Workflow Part 2 – Work Items

Transcript

0:00	eCentre at Charles Darwin University workflow part 2 work items.
0:07	eCentre provides a workflow service for all of CDU.
0:10	This means a form can be attached to a workflow and will automatically follow a submit, approve, action path.
0:18	This video shows you how to action work items that are attached to a workflow form that has been submitted.
0:27	You can find eCentre from the CDU homepage. Click on the staff link and go down to Staff computer account/eCentre.
0:37	Login to eCentre using your CDU username and password.
0:50	Once you have logged the quick status table tells you if you have any tasks waiting.
0:57	If you do you can click the link to go straight to the task page. You can also find your task list in the tasks tab.
1:18	The workflow task page lists all work items you can action, but only those that apply to you.
1:25	Items can apply to you for one of the following reasons. You own the thing being requested in the form. Therefore you must approve or provide the thing being requested.
1:36	You are the supervisor of the person doing the requesting and the thing being requested requires supervisor approval.
1:43	You are the person or member of a nominated group that has to action that particular form.
1:50	You are the supervisor of the person or group nominated and the form has not been actioned within a certain time and the form has been escalated to you.
2:00	This time can vary from form to form by is normally 7 days.
2:04	Note the reserved column. If a work item can be actioned by a group of people anyone can reserve the item.
2:15	This tells everyone else that the form is being worked on, however even if an item is reserved it can still be completed by anyone else is in the group if need be.
2:16	Click the workflow item you wish to open in the list of work items to open the form.
2:34	Every workflow has three sections as follows.
2:36	Section one the workflow over view. This provides summary information including the action required to move this form to next stage of the workflow.
2:45	Also included here are any comments left by the previous workflow actioner.
2:52	Section two is the form itself, review it's contents and make sure you are happy with it.
2:57	Section three the workflow buttons. This is where you do your workflow action.
3:03	The buttons will change automatically to reflect the forms workflow status.
3:08	For example if the form needs approval there is an approval button.
3:12	In this example John Citizen is the supervisor of Joe Bloggs.
3:18	Joe has made a request and John need to approve it. John opens the form and review the request.
3:25	If John is happy with the request he can approve it. If the form needs actioning there is a make complete button to indicate you have completed the action.

3:33 You can hover over the button with your mouse to see a description of their purpose.

3:46 Depending on the form eCentre will send you emails immediately or the next day to let you know there is a workflow item ready for actioning.

3:54 For each day that one or more workflow items remain you're able to action. You will be sent a daily digest of items outstanding by eCentre.

4:04 Refer to eCentre itself for more help and information.