SunTrust

Content Management Workflows Tutorial

Macquarium Intelligent Communications
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Atlanta, GA 30309

TABLE OF CONTENTS

INTRODUCTION

CLASS PARTICIPANTS

- Instructors
- Participants
- Observers

THE GOALS OF THIS CLASS …

- Walk you through the processes of the SunTrust workflows for online (Web) file approvals.
- Teach you to create, review, revise, and cancel workflows.
- Familiarize you with the Workflow Reporting Tool - illustrating workflow-related statistics.

WHAT YOU WON'T LEARN TODAY

- This class will not teach you how to use Teamsite for any purpose other than Workflows.
- Neither content creation applications nor HTML will be taught.
- No theories or methods for writing content for the Web.

CLASS FORMAT

- **3 hours.**
- **15-minute break** at the halfway point.
- **Casual**, conversational environment.
- **Much of the lesson is hands-on**. However, there will be points when we'll stop to discuss an aspect of the training.
- We'll maintain a "parking lot" for any topics that are brought up but not addressed immediately.

LESSON ONE: CREATE A ROUTINE WORKFLOW

UP FRONT: ABOUT THIS LESSON

PRE-REQUISITES

- You have been given a Teamsite account and you know your Teamsite User ID (usually the same as your SunTrust RACFID) and password.
- In order to complete all tasks in this lesson, the SunTrust eBusiness team has provided you with a Teamsite login at the Administrator level.
- Your computer is on.
- You're logged into the SunTrust computing environment.
- You've launched your Web browser.

LESSON DETAILS

- This lesson will take 45 minutes in the classroom setting.
- This lesson will include discussion segments (illustrated here in red) as well as hands-on work.
- The screenshots included here are approximations. Variations between these images and your actual screen views should not affect today's class.
- **At the end of this lesson, you should be able to perform the following tasks:**
  - Access the Teamsite Workflow environments.
  - Create, Review, Revise, and Submit Workflow requests.
  - Add Files to Your Workflow Job.

ACCESSING THE TEAMSITE ENVIRONMENT

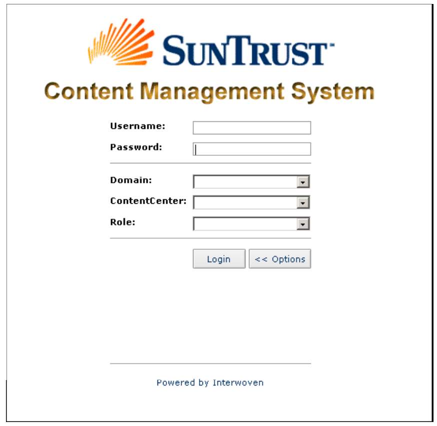
LAUNCHING TEAMSITE

1. From your Web browser, enter the SunTrust Teamsite URL:

`http://teamsitedev.stsc.suntrust.com`

2. Press **<ENTER>.**

   You should see the following screen:



3. **Enter your RACFID** (or supplied Teamsite username) in the "Username" field.

4. Enter your RACFID **password** (or supplied Teamsite password) in the "Password" field.

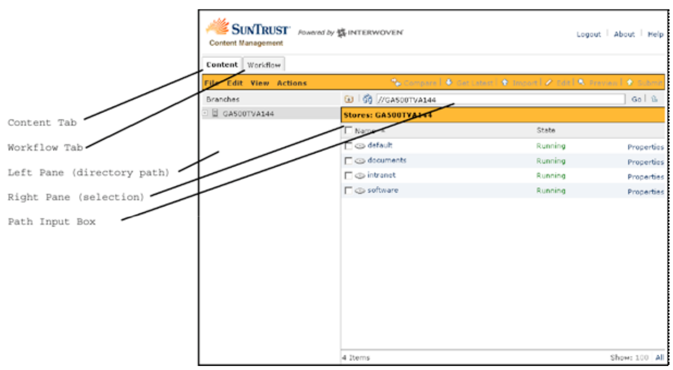
5. From the "Domain" menu, select: **GA500TVA144**

6. From "ContentCenter," select: **Professional**

7. From the "Role" menu, select: **Administrator**

8. Click the "**Login**" button.

   Once your login is accepted, you will see a screen similar to the following:



NOTE: If you've previously used Teamsite on at least one occasion, you'll notice your account launches to the directory (location) you were in at the time of your last logout. To navigate to the directory illustrated above, select the following items in order:

9. Click the "**Content**" tab at the top left corner of the Teamsite screen.

10. Under the "Branches" heading in the far left pane, select: **GA500TVA144**

11. **If you have a minus (-)** symbol to the left of the directory labeled "Default," **select it now.**

Your screen should now look <u>similar</u> to the example above. This screen displays your "Content" tab workspace.

NAVIGATING TO YOUR TEAMSITE WORKAREA

Use the Content tab to select and navigate within the site's various directory structures.

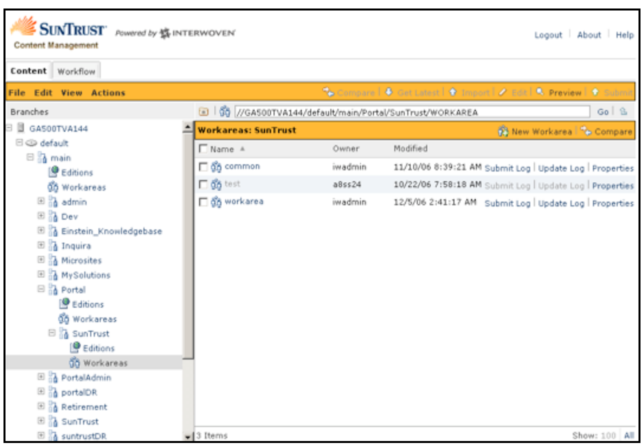
12. Before we create our workflow, navigate to the following directory:

`GA500TVQ144/default/main/Portal/SunTrust/Workarea/Workarea`

13. Navigate to the above directory using your preferred method now. Your screen should look similar to the following example:

Side Note: There are several ways you can move among directories:

- Select/Open the nested folders in the left window.
- Open nested folders in the right (and left) window.
- Use the "View / My Favorites" menu (*if* you have previously added that folder to your "My Favorites" list)
- Type the exact path into the path field box and select "Go."
- Login to Teamsite following a graceful logout in which you were already in the desired directory.



DISCUSSION: WHAT IS A ROUTINE

WORKFLOW?

kdemange 12/9/06 1:57 PM
Comment: 4th text box down on right says "External Task to Dump Audit Trail Information…" should all of those words be capitalized?

kdemange 12/9/06 1:56 PM
Comment: Can you straighten the arrows in the diagram?
The top right text box says "workflow moves to the creative services user/group task.." is it mean to say "user group task"?

ROUTINE WORKFLOW: EXAMPLES

- ANY changes and/or additions to product or service names, definitions, or contexts
- Product campaigns, microsites, advertising banners
- Brand content

STEPS IN ROUTINE WORKFLOW

- Requestor contacts Content Manager
-

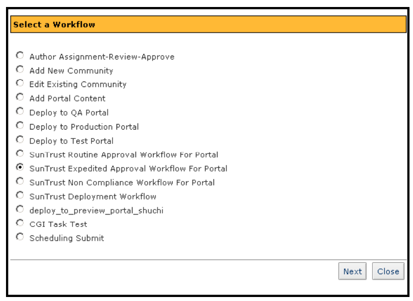
CREATING A NEW ROUTINE WORKFLOW

We're ready to create a new Routine Workflow Job Request.

14. Make sure your screen is on the **Content** tab.

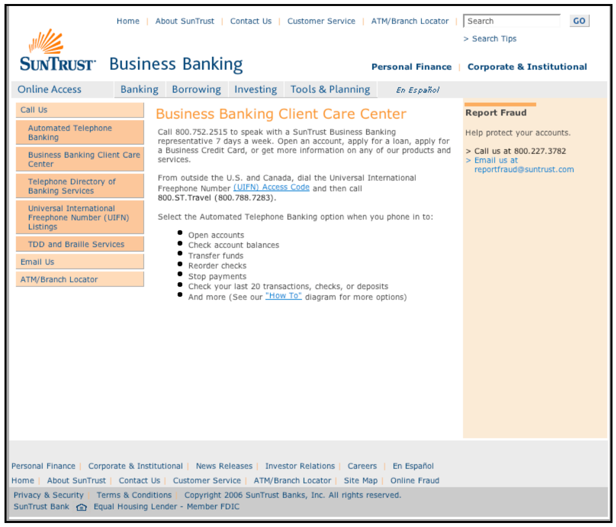
15. Select "**New Job**" from the Actions pull down menu.

Your browser will spawn the following pop up window titled "Select a Workflow."



For the purpose of this lesson, we'll concentrate on the option "SunTrust Routine Approval Workflow for Portal."

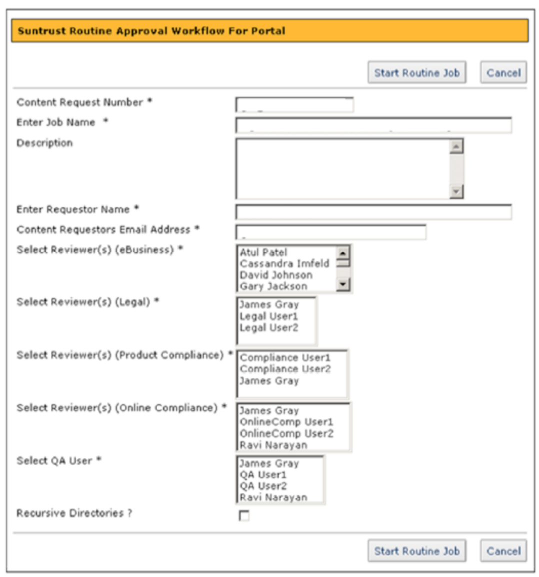
We're going to be creating a workflow based on a request to change some basic information on the Business Banking Client Care Center page on suntrust.com:



16. Select the radio button next to "**SunTrust Routine Approval Workflow for Portal**"

17. Click the "**Next**" button at the bottom of the window.

You should see a screen similar to the following:



This screen displays information about the participants and routing order that the workflow will travel as part its approval process. It also provides you with the opportunity to enter key identifying information and instructions that will aid the participants with their required tasks in the process.

