Workflow Processing

Honorariums and Special Non-Hourly
(Coaches & Faculty Stipends)

3/19/24

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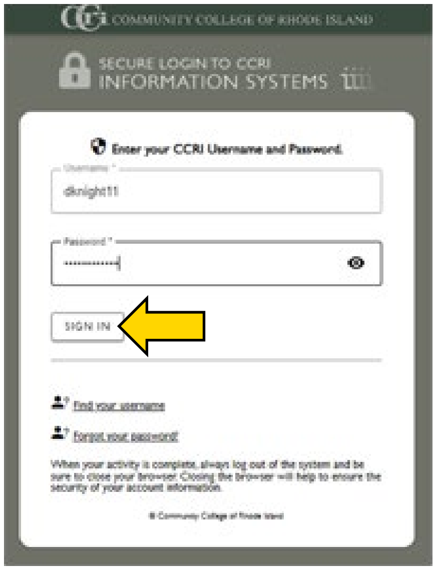
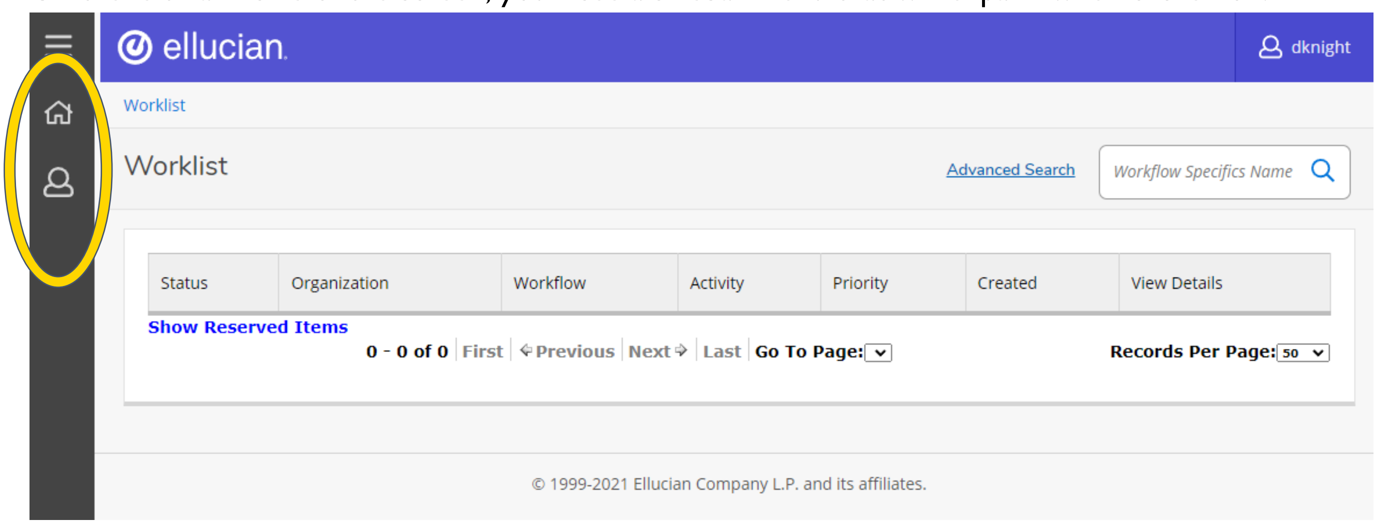
Accessing the Workflow System

Go to this link to access the Workflow system: https://workflow.ccri.edu/wfdora

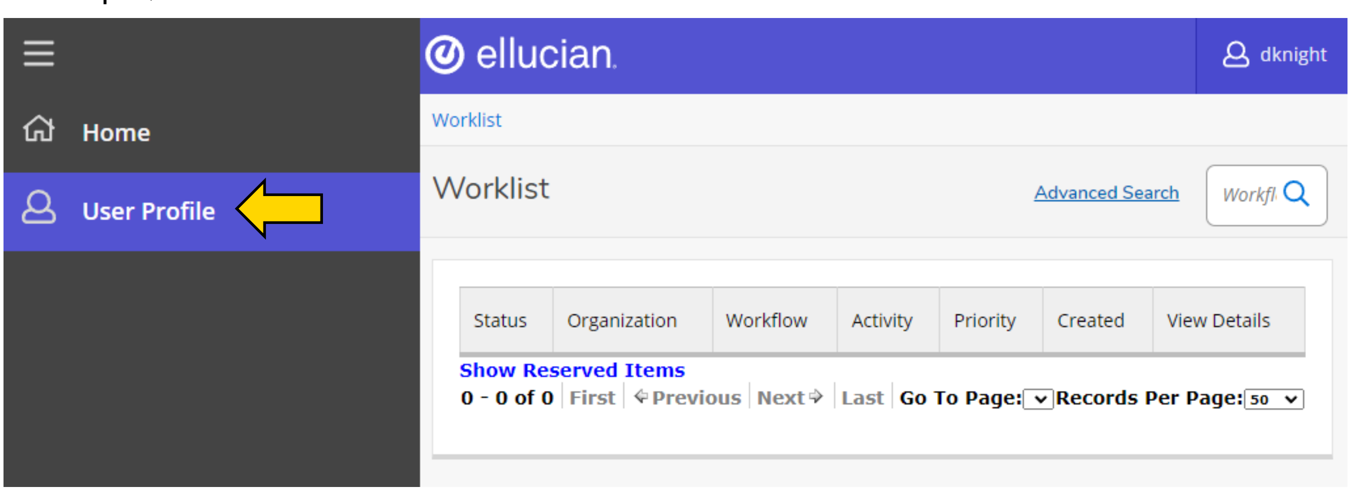
Log in using your CCRI ID username and password.



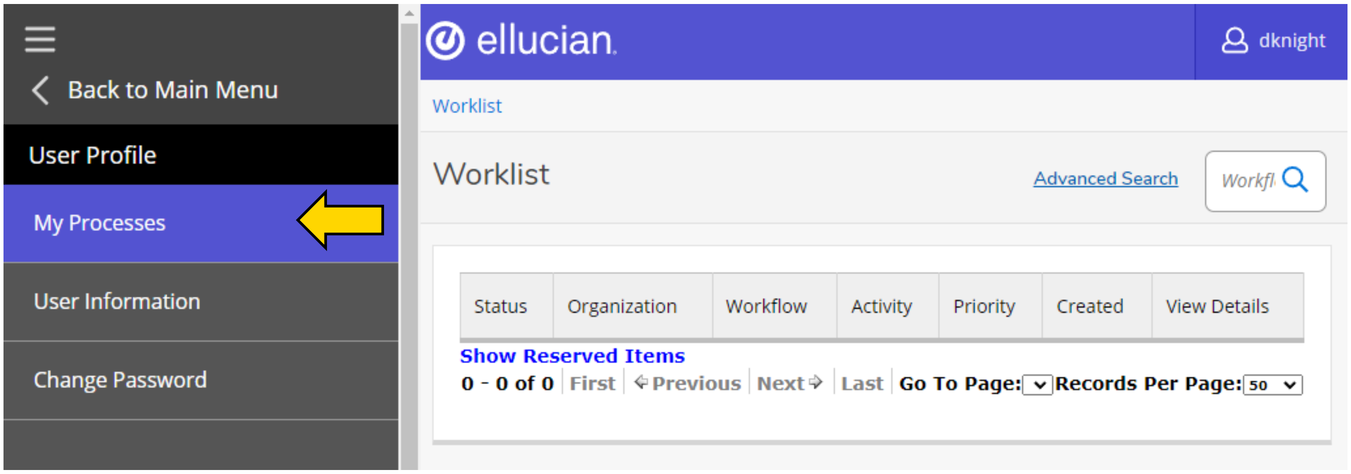
On the left-hand side of the screen, you'll see a sidebar menu that will expand when clicked on.



