



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

3/19/24

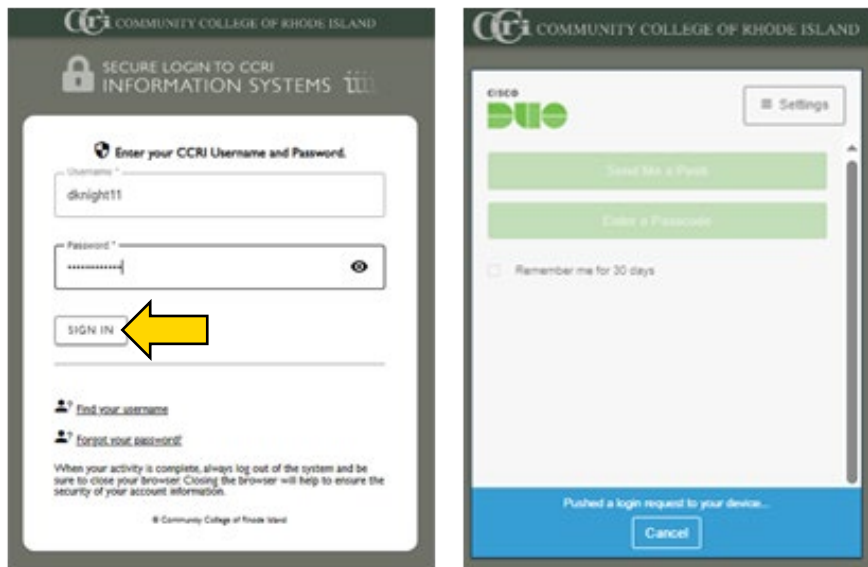
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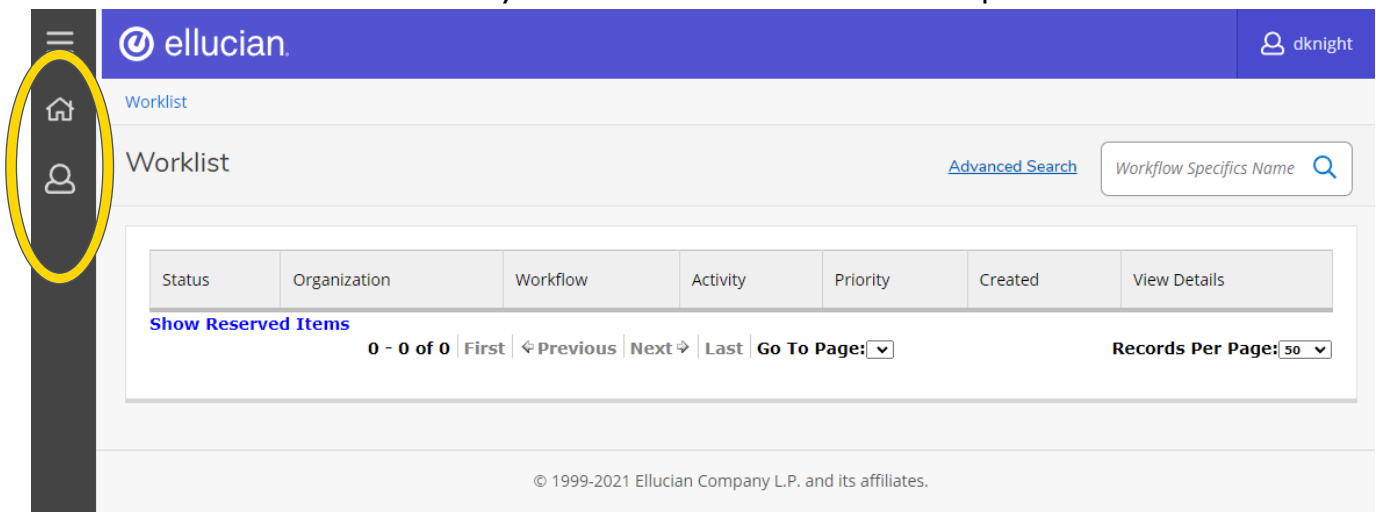
Accessing the Workflow System

