**Agenda**

How & Why We Use BannerWorkflow & EPAFs  
Overview of BannerWorkflow & EPAF  
BannerWorkflow Setup  
Using Banner Workflow  
EPAF Basics & Advantages  
EPAF Setup  
EPAF User Roles  
Using EPAF  
Lessons Learned  

- How & Why We Use BannerWorkflow & EPAFs  
- Overview of BannerWorkflow & EPAF  
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- EPAF Setup  
- Using EPAF  
- Lessons Learned
BannerWorkflow and EPAF at Miami
### How & Why We Use BannerWorkflow & EPAFs

- Update Banner with electronically approved changes, including forms outside of PEAEMPL, PPAIDEN, and NBAJOBS. 
  
  *e.g.* NBAPOSN, NBAPBUD, PHAMTIM
- Build new employee records, jobs, and biographical information.
- Eliminate re-keying of data approved elsewhere.
- Component of evolving staff function from data entry to strategic HR.

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Overview of Banner Workflow
Overview of BannerWorkflow

- BannerWorkflow takes data in Oracle tables and moves it into Oracle Banner tables, including data that is not “EAPFable.”

- BannerWorkflow capabilities include:
  - Automate flow of information based on logic/criteria
  - Continue or pause workflow based on criteria
  - Notifications (including multiple notifications at different steps)
    
    Provide as much or as little information in notifications as is appropriate.
  
- Multiple user roles

Agenda

- How & Why We Use BannerWorkflow & EPAFs

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Banner Workflow Setup
BannerWorkflow Setup

- Miami BannerWorkflows setup by IT for HR.

- Setup Phases
  - Analyze
    - What is the work performed?
    - When is the work performed?
    - How is the work performed, by whom, in what sequence?
  - Develop
    - Use workflow to create objects to define & perform
      - Create roles (needs to be done first)
      - Parallel activities (create users, user-roles, business processes, workflow model)
  - Implement
    - Setup workflow
    - Setup when work executed
    - Setup how work processed
**BannerWorkflow Setup**

- **Setup Phases (continued)**
  - **Execute**
    - Workflows begun by a business event or an authorized user and move work along flow/logic
  - **Monitor**
    - Examine performance of running workflows
    - Address process issues or bottlenecks

- **Key Setup Needs for Human Resources**
  - Fields needed for data population and logic
  - Field mapping
  - Logic decision points
  - Notifications needed and for whom

- **Note:** Workflow used in a browser, may need pop-up blocker turned off depending on if Workflow calls INB (native banner.)
Using BannerWorkflow
Using Banner Workflow

- Data in Oracle Table Triggers Workflow
- Notification Received that Workflow Started
  - Email to appropriate user(s)
- Workflow (especially a simple workflow) Processes without Intervention and is Completed
  - Email sent to appropriate user(s)
- Workflow “Pauses” when Necessary
  - Data missing
  - Criterion not met (e.g. dates outside of pay period)
  - Warning triggered (e.g. payroll already initiated, cannot process)
  - User(s) receive notification, goes to Workflow and intervenes as necessary (correct data, hold until payroll completed...)
- Step(s) in Workflow can trigger EPAF
Using BannerWorkflow (continued)

- Day-to-day use and administration of the workflow done by the offices which own each workflow

- Main “tasks” of BannerWorkflow
  - Watch for notifications of Workflows
    - Expected
    - Expected but not triggered
  - Resolve any paused Workflows
  - Contact administrator for Workflows expected by not triggered

- Administrator “tasks” for BannerWorkflow
  - Typically administrator not “end user” of Workflow processes
  - Troubleshoot, pause, restart, cancel Workflows in process
Using Banner Workflow - Sample Workflow

Outline
- EPAF Basics & Advantages
- EPAF Setup
- EPAF User Roles
- Using EPAF
- Lessons Learned
EPAF (Electronic Personnel Action Forms) Basics & Advantages
EPAF Basics

- EPAF stands for Electronic Personnel Action Form
- Three Banner forms are eligible for EPAF
  - PEAEMPL
  - PPAIDEN
    - Includes ability to use GOAMTCH for Common Matching to prevent duplicate PIDMs
  - NBAJOBS
- Other Banner tables are not “EPAFable”
  - BannerWorkflow can be used to enter non-“EPAFable” data.
Agenda
How & Why We Use BannerWorkflow & EPAFs
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Using Banner Workflow - Sample Workflow Outline

