



Workflow



Overview and Update

Presented by Shirley Mitchell

January 23, 2009

System sign-on

The University of New Mexico Login - powered by SunGard Higher Education - Windows Internet Explorer

https://my.unm.edu/cp/home/displaylogin

Links Customize Links Help Desk HSLIC MyUNM UNMH Intranet Windows

The University of New Mexico Login - powered by Sun...

myUNM
The University of New Mexico [YOUR PERSONALIZED GATEWAY TO UNM]

Login

NetID:

Password:

Login Cancel

You have requested access to a site that requires you to login with a UNM NetID.
[Having problems logging in? Click here.](#)

TextMe UNM
Add Text
get fast, convenient, real-time message alerts.

myUNM News
myUNM is restarted every night to perform backups. Typically this happens sometime between midnight and 2AM. The restart takes approximately 5 minutes but all users will be disconnected during this time and required to login again.

How do I get my UNM NetID and password?

- [Create a UNM NetID](#)
- [Change Password](#)

Make this my homepage.

[Click here](#) for instructions on how to make your browser load this page on startup.

Welcome to myUNM
myUNM is your personal gateway to UNM. The myUNM portal provides the entire campus community centralized access to University resources and the ability to customize the portal to suit their individual needs by selecting which resources are available.

What's Inside?

- LoboWeb for Students:** LoboWeb will be replacing I-TEL-UNM for Registration, Grades, Financial Aid, Admissions info, etc.
To access LoboWeb for Students, log in to myUNM with your UNM NetID and password, and then click on the Student Life tab. Once there, click on the LoboWeb logo to enter.
- LoboWeb for Faculty & Advisors:** LoboWeb is the place for advisors to update and view advisee information, and for Faculty to get class lists, view student information, enter grades, perform registration overrides, etc.
To access LoboWeb for Faculty & Advisors, log in to myUNM with your UNM NetID and password, and then click on the Faculty Life tab. Once there, click on the LoboWeb logo to enter.
- E-mail:** The portal email is likely to be the preferred email application for students, or other "nomadic" style users who prefer the ability to check email via a Web interface rather than be dependent on one computer and a proprietary email application. Portal email is a robust application and you can also check email from other provider accounts with it.
- Calendar:** Campus community members - especially students! -- are encouraged to try out the calendar. The portal calendar is a great resource for students, classes, and groups/organizations to track schedules, tests, meetings and other events. Those on campus already using Oracle or Groupwise should continue to use those calendars to schedule University business-related meetings and events.
- Groups:** The Group Studio feature provides an easy-to-use Web presence for student, department, and other campus organizations. Group Studio applications include chat, where you can text chat online in real time; a message board to exchange information, and file sharing where groups can post and exchange files. Any campus organization or department that currently has its own NetID may request a Group via the Group Studio application. If an organization/department does not have its own NetID, you must first complete and return the [Organization/Departmental NetID request form](#) to the ITS Computer Accounts office.

and much more...

Done

start GroupWise... Novell ... Oracle App... Oracle Dev... The Univer... SAMitchell Microsoft P... Internet 100% 1:26 PM

System sign-on, cont'd

MyUNM - Windows Internet Explorer
http://my.unm.edu/cp/tag.2d02011687d03f7b.render.userLayoutRootNode.uP_tparam=activeTab&activeTab=u281s17&uP_tparam=fm&fm=

my UNM
The University of New Mexico
[YOUR PERSONALIZED GATEWAY TO UNM]

Welcome Shirley A Mitchell
You are currently logged in.

Home Campus Life Library UNM E-Mail Briefcase **Employee Life** HSC

January 22, 2009

Human Resources

- General Information
 - HR Home
 - ePAN
 - eJobs
 - Salary Structure Table
- Career Development
 - Career Development Home Page
 - Education and Training
 - Job Enrichment
 - Career Ladders
 - Career Advancement
- Staff Resources
 - EHPP
 - EOD
 - OEI
 - Dispute Resolution
 - Counseling Assistance and Referral Services (CARS)

Benefits

- Insurance
 - Health Insurance
 - Dental Insurance
 - Vision Insurance
 - Life Insurance
 - View All Insurance Benefits
- Education
 - Dependent Education Program
 - Tuition Remission
- Retirees
 - Educational Retirement Board
 - Alternative Retirement Plans

LoboWeb For Employees

Hyperion 8.5 Upgrade Delayed
Hyperion 8.5 Upgrade has been postponed until further notice. [CLICK HERE](#) for more information...

The University of New Mexico LoboWeb

What is LoboWeb?
LoboWeb is the place for employees to view/update personal information, benefits and deductions, pay information, tax forms and more.

