Workflow Part 1 – Making a request through eCentre

Transcript

0:00 eCentre at Charles Darwin University. Workflow Part 1 – making a request through e Centre
0:09 eCentre provides a workflow service for all of CDU.
0:12 This means a form can be attached to a workflow and will automatically follow a three step path of Submit, Approve, Action
0:21 The submit step consist of filling in the form and submitting it.
0:25 If the form requires approval the right person or people will be asked by eCentre to approve it.
0:32 If the workflow requires actioning the right person or people will be asked by eCentre to action it.
0:39 This means do whatever is required to provide whatever was requested.
0:45 This should be obvious for each form.
0:48 eCentre is able to do this because it has an awareness of everyone at CDU and who their managers are.
0:55 No other CDU system has this awareness for all staff, visitors and contractors at CDU.
1:04 The starting point of a workflow is a request.
1:08 In the request tab you can find all the forms you can fill in as well as finding forms you have filled out previously.
1:16 So you can see where they are at.
1:18 Some forms can be filled out by anyone and some only by supervisors.
1:25 Some forms can be filled out for anyone and only for members of your team.
1:29 Suppose you need to get access to Callista. You will click on **Request Something**, **Computer Accounts, Callista Access Request**.
1:38 Each form is custom built and provides a validated input so you can provide the exact information required.
1:46 Note that every workflow form has three sections.
1:51 Firstly there is the workflow overview. This provides information about the workflow of the form.
1:58 Use this to check the status of forms and understand where this form will go for approval and actioning.
2:04 There is an expandable section to provide more detail which you may be interested in.
2:11 The second section is the form itself.
2:14 Here you enter the details of the request you are making.
2:19 Each form contains the help you need to complete it.
2:24 The third section are the workflow buttons at the bottom of the form.
2:28 The buttons will change depending on where in the work flow the form currently is.
2:34 Click the Submit button to start the workflow off.
2:37 eCentre validates the information you have provided and if it is all correct the form enters the workflow for either approval or actioning.

2:47 To see workflows you have submitted go to the **View My Requests** and click on **Pending Requests**

2:58 You can find requests you have made here.

3:03 You can open them and review their workflow status any time you like.

3:07 Once you have made your request and it has been approved.

3:10 eCentre creates work items for people to complete.

3:15 Watch the next video call **Workflow Part 2 – Work Items** for the next part of the workflow process.

3:28 end of video.