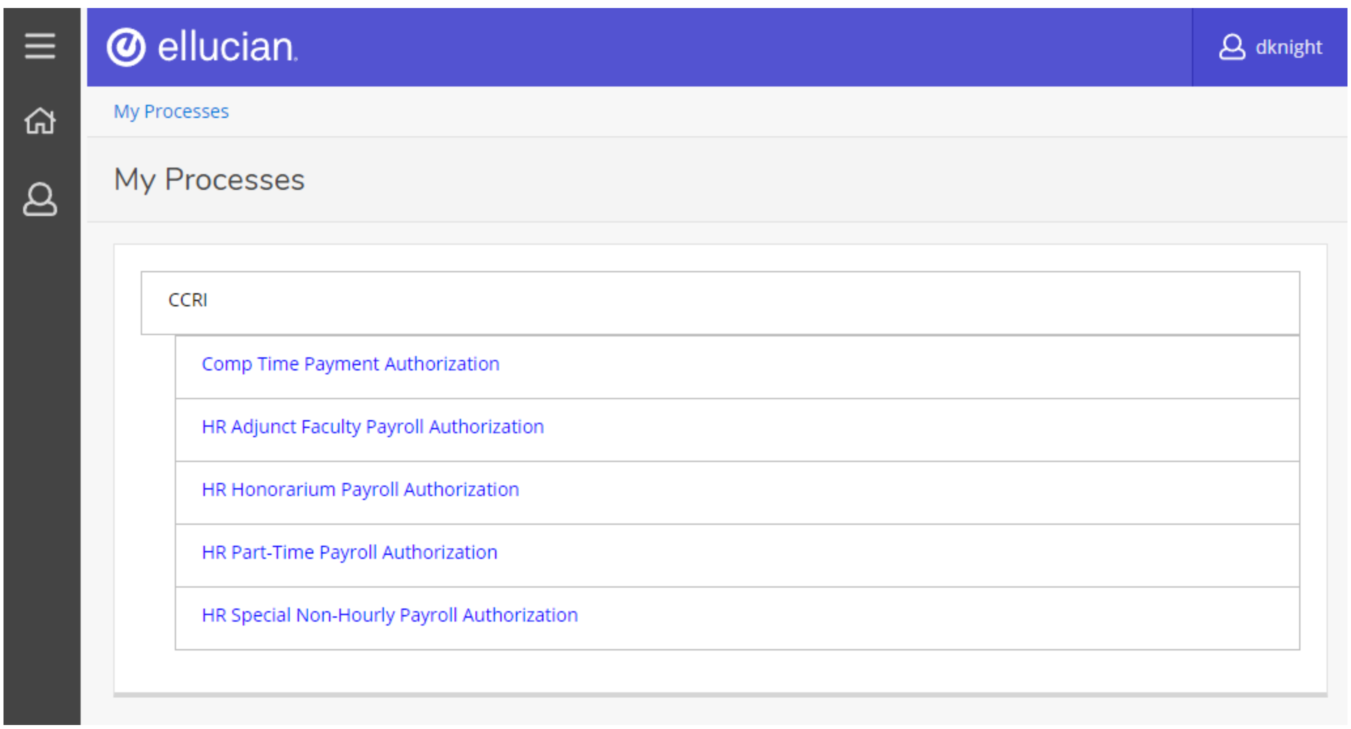
Once open, select "User Profile."



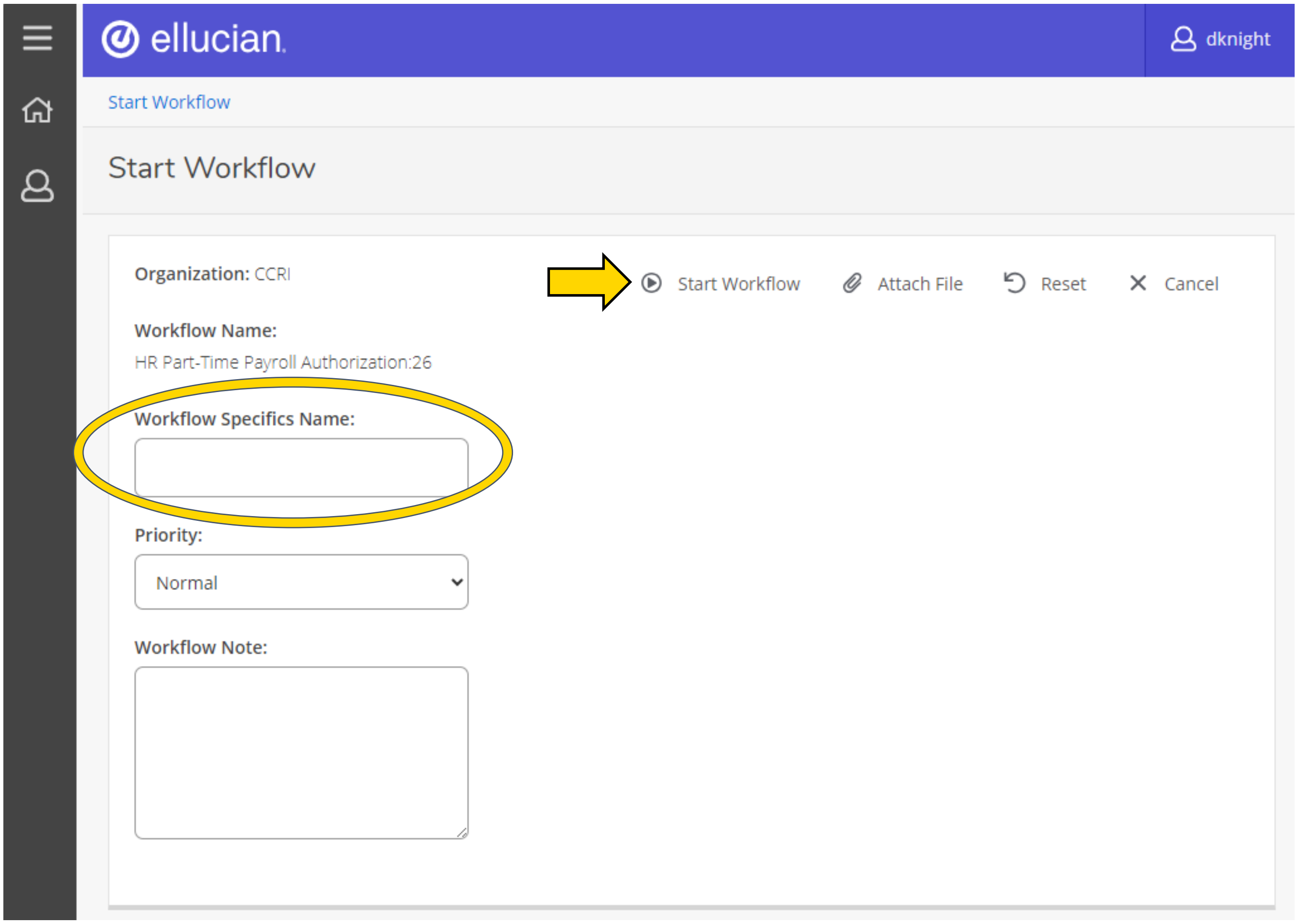
Then, select "My Processes" to open up a new page.



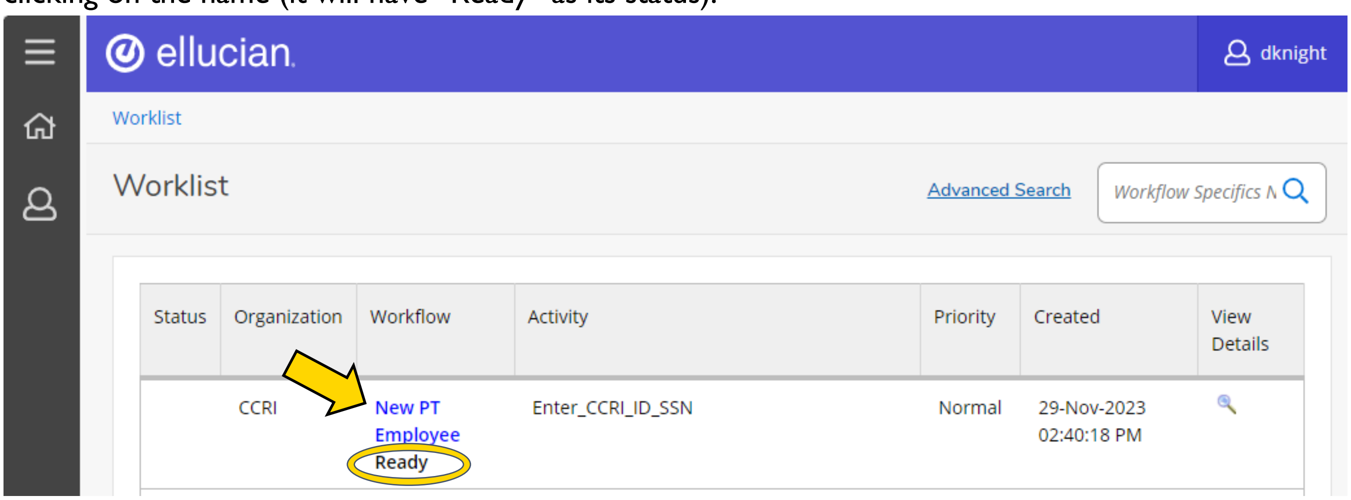
Choose from the list of forms.