ROUTINE WORKFLOW FIELDS IDENTIFIED

- **Content Request Number**: This is a unique number that eBusiness will use to quickly identify a Job request:
  - Content Management Number (4 digits)
  - Hyphen
  - Aprimo Job Number (5 digits)
  - Example: *1234 - 56789*

For the purpose of today's exercise, please prefix your workflow Jobs with your Teamsite username:

A8th31234-99999

- **Job Name**: This is a short, free form field you can use to identify the Context of the Job. Examples:
  - *Total Business Banking*
  - *Supreme Plus Banking*
  - *Bus MMPA typo*
- **Request Type:** On a Routine job, the request type might be best described by the overwhelming type of changes:
  - *Updates*
  - *New Product*
  - *Fix*
- **Description**: This includes IMPORTANT, high-level instructions used to help your reviewers.
  - *Added new support services information to TBB's fourth paragraph.*
  - *3 New Content pages. Supreme Plus Banking product. Revisions to affected Personal Banking pages.*
  - *Typo in telephone number. Actual number should be 8132.222.2222 throughout.*
  - *Multiple copy changes. Janet in product management will send reviewer instructions in separate email.*
- **Requestor Name**: *Janet Parkman*

- **Reviewer email**: *Janet.parkman@suntrust.com*
- **Reviewer Lists (by group in order):** Routine workflows include:
    - Creative Services person
    - eBusiness representative
    - Legal review
    - Compliance review
    - QA reviewer (usually eBusiness rep)
- **Recursive Directories Enabled?** – This option allows you to select all the files in the current directory AND all the files in the various sub-directories at the same time.

18. Enter the information supplied below into the appropriate fields on your screen. Use your personal information wherever possible.


Suntrust Routine Approval Workflow For Portal

Start Routine Job | Cancel

Content Request Number *	a8th31234-98765
Enter Job Name *	Business Banking Center
Enter Job Type *	service name change
Description	changed Bus. Banking Advisory Center name to Business Banking Client Care Center.
Enter Requestor Name *	your name
Content Requestors Email Address *	your email@suntrust.com
Select Reviewer(s) (eBusiness) *	your name
Select Reviewer(s) (Legal) *	your name
Select Reviewer(s) (Product Compliance) *	your name
Select Reviewer(s) (Online Compliance) *	your name
Select QA User *	your name
Recursive Directories ?	X

Start Routine Job | Cancel

19. Select the "**Start Routine Job**" button.

After a few moments, the pop up screen will close, indicating you've successfully created a new job request.

We're still not ready to send the request to our reviewers. Our workflow request has been created, but it's still missing some important elements (most importantly, the workflow files).

REVIEWING AND REVISING A WORKFLOW JOB

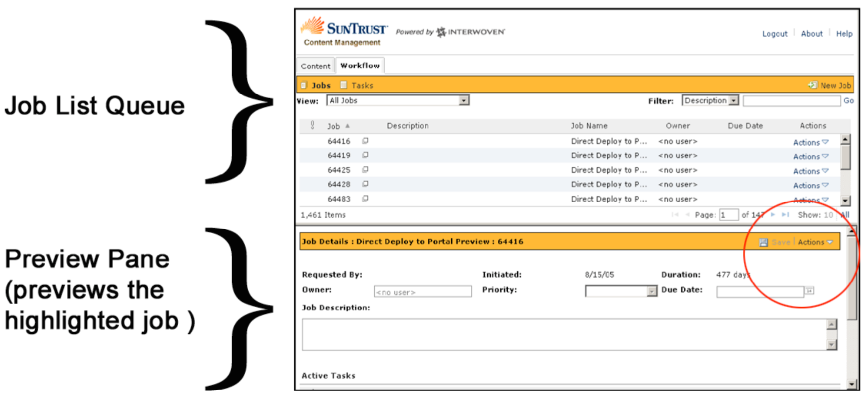
For this exercise, we're going to revise some of the input we've added to the job in the previous windows.

FIND YOUR JOB IN THE WORKFLOW JOB LIST QUEUE

Once you submit your job request, it goes into the workflow Job List "queue" along with other job requests. Jobs are added to the queue in the order they were created. Each job - and each task within a job - is assigned a sequential number as part of one continually appended list. If a new job starts at number 109487 and has 19 tasks, the next job to be created will be assigned number 109507.

20. If you haven't already done so, **click on the Workflow tab** now.

21. Select **"Jobs"** from the Workflow tab's submenu.



LOCATING A JOB IN THE JOB QUEUE

There are several ways to locate a particular job:

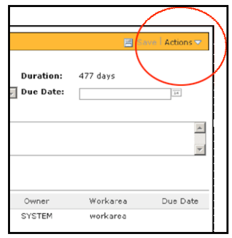
- Enter the last page in the Job list into the "Page" field (this works best of if we go to the queue relatively quickly after the job is created).
- Select a column heading (such as "Job" or Owner) to re-sort the jobs from last to first in alphanumerical order by that chosen column.

- View a subset of the jobs via the "View" pull down menu.
- Filter jobs based on criteria such as Priority or Due Date.
- Any combination of these options.

22. **Highlight** – but don't open – your file within this Job queue list.

You'll notice that the lower half of the Job queue screen now contains a preview pane of your job information along with some new options.

23. **Select the Actions sub-menu** from the right side of the preview pane screen.



24. **Select "Change Properties."**

25. In the pop up window, revise the Priority to "**0 – Highest**."

26. **Close** this window.

27. Click **Save.**

DISCUSSION: REVIEWING A JOB

MAKE JOB REVISIONS

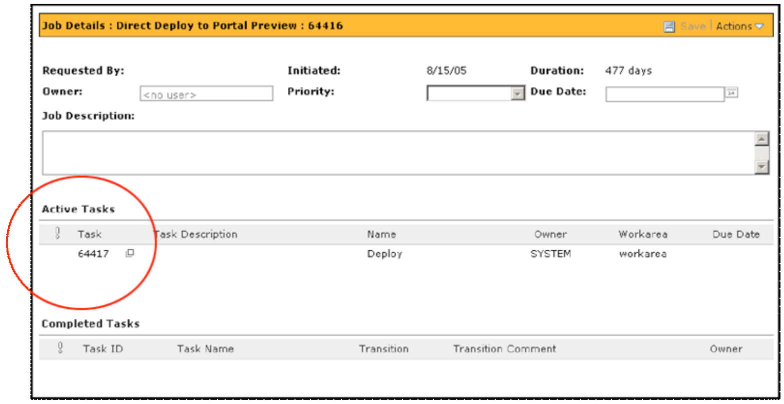
ADDING FILES TO YOUR JOB USING THE TASKS SCREEN

Your Workflow is only of value to your reviewers if its files are attached.

Technically, as your workflow job has already been created, this next step is considered a "task" within the process of moving your job through the system.

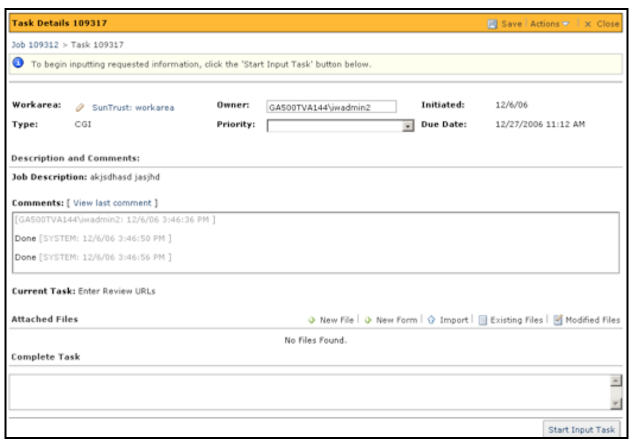
28. Open your job by selecting its box icon included in the Job

list queue. A new window similar to the following will appear. This is the Job Details window.

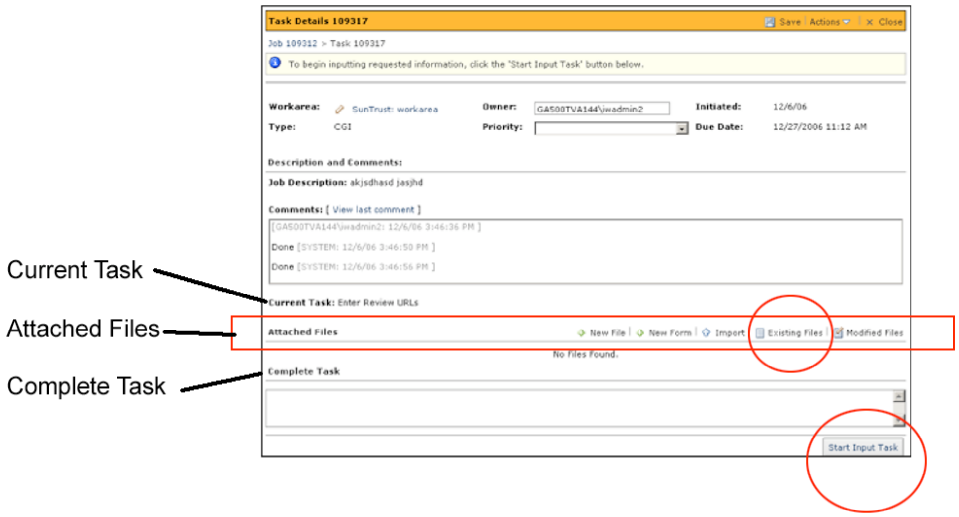


29. In the Job Details window, **select the box icon below** the Active Tasks heading information. This will open a new pop up window called the Task Detail window.

Your screen should look similar to the following example. Note that the “Attached Files” box reads “No Files Found.” This indicates that no files are [yet] included in the workflow.