EPAF Basics & Advantages
EPAF User Roles
EPAF Setup
Using EPAF
Lessons Learned

EPAF Advantages

- ** Routable
  - Approver queue
  - Enforceable

- ** “Trackable”
  - Who approved what and when

- ** Differentiation of Duties
  - Different initiator and applier.
  - May be helpful for internal auditing office.
EPAF User Roles
Agenda
How & Why We Use BannerWorkflow & EPAFs
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EPAF Basics & Advantages

**EPAF User Roles**

- **Required Users**
  - Originator
  - Applier

- **Optional Users**
  - Approver
  - “FYIer”

- **Proxy Users**
  - NTRPROX
EPAF Setup Key Forms

- Forms Key to EPAF Setup
  - NTRINST – Position Control Installation Rules
  - NTRAUSG – Electronic Approval Usage Rules
  - NTRALVL – Approval Level Rules
  - NTRAPTY – Approval Type Rules
  - NTRACAT – Approval Category Rules
  - NTRROUT – Default Routing Rules
  - NTRPROX – Proxy Rules
Setup EPAF (continued)

**NTRINST - Turn on Ability to Use EPAFs**

- “Electronic Approval” tab
- Check “Electronic Approvals” and “Use Approval Groups”
- Choose the appropriate set of rules for GOAMTCCH
Setup EPAF (continued)

NTRAUSG- Approval Usage Rules

- Set forms, tables, and fields to allow approvals.
- Indicate which blocks are dated.

Field Selection

- Set fields to allow approvals.
- Select the format of the data.
NTVACAT - Name the EPAF Approval Category

Establish the:

- category code
- description
- self-service description
- self-service display sequence
**Setup EPAF (continued)**

### NTVAPTY - Approval Type Validation

**Name:**

- category code
- description
- self-service description
- self-service display sequence

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![Approval Type Code Validation Table]

<table>
<thead>
<tr>
<th>Approval Type Code</th>
<th>Description</th>
<th>Self-Service Description</th>
<th>Activity Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>PTVF</td>
<td>Faculty FT Temp Re-Hire</td>
<td>PeopleAdmin Address</td>
<td>21-SEP-2010</td>
</tr>
<tr>
<td>FPRECH</td>
<td>Faculty PT Hire, Credit Hr &amp; %</td>
<td>PeopleAdmin Bio Info</td>
<td>21-SEP-2010</td>
</tr>
<tr>
<td>JOBERN</td>
<td>Earnings Information</td>
<td>PeopleAdmin Bio Info</td>
<td>21-SEP-2010</td>
</tr>
<tr>
<td>JOBLAB</td>
<td>Job Labor Distribution</td>
<td>PeopleAdmin Bio Info</td>
<td>21-SEP-2010</td>
</tr>
<tr>
<td>JOBLSJ</td>
<td>Award Job Enrichment LSJ Bonus</td>
<td>PeopleAdmin Bio Info</td>
<td>21-SEP-2010</td>
</tr>
<tr>
<td>JOBPIP</td>
<td>Award Job Enrichment PIP</td>
<td>PeopleAdmin Bio Info</td>
<td>21-SEP-2010</td>
</tr>
<tr>
<td>JOBPAPP</td>
<td>Award Job Enrich PIP, Prem Pay</td>
<td>PeopleAdmin Bio Info</td>
<td>21-SEP-2010</td>
</tr>
<tr>
<td>JOBTY</td>
<td>Job Type</td>
<td>PeopleAdmin Bio Info</td>
<td>21-SEP-2010</td>
</tr>
<tr>
<td>PAADDR</td>
<td>PeopleAdmin Address</td>
<td>PeopleAdmin Address</td>
<td>21-SEP-2010</td>
</tr>
<tr>
<td>PASIO</td>
<td>PeopleAdmin Bio Info</td>
<td>PeopleAdmin Bio Info</td>
<td>21-SEP-2010</td>
</tr>
<tr>
<td>PANOJ</td>
<td>PA Build PEAEMPL and NBAJOBS</td>
<td>PeopleAdmin Bio Info</td>
<td>21-SEP-2010</td>
</tr>
<tr>
<td>PATELE</td>
<td>PeopleAdmin Telephone</td>
<td>PeopleAdmin Bio Info</td>
<td>21-SEP-2010</td>
</tr>
</tbody>
</table>
Setup EPAF (continued)

**NTVAGRP - EPAF Group Name**

- Overall group name
- Can add as many as needed when have a new group of EPAFS.
- Tied to originator security.
Setup EPAF (continued)

**NTVAGRGP - EPAF Group Name**
- Overall group name
- Can add as many as needed when have a new group of EPAFS.
- Tied to originator security.