Enter LoboWeb

Due to scheduled backups, LoboWeb/LoboPhone is unavailable Saturday 7:00 pm - 9:30 pm.

What's New in HR

- Paid Time Requirements for Non-Exempt Employees**
 - Memo to clarify paid time requirements for non-exempt employees [PDF]
 - Sample Time Sheet [PDF]
 - Sample Time Sheet [Excel]
- Application for Dependent Education
- Changes to Union Contracts 2006
- Term Appointment Updates**
 - Memo to Clarify Term Appointment Procedures
 - Term Appointment Memo of Understanding
 - Notification of Completion of Term Appointment

Banner Applications

Transaction and Real-time Query Systems

- Internet Native Banner
- LoboWeb
- LoboMart
- UNMJobs
- Workflow

Reporting

- E-Print
- Hyperion

Banner Resources

- Banner Authorization Requests
- Report a Duplicate Person/Non-person
- Search Class Schedule
- Search Course Catalog
- Electronic Forms
- Purchasing Department Website

Banner Announcements

No current announcements.

Banner Training

Training Databases

- Banner(TRNG2)
- LoboMart Training

Job Aids and Standard Operating Procedures

Learning Central (Register for courses and manage your learning plan)

FastInfo Knowledge Base:

Search Knowledge Base

Worklist in Workflow

The screenshot displays a web browser window titled "Workflow 4.4 (wfbnp) - mitchel" with the address bar showing the URL: <https://workflow.unm.edu:4443/wfbnp/home/worklist.do?renderer=lumis&hidecrumbs=false&hidenav=false>. The browser's address bar also shows "Google".

The page content is divided into several sections:

- Home**: A sidebar menu with links for "Worklist", "Workflow Status Search", and "Workflow Alerts".
- User Profile**: A sidebar menu with links for "My Processes", "User Information", and "Change Password".
- Worklist**: The main content area, featuring a table with columns for "Organization", "Workflow", "Activity", "Priority", and "Created". The table is currently empty, showing "0 - 0 of 0" items. Navigation controls include "First", "Previous", "Next", "Last", and a "Go to page:" dropdown menu. A link for "Show Reserved Items" is visible.
- Workflow Help**: A link in the top right corner.

At the bottom of the page, there is a "Top" link and a logo for "SUNGARD SCT HIGHER EDUCATION".

The Windows taskbar at the bottom shows the Start button, several open applications (GroupWise, Novell GroupWise, Internet Explorer, SAMitchell, Microsoft PowerPoint, Document1 - M...), and the system tray with the time 1:32 PM.

Training Class

- Next 90-Day Notification Workflow class:
 - Wednesday, February 11
 - Room 125 (HSSB first floor)
 - 9:00 – 10:00 am
 - RSVP: hscar@salud.unm.edu

- Other training classes by appointment
 - Contact your Fiscal Monitor
 - Day, time, location to fit your needs

Workflow Reports

- Hot off the presses!
- Hyperion report FRH0005
 - *“Closeout Workflow for Funds Ending on Contracts and Grants”*
- Query by:
 - Org, PI, Acct Administrator, Fiscal Monitor

Workflow Reports, Cont'd

- Types of reports:
 - Department Management Report
 - Waiting for Progress Report from AA
 - Waiting for AA to respond to Recon
 - Waiting for Pre-award Approval, Main Campus
 - Waiting for Pre-award Approval, HSC

- Print or Export to Excel

Hyperion Report

Browse - mitch on hyper01.unm.edu - Windows Internet Explorer
https://hyperprod.unm.edu/Hyperion/browse/Main

Hyperion Performance Suite
hyper01.unm.edu:1800 | mitch

Reports

- Dec 2 2008 1:20 PM [bqv](#)
- FRH0007 - Unrestricted Balances and Savings Summary for UBPP 7000**
Used to measure current year savings in accordance with LBRP 7000
- Oct 2 2008 12:25 PM [bqv](#)
- FRH001&2 Grant Ledger Detail and Summary**
Grant Ledger summary and detail report
- Dec 2 2008 2:41 PM [bqv](#)
- * **FRH0003: Contract and Grant Ledger Executive Summary**
Grant listing by organization code. It displays budget, expenses to date, encumbrances, and available balance summarized by Grant Code.
- Jan 21 2009 7:19 AM [bqv](#)
- * **FRH0005 - Closeout Workflow for Funds Ending on Contracts and Grants**
Workflow close out report by status. Reports by organization, Principle Investigator, Account Administrator, and Fiscal Monitor.
- Jan 22 2009 12:08 PM [bqv](#)
- FSH0001L Payroll and Payroll Benefits Distribution**
This version contains static HRS legacy Payroll information as of Dec 31, 2007 ONLY. For additional information about this report, please refer to FastInfo Answer Id #4053--Finance Systems Management
- Jan 15 2009 11:58 AM [bqv](#)
- FSH0001 Salary Labor Benefits and Encumbrance Report**
Included "Index no grouping" report which presents labor and fringe on same line if paid from same index. Also removed encumbrance column and restored fringe rate column in this report.
- Dec 3 2008 8:32 AM [bqv](#)
- FSH0002 Labor Distribution Reports**
Labor distribution reports by organization or employee
- Nov 7 2008 2:01 PM [bqv](#)