DISCUSSION: REVIEW THE TASK DETAIL SCREEN



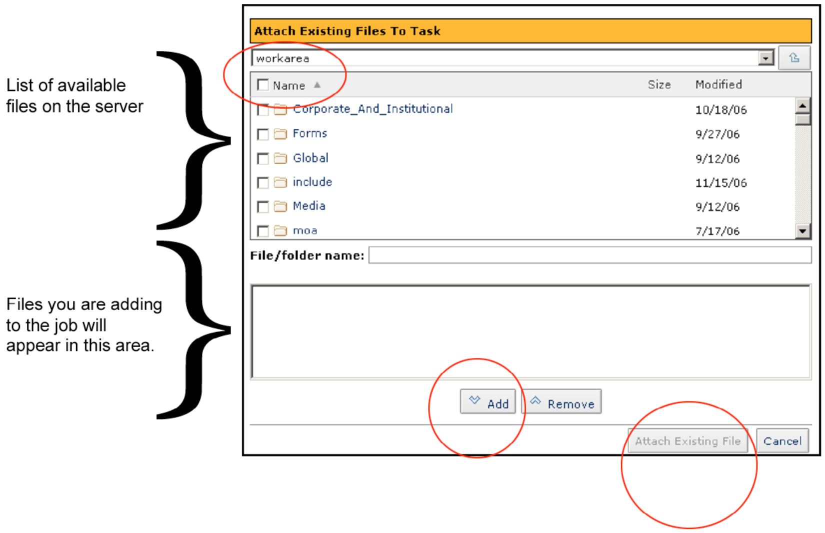
ADDING FILES TO THE ROUTINE WORKFLOW JOB

For the purpose of this lesson:

- We're going to simulate that we've made a revision to the Business Banking Advisory Center pages.
- The actual change request has already gone to creative services and the files are revised and ready for approval via the workflow process.
- We need to add the files to the workflow.

30. **Click the "Existing Files" option** within the Task Details window.

    The "Attach Existing Files to Task" pop up window will appear. This window consists of two functional panes: The first displays the list of all site available to us; The second will show only those files we select to include in this job.

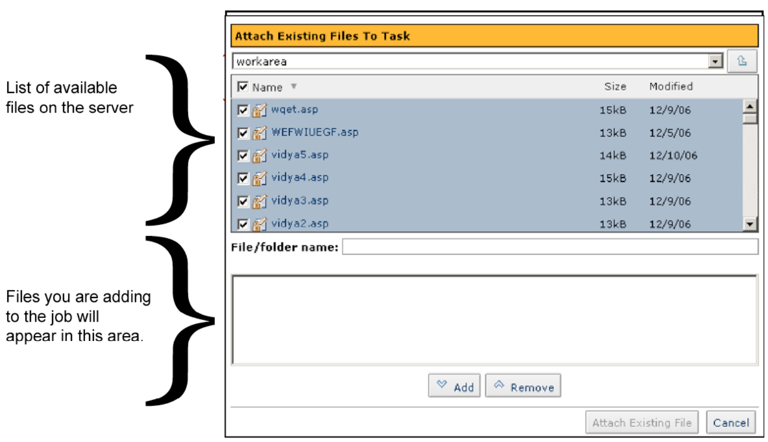


31. **Double-Click** on the appropriate directory names in the TOP pane to navigate to the following list of files:

    `Global/contact_us/business_banking_advisory_center`

32. Once you reach the "business_banking…" directory, **select the check box beside "Name"** at the top left of this pane.

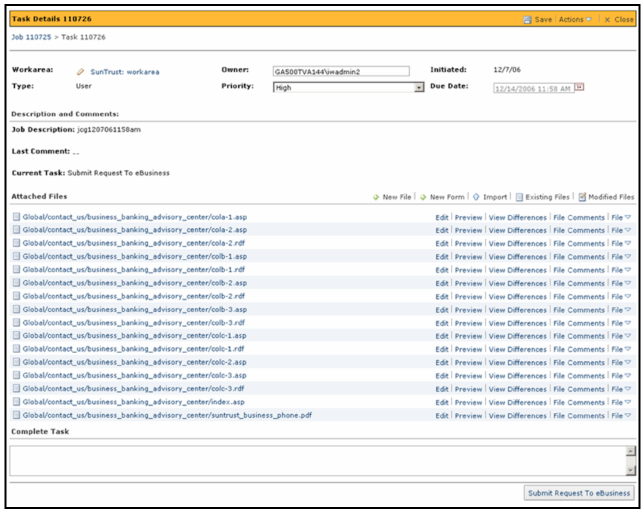
    Notice that this action selects all the items in the current directory.



33. Now, **Click the Add button** to add the selected files - from the top pane – to your Job file list (which will display in the bottom pane).

34. Next, **Click the "Attach Existing File" button** at the bottom left of the window. The current window will close.

35. Your Task Details window should now look similar to the following:



36. You can use the same instructions to add or delete more files (even full directories) to the workflow.

SUBMITTING YOUR ROUTINE JOB TO THE EBUSINESS GROUP FOR RELEASE

Once the required files are attached to the workflow, we're ready to alert eBusiness to release the files to the QA (staging) server.

37. If you have extra comments or information about these files for the eBusiness team, you can enter it in the "Comments" field here.

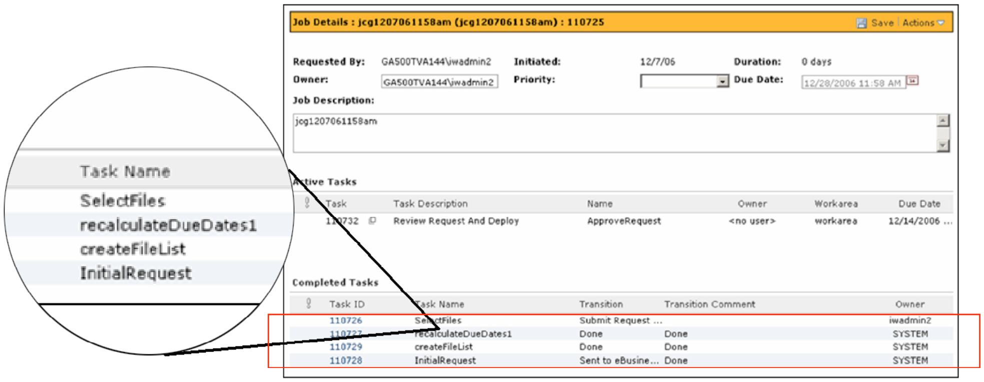
38. **Click the "Submit Request to eBusiness**" button at the bottom of the Task Details window.

39. Now **Close your Task Details window**.

Your screen will have returned to the Job List Queue window in the Workflow Tab window.

40. **Click on the box** next to your Job's number to review your changes.

You should see that the system has performed several automated tasks since your last interaction:



41. To review any of these tasks in detail, click the task number from within the Job Detail window.

Your Job request is now waiting for an eBusiness team member to approve it so that the System can generate the email alerting your first reviewer to approve or reject it.

RECAP

Now that we've completed this lesson, you should feel comfortable performing the following actions on your own:

- Access the SunTrust CMS Environment
- Create a new routine workflow
- Review the routine workflow environment
- Revise your workflow Job
- Add modified files to your workflow Job
- Submit your workflow request to eBusiness
- Review Job and Task status

LESSON TWO: CREATE AN EXPEDITED WORKFLOW

UP FRONT: ABOUT THIS LESSON

PRE-REQUISITES

- You've successfully completed *"Lesson One: Create a Routine Workflow Job."*
- You have a comfortable understanding of the creation, revision, review, and submission processes for routine workflow jobs and tasks.

LESSON DETAILS

- This lesson will take 30 minutes in the classroom setting.
- At the end of this lesson, you should be able to perform the following tasks:
  - Demonstrate an understanding of the differences between a Routine and an Expedited Workflow
  - Create, review, revise, and add files to an Expedited workflow
  - Submit your expedited workflow to eBusiness for Release

kdemange 12/9/06 2:23 PM
Comment: Indent these items

ACCESSING THE TEAMSITE ENVIRONMENT

kdemange 12/9/06 1:21 PM
Comment: Did you mean to have this here twice?

42. From within your Web browser window, enter the SunTrust Teamsite login screen URL into the browser's address bar:

    `http://teamsitedev.stsc.suntrust.com`

43. Login to your Teamsite account.
44. Access the Content Tab window.
45. Navigate to the following directory:

`GA500TVQ144/default/main/portal/SunTrust/WORKAREA/Workarea`

DISCUSSION:
WHAT IS AN EXPEDITED WORKFLOW?

EXPEDITED WORKFLOW EXAMPLES

- Press Release
- Fraud Alert
- Quarterly Report

CREATING A NEW EXPEDITED WORKFLOW

46. Select “**New Job**” from the “Actions” pull down menu.

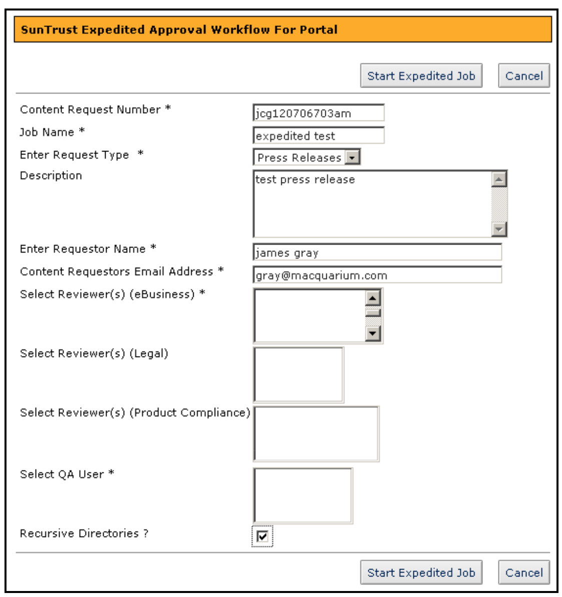
Your browser will display the following popup window titled “Select a Workflow.”

For the purpose of this lesson, we’ll concentrate on the option labeled “SunTrust **Expedited** Approval Workflow for Portal.”

47. **Click** the radio button next to “SunTrust Expedited Workflow Approval for Portal” now.

48. Click the “**Next**” button at the bottom of the window.

You should see a screen similar to the following:



This screen displays the information about the participants and routing order that the **expedited** workflow will travel as part its approval process. It also provides you with the opportunity to enter key identifying information and instructions that will aid the participants with their required tasks in the process.

