

Initiating a “Change Org Title” Workflow in 4 Easy Steps

Workflow Initiator’s Quick Reference Guide

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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.

1 Step One: Log into Banner Workflow

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

GEORGE MASON UNIVERSITY

ADMINISTRATIVE SYSTEMS

Production
Patriot Web Self Service

Internet Native Banner
Warning: Duplicate G numbers may be present in Production. Please read an **Important Message** before accessing Production.

> For Windows Users
If you are a first time Windows user to the Internet Native Banner Interface, please read the **Oracle JInitiator Download Information** and install the JInitiator software. This software is required for you to be able to login above.

> For Mac Users
If you are a first time Mac user to the Internet Native Banner Interface, please read the **Banner and the Mac Information** document to verify whether the requirements for access have been met.

Customer Service
- Patriot Web Alerts
- Report a Production Problem (Banner or e-Print)

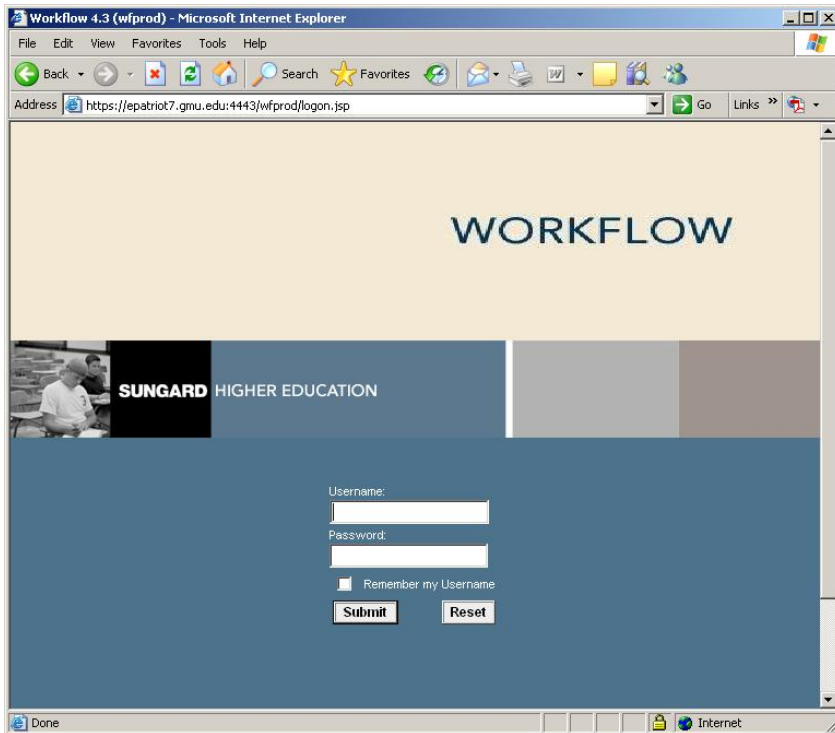
Reporting
- Discoverer Viewer
- e-Print Reports
- Oracle Reports

Other Applications
- Foundation Accounts System
- Pooled Position Lookup Form
- WorkFlow