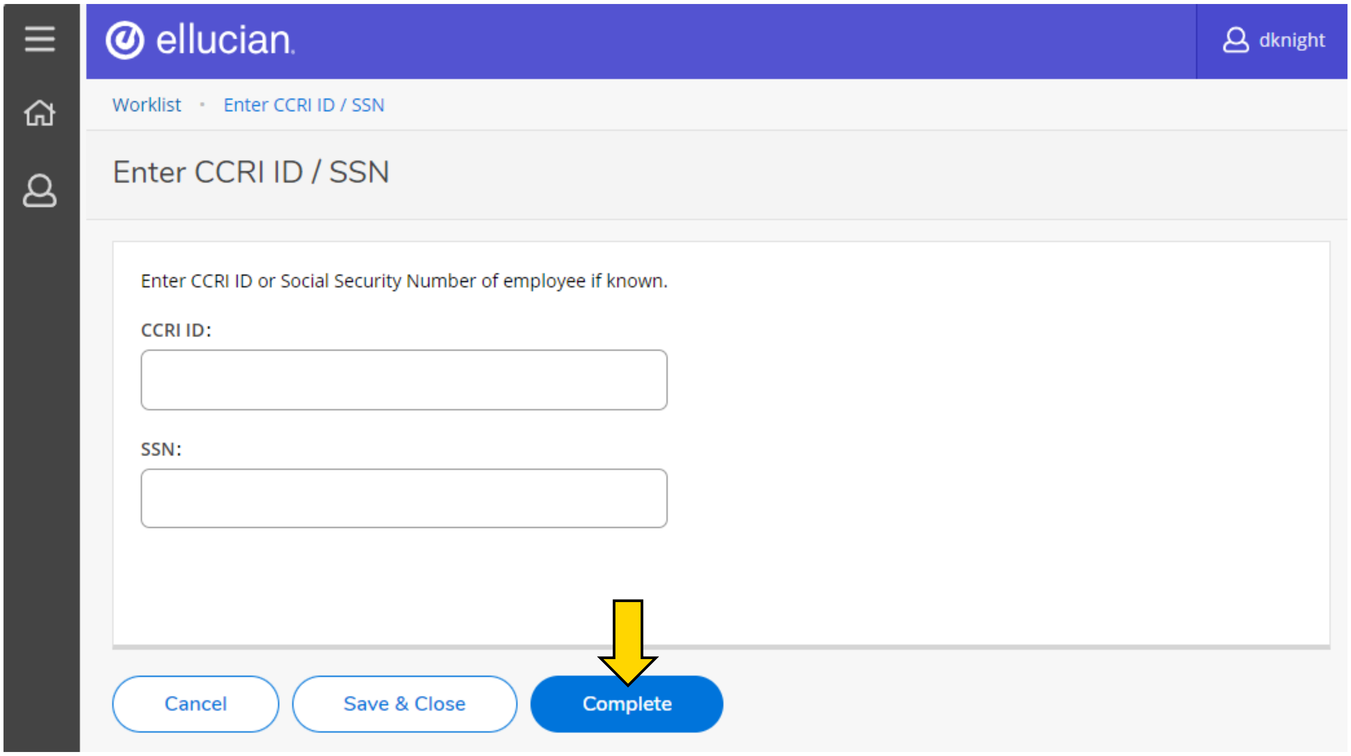
Start the workflow for the one you chose by entering a "Workflow Specifics Name." This is generally the full name of who the authorization is for. Then, press " ▸ Start Workflow."



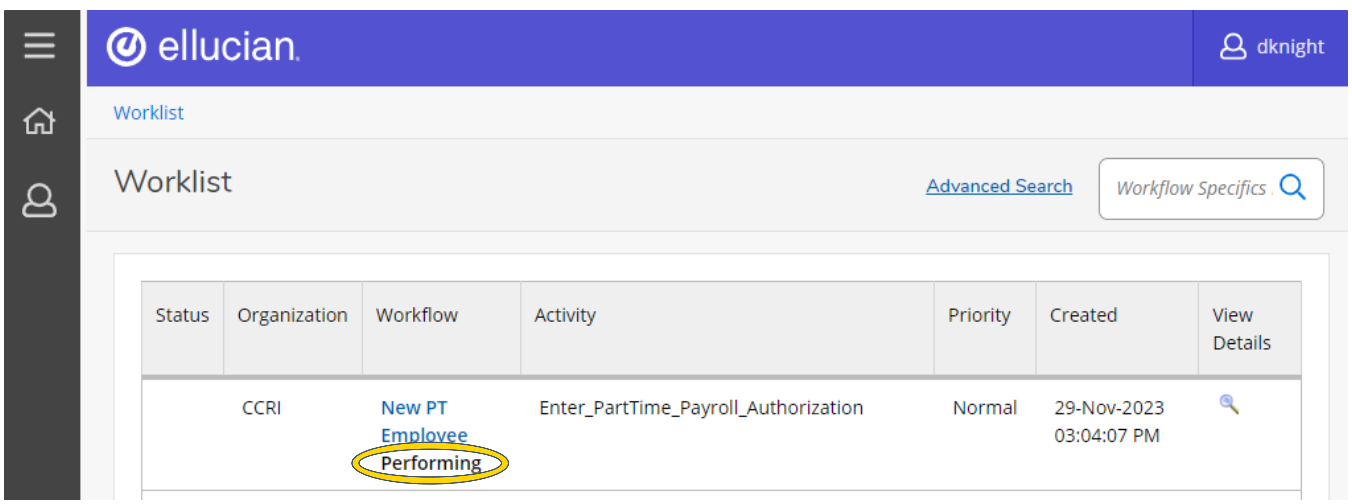
The workflow will now appear in your Worklist on the home screen. Open the correct workflow by clicking on the name (it will have "Ready" as its status).



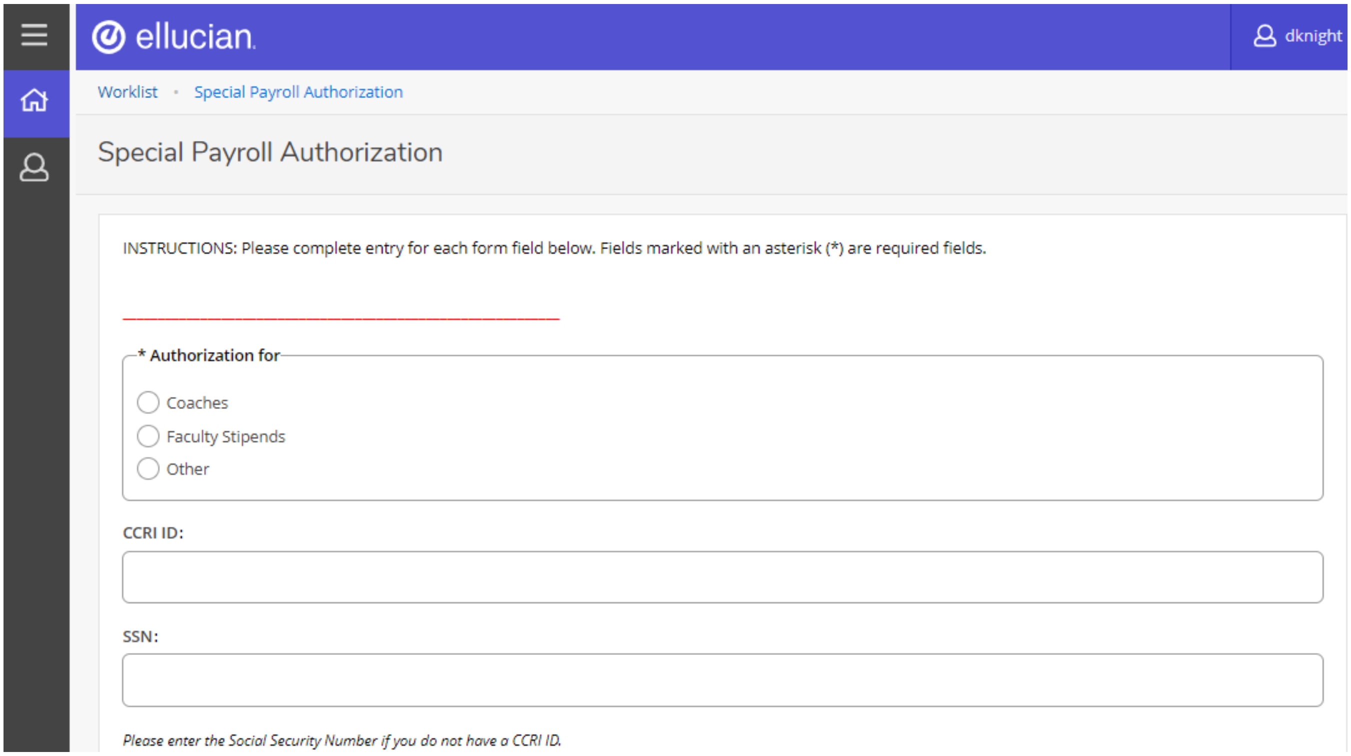
Enter the employees CCRI ID or Social Security Number, and then press “Complete.”