EXPEDITED WORKFLOW FIELDS IDENTIFIED

- **Content Request Number**: This is a unique number that eBusiness will use to quickly identify a Job request:
  - Content Management Number (4 digits)
  - Hyphen
  - Aprimo Job Number (5 digits)
  - Example: *1234 - 56789*

For the purpose of today's exercise, please prefix your workflow Jobs with your Teamsite username:

A8th31234-99999

- **Job Name**: This is a short, free form field you can use to identify the Context of the Job. Examples:
  - *Total Business Banking*
  - *Supreme Plus Banking*
  - *Bus MMPA typo*
- **Request Type:** On a Routine job, the request type might be best described by the overwhelming type of changes:
  - *Updates*
  - *New Product*
  - *Fix*
- **Description**: This includes IMPORTANT, high-level instructions used to help your reviewers.
  - *Added new support services information to TBB's fourth paragraph.*
  - *3 New Content pages. Supreme Plus Banking product. Revisions to affected Personal Banking pages.*
  - *Typo in telephone number. Actual number should be 8132.222.2222 throughout.*
  - *Multiple copy changes. Janet in product*

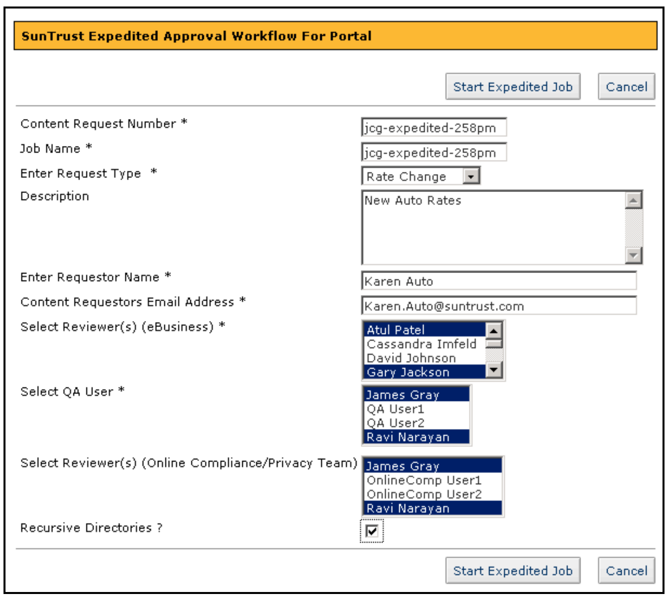
management will send reviewer instructions in separate email.

- **Requestor Name**: *Janet Parkman*
- **Reviewer email**: *Janet.parkman@suntrust.com*
- **Reviewer Lists (by group in order):** Routine workflows include:
  - Creative Services person
  - eBusiness representative
  - Legal review
  - Compliance review
  - QA reviewer (usually eBusiness rep)
- **Recursive Directories Enabled?** – This option allows you to select all the files in the current directory AND all the files in the various sub-directories at the same time.

49. Enter this information into the fields as we've just discussed.

 To highlight multiple recipients within a field, press and hold your keyboard <CTRL> key while selecting.

kdemange 12/9/06 2:28 PM
Comment: Enter missing content



50. Once you've entered the information illustrated above, select the "Start Expedited Job" button.

After a few moments, your pop up screen will close indicating you've successfully created a new job request.

REVIEWING AND REVISING AN EXPEDITED WORKFLOW JOB

For this exercise, we're going to revise some of the input we've added to the job in the previous windows.

FIND YOUR JOB IN THE WORKFLOW JOB LIST QUEUE

Once you submit your job request, it goes into the workflow Job List "queue" along with other job requests. Jobs are added to the queue in the order they were created. Each job - and each task within a job - is assigned a sequential number as part of one continually appended list. If a new job starts at number 109487 and has 19 tasks, the next job to be created will be assigned number 109507.

51. If you haven't already done so, **click on the Workflow tab** now.

52. Select **"Jobs**" from the Workflow tab's submenu.

53. Locate your job. Be sure to verify it is your job by checking the Owner column in the list window.

54. **Click on your job ONCE** to highlight it in the list window. You'll notice that the lower half of the screen contains a preview pane of your job information along with some new options.

MAKE REVISIONS

55. From the preview pane, change your job's Priority by selecting the "Priority" pull down menu. Set the priority to "**1-high**."

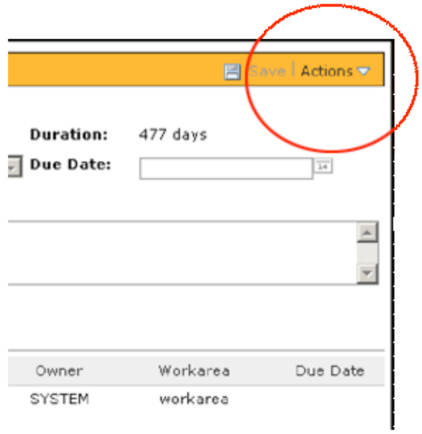
56. Next, experiment changing the content you entered in the Job Description box.

57. Select "**Save**" from the Upper Right corner of the preview pane.

    Your changes are reflected in your job as it appears in the list and preview windows.

58. Next, **Click on the box icon to Open the Job.**

Now, select "Actions" > "Change Properties" from the upper right corner of this popup window.



Another smaller window will pop up. This window allows you to change many of the properties you selected in the original Job creation.

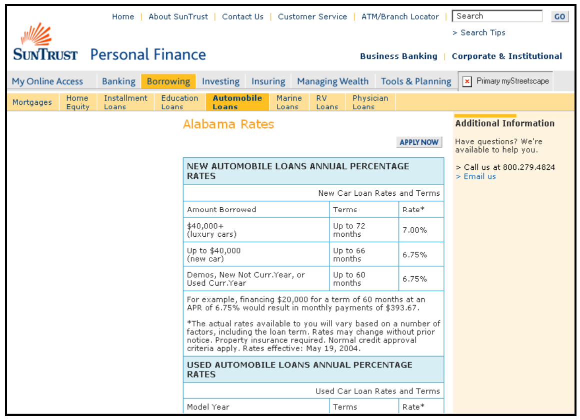
You can even change the job owner from this window. **NOTE: If you do this, you will no longer own the job.**

Warning: If you aren't certain what a field is or does, check with your eBusiness support team before making changes. You could irretrievably alter your workflow request.

59. Select the "**Save**" option from the bottom of this popup window.

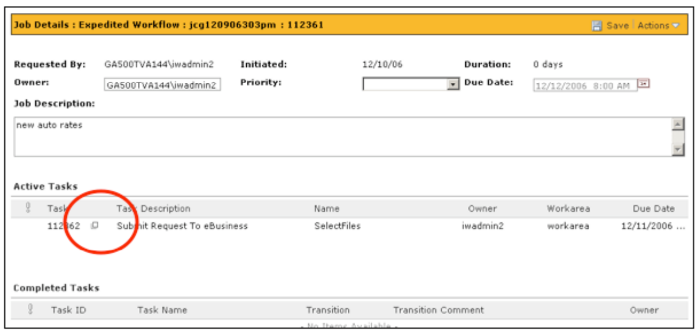
ADDING FILES TO THE JOB USING THE TASKS SCREEN

For this exercise, we're going to assume that our team has been asked to make modifications to the files that comprise the Personal / borrowing / automobile_loans / alabama page on SunTrust.com:

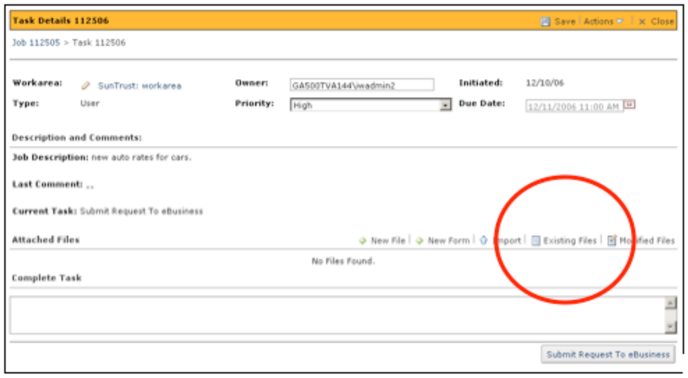


60. Return to the Workflow screen.

61. In the Workflow window, select the box icon next to the "Active Tasks" option.



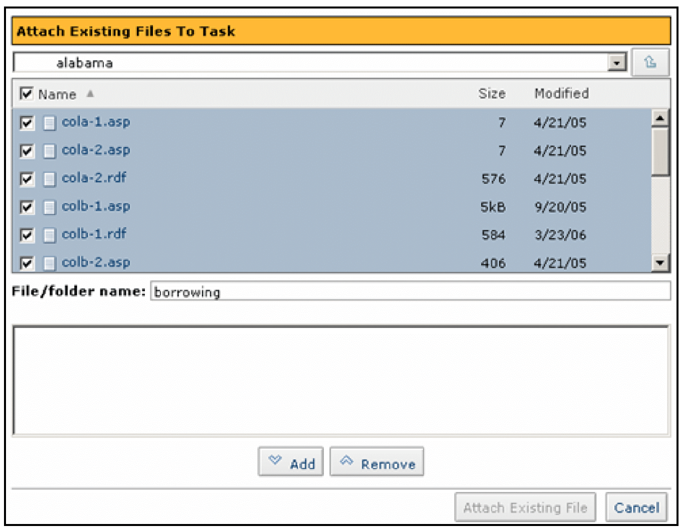
62. In the resulting pop up window, click the "Existing Files" option.



The “Attach Existing Files to Task” pop up window appears.

