ABSTRACT
This user guide provides an in-depth introduction to LSU Business Process Management (BPM). It also discusses the characteristics of the LSU BPM Portal, which is the location for business process participants to interact with various requests.

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What is Business Process Management (BPM)?

LSU BPM refers to the Business Process Management information technology tool that LSU has adopted to promote business efficiency and effectiveness by transforming manual, paper processes into automated, electronic processes. These new web-based processes will be utilized by various members of the LSU community and will include automatic routing through the appropriate approval processes as prescribed by University, State and Federal policies. Most LSU BPM processes will be initiated by accessing the specific process’s link under the appropriate group heading on the left-hand side of the myLSU desktop (ex. “Tuition Exemption Request” under “Employee Resources”). Users can monitor the status of their items or view a list of items they must action by accessing the LSU BPM Portal.

Accessing LSU BPM Portal

The LSU BPM portal is accessible via a link located at the top left corner of the myLSU desktop positioned above the Search box. Once a user clicks the LSU BPM link, they will enter the main workspace area of the LSU BPM Portal.

LSU BPM Portal Sections
Please refer to Figure 2 above. Once in the LSU BPM Portal, you will notice two main sections: “To Do List” and “Watch List”. The To Do List contains all requests for which the person visiting the portal needs to action with either an approval or disapproval decision. The section contains the Process Name of the request, the Stage name for the stage in which the request is sitting, and the Start Date the request was initiated. There is also a link in underlined blue font named “Process Request” which, once clicked, allows users to view the request in order to approve or disapprove it.

The second main section is entitled “Watch List” and contains all requests for which the person visiting the portal has either originally initiated, previously approved, or been added to for viewing purposes. These requests can be clicked on in order to view their progress if still in process or to view the final details if the request is completed or cancelled. Requests will remain on the Watch List for 90 days after the request is completed or cancelled and will then subsequently be archived and removed from the list.

Filtering Options

The LSU BPM Portal To Do List and Watch List both have a filtering feature built in to allow a user to search for a specific request or set of requests. Since the portal will include several different University processes and a given user could potentially have several requests in their To Do List and/or Watch List, this built-in feature can be quite helpful. In order to filter either list, select the field in which to search from the dropdown box next to “Quick Search:” or leave the box set to “All fields” to search in all fields shown. Then, type the text for which you would like to search in the next box and hit the green refresh icon to conduct the search.

See Figure 3 below. This figure illustrates a search conducted on the “Process Name” field for the text “tuition exemption”. Note that only those requests containing the desired text will show with the found matching text highlighted in yellow.
Sorting Options

Users can click on the header of any column in both the To Do List and Watch List to sort the data in the columns. Clicking multiple times will switch the sort for the column from ascending to descending.

Conclusion

Please note that requests will remain on the To Do List of a user until it is actioned by one of the potentially multiple users eligible to fulfill the current stage’s approval requirement. In that case, it would be on multiple users’ To Do Lists. However, if only one user is eligible to action a request to advance it to the next stage, then the request will remain on that user’s To Do List until he/she actions the item. The user(s) will receive reminder emails once every business day until the item is actioned and removed from the To Do List.

If a user is “watching” an item and therefore has the item on their Watch List, then the request will remain on the user’s Watch List for 90 days. At that point, the request will be archived and removed from the user’s Watch List. No reminders are sent to users for items on the Watch List.