If a CCRI ID or SSN is entered, the Workflow will go out to the database and retrieve the employee’s information for the form. If no information is entered, a blank form will appear when “Complete” is clicked.

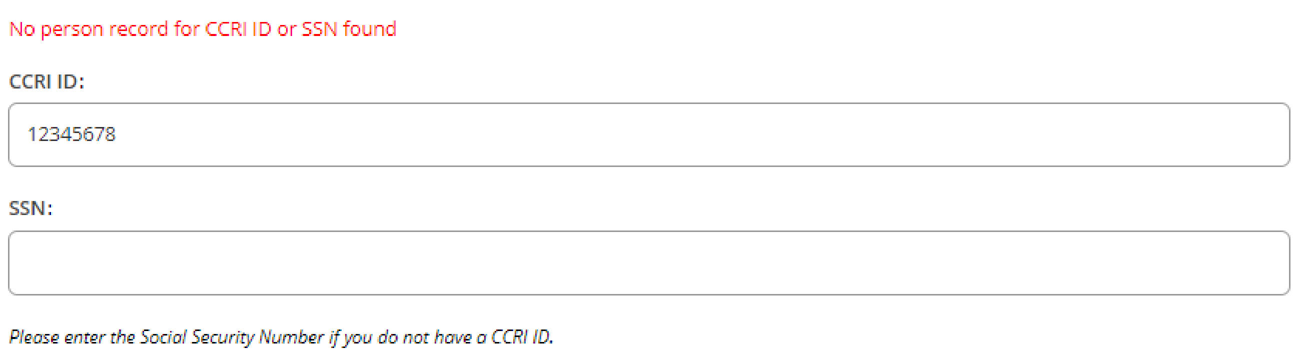


You will be brought back to the Worklist page where the workflow will be listed with “Performing” underneath. If you do not see it right away, wait about 30 seconds and refresh the page.



Press the purple "Top" button in the lower right-hand corner if you need to return to the top of this screen. It will move as you scroll down the form.

Depending on what you entered, either the CCRI ID or SSN will autofill on this screen. Do not edit these text fields unless necessary.



For this example, the CCRI ID was not found, so no additional information was automatically gathered in this form.

In your case, the form may not be blank – please follow along will these instructions and make corrections if anything is outdated.

1. **Name** – First and last name of employee.
2. **Street Address** – Number and street name of employee's residence.
3. **City** – Town or city the employee lives in.
4. **State** – State the employee lives in (abbreviation is fine).
5. **Zip** – Postal zip code of where the employee lives.
6. **Phone** – Employee's personal phone number, including area code.
7. **E-Class** – Enter the E-class for the position. The following are most common:
   - **L5 -** Honorarium/Stipend for PT
   - **L7 -** PT Coaches (Athletics)
   - **L8 -** Honorarium/Stipend for FT
8. **Phone Status** – If an employee uses a landline for their personal phone number, select "Listed." If not, choose "Unlisted."
9. **Date of Birth** – Specific date (MM/DD/YYYY) the employee was born.

10 Is the employee currently a matriculating student at CCRI?

*

- ◯ No
- ◯ Yes

If yes, enter the # of credits they are attempting to earn this semester.

11 Credits:

0

10. Select the appropriate radio button to answer the question.
11. If you answered "Yes" above, enter the number of credits they are attempting to earn this semester.

12 Department *:

Please Select Department - 000

13 Campus *:

Select A Campus

14 Fund *:

15 Organization *:

16 Program *:

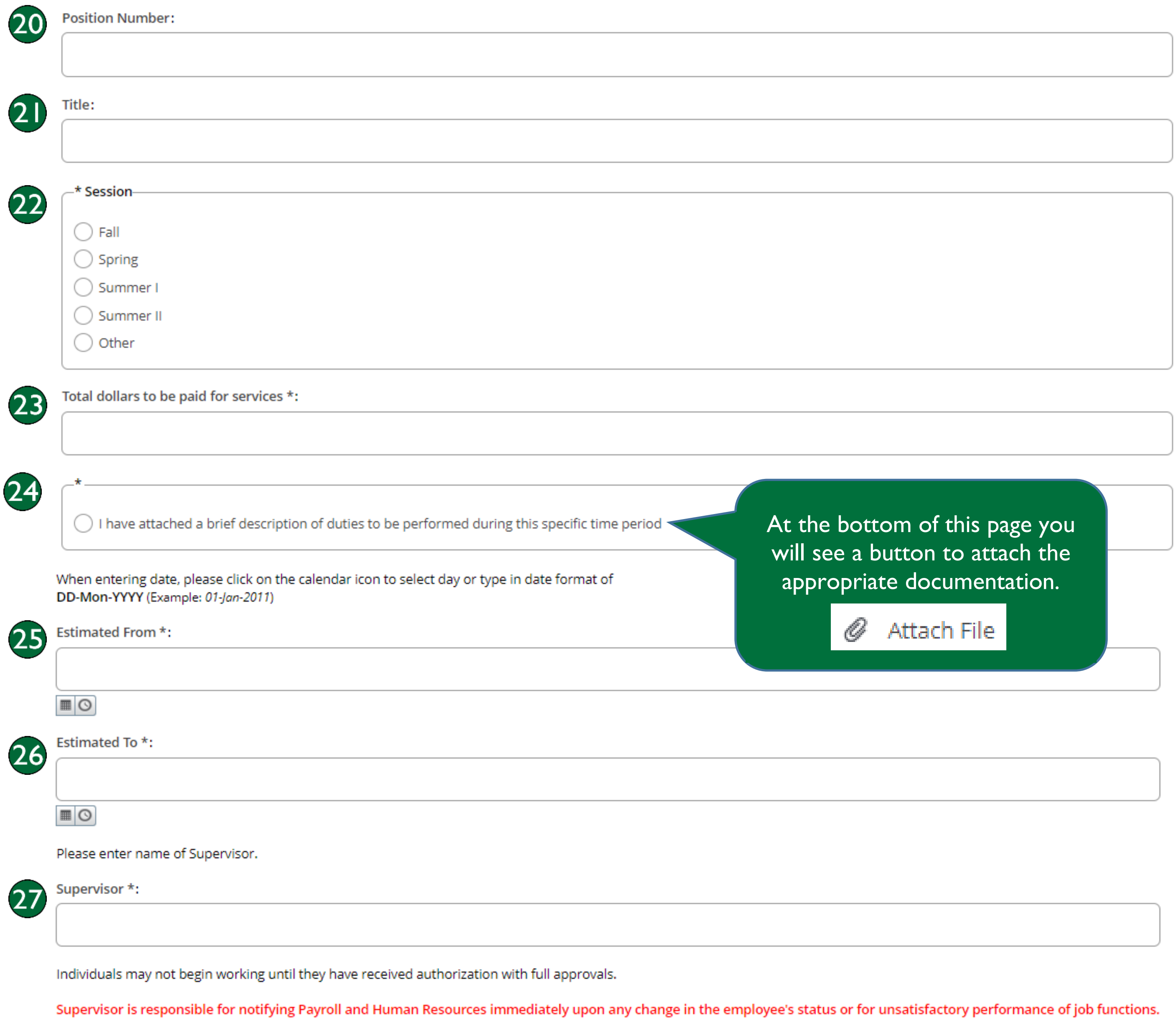
17 Account *:

18 Location:

If Grant, please enter Grant name.

19 Grant Name (if applicable):

12. **Department** – Enter the department the employee will hold the position in.
13. **Campus** – Select which CCRI campus the employee will work from in the drop-down menu.
14. **Fund** – The Fund code (Where the funds come from).
15. **Organization** – The Org code (Who is responsible for the funds).
16. **Program** – The Program code (The functional purpose of the transaction).
17. **Account** – The Account code (The type of transaction).
18. **Location** – The Location code (Which campus the transaction is specific to, if any).
19. **Grant Name** – Enter the Grant name if this position is being funded in part by a Grant.



20 Position Number:

21 Title:

22 * Session

- Fall
- Spring
- Summer I
- Summer II
- Other

23 Total dollars to be paid for services *:

24 *

I have attached a brief description of duties to be performed during this specific time period

At the bottom of this page you will see a button to attach the appropriate documentation.

Attach File

When entering date, please click on the calendar icon to select day or type in date format of **DD-Mon-YYYY** (Example: *01-Jan-2011*)

25 Estimated From *:

26 Estimated To *:

Please enter name of Supervisor.