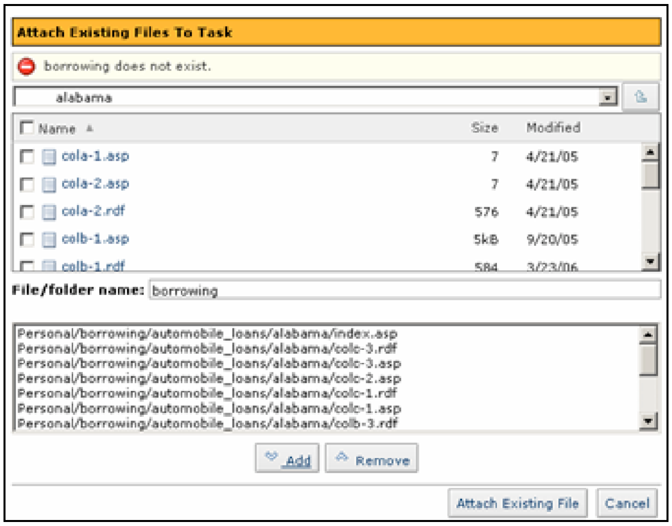
63. Navigate to and select the checkmarks to the left of the documents in the following directory of files:

`Personal / Borrowing / Auto Loans / Alabama`



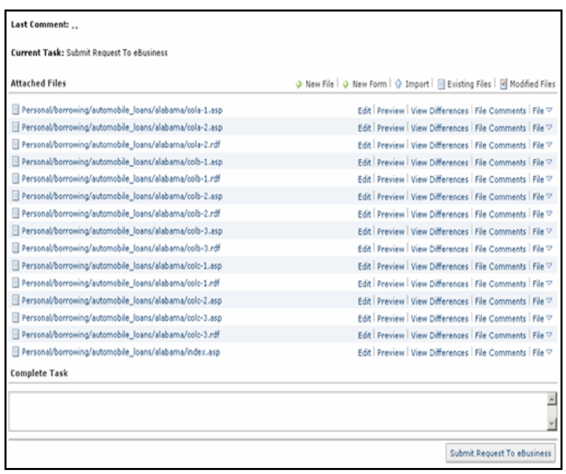
64. Once you've selected all the files, click the Add button at the bottom of this window.

    You should see your list of files added to the bottom pane in this pop up window.



65. Click the "Attach Existing File" button at the bottom left of the window. This will close the window.

    Now, your Task Details window should now look similar to the following:



66. You can use this same process to add or delete more files (even full directories) to the workflow.

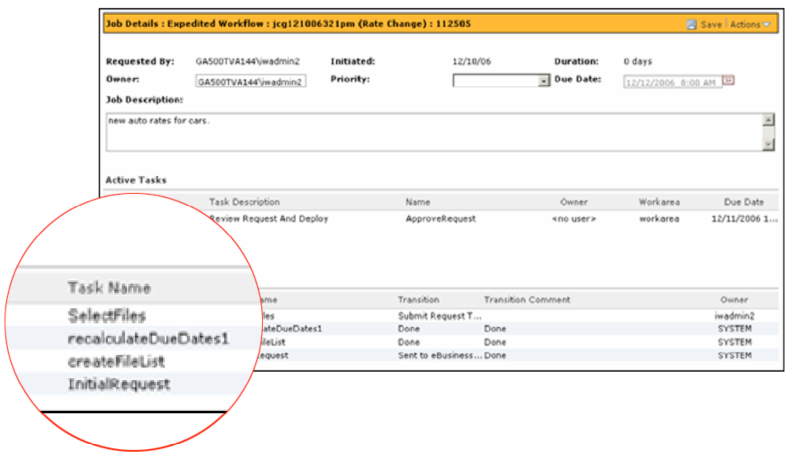
SUBMITTING THE EXPEDITED JOB TO THE EBUSINESS GROUP FOR RELEASE

Once the files are attached to the Job, we're ready to alert eBusiness to release the files to the QA (staging) server.

67. Click the "Submit Request to eBusiness" button at the bottom of the "Task Details" window.

68. To review the changes you've made to this task, select the job from the Job List window by clicking on the box next to your job number.

In the resulting Job Details window, you should see that the System has performed several automated tasks since your last interaction:



After eBusiness approves your request, the system will release an email to the first person/group on your Job's workflow list.

69. To review any of these tasks in detail, click the task number from within the Job Detail window.

RECAP

Now that we've completed Lesson Two, you should feel comfortable performing the following actions on your own:

- Understand and identify Routine and Expedited Workflows
- Create and revise an expedited workflow
- Add files to your workflow Job
- Submit your expedited workflow request to eBusiness
- Review the status of your workflow in progress

kdemange 12/9/06 2:34 PM
Comment: Is there a part of the tool that's called "Your Workflow Job"? Otherwise, small caps for consistency

LESSON THREE: CREATE A NON-COMPLIANCE WORKFLOW

UP FRONT: ABOUT THIS LESSON

PRE-REQUISITES

This lesson assumes…

- You've successfully completed *"Lesson Two: Create an Expedited Workflow"*
- You have a comfortable understanding of the creation, review, and submission processes for routine and expedited workflow jobs and tasks.

LESSON DETAILS

- This lesson will take 10-15 minutes in the classroom setting.
- At the end of this lesson, you should be able to perform the following tasks:
  - Demonstrate an understanding of the differences between routine, expedited, and non-compliance workflows
  - Create and revise a non-compliance workflow request
  - Add files to the non-compliance workflow
  - Submit your non-compliance workflow to eBusiness for release
  - Review the status of your workflows

kdemange 12/9/06 2:35 PM
Comment: Indent

ACCESSING TEAMSITE

70. Login to your Teamsite account.

71. Navigate to the following directory:

```
GA500TVQ144/default/main/portal/SunTrust/WORKAREA/Workarea
```

DISCUSSION: WHAT IS A NON-COMPLIANCE WORKFLOW?

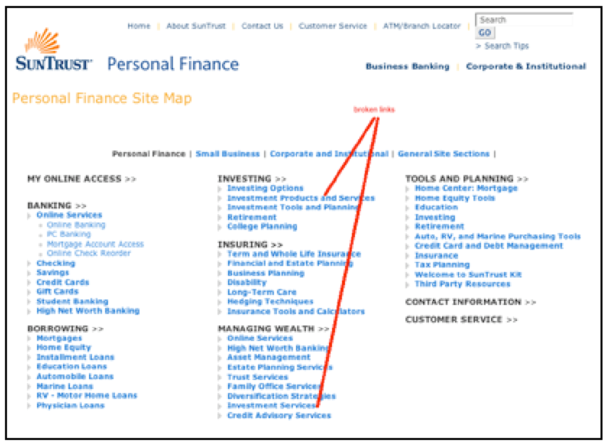
kdemange 12/9/06 2:36 PM
Comment: Straighten up arrows if possible

NON-COMPLIANCE EXAMPLES

- Basic typo
- Phone number change/correction
- Link updates

CREATING A NEW NON-COMPLIANCE WORKFLOW

For this scenario, our task is to correct a typo in the URL syntax of an item on our suntrust.com Site Map page. As this is technically a “broken” technical item on the site, we want this workflow to go through the system very quickly. And since the fix is coding – not content – we won’t need to go though legal or compliance to make the change.



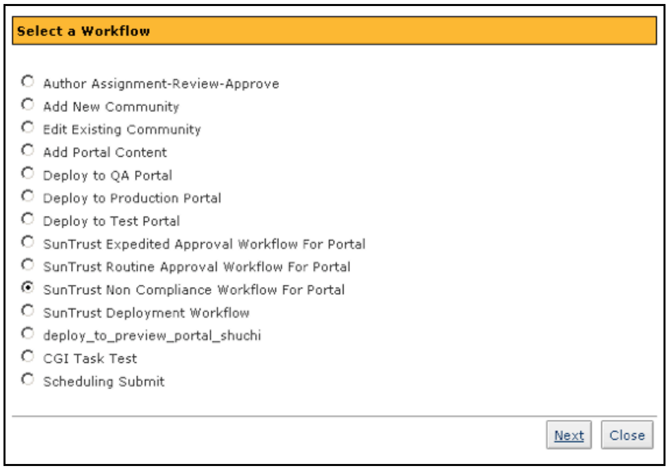
For this exercise, we’re going to revise some of the input we’ve added to the job in the previous windows.

72. Select “**New Job**” from the “Actions” pull down menu.

Your browser will display the following pop up window titled “Select a Workflow.”

For the purpose of this exercise, we’ll concentrate on the option labeled “SunTrust **Non-Compliance** Approval Workflow for Portal.”

73. Select the radio button next to “**SunTrust Non-Compliance Approval Workflow for Portal.”**



74. Click the “**Next**” button at the bottom of the window.

NON-COMPLIANCE WORKFLOW FIELDS IDENTIFIED

From this screen, our earlier exercises, and Appendix C: Non-Compliance Workflow Process Diagram, you should be able to determine the correct content for this window.

75. **Enter** the necessary information into the fields.

76. **Select** the “Start Non-Compliance Job” button.

REVIEWING AND REVISING A NON-COMPLIANCE WORKFLOW

For this exercise, we’re going to revise some of the input we’ve added to the job in the previous windows.

FIND YOUR JOB IN THE WORKFLOW JOB LIST QUEUE

77. **Click on the Workflow tab** now.

78. Select **“Jobs**” from the Workflow tab’s submenu.

79. Locate your job. Be sure to verify it is your job by checking the Owner column in the list window.

80. **Click on your job ONCE** to highlight it in the list window. You’ll notice that the lower half of the screen contains a preview pane of your job information along with some new options.

MAKE REVISIONS

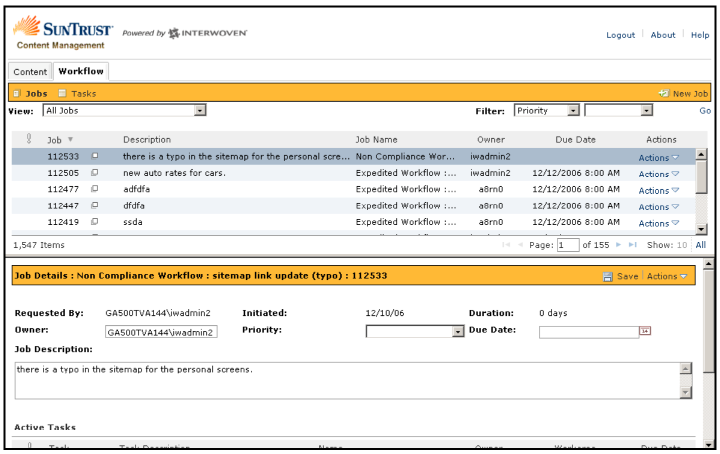
81. From the preview pane, change your job’s Priority by selecting the “Priority” pull down menu. Set the priority to “**0-Highest.**”

82. Select “**Save**” from the Upper Right corner of the preview pane.

83. Next, Click on the box icon to open the Job Detail window.

ADDING FILES TO THE JOB USING THE TASKS SCREEN

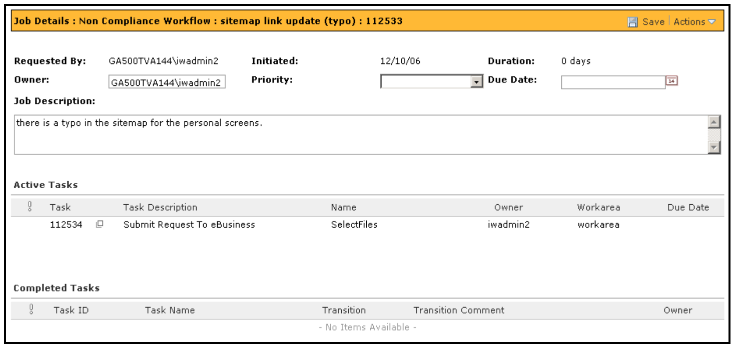
Your screen should look like the following example:



84. Locate your Job. Review the Owner column to be sure the Job you are selecting is yours.

85. Double Click the box icon next to your Job’s number.

You should see the Job Detail screen for your Non Compliance Workflow.