Search: this Folder (and subfolders) GO

Start | GroupWise... | Novell Gro... | Internet... | SAMitchell | Microsoft P... | Document1... | Document2... | Internet | 100% | 5:13 PM

FRH0005

The screenshot shows a web browser window with the following details:

- Address bar: https://hyperprod.unm.edu/Hyperion/dataaccess/Browse?REQUEST_TYPE=GET_DOCUMENT&DOC_UIID=0000011
- Page Title: **FRH0005**
- Section: **Closeout Workflow for Funds Ending on Contracts and Grant**
- Form Fields:
 - Segment: Organization
 - Value (% allowed): [Empty]
 - Buttons: Add Criteria, Delete Criteria, Find
- Dropdown Menu (Organization):
 - Organization
 - Principal Investigator
 - Account Administrator
 - Fiscal Monitor
- Radio Button List:
 - Department Management Report
 - Waiting for Progress Report From AA
 - Waiting for AA to Respond to Recon
 - Waiting for Pre-Award Approval - Main Campus
 - Waiting for Pre-Award Approval - HSC
- Process Button: [Process]

The browser's taskbar at the bottom shows the Start button and several open applications: GroupWise..., Novell Gro..., Internet..., SAMitchell, Microsoft P..., Document1..., and Document2... The system clock indicates 5:15 PM.

Report Example

The screenshot shows a web browser window displaying a report generation interface. The browser's address bar shows the URL: `https://hyperprod.unm.edu/Hyperion/dataaccess/Browse?REQUEST_TYPE=GET_DOCUMENT&DOC_UUID=0000011`. The page title is "FRH0005 Closeout Workflow for Funds Ending on Contracts and Grant".

The interface includes a search section with a "Segment" dropdown menu set to "Fiscal Monitor" and a "Value (% allowed)" field containing "Martinez". There are buttons for "Add Criteria", "Delete Criteria", and "Find".

Below the search section is a list of report options, each with a radio button:

- Department Management Report
- Waiting for Progress Report From AA
- Waiting for AA to Respond to Recon
- Waiting for Pre-Award Approval - Main Campus
- Waiting for Pre-Award Approval - HSC

A teal "Process" button is located below the list. Below the button is a scrollable list box containing the following entries:

- Fiscal Monitor : Martinez, JoAnne
- Fiscal Monitor : Martinez, Burt

The Windows taskbar at the bottom shows the Start button, several open applications (GroupWise, Novell Gro..., Internet..., SAMitchel, Microsoft P..., Document1..., Document2...), and the system tray with the time 5:22 PM.

Report Example, cont'd

The screenshot shows a web browser window with the following content:

- Address Bar:** https://hyperprod.unm.edu/Hyperion/dataaccess/Browse?REQUEST_TYPE=GET_DOCUMENT&DOC_UUID=0000011
- Page Title:** FRH0005
- Section Header:** Closeout Workflow for Funds Ending on Contracts and Grant
- Form Fields:**
 - Segment: Fiscal Monitor
 - Value (% allowed): Martinez
 - Buttons: Add Criteria, Delete Criteria, Find
- Search Results:** Fiscal Monitor: Martinez, Burt
- Report Selection:**
 - Department Management Report
 - Waiting for Progress Report From AA
 - Waiting for AA to Respond to Recon
 - Waiting for Pre-Award Approval - Main Campus
 - Waiting for Pre-Award Approval - HSC
- Action:** Process

The browser's taskbar at the bottom shows several open applications, including GroupWise, Novell Gro..., Internet..., SAMitchel, Microsoft P..., Document1..., and Document2..., along with the system clock showing 5:23 PM.