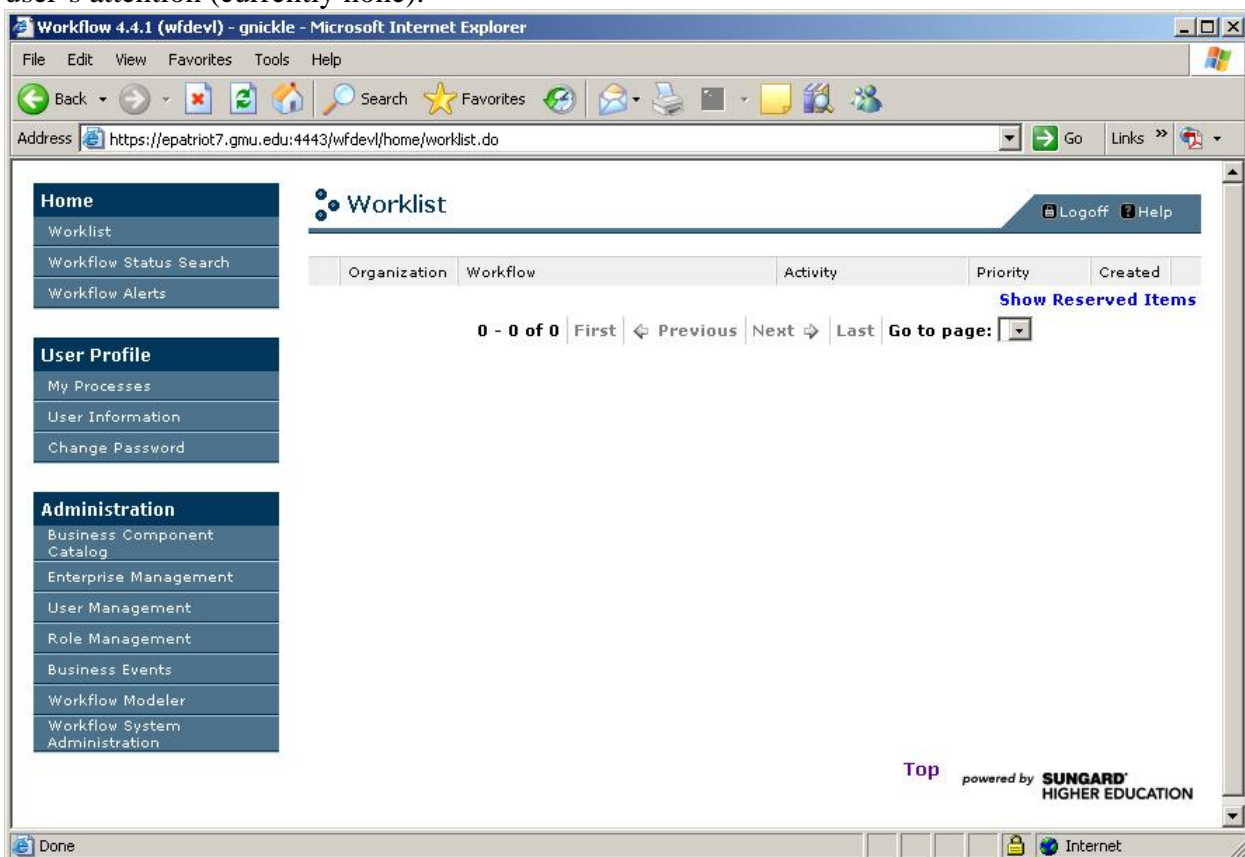
Resources
- Data Standards Document (pdf)
- Data Warehouse Information
- Printer Installation Procedure

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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.

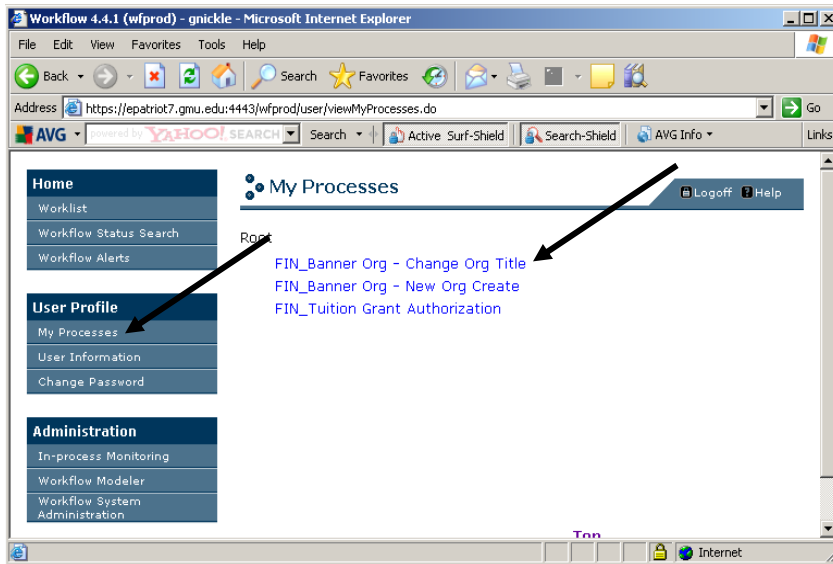


The user's inbox is displayed, which contains the "Worklist" of all workflow instances that require the user's attention (currently none).

