“New Organization Request” in 3 Easy Steps

Workflow Approver Quick Reference Guide

Revised 12/11/07

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1 Workflow Terminology

**Workflow** – Workflow is a tool that is used to automate business processes and electronically route the right information to the right people at the right time. Workflow users are notified of pending work, which helps information move through the review/approval process more quickly.

**Business process map** – a graphical representation of a business process that the workflow product uses to forward activities to the appropriate performers in a specific, defined path.

**Workflow instance** – A copy or “instance” of a business process map to be used for an individual transaction. Since many staff will be creating workflow instances from the same business process map, it is recommended that users create unique, transaction-specific names for their instances.

For example, a student will be given a tuition grant authorization (TGA) for the Fall 2007 semester. A good name for the workflow transaction would be “TGA – John Smith – 200770”. Using this naming convention makes it easier for both the user and other performers to search for and keep track of specific workflow instances, since all TGA transactions for a given student will group together when sorted by transaction name.

**Initiator** – The person who creates and starts the workflow instance and who will be contacted when the workflow is completed.

**Role** – A role indicates the group is responsible for completing an activity in a business process map (Budget Office Approver, Gen Accounting Staff, Responsible Person, etc.). One role is assigned to each activity and specific individuals are added to each role.

**Performer** – The person (or business office) that completes an activity in a business process map.

**Approve** – The action selected by a performer to show they approve of the transaction. Approving a transaction will move it on to the next performer.

**Reject** – The action selected by a performer if they want to cancel the transaction. The transaction cannot be restarted once it is rejected.

**Return for Rework** – The action selected by the performer if they need to send a transaction back to be edited and re-approved by all previous performers.
2 Step One: Log into Banner Workflow

In Internet Explorer, enter the url: https://patriotweb.gmu.edu/admin. Then click on the “Workflow” link.

At the login screen, enter your email user name (e.g., cmcginn2). The password depends on whether you have access to e-Print/Internet Native Banner (INB). If you have e-Print/INB access, use your e-Print/INB password. Otherwise, use your six-digit Banner pin.
The user’s inbox is displayed, containing all workflow instances that require the approver’s attention. Select a workflow transaction from the worklist to review and approve.
3 Step Two: Review Transaction information

The transaction information will be displayed. The information displayed will be slightly different for each type of approver (optional approver, department approver, division approver, additional approver). A sample page is shown below. The approver can edit all of the fields, except for the ones that are grayed-out (read-only). Required fields are prefaced with an asterisk.

New Organization Request – Optional Approver

<table>
<thead>
<tr>
<th>TRANSACTION INFORMATION:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Approval Status:</td>
<td>Pending</td>
</tr>
<tr>
<td>Last Review Date:</td>
<td></td>
</tr>
<tr>
<td>Last Reviewed By:</td>
<td></td>
</tr>
<tr>
<td>Last Reviewer Action:</td>
<td></td>
</tr>
<tr>
<td>Last Reviewer’s Comments:</td>
<td></td>
</tr>
<tr>
<td>Date Initiated:</td>
<td>05/05/2005, 09:47 AM</td>
</tr>
<tr>
<td>Initiator Submit/Resubmit Date:</td>
<td>05/05/2005, 09:51 AM</td>
</tr>
<tr>
<td>Initiator Name:</td>
<td>Gerri Nickle</td>
</tr>
<tr>
<td>Initiator Organization:</td>
<td>Fiscal Services</td>
</tr>
<tr>
<td>Initiator Comments:</td>
<td>This is the new org we discuss</td>
</tr>
</tbody>
</table>

| Optional Approver Name:  | Yolanda Tamayo |
| Optional Approver Username: | ytamayo |
| Responsible Person Name: | Barbara Doane |
| Responsible Person Username: | bdoane |
| Required Resp Person Approval?: | Yes |
| Responsible Person MSN:  | 1B5 |
| Dean/Director Name:      | Beth Brock |
| Dean/Director Username:  | ebrock |
| Requires Dean/Director Approval: | Yes |

<table>
<thead>
<tr>
<th>NEW ORGANIZATION INFORMATION:</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Organization Title:</td>
</tr>
</tbody>
</table>
**New Organization Description/Purpose:** Teach staff how to use workflow

**Predecessor (Roll up) Orgn Code:** 12345

**Give organization access to (Name and Username):** Linda Hatcher (lhatcher)

**Reconciler Name (if different from Resp Person):** Gerri Nickle

**Reconciler Username:** gnickle

**FUNDING INFORMATION:**
- **Activity supported by own revenue?** Yes
- **Will orgn require creation of new perm positions?** Yes
- **Non permanent positions?** Yes

**Source if moving funds from another orgn:**
- **From organization:** 55555
- **From account:** 44444
- **Amount to be moved:** 300.00

**OSP OFFICE ONLY:**
- **Index:** NA
- **Predecessor Fund:** NA
- **Fund:** NA
- **Program:** NA
- **Campus:** NA

**APPROVER INFORMATION:**
- **Optional Approver Approval** *
  - Approve
  - Return to Initiator for Rework
  - Reject

**Optional Approver Comments:** NONE

Complete | Save & Close | Cancel
4 Step Three: Choose an Action

When finished reviewing, the approver chooses an action: Approve, Reject, or Return for Rework. Include a comment to justify the action or to communicate with the next approver.

Either continue on to the next transaction in the inbox or exit the application.

That’s it!! If you have any questions, problems, or comments please contact Carol McGinnis at cmcginn2@gmu.edu or (703) 993-2588.