Report Example, cont'd

https://hyperprod.unm.edu/Hyperion/dataaccess/Browse?REQUEST_TYPE=GET_DOCUMENT&DOC_UUID=0000011 - Windows Internet Explorer

https://hyperprod.unm.edu/hyperion/dataaccess/Browse?REQUEST_TYPE=GET_DOCUMENT&DOC_UUID=0000011efef9b9f-0000-0b0c-406a-kac&DOC_VERSION=1&JScrip=enable&zeroadminid=0000011f00d6bce3-0000-9cce-c0a85169

File Edit View Insert Format Report Tools Help

Data Function

FRH0005 Department Management Report 01/22/09 05:23 PM

Waiting for Pre-Award Approval

Fund Code	Grant Code	Index Code	Org Code	Duration	PI	FM	AA
337E0	3R37E	254300	254B44	2	Angele Wandinger-Nes	Burt Martinez	Janet Kelly
349Y1	3R49Y	254406	254B44	112	Stephen Young	Burt Martinez	Mary Sasley

Total 2

Waiting for Dept to Extend or Close

Fund Code	Grant Code	Index Code	Org Code	Duration	PI	FM	AA
309M0	3R09M	254462	254B01	82	Therese Bocklae	Burt Martinez	Mary Sasley
370B0	3R70B	254465	254B11	9	Richard Larson	Burt Martinez	Debbie Jennings
321N0	3R21N	254207	254B11	54	Richard Larson	Burt Martinez	Pattie Curran
357S0	3R57S	254432	254B11	106	Richard Larson	Burt Martinez	Pattie Curran
369B0	3R69B	254461	254B16	19	Thomas Williams	Burt Martinez	Mary Sasley
372A0	3R72A	254478	254B46	51	Bridget Wilson	Burt Martinez	Mary Sasley
33810	3R381	254162	254B46	82	Bridget Wilson	Burt Martinez	Ryan Tanner
35680	3R568	490075	490A	19	Leslie Morrison	Burt Martinez	Joann Glasoe
30571	3R057	490201490	490A	54	Yoshio Okada	Burt Martinez	Joann Glasoe
366P0	3R66P	490331	490B0	19	Gary Rosenberq	Burt Martinez	Joann Glasoe
330G1	3R30G	490324	490B0	113	Gary Rosenberq	Burt Martinez	Joann Glasoe
325K0	3R25K	490239	490B03	113	Gary Rosenberq	Burt Martinez	Joann Glasoe
317H0	3R17H	490051	490B05	52	Corey Ford	Burt Martinez	Joann Glasoe
331S0	3R31S	490194	490B05	54	Corey Ford	Burt Martinez	Joann Glasoe
37840	3R784	490083	490B08	19	John Chapin	Burt Martinez	Joann Glasoe
335K2	3R35K	490319490	490B09	54	Yoshio Okada	Burt Martinez	Joann Glasoe
363J0	3R63J	490337	490B29	19	Suroh Paul	Burt Martinez	Joann Glasoe
366N0	3R66N	490330	490B35	19	Stefan Posse	Burt Martinez	Joann Glasoe
377S0	3R77S	490363	490B35	19	Stefan Posse	Burt Martinez	Joann Glasoe
371L0	3R71L	490344	490B35	114	Stefan Posse	Burt Martinez	Joann Glasoe
371C0	3R71C	490340	490C04	19	John Phillips	Burt Martinez	Joann Glasoe
378Z0	3R78Z	497258	497G03	44	Robert Quinn	Burt Martinez	Michelle Jaramillo
372S0	3R72S	497240	497G03	115	Robert Quinn	Burt Martinez	Michelle Jaramillo
33470	3R347	497160	497J06	113	Susan Queen	Burt Martinez	Michelle Jaramillo
38005	3R800	8510LM851	851H04	9	Philip Wagner	Burt Martinez	Curtis Vigil
351W0	3R51W	8510HS	851H04	142	Philip Wagner	Burt Martinez	Mike Maes
373W0	3R73W	8510FF	851H05	9	Orrin Myers	Burt Martinez	Curtis Vigil
369P0	3R69P	85100B	851H05	9	Orrin Myers	Burt Martinez	Curtis Vigil
365D0	3R65D	8510NS	851H05	142	Orrin Myers	Burt Martinez	Glenn Felton
310M0	3R10M	85100V851	851H10	170	Sue Kimm	Burt Martinez	Rebecca Gutierrez
368K0	3R68K	851005	851H18	170	Sang-Joon Lee	Burt Martinez	Rebecca Gutierrez

Total 31

Waiting for Final Materials Sent Dates

2 Page(s) Zoom: 88%

Start GroupWise... Novell Gro... Internet... SAMitchell Microsoft P... Document1... Document2... Unknown Zone 100% 5:23 PM

Report Example, cont'd

Microsoft Excel - Burt as of 1-22-09.xls

Type a question for help

File Edit View Insert Format Tools Data Window Help

Close Exit Print Paste Undo Redo Find & Replace Sort & Filter AutoSum 100%

Reply with Changes... End Review...