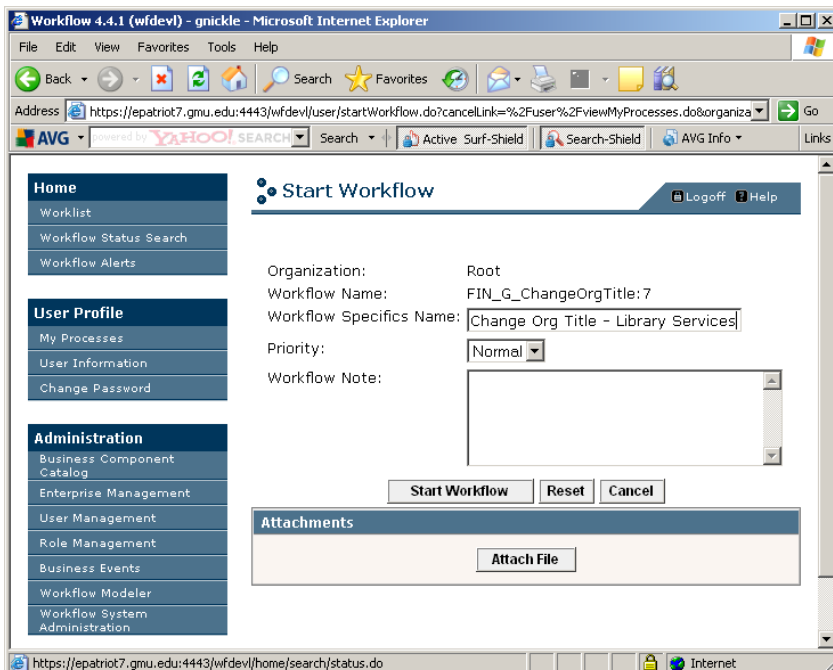


2 Step Two: Create and start a workflow instance

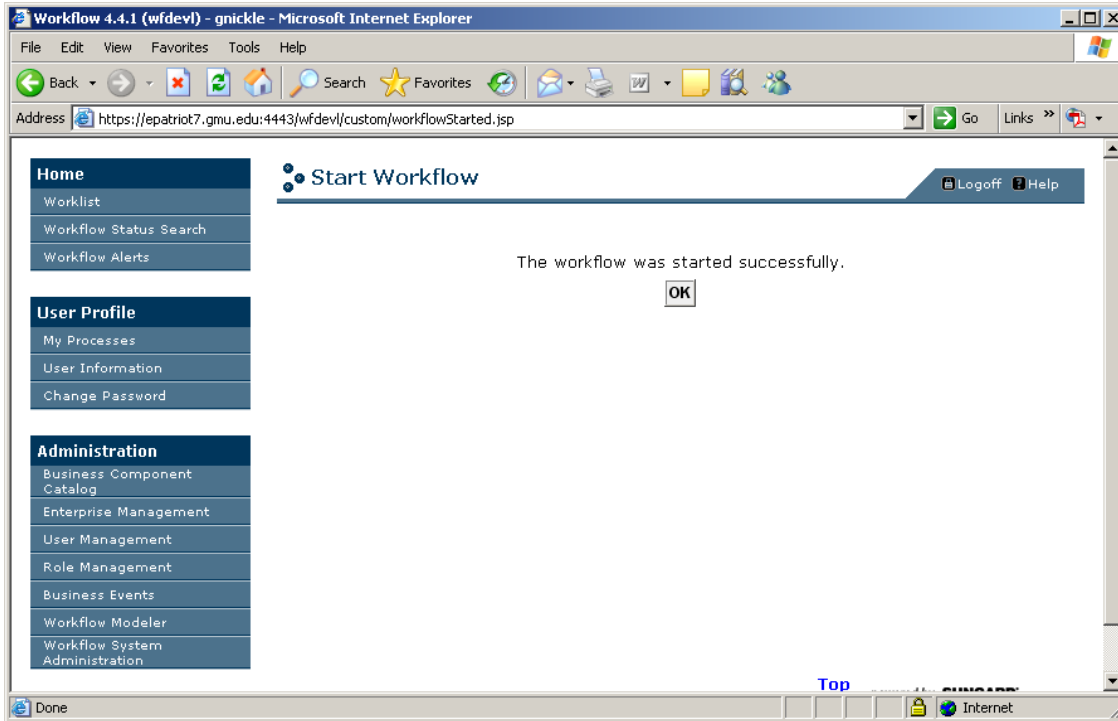
To start a workflow transaction, click on the “My Processes” link in the left-hand menu. The different types of Workflow transactions that the user has security access to will be displayed. If you need to start a particular type of workflow transaction and it doesn’t appear in the list, contact your department’s Banner Security Officer. To edit and org’s title, select the link “FIN_Banner Org – Change Org Title”.