27 Supervisor *:

Individuals may not begin working until they have received authorization with full approvals.

Supervisor is responsible for notifying Payroll and Human Resources immediately upon any change in the employee's status or for unsatisfactory performance of job functions.

20. **Position Number** – If you know the position number, enter it here. If not, leave blank.
21. **Title** – Enter the position title for this request.
22. **Session** – Select which semester/summer session the employee will be working in.
23. **Total Dollars to be Paid for Services** – Enter the total amount in US dollars to be paid.
24. ***Attach Job Duties** – Attach the document detailing job duties, then click this radio button to confirm.
25. **Estimated From** - Use the calendar button to enter the start date of the position.
26. **Estimated To** - Use the calendar button to enter the end date of the position.
27. **Supervisor** – Enter the name of the individual who will be supervising this employee.

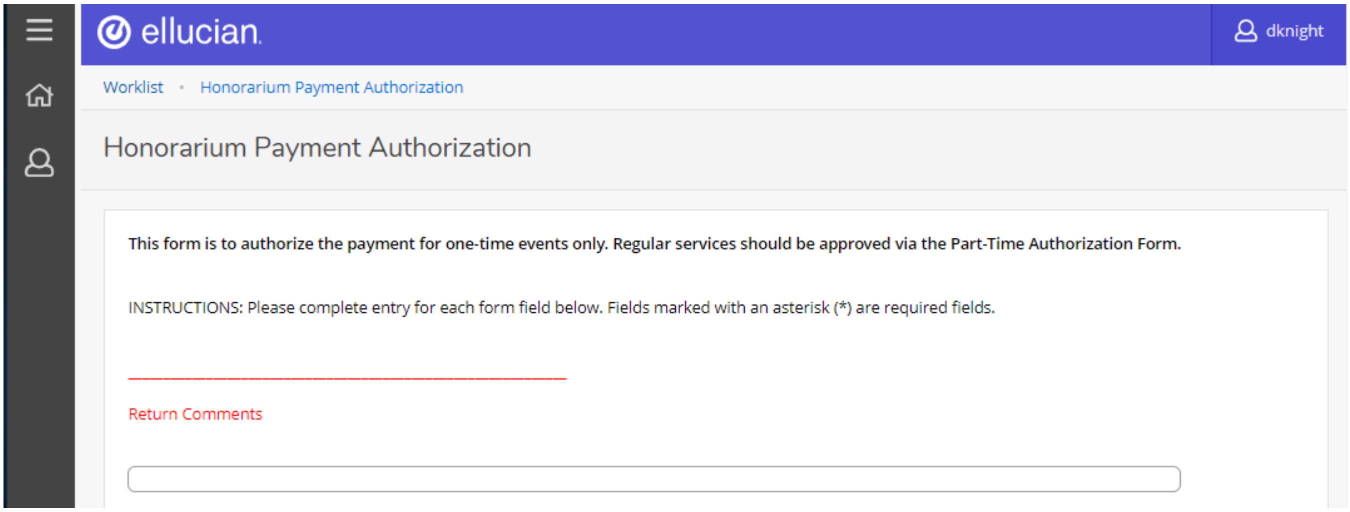
28. **Decision** – Select "Submit" if the form is finished and needs to be sent to the Department Approver for their review and approval. If "Stop" is selected, the form will stop and no longer be available for processing.

Click the "Complete" button to send the form to the next level for review and approval.

Click "Save & Close" if more information is needed and you wish to put the Workflow back in your worklist with a pending status.

Honorarium Payment Authorization

*Please Note: This form is to authorize the payment for **one-time events only**. Regular services should be approved via the Part-Time Authorization Form.*



Press the purple "Top" button in the lower right-hand corner if you need to return to the top of this screen. It will move as you scroll down the form.

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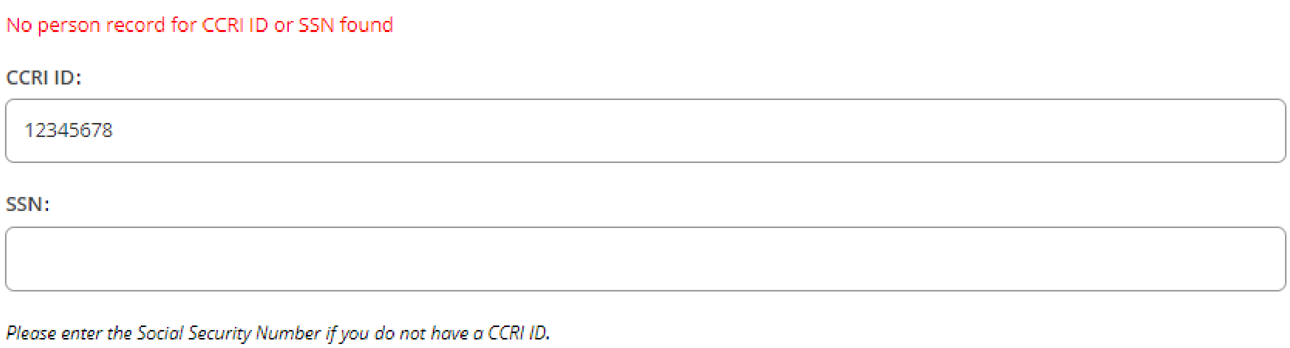
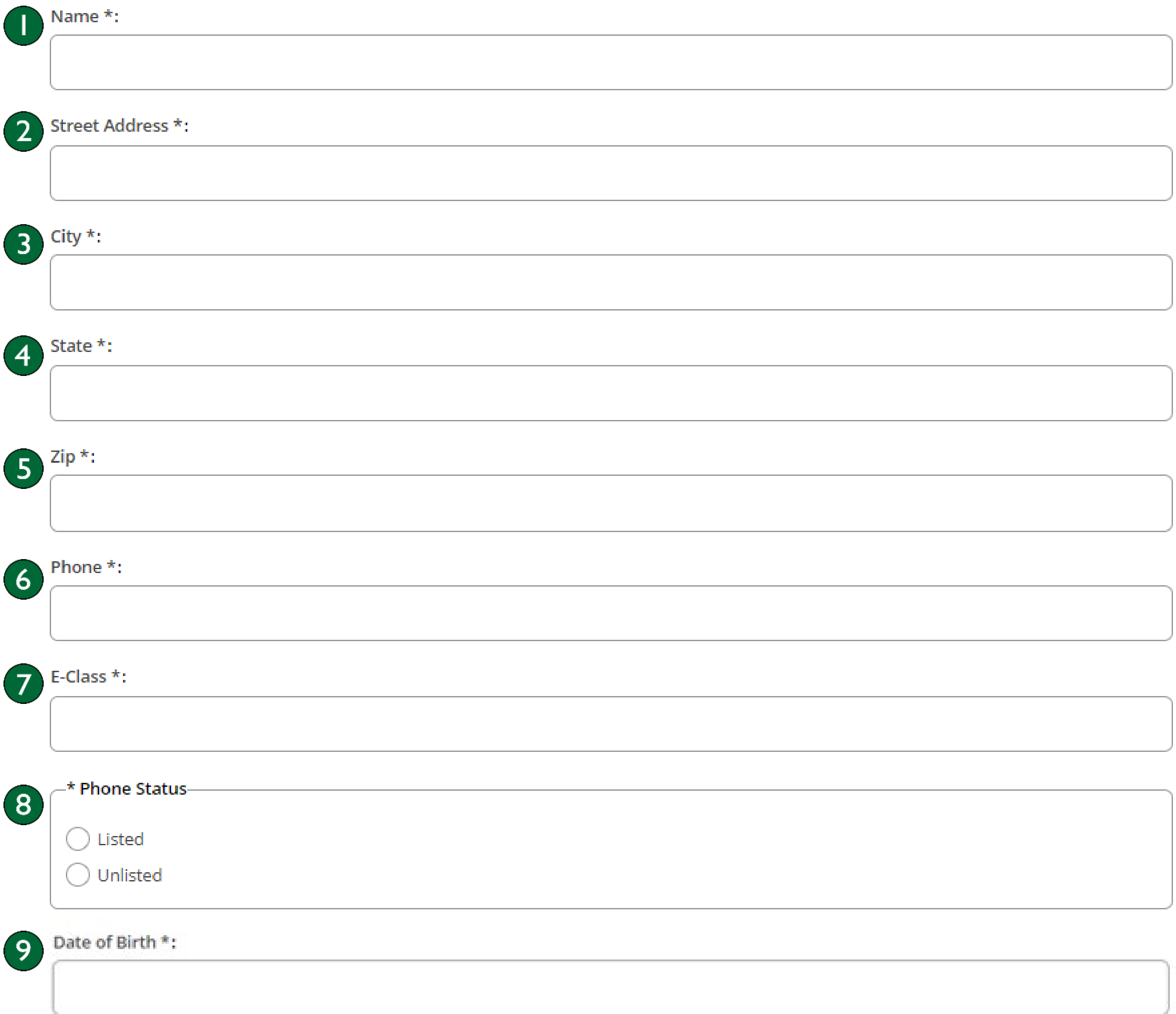


For this example, the CCRI ID was not found, so no additional information was automatically gathered in this form.