Arial

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	Waiting for Pre-Award Approval																	
2	Fund Code	Grant Code	Index Code	Org Code	Duration	PI	FM	AA										
3	3.37E+02	3R37E		254300	254B44	2	Angela W	Burt Martin	Janet Kelly									
4	349Y1	3R49Y		254406	254BA4	112	Stephen Y	Burt Martin	Mary Sisley									
5																		
6																		
7	Total	2																
8	Waiting for Dept to Extend or Close																	
9	Fund Code	Grant Code	Index Code	Org Code	Duration	PI	FM	AA										
10	369M0	3R69M		254462	254B01	82	Therese B	Burt Martin	Mary Sisley									
11	370B0	3R70B		254465	254B11	9	Richard La	Burt Martin	Debbie Jennings									
12	321N0	3R21N		254207	254B11	54	Richard La	Burt Martin	Pattie Curran									
13	357S0	3R57S		254432	254B11	106	Richard La	Burt Martin	Pattie Curran									
14	369B0	3R69B		254461	254B16	19	Thomas W	Burt Martin	Mary Sisley									
15	372A0	3R72A		254478	254B46	51	Bridget W	Burt Martin	Mary Sisley									
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17	35680	3R568		490075	490A	19	Leslie Mar	Burt Martin	Joann Glasoe									
18	30571	3R057	#####	490A	54	Yoshio Ok	Burt Martin	Joann Glasoe										
19	366P0	3R66P		490331	490B0	19	Gary Rose	Burt Martin	Joann Glasoe									
20	350G1	3R50G		490324	490B0	113	Gary Rose	Burt Martin	Joann Glasoe									
21	325K0	3R25K		490239	490B03	113	Gary Rose	Burt Martin	Joann Glasoe									
22	317H0	3R17H		490051	490B05	52	Corey Forc	Burt Martin	Joann Glasoe									
23	331S0	3R31S		490194	490B05	54	Corey Forc	Burt Martin	Joann Glasoe									
24	37840	3R784		490083	490B08	19	John Chap	Burt Martin	Joann Glasoe									
25	335X2	3R35X	#####	490B09	54	Yoshio Ok	Burt Martin	Joann Glasoe										
26	368J0	3R68J		490337	490B29	19	Surajit Pa	Burt Martin	Joann Glasoe									
27	366N0	3R66N		490330	490B35	19	Stefan Pos	Burt Martin	Joann Glasoe									
28	377S0	3R77S		490363	490B35	19	Stefan Pos	Burt Martin	Joann Glasoe									
29	371L0	3R71L		490344	490B35	114	Stefan Pos	Burt Martin	Joann Glasoe									
30	371C0	3R71C		490340	490C04	19	John Philli	Burt Martin	Joann Glasoe									
31	376Z0	3R76Z		497258	497G03	44	Robert Qui	Burt Martin	Michelle Jaramillo									
32	372S0	3R72S		497240	497G03	115	Robert Qui	Burt Martin	Michelle Jaramillo									
33	334T0	3R34T		497160	497J06	113	Susan Qui	Burt Martin	Michelle Jaramillo									
34	38005	3R800	8510LM8510LM	85101	851H04	9	Phillip Wa	Burt Martin	Curtis Vigil									
35	351W0	3R51W	8510HS	851H04	142	Phillip Wa	Burt Martin	Mike Maes										
36	373W0	3R73W	8510PF	851H05	9	Ornin Myer	Burt Martin	Curtis Vigil										
37	369P0	3R69P	8510OB	851H05	9	Ornin Myer	Burt Martin	Curtis Vigil										
38	365D0	3R65D	8510N5	851H05	142	Ornin Myer	Burt Martin	Glenn Felton										
39	310M0	3R10M	85100V85100V	85157	851H10	170	Sue Kimm	Burt Martin	Rebecca Gutierrez									
40	368K0	3R68K	8510O5	851H18	170	Sang-Joon	Burt Martin	Rebecca Gutierrez										
41																		
42																		
43	Total	31																
44	Waiting for Fiscal Monitor to Send Recon																	
45	Fund Code	Grant Code	Index Code	Org Code	Duration	PI	FM	AA										

Burt as of 1-22-09/

Draw AutoShapes

Ready

NUM

Start

GroupWise... Novell Gro... Intene... Windo... Microsoft P... Microsoft... Microsoft E...

5:24 PM