Got Workflow?
Richard Dumm & Beth Hayes

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.

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.
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.
Got Workflow?

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

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

Workflow Contacts and Information
Beth Hayes, Project Manager  
bah1@psu.edu, 863-3514  
Rich Dumm, Manager, Open Standards Development Group  
rdd4@psu.edu, 865-1754  
Web site  
http://ais.its.psu.edu/workflow
Questions  
workflow@psu.edu
Undergraduate Education Research Travel Request – Process Flow
Role Based Approval Paths

Faculty Mentor

College Location?

UP

Department Head

College Dean

Schreyer Dean

YES

College Location?

CWC

Campus Academic Officer

Vice President for Commonwealth Campuses

NO

Schreyer Student?

Division Head

Chancellor

Undergraduate Education Associate Vice Provost

FO Presidents Office

Submit AABT

Version 3
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: ____________________

Undergraduate Education, 10/13/03
**Undergraduate Research Conference Travel Request**  
**Form Number 141571**

### Student
- PSU Access Account ID: TOSD81
- Name: ANTHONY DJPCMVZ
- Phone: 8145555555
- Email: TOSD81@PSU.EDU
- Address: P.O. BOX 999 Curtin Rd Universtiy Park PA 16802
- Major: CIVIL ENGINEERING
- College: ENGR

### Faculty Mentor
- Name: JOHN DOE
- Department: engr sci & mechanics

### Conference
- Name: Beagles and Collies Expo
- Location: Ft. Lauderdale, FL
- Start Date: Jun 12, 2006
- End Date: Jun 13, 2006

### Presentation
- Title: Neurotic Dogs or Neurotic Owners: You Decide
- Type: Oral

### Statement of support from Mentor/Department
I fully support attendance at this conference!

### Group Travel
- Group Travel: Yes
- Students Traveling: Jack, Jill, Maggie and Filo.

### Itemized Anticipated Expenses
- Lodging: $1000.00
- Meals: $200.00
- Registration: $200.00
- Transportation: $200.00
- Misc. Expenses: $100.00
- Total Expenses: $1700.00

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