**NOAOGGRP - EPAF Group Name**
- Originator security
- Need GOAEACC
- Multiple Roles okay
Setup EPAF (continued)

**NTRALVL - User Routing Queue Entry & Level Placement**

- Create the number of levels needed.
- Highest level is “Superuser”
- Leave space for additional levels in future.
Setup EPAF (continued)

**NTRALVL - User Routing Queue Entry & Level Placement**

- Example Level 90
- Create level and manage users on same form
  - Add individual user
  - Add inactivate existing users
Setup EPAF (continued)

NTRAPTY – Creating Fields within each Component of the EPAF

- Approval type is the EPAF code for the EPAF section.
NTRAPTY – Adding Forms & Fields to EPAF Components

- Order forms, setting data apply order
  - Leave room for future changes.
- Control Page Down to enter fields, description and sequence of fields
  - Leave room for future changes.
  - Required fields marked
NTRACAT - Assemble EPAF Parts within Approval Category

- Routing must include at least “Apply”
- Add other mandatory levels as appropriate (users able to add others, but cannot remove required levels.)
NTRACAT (continued) - Approval Type Field Default Values and/or “Overrideable”

- Select “Approval Type Default Values” from options menu when in middle area of NTRACAT
- Enter field description
- Enter default value (if applicable)
- Check if “enterable” field
Setup EPAF (continued)

NTRAGRP – Add Completed EPAF to Group Level

![NTRAGRP screen shot](image)
Key EPAF Setup Notes

- **Determine which fields are required**

- **Data map all fields, especially if the data does not originate in Banner.**

- **Certain fields must be in particular order**
  - You’ll be able to indicate which fields are required, enter preset values (if applicable) and determine the processing order. Banner is a bit picky about the order in which the data is entered.
Overview of Using EPAF

- **EPAF Initiated**
  - By step in BannerWorkflow process
  - By Initiation of EPAF within INB or BannerWeb by initiator

- **Functional User Reviews EPAF Data, Updates as Needed in NOAEPAF**
  - This phase can have multiple steps and screens (for example, biographical data, address data, jobs data)
  - Can include stages of the EPAF to end one job before the start of another (or not, depending on business need.)

- **EPAF Approved & Applied in NOAEPAF**
  - Approval optional depending on setup.
  - EPAF Applied and data into Banner tables

- **Check Status/View Summary of EPAFs in NOAAPSM**
Using EPAF (continued)

NOAEPF – Approve & Apply EPAFs

- Review Information
- Compare Current and New
- Route
- Comment
- Approve or Apply
Using EPAF (continued)

NOAAPSM – Status of EPAFs

- Search by:
  - date
  - transaction status
  - queue status
Lessons Learned
• **Plan Fields to be Included**
  - Check and double check fields for BannerWorkflow & EPAF processes.
  - Possible to edit existing processes, but easier to fix in implementation.

• **Test, test, and test again**

• **Processing Change for Staff**
  - Plan for period of transition
  - Help staff contextualize strategic vs transactional approach
  - Workflow/EPAF may feel (and even be) slower for very experienced INB 8.x users
Appendix
Appendix

- **BannerWorkflow Documentation**
  - BannerWorkflow Analyst/Administrator Handbook
  - Ball State University documentation for using workflow to Create FOAPAL Requests

- **EPAF Documentation**
  - EPAF End User Documentation - JCCC (Johnson County Community College) 2 page PDF
    - Helpful definitions of the setup forms for EPAF
    - This PDF available as a supplement to the handout for this session
  - Wayne State University EPAF 101 & EPAF Implementation Home Page
Questions
Summary
BannerWorkflow and EPAF can:

- Streamline processing
- Automate data entry where appropriate
- Incorporate business practices and criteria
- Avoid duplicate work
- Reduce keyboarding errors
- Increase efficiency
- Help move HR from transactional to strategic
To receive presentation slides:

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