86. Now select the box icon beside the Task Description “Submit Request to eBusiness. This is the appropriate task that will allow you to add files to your new workflow.

    The “Task Details” pop up window will appear.

87. In this pop up window, click the “Existing Files” option.

    The “Attach Existing Files to Task” pop up window appears.

Recall that for this exercise, we’re going to assume that our team has been asked to make modifications to the files that comprise the **Site Map Pages on SunTrust.com:**

88. In the “Attach…” pop up window, navigate to the following directory of files:

    `Global /site_map/`

89. Add the files.

90. Click the “Attach Existing File” button at the bottom left of the window.

SUBMITTING THE NON-COMPLIANCE JOB TO THE EBUSINESS GROUP FOR RELEASE

Once the files are attached to the workflow, we’re ready to alert eBusiness to release the files to the QA (staging) server.

91. Click the “Submit Request to eBusiness” button at the bottom of the “Task Details” window.

RECAP

Now that we've completed Lesson Three, you should feel comfortable performing the following actions on your own:

- Understand and identify routine, expedited and non-compliance workflows
- Create and revise a non-compliance workflow
- Add files to your workflow job
- Submit your expedited workflow request to eBusiness
- Review the status of your workflow in progress

BREAK (15 MINUTES)

LESSON FOUR: ACTING AS A WORKFLOW PARTICIPANT

UP FRONT: ABOUT THIS LESSON

PRE-REQUISITES

This lesson assumes…

- You've successfully completed Lessons 1-3*: Create a Routine, Expedited,* and *Non-Compliance Workflows.*
- You have a comfortable understanding of the creation, review, and revision processes for workflow jobs and tasks.

LESSON DETAILS

- This lesson will take approximately 30 minutes in the classroom setting.
- Lesson will include short discussion segments (illustrated here in red) as well as hands-on work.
- At the end of this lesson, you should be able to perform the following tasks:
  - Recognize and access workflows and participation requests via their various system-generated emails
  - Recognize and access workflows from within the Teamsite interface
  - Approve a workflow to its next logical stage
  - Rejecting a workflow
  - Cancel a workflow
  - Demonstrate an understanding of participant roles

kdemange 12/9/06 2:44 PM
Comment: Indent

REVIEW: THE WORKFLOW PROCESS

- Recall that in Lesson One we determined that most workflows aren't established until *after* the files have been created and/or modified by the creative staff.
- The creative staff member – acting on behalf of a job "requester" - assigns the files and submits the workflow request to eBusiness.
- The System alerts eBusiness that a job is pending approval.
- eBusiness, in turn, approves ("releases") the workflow request.
- The System performs several actions including sending an

email alert to your job's initial participant.

ACCESSING YOUR TEAMSITE EMAILS

In our earlier lessons, we sent several workflow requests to eBusiness to approve: – one routine, one expedited, and one non-compliance workflow.

During the break, our "eBusiness Liaison" was able to approve all our workflow requests.

His approval kicks off a small series of System actions including an email that gets sent to the next reviewer on your lists.

VIEWING YOUR WORKFLOW JOB REQUESTS IN EMAIL

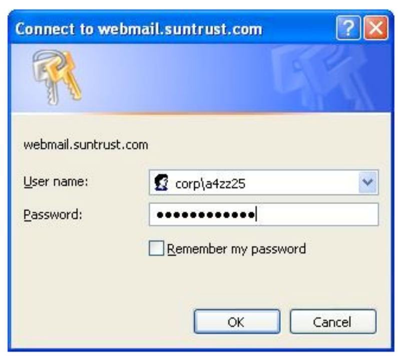
92. Open a new Web browser window by selecting "New> Window" from your browser's File menu.

93. Access the SunTrust Webmail site by entering the URL:

`http://webmail.suntrust.com`

94. Click the "Login to Webmail" button.

95. In the pop up menu, enter your SunTrust RACFID account and password using the appropriate syntax similar to that shown in the attached example:



96. Once you successfully access your SunTrust email account, you should see several emails with subject lines similar to the following:

You've been assigned Approval Task (eBusiness Initial Approval Task) (as part of Job 110725)	Thu 12/7/2006 3:04 PM
Please deploy the following files (as part of Job 110287) to the production server	Thu 12/7/2006 1:15 AM
Teamsite Workflow Approval Email (as part of Job 109796)	**Wed 12/6/2006 9:09 PM**
You've been assigned Teamsite Review Task (Compliance Review Task) (as part of Job 109796)	**Wed 12/6/2006 9:05 PM**
Teamsite Workflow Approval Email (as part of Job 109767)	**Wed 12/6/2006 5:54 PM**

These are various message subjects sent to you from the Teamsite system.

REVIEWING YOUR WORKFLOW REQUEST EMAIL

97. Open the earliest-sent request you received from today's class.

EMAIL FIELDS IDENTIFIED

Subject: You've been assigned QA Review Task as part of Job 112880

Dear James Gray ,

Please access/review the following file link(s) by 12/12/2006 9:57 AM. Comments from other tasks in the job can be reviewed at the end of this message.

Job Name : Business Banking Advisory Center
Job Created Date :
Teamsite Workarea : /default/main/Portal/SunTrust/WORKAREA/workarea
Job Description: testing rate change

Please click here to complete the review task.
Following are the list of files that have been modified

- Global\contact_us\business_banking_advisory_center\index.asp
- Global\contact_us\business_banking_advisory_center\suntrust_business_phone.pdf

PREVIEW/REVIEW THE ATTACHED FILES FROM YOUR WORKFLOW EMAIL

98. Click the link "Please click here to complete the task."

    Your browser should open a new window displaying the login screen for the SunTrust CMS Environment.

99. Login using your information as instructed in Lesson One.

    You should be taken directly to the active Task Detail screen for this Job/Task.

Let's set this screen aside for a moment and review another aspect of that email message.

100. Using your mouse, toggle back to your open email message.

101. Now, click on the first bulleted item under the heading "The following files have been modified:"

Your browser will launch another window displaying the selected Web page as it appears on the SunTrust CMS' QA server.

These are only two of the many ways you can review and test the email's attached file(s) in your CMS review (QA) environment. They are the least complicated, though.

102. Now, let's toggle back to the earlier browser window we generated from this email message – the one showing our Task Details.

103. Note (but don't click) the "Take Ownership" button at the bottom of this window.

ACCESSING WORKFLOW REQUESTS VIA THE TEAMSITE INTERFACE

You can access and review your Teamsite jobs and tasks without first going through your SunTrust mail account.

104. In Teamsite, click on the "Workflows" tab. You will see the Workflow window.

105. Click the "**Jobs**" option on the Workflows menu bar.

106. Using the skills you learned in Lesson One, navigate among the various Job Lists to find and open the Job Detail that contains your submitted routine workflow request.

107. In the Active Tasks list in that Job Detail window, select the Task described as QA Review.

Note how much less user friendly this window is.

Can you find (but don't click!) the "Take Ownership" button?

TAKING OWNERSHIP OF A REVIEW

Recall that the QA Review is the first review "stop" along your Workflow's path to the production site. Once the eBusiness team approves your request for the workflow, the system moves the attached files and alerts your QA reviewer via email.

(Example ppt 5 screen 4)

kdemange 12/9/06 2:49 PM
Comment: Insert content

You have to "Take" ownership even if you're the only person the creator selected within the task option in the Workflow creation pop up.

108. Click "Take" from the center of the Task Detail. The "Take" option will disappear and the Approve and Reject options will become active.

YOUR TASK: APPROVE A WORKFLOW

That phrase is only slightly misleading. You *are* going to "approve" the Routine workflow we created this morning … but you're only approving it *past your stage* in the process – not completely to the live site.

Recall that the process flow for a Routine Workflow contains several approval steps. Ultimately, however, even a completely approved workflow cannot go to the live site until after the eBusiness team physically deploys the file(s) to the production server.

We're going to perform the initial task of reviewing/approving our files from the QA Review stage in the workflow process.

109. If you aren't already there, navigate to this new active task window now.

     Let's assume you've gone into the preview screens and checked the files – feeling they're OK to send further through the approval process.

110. Under the Complete Task heading at the bottom of this screen, add the phrase:

```
I approve these files.
```

111. Now, scroll to the bottom of the window (note the "Take Ownership" button is no longer available).

112. Select the "Approve" button.

     This Task Details screen will close – indicating you've successfully approved the QA Review.

The System will note your comments, and move to the next stage. At this time the next person(s) in the process will receive a similar email alert. With some minor differences, they will now perform their approvals just as you have.

113. Optional task: Take five minutes now to review your email for other "Routine Workflow…" alerts. Note how the legal and compliance alerts might provide different options.

REJECTING A WORKFLOW

Now let's look at what happens when a workflow is rejected.

114. In your email in box, seek out the "Expedited Workflow…" alert we generated during Lesson 2.

115. Using the functions you learned thus far in Lesson Four, provide a comment such as:

```
"Please revise suntrust to SunTrust
in paragraph four."
```

Whenever you reject a workflow, make sure you give some level of information so that the PEOPLE receiving that rejection email understand why.

116. "Reject" this workflow now.

117. Toggle back to your email window and (if necessary) refresh your screen until a subject line such as "Teamsite workflow Task Rejection…"

118. Open this email now.

Note that this email contains the comment that you added while wearing your "QA" hat.

119. Now, toggle to your Teamsite window.

120. Locate this latest Job or Task.

Note that you're workflow is back at the "submit to eBusiness" stage. This will allow you to update the content and re-submit without having to re-create the workflow from scratch.