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

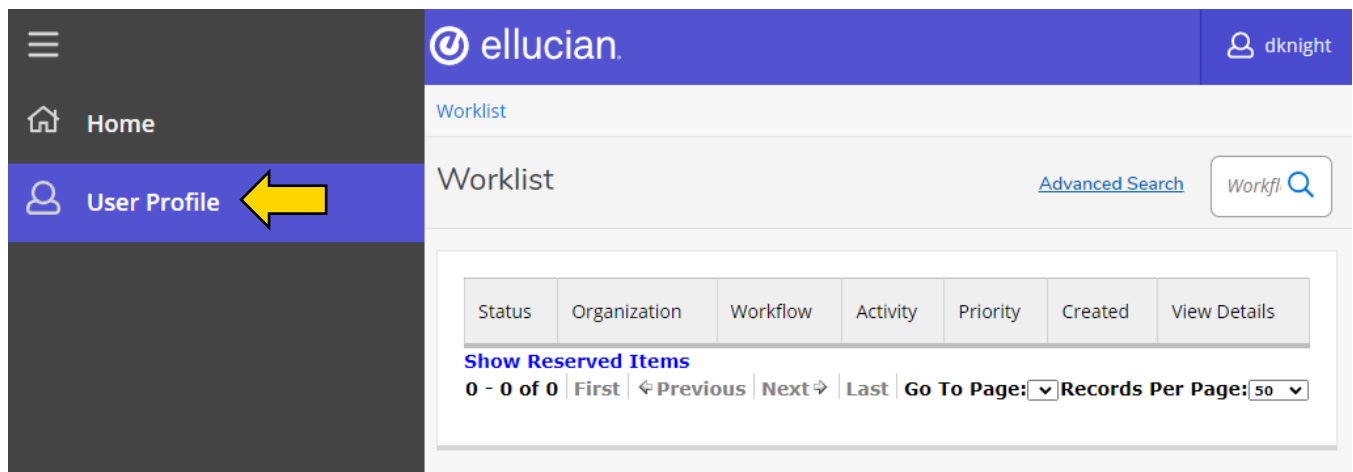
Log in using your CCRI ID username and password.



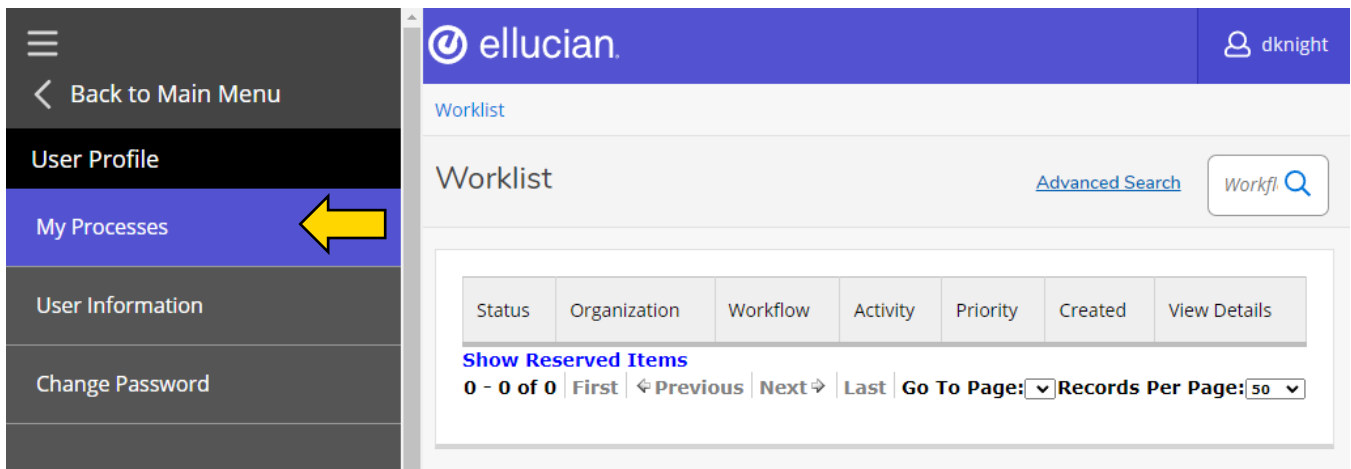
On the left-hand side of the screen, you'll see a sidebar menu that will expand when clicked on.