In your case, the form may not be blank – please follow along will these instructions and make corrections if anything is outdated.


1 Name *:

2 Street Address *:

3 City *:

4 State *:

5 Zip *:

6 Phone *:

7 E-Class *:

8 * Phone Status

Listed

Unlisted

9 Date of Birth *:

1. **Name** – First and last name of employee.
2. **Street Address** – Number and street name of employee's residence.
3. **City** – Town or city the employee lives in.
4. **State** – State the employee lives in (abbreviation is fine).
5. **Zip** – Postal zip code of where the employee lives.
6. **Phone** – Employee's personal phone number, including area code.
7. **E-Class** – Enter the E-class for the position. The following are most common:
    - **L5 -** Honorarium/Stipend for PT
    - **L8 -** Honorarium/Stipend for FT
8. **Phone Status** – If an employee uses a landline for their personal phone number, select "Listed." If not, choose "Unlisted."
9. **Date of Birth** – Specific date (MM/DD/YYYY) the employee was born.

10 Department *:

Please Select Department - 000

11 Campus *:

Select A Campus

12 Fund *:

13 Organization *:

14 Program *:

15 Account *:

16 Location:

If Grant, please enter Grant name.

17 Grant Name (if applicable):

10. **Department** – Select the department the employee will be working for in the drop-down menu.
11. **Campus** – Select which CCRI campus the employee will work from in the drop-down menu.
12. **Fund** – Enter the Fund Code (where the funds come from).
13. **Organization** – Enter the Org code of the department (who is responsible for the funds).
14. **Program** – Enter the Program code (the functional purpose of the transaction).
15. **Account** – Enter the Account code (the type of transaction).
16. **Location** – Enter the Location code for this transaction (Which campus is this taking place?).
17. **Grant Name (if applicable)** – If the event is being funded by a grant, enter the name here.

18 Dates of Event *:

19 Total Hours *:

20 Hourly Rate *:

21 Gross Amount Due *:

22 Time (Start-Finish):

23 Course name and number

24 Honorarium Comments

18. **Dates of Event -** Specific dates (MM/DD/YYYY) of the event.

19. **Total Hours** – Number of hours the event is running for.

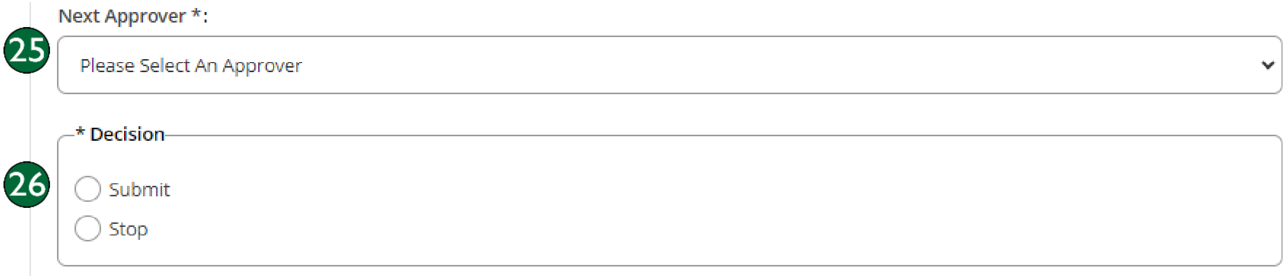
20. **Hourly Rate** – Enter the hourly wage for this request.

21. **Gross Amount Due** – Enter the total amount to be paid to the employee.

22. **Time (Start-Finish)** – Enter the start and end times of the event.

23. **Course Name and Number** – If applicable, enter the course name and number associated with the event (ex: COMM 1010 – Communication Fundamentals).

24. **Honorarium Comments** – Enter any comments or notes you would like to add.



25. **Next Approver** – Select who should be the next approver from the drop-down list (this is usually a supervisor).
26. **Decision -** Select "Submit" if the form is finished and needs to be sent to the Department Approver for their review and approval. If "Stop" is selected, the form will stop and no longer be available for processing.

Click the "Complete" button to send the form to the next level for review and approval.

Click "Save & Close" if more information is needed and you wish to put the Workflow back in your worklist with a pending status.

Approval of Workflow Requests

Once the form is submitted and complete the Department Approver will receive an email notification from Workflow that an Authorization Form is available on their Worklist to review.

The email notification will indicate the following:

- What level of approval is needed (Department Approver, Dean Approver, or Division Approver)
- What type of Authorization is being submitted
- Who the Authorization is for
- Who submitted the request

HR

From: humanresources@ccri.edu (mailto:humanresources@ccri.edu)
Sent: Friday, December 1, 2023 11:45 AM
To: Flanagan, Fran <fflanagan76@ccri.edu>
Subject: HR Part-Time Payroll Authorization Approval Requested

THIS IS A NOTIFICATION EMAIL ADDRESS – DO NOT REPLY TO THIS EMAIL

As the HR Verifier, you are receiving this email to notify you that there is a workflow process waiting on your workflow list ready for your action. Please review and approve the Authorization for **Knight, Drew** which has been submitted by **Liston, Bethany.**

Login to Workflow to review the request.

Employee Details

Employee Information	
CCRI ID	12345678
Name	Knight, Drew

At this point, the Approver should log into workflow: https://workflow.ccri.edu/wfdora to review the request. The Approver is able to review all the information on the form.

Once the Approver has reviewed the information they have the option to "Submit" (sends the form to the next level approver) or "Stop" (cancels the workflow).