CANCELING A WORKFLOW

Sometimes, workflows don't make it to the live site simply because plans change – the workflow becomes unnecessary.

121. As you learned in Lesson One, navigate Teamsite to your Job List window.

122. Find your job pertaining to the routine workflow we created in Lesson One.

123. Select the “Action” pull down menu from the far right column on the job list.

124. Select “End Job”.

After a moment, the End Job pop up alert with appear and offer you a chance to reconsider this request.

125. Select “End Job” from the pop up window.

After a moment, the alert window will close and your Job will be removed from the Job List queue.

DISCUSSION: HOW DO PARTICIPANT INTERACTIONS AFFECT THE WORKFLOW?

PRE-DETERMINED TIME LIMITS

Routine Workflow Jobs:

- Change each time a participant submits their work.
- Are greatly affected by “rejected” tasks.
- Can be reset by the Job initiator
- Can be reset by eBusiness team member

kdemange 12/9/06 2:53 PM
Comment: Missing content?

RECAP

Now that we’ve completed Lesson Four, you should feel comfortable performing the following actions on your own:

- Recognize and access various system-generated emails
- Access Teamsite via email links
- Access Workflow requests via Teamsite Interface
- Approve a workflow to its next logical stage
- Reject a workflow and understand the ramifications of the rejected workflow process
- Cancel a workflow
- Demonstrate an understanding of the various steps and

roles performed by workflow participants.

LESSON FIVE: THE WORKFLOW REPORTING TOOL

UP FRONT: ABOUT THIS LESSON

PRE-REQUISITES

This lesson assumes…

- You've successfully completed an introduction to the SunTrust Teamsite environment.
- You have a comfortable understanding of the roles and processes that combine to create the Teamsite workflow system

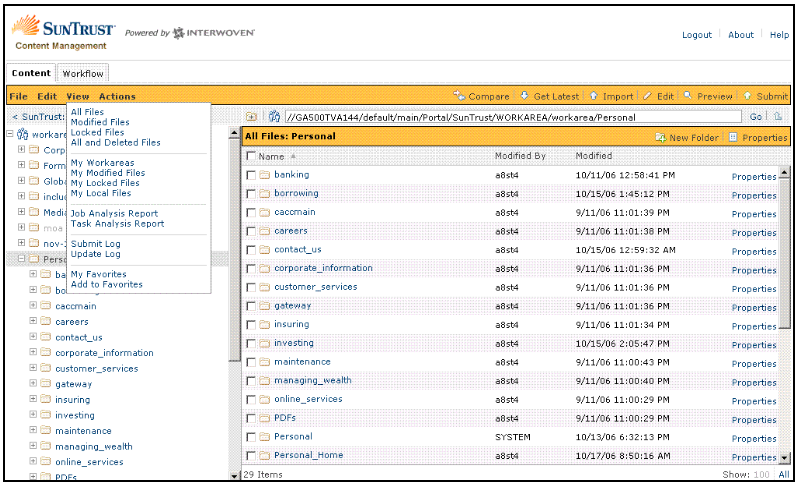
LESSON DETAILS

- This lesson will take approximately 15 minutes in the classroom setting.
- Lesson will include short discussion segments (illustrated here in red) as well as hands-on work.
- At the end of this lesson, you should be able to perform the following tasks:
- Create simple, single-use workflow reports based on dates, roles, etc.
- Read and manipulate report data

ACCESSING THE WORKFLOW JOB REPORTING ENVIRONMENT IN TEAMSITE

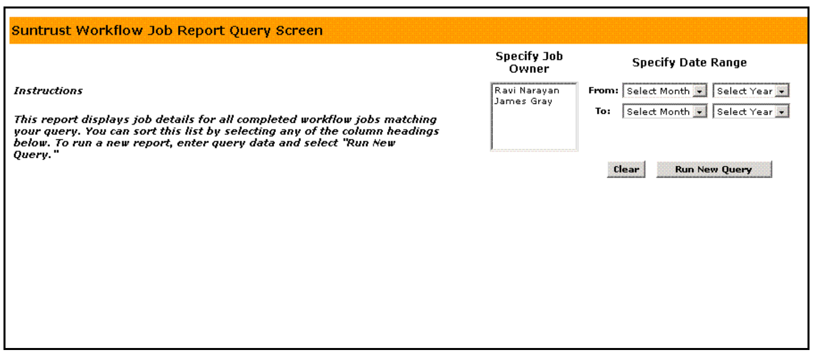
kdemange 12/9/06 2:54 PM
Comment: Add content

126. Login to Teamsite.



127. From the Content Tab window, select “View” > “Job Analysis Report.”

You should see a screen similar to the following “SunTrust Workflow Job Report Query Screen:”

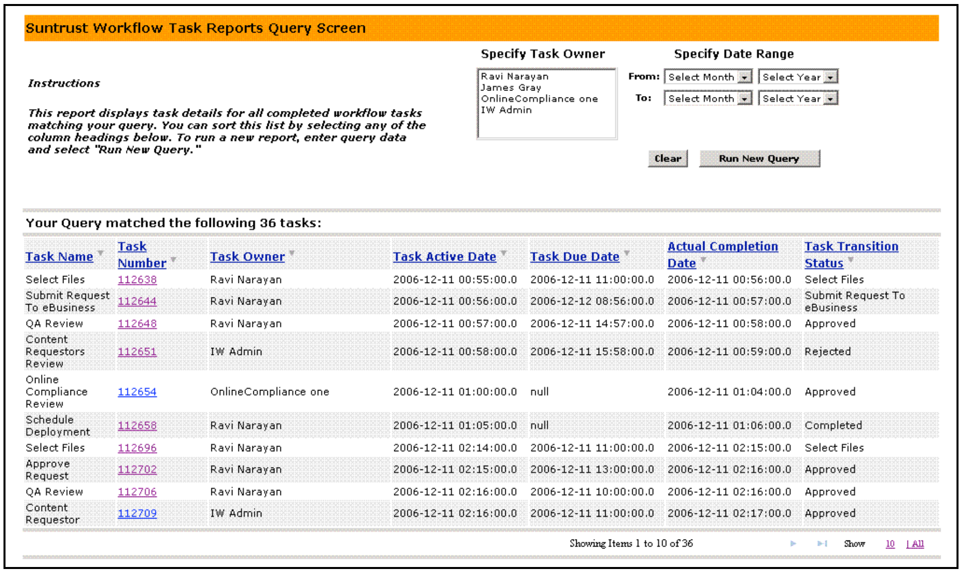


RUNNING A BASIC QUERY

A basic query report displays the complete list of **all** Jobs to have been completed since the time the System began recording Jobs data.

128. To run a basic query, select “Run New Query.”
Note: You should not select or alter any of the screen’s selections before running this query.

The resulting screen will display each completed Job that has been recorded in order of actual "Task Active Date."



Suntrust Workflow Task Reports Query Screen

Instructions

This report displays task details for all completed workflow tasks matching your query. You can sort this list by selecting any of the column headings below. To run a new report, enter query data and select "Run New Query."

Specify Task Owner

Ravi Narayan
James Gray
OnlineCompliance one
IW Admin

Specify Date Range

From: Select Month Select Year

To: Select Month Select Year

Clear Run New Query

Your Query matched the following 36 tasks:

Task Name	Task Number	Task Owner	Task Active Date	Task Due Date	Actual Completion Date	Task Transition Status
Select Files	112638	Ravi Narayan	2006-12-11 00:55:00.0	2006-12-11 11:00:00.0	2006-12-11 00:56:00.0	Select Files
Submit Request To eBusiness	112644	Ravi Narayan	2006-12-11 00:56:00.0	2006-12-12 08:56:00.0	2006-12-11 00:57:00.0	Submit Request To eBusiness
QA Review	112648	Ravi Narayan	2006-12-11 00:57:00.0	2006-12-11 14:57:00.0	2006-12-11 00:58:00.0	Approved
Content Requestors Review	112651	IW Admin	2006-12-11 00:58:00.0	2006-12-11 15:58:00.0	2006-12-11 00:59:00.0	Rejected
Online Compliance Review	112654	OnlineCompliance one	2006-12-11 01:00:00.0	null	2006-12-11 01:04:00.0	Approved
Schedule Deployment	112658	Ravi Narayan	2006-12-11 01:05:00.0	null	2006-12-11 01:06:00.0	Completed
Select Files	112696	Ravi Narayan	2006-12-11 02:14:00.0	2006-12-11 11:00:00.0	2006-12-11 02:15:00.0	Select Files
Approve Request	112702	Ravi Narayan	2006-12-11 02:15:00.0	2006-12-11 13:00:00.0	2006-12-11 02:16:00.0	Approved
QA Review	112706	Ravi Narayan	2006-12-11 02:16:00.0	2006-12-11 10:00:00.0	2006-12-11 02:16:00.0	Approved
Content Requestor	112709	IW Admin	2006-12-11 02:16:00.0	2006-12-11 11:00:00.0	2006-12-11 02:17:00.0	Approved

Showing Items 1 to 10 of 36 Show 10 | All

JOB REPORT DATA

Report data uses much the same criteria as the creation of a workflow Job. However, a few additional columns of information also appear:

- **Actual Completion Date**: This column, combined with data from the Task Active and Task Due Date columns, provides information that can be used to tabulate man hours and capacities.
- **Task Transition Status**: This column provides current statuses and can be used to record trends.

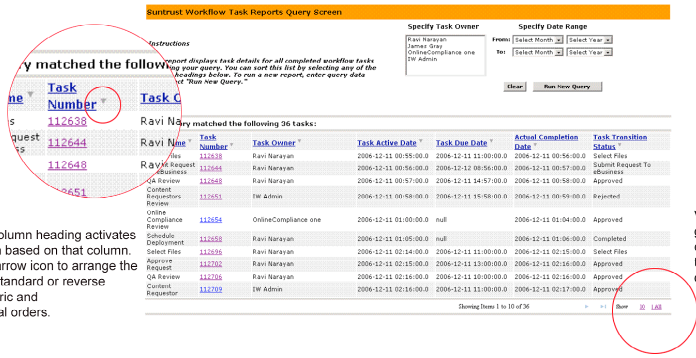
SORTING JOB DATA

There are several ways to sort data within the Reporting functions of SunTrust's workflow environment.