Once open, select "User Profile."

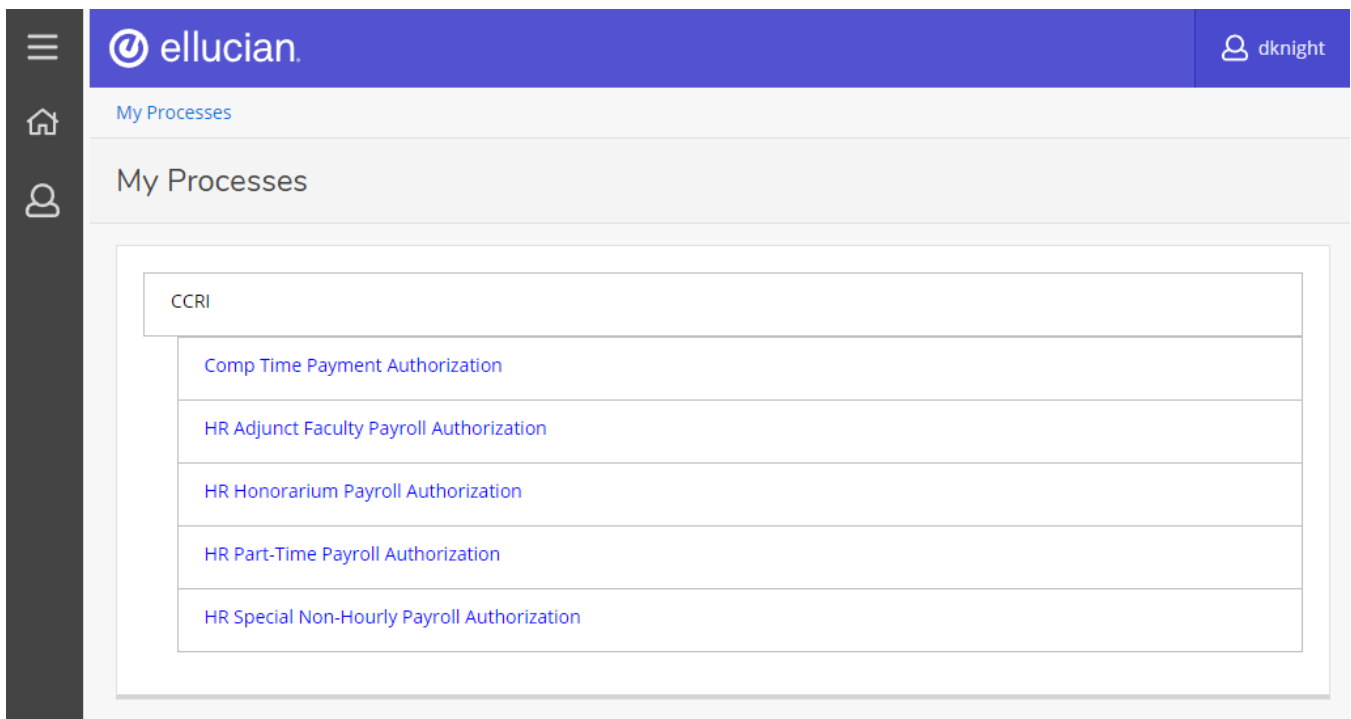


Then, select “My Processes” to open up a new page.



The screenshot shows the ellucian user interface. On the left is a dark sidebar with a menu. The 'My Processes' option is highlighted in blue, with a yellow arrow pointing to it. Other menu items include 'Back to Main Menu', 'User Profile', 'User Information', and 'Change Password'. The main content area has a blue header with the ellucian logo and the user name 'dknight'. Below the header, the page title is 'Worklist'. There is an 'Advanced Search' link and a search box containing 'Workfl'. A table header is visible with columns: Status, Organization, Workflow, Activity, Priority, Created, and View Details. Below the header, there is a 'Show Reserved Items' link and pagination controls: '0 - 0 of 0 | First | Previous | Next | Last | Go To Page: [dropdown] | Records Per Page: 50 [dropdown]'.