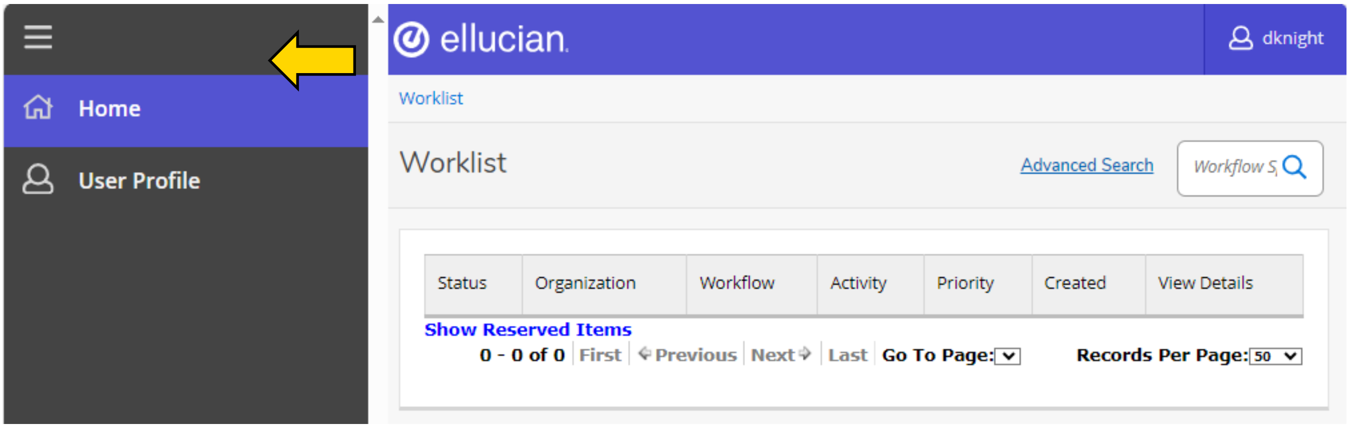
* Decision

- Submit
- Stop

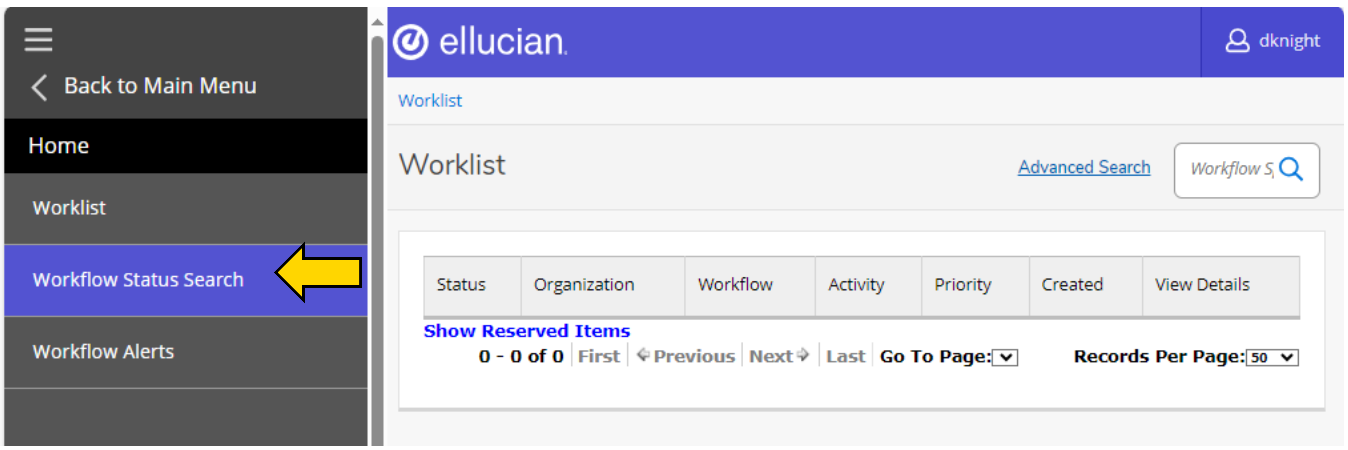
The Approver also has the option of commenting. If a comment is added, it will carry forward to all levels of approval once it is submitted.

Tracking the Status of Your Workflow

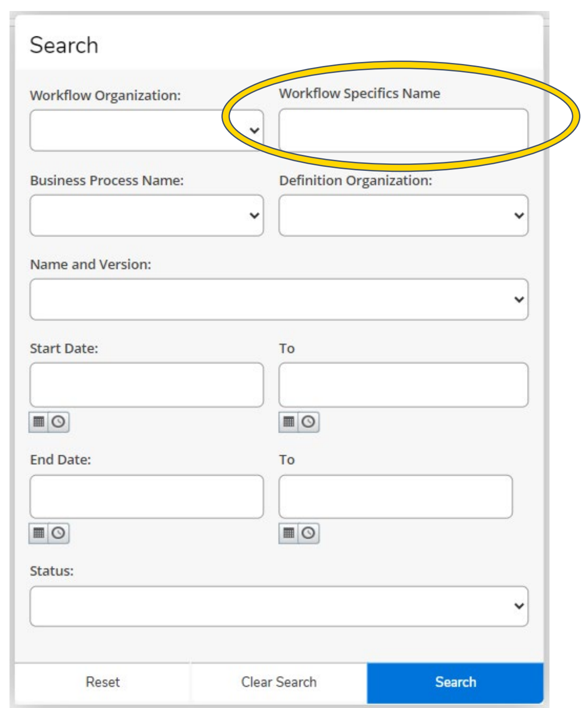
You are able to track the status of your workflow. To do this, click on "Home" in the left-hand sidebar.



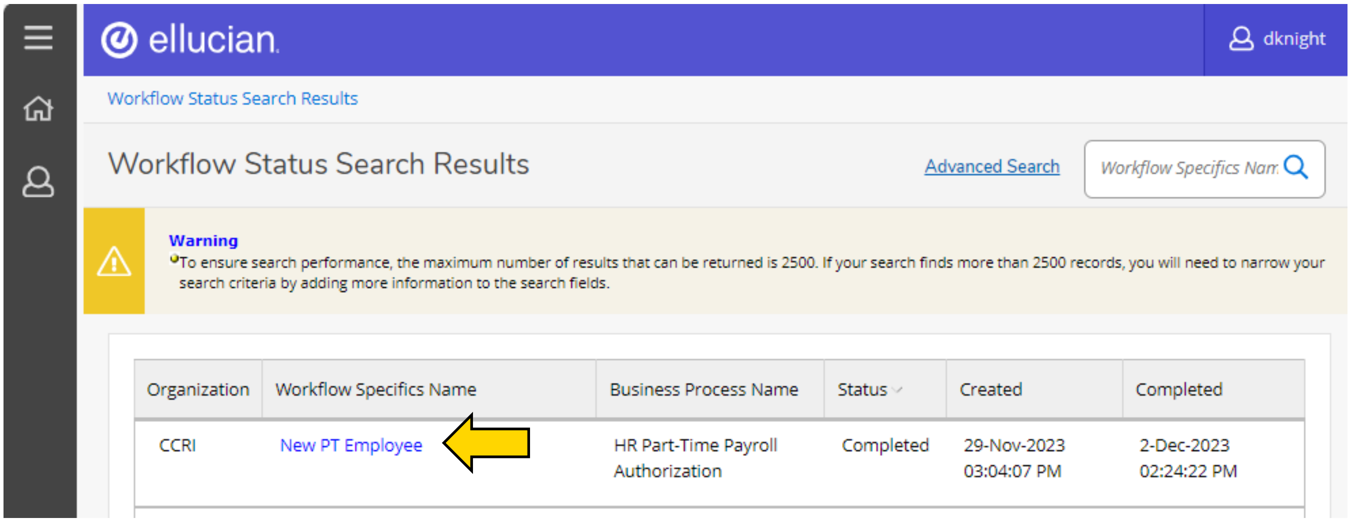
Then select "Workflow Status Search"



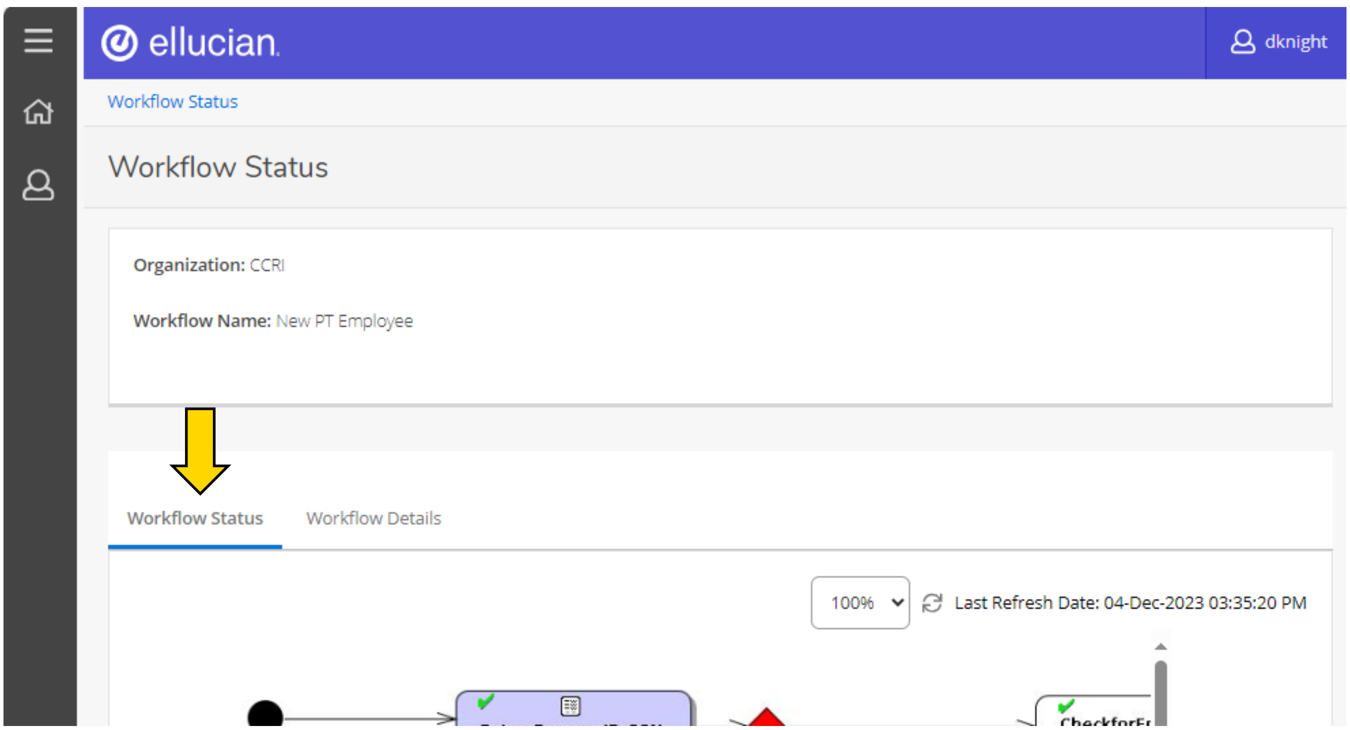
If you know the name of the workflow that was submitted, you can enter it in the "Workflow Specifics Name" text field (ex. New PT Employee). You are also able to search by when it was created, business process name, status, or other attributes in their labeled text fields.