- **Specify Task Owner** – allows you to run reports specific to a person or a sub-group of people.
- **Specify Date Range** – Used alone or combined with the "Specify Task Owner" settings, this option allows you to further categorize information based on a specific year/month range.
- **Column Toggles** – Each of the report columns can be

toggled to list in alphabetical/chronological order or reverse order.

•



Clicking a column heading activates organization based on that column. Toggle the arrow icon to arrange the column by standard or reverse alpha-numeric and chronological orders.

View incrementally by groups of 10, or select "All" to scroll through complete data sets.

•

RECAP

Now that we've completed Lesson Four, you should feel comfortable performing the following actions on your own:

- Create simple, single use workflow reports based on dates, roles, etc.
- Read and manipulate report data
- Create a recurring report
- Download/Save a report to your workstation
- Email a report to a colleague
- Use a report received via email

CLASS RECAP: THE SUNTRUST WORKFLOW TOOL

WHAT YOU LEARNED TODAY

Now that we've completed this class, you should feel comfortable performing the following actions on your own:

- Demonstrating knowledge of the types and purposes of workflows
- Creating, reviewing, and revising workflows
- Receiving and participating in workflows via email and Teamsite interface
- Using the Workflow Reporting tools

OPTIONAL LESSON SIX: NON-STANDARD WORKFLOWS

CREATING A WORKFLOW THAT HAS NO COMMUNITY

You should recall from your CMS training that whenever you create a new suntrust.com page of content, you first have to request the creation of the new community. This not only helps you by providing a location to build your pages, it helps the System during the workflow creation process.

During workflow creation, the System ensures the necessary community exists at the time your workflow request is submitted to eBusiness for approval.

- This prevents the risk of your new content being sent to a location that has no URL once it reaches the production server.
- It also provides the System with a location to send non-CMS users (such as the legal and compliance teams) to preview your non-community files during their approval process.

But some site changes may not require additions or changes to any of the suntrust.com communities. So when you create a workflow in which no unique community content is affected, the System needs your help determining where to send the content – and its reviewers – so that it can be tested.

WORKFLOWS FOR MICROSITE CHANGES

This exercise assumes you are familiar with the “layout” of the SunTrust online system and its various Web sites.

In this scenario, we’re going to make changes to the SunTrust NAPA site.

129. From the Content tab, let’s **create a New Job**.

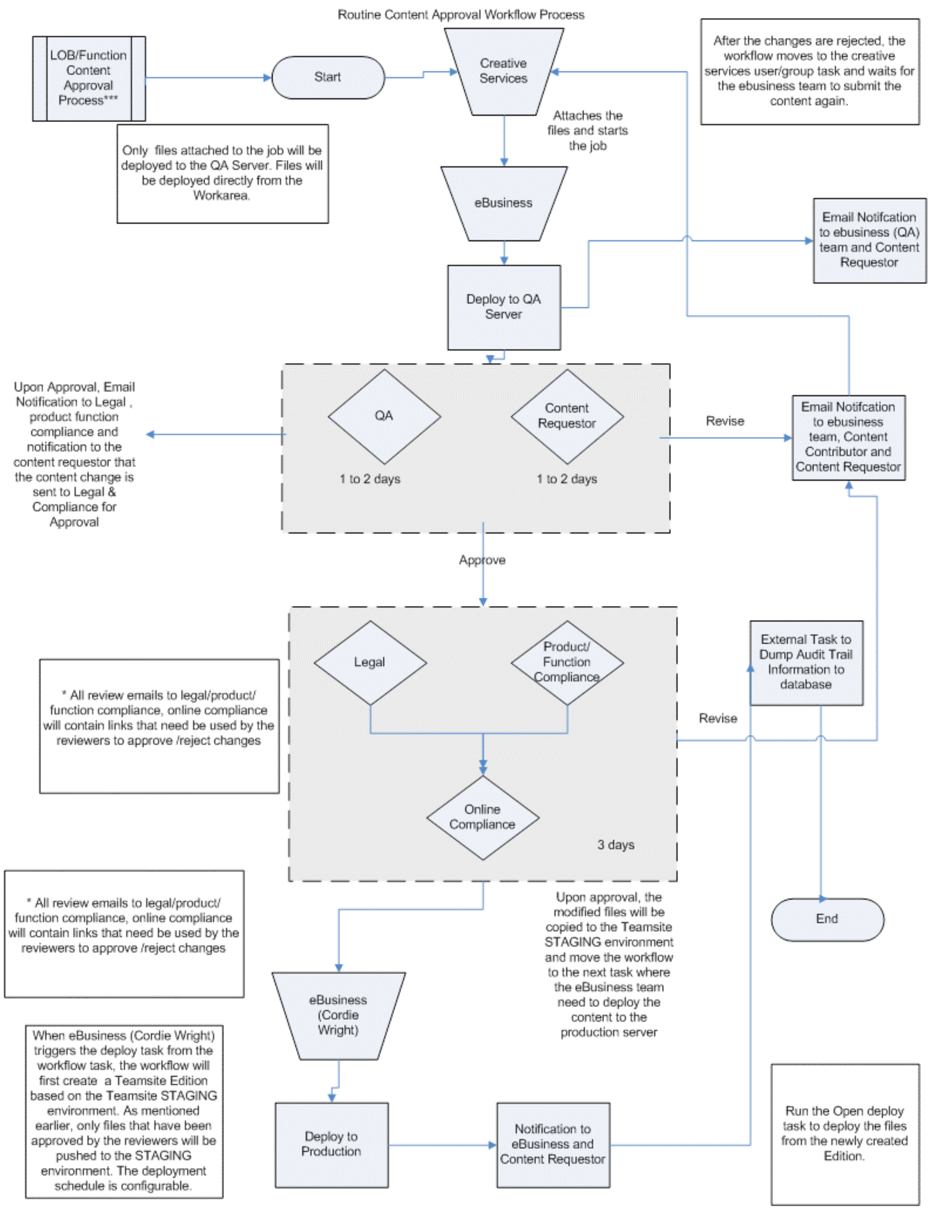
130. Make the Job a **Routine Workflow** and complete the request form as you might any time you’re making such changes.

131. Click “**Start Routine Job**.”

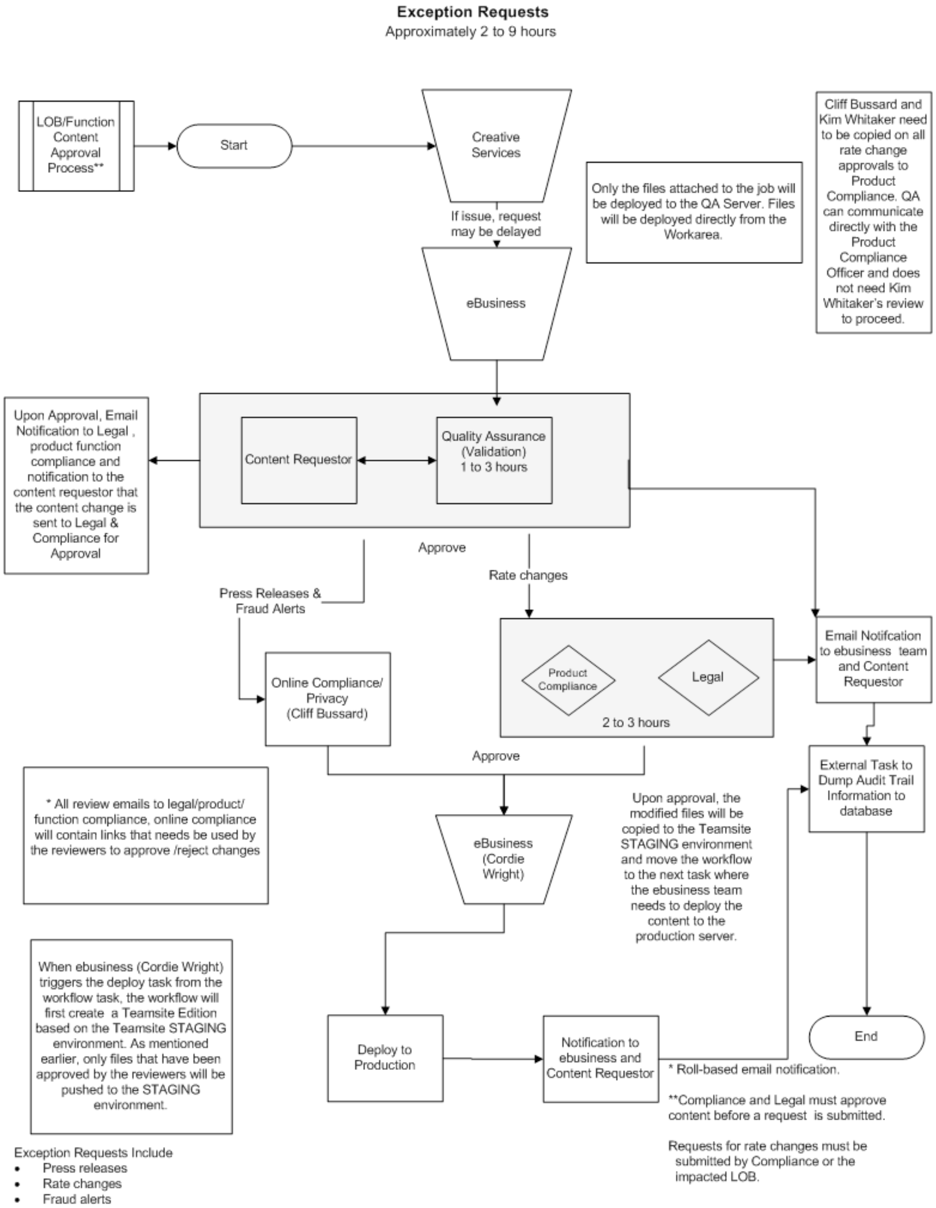
132. Next, select the **Workflows** Tab.

133. Using the skills you learned in Lessons 1-3, navigate to the “**Attach Files to Routine Workflow**” window.

APPENDIX A: ROUTINE WORKFLOW PROCESS DIAGRAM



APPENDIX B: EXPEDITED WORKFLOW PROCESS DIAGRAM



APPENDIX C: NON-COMPLIANCE WORKFLOW PROCESS DIAGRAM