Choose from the list of forms.



The screenshot shows the 'My Processes' page in the ellucian system. The sidebar on the left has icons for home and user profile. The main content area has a blue header with the ellucian logo and the user name 'dknight'. Below the header, the page title is 'My Processes'. A list of forms is displayed under the heading 'CCRI':

- Comp Time Payment Authorization
- HR Adjunct Faculty Payroll Authorization
- HR Honorarium Payroll Authorization
- HR Part-Time Payroll Authorization
- HR Special Non-Hourly Payroll Authorization

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.”

Organization: CCRI

Workflow Name:
HR Part-Time Payroll Authorization:26

Workflow Specifics Name:

Priority:
Normal

Workflow Note:

▶ Start Workflow Attach File Reset Cancel

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).

Worklist

Advanced Search Workflow Specifics N

Status	Organization	Workflow	Activity	Priority	Created	View Details
	CCRI	New PT Employee Ready	Enter_CCRI_ID_SSN	Normal	29-Nov-2023 02:40:18 PM	

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

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Worklist · Enter CCRI ID / SSN

Enter CCRI ID / SSN

Enter CCRI ID or Social Security Number of employee if known.

CCRI ID:

SSN:

Cancel Save & Close 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.

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Worklist

Worklist [Advanced Search](#)

Status	Organization	Workflow	Activity	Priority	Created	View Details
	CCRI	New PT Employee Performing	Enter_PartTime_Payroll_Authorization	Normal	29-Nov-2023 03:04:07 PM	

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.

Special Non-Hourly Payroll Authorization

The screenshot shows the ellucian interface for 'Special Payroll Authorization'. The header includes the ellucian logo and the user 'dknight'. The breadcrumb trail is 'Worklist > Special Payroll Authorization'. The main heading is 'Special Payroll Authorization'. Below this, instructions state: 'INSTRUCTIONS: Please complete entry for each form field below. Fields marked with an asterisk (*) are required fields.' The form contains a red horizontal line, a section for '* Authorization for' with radio buttons for 'Coaches', 'Faculty Stipends', and 'Other', a 'CCRI ID:' text field, and an 'SSN:' text field. A note at the bottom reads: 'Please enter the Social Security Number if you do not have a CCRI ID.'

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.

No person record for CCRI ID or SSN found

CCRI ID:

12345678

SSN:

Please enter the Social Security Number if you do not have a CCRI ID.

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 with 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
 - **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.



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.

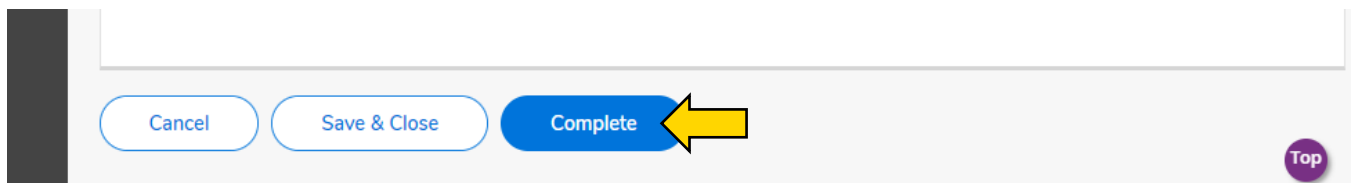
28

* Decision

- Submit
- Stop

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.