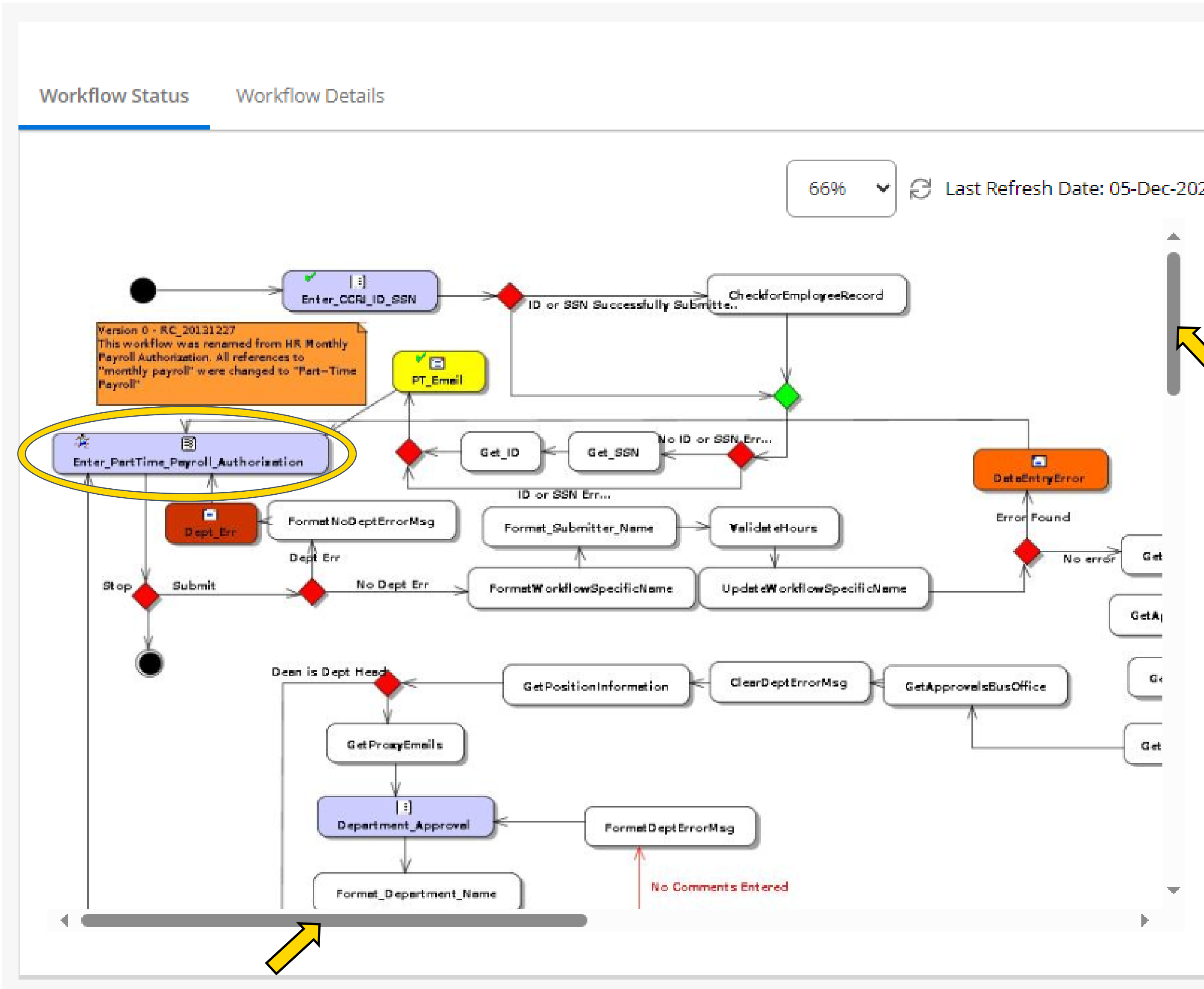
This will bring up the search results. Click on the workflow name to see the status.



This brings up the Workflow Status screen. Scroll down to view the "Workflow Status" or the "Workflow Details."

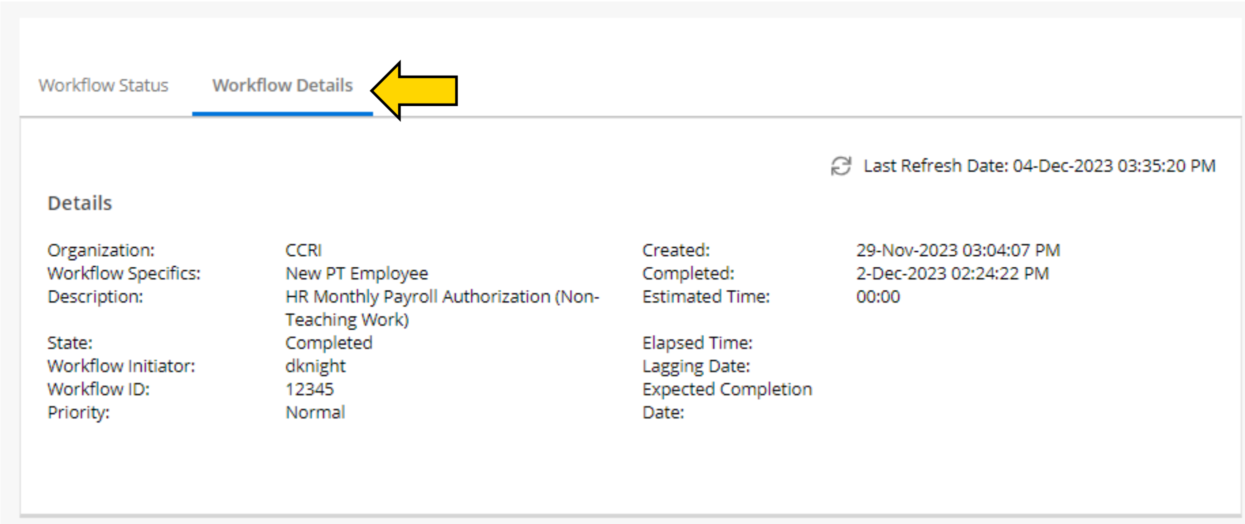


The "Workflow Status" features a box with a process flow chart. Follow the arrows/processes until you find the step with the "Running Man" icon.  Use the scrollbars on the right and bottom to view the whole chart.

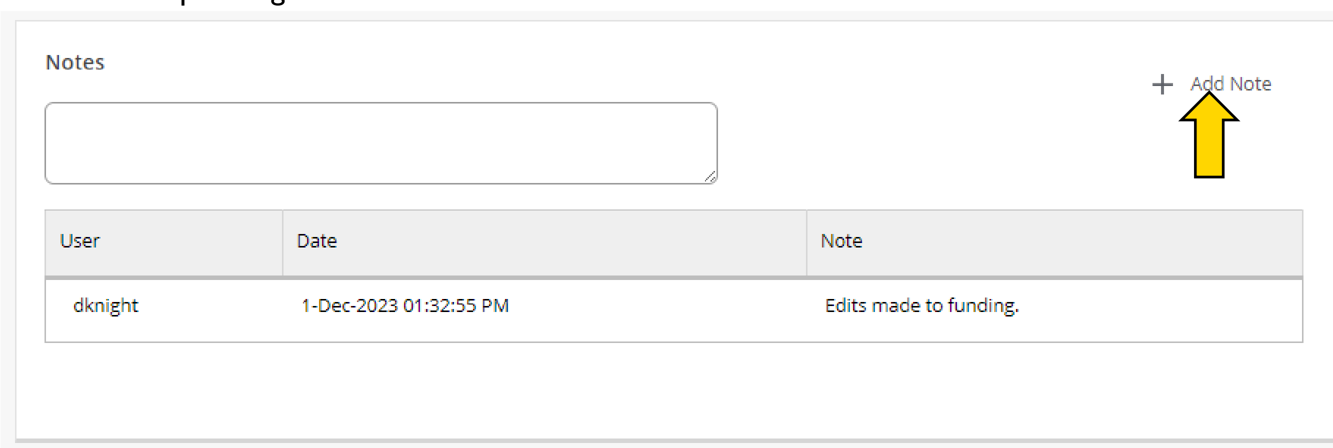


Once you have located the running man, you will be able to determine at what part of the process or at what approver level it is at.

The "Workflow Details" features a box with more information such as who intiated the workflow, the description, elapsed time, etc.



Below is a section for any notes that have been added. You can also add notes here by typing in the text field and pressing "+ Add Note."



Further down is a section for any documents attached to the workflow. You can add documents pressing "Attach File."