: \_\_\_\_\_

Itemized anticipated expenses (transportation, meals, lodging, registration, etc.):

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

### Approvals:

Amount: \_\_\_\_\_ Department Signature: \_\_\_\_\_

Amount: \_\_\_\_\_ College Signature: \_\_\_\_\_

Amount: \_\_\_\_\_ Schreyer Honors College: \_\_\_\_\_

Amount: \_\_\_\_\_ Undergraduate Education: \_\_\_\_\_