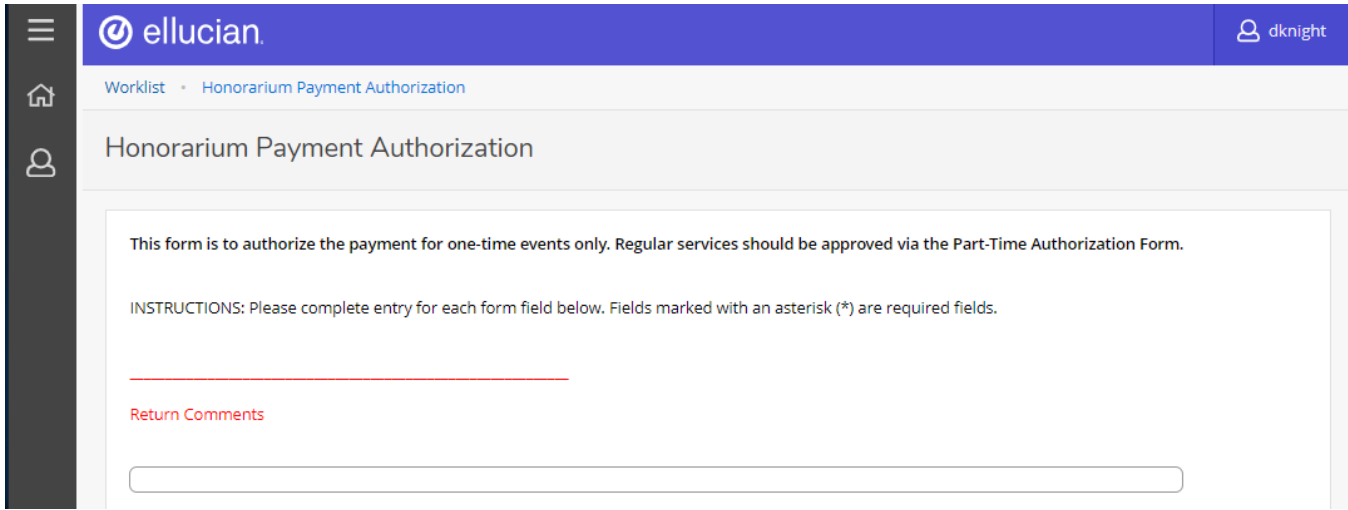
Click the “Complete” button to send the form to the next level for review and approval.



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.



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

No person record for CCRI ID or SSN found

CCRI ID:

12345678

SSN:

Please enter the Social Security Number if you do not have a CCRI ID.

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 with 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 *:

11 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 Honarium 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. **Honarium Comments** – Enter any comments or notes you would like to add.

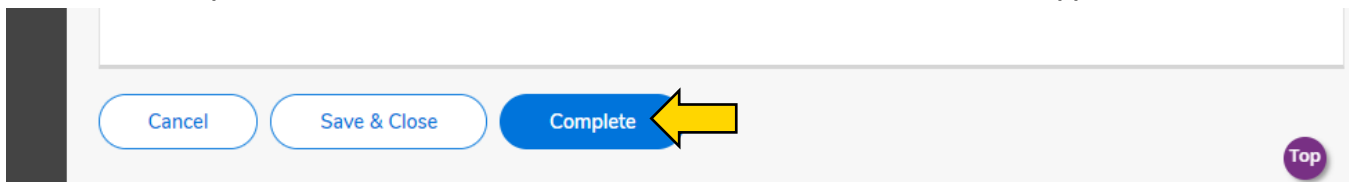
25 Next Approver *:
Please Select An Approver

26 * Decision
 Submit
 Stop

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).

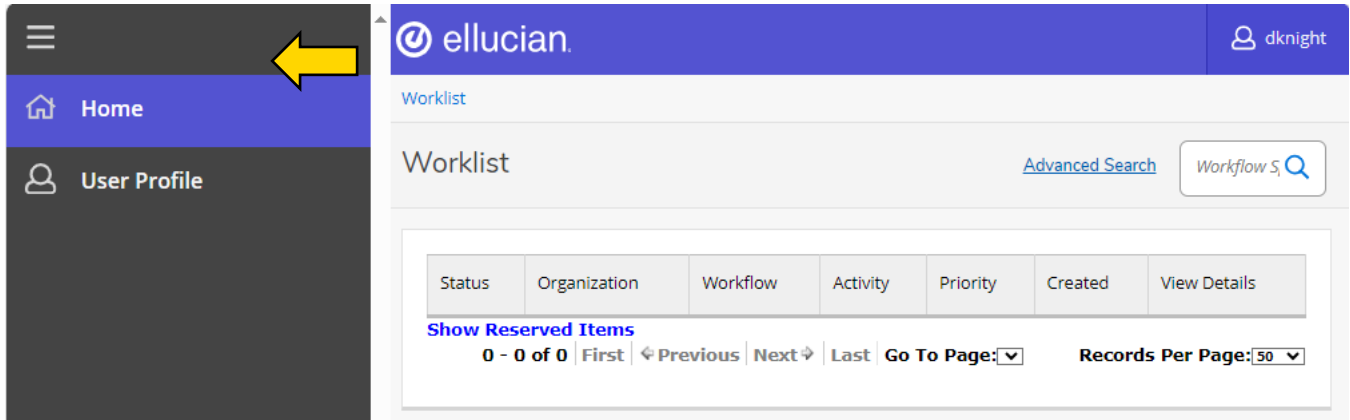
* Decision

- 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.

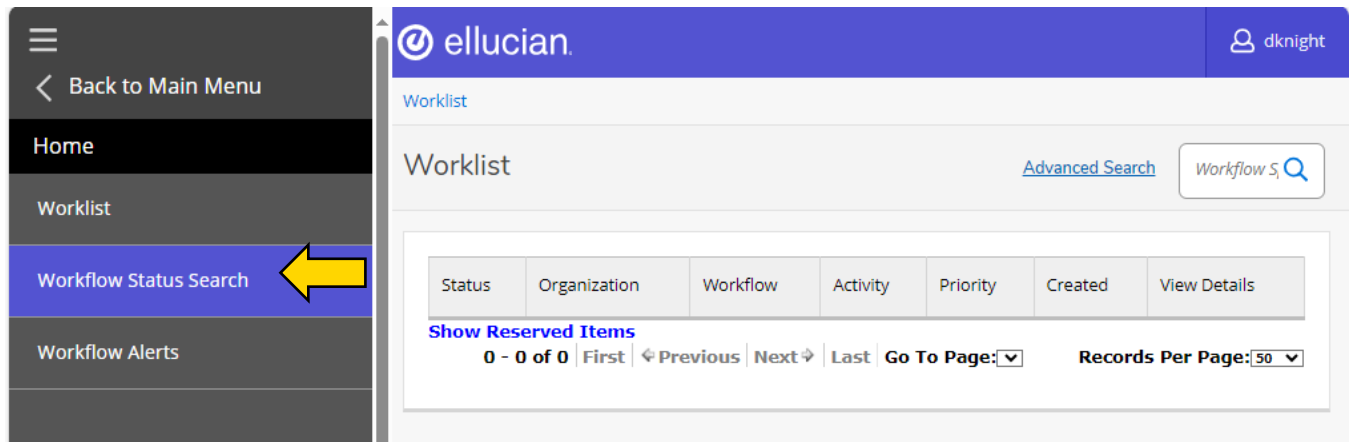
Tracking the Status of Your Workflow

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



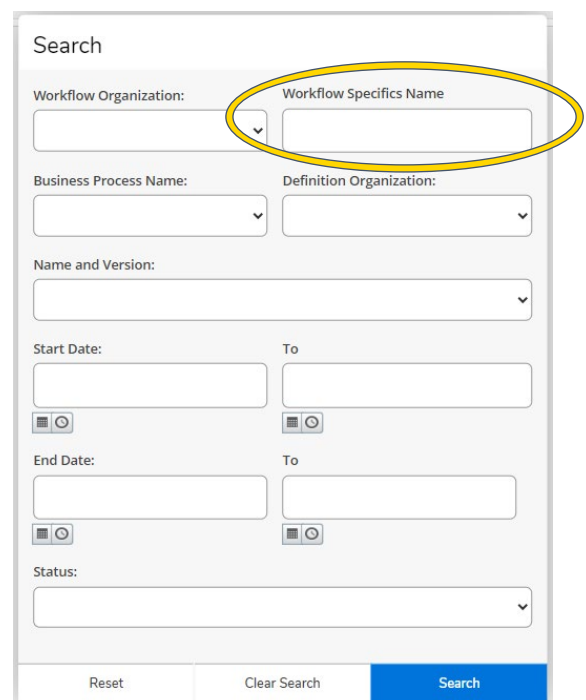
The screenshot shows the ellucian Worklist interface. The left-hand sidebar is dark grey and contains three items: a home icon labeled "Home", a user profile icon labeled "User Profile", and a menu icon. A yellow arrow points to the "Home" item. The main content area is white and features the ellucian logo at the top left, the user name "dknight" at the top right, and a search bar labeled "Workflow S" with a magnifying glass icon. Below the search bar is a table with columns for Status, Organization, Workflow, Activity, Priority, Created, and View Details. The table is currently empty, and the text "0 - 0 of 0" is displayed below it. Navigation controls include "First", "Previous", "Next", and "Last" buttons, along with a "Go To Page:" dropdown and a "Records Per Page: 50" dropdown.

Then select “Workflow Status Search”



The screenshot shows the ellucian Worklist interface with the "Workflow Status Search" item highlighted in the sidebar. The sidebar is dark grey and contains four items: "Back to Main Menu", "Home", "Worklist", and "Workflow Status Search". A yellow arrow points to the "Workflow Status Search" item. The main content area is white and features the ellucian logo at the top left, the user name "dknight" at the top right, and a search bar labeled "Workflow S" with a magnifying glass icon. Below the search bar is a table with columns for Status, Organization, Workflow, Activity, Priority, Created, and View Details. The table is currently empty, and the text "0 - 0 of 0" is displayed below it. Navigation controls include "First", "Previous", "Next", and "Last" buttons, along with a "Go To Page:" dropdown and a "Records Per Page: 50" dropdown.

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.



The screenshot shows the Search form. The form has several labeled text fields: "Workflow Organization:", "Workflow Specifics Name", "Business Process Name:", "Definition Organization:", "Name and Version:", "Start Date:", "End Date:", and "Status:". The "Workflow Specifics Name" field is highlighted with a yellow oval. At the bottom of the form are three buttons: "Reset", "Clear Search", and "Search".

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

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Workflow Status Search Results

Workflow Status Search Results [Advanced Search](#)

Warning
To ensure search performance, the maximum number of results that can be returned is 2500. If your search finds more than 2500 records, you will need to narrow your search criteria by adding more information to the search fields.

Organization	Workflow Specifics Name	Business Process Name	Status	Created	Completed
CCRI	New PT Employee	HR Part-Time Payroll Authorization	Completed	29-Nov-2023 03:04:07 PM	2-Dec-2023 02:24:22 PM

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

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Workflow Status

Workflow Status

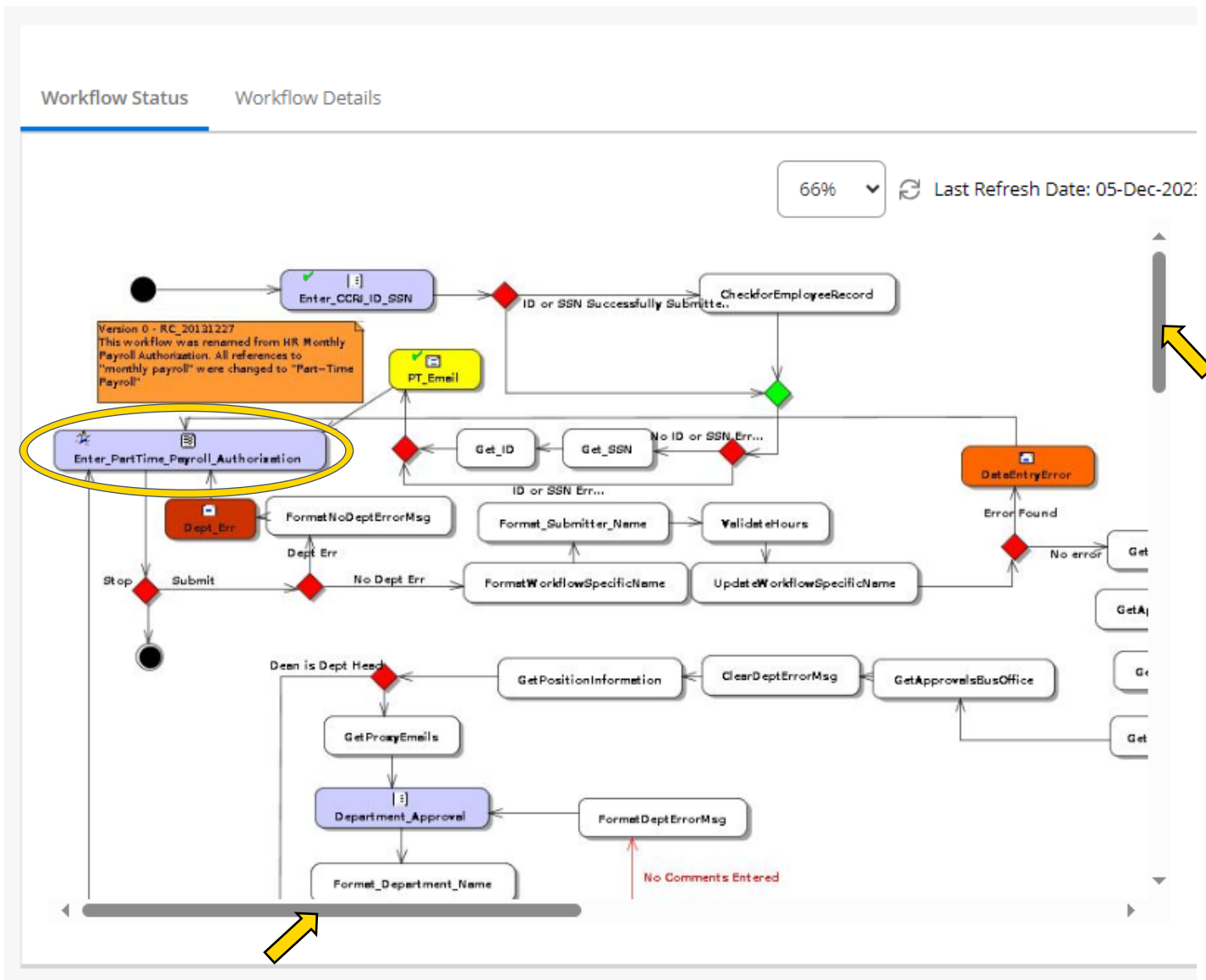
Organization: CCRI
Workflow Name: New PT Employee

Workflow Status Workflow Details

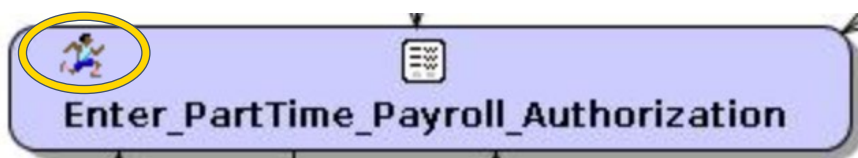
100% Last Refresh Date: 04-Dec-2023 03:35:20 PM

Workflow diagram showing a green checkmark and a red triangle.


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 initiated the workflow, the description, elapsed time, etc.


Workflow Status **Workflow Details** 

Last Refresh Date: 04-Dec-2023 03:35:20 PM

Details

Organization:	CCRI	Created:	29-Nov-2023 03:04:07 PM
Workflow Specifics:	New PT Employee	Completed:	2-Dec-2023 02:24:22 PM
Description:	HR Monthly Payroll Authorization (Non-Teaching Work)	Estimated Time:	00:00
State:	Completed	Elapsed Time:	
Workflow Initiator:	dknight	Lagging Date:	
Workflow ID:	12345	Expected Completion Date:	
Priority:	Normal		



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.”


Notes + Add Note 

User	Date	Note
dknight	1-Dec-2023 01:32:55 PM	Edits made to funding.

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

Attachments

 dknight
 Tax-form.pdf (116 KB)
01-Dec-2023 10:15:29 AM
[Comments: Tax form](#)
[\[Update\]](#) [\[Remove\]](#)

 Attach File 