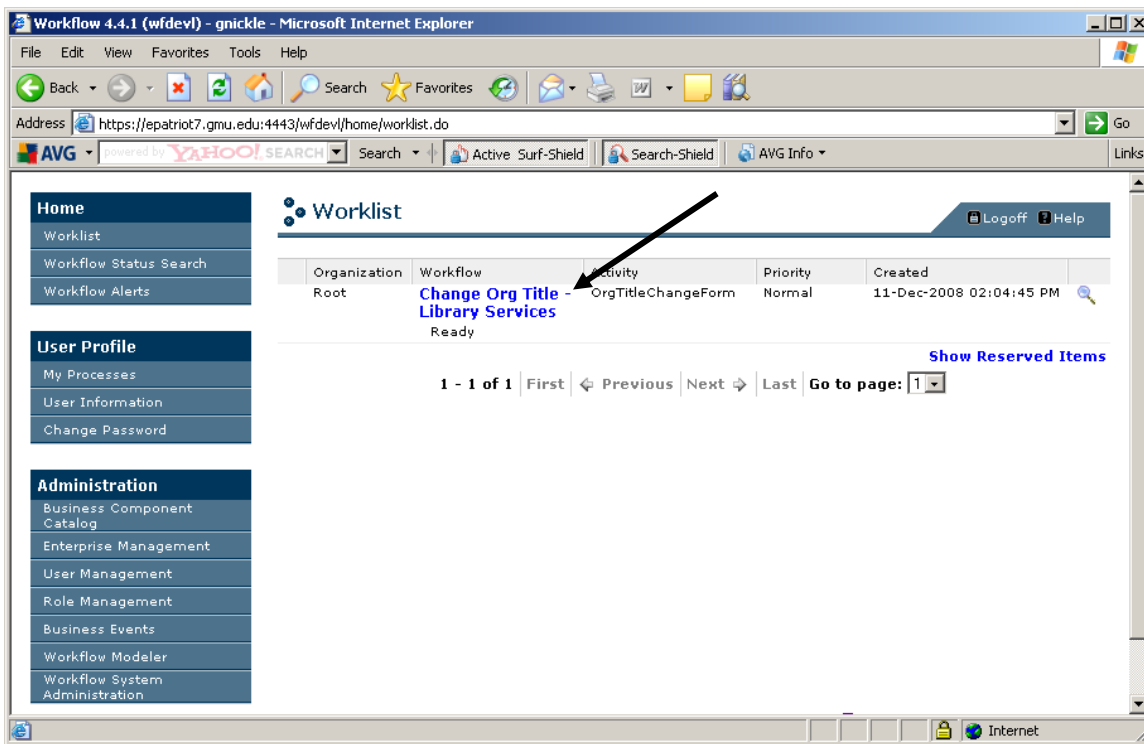
Enter a UNIQUE workflow instance name into the “Workflow Specifics Name” field. NOTE: When naming workflow instances, make the name a combination of both the actual business process name and the org name. For example, a user needs to edit the title of an existing Banner organization named “Library Services”. So they will create an instance of a “Change Org Title” map and name their instance, “Change Org Title – Library Services”. Using this naming convention makes it easier to search for and keep track of specific workflow instances. Next, click on “Start Workflow”.



Click “OK”.



The workflow instance you created now appears in your worklist. (You may need to refresh your inbox by clicking the “Worklist” link to make the transaction appear.). Then, click on the link in your worklist to display to “Change Org Title” data entry form.



3 Step Three: Complete Initiator's "New Org Request" form

The following are descriptions for the data entry fields on the "New Organization Request" form.

Initiator ID:	Initiator's userid (populated by Workflow)
Initiator Organization:	Initiator's organization name
Reason for Title Change:	Document reason for title change
Org Code:	Banner org code being edited
Current Org Title:	Current Banner org code
New Org Title:	New org title
Effective Date:	Date edited org title becomes effective
Responsible Person Name:	Name of person who is responsible for managing the budget and approving transactions for this organization
Resp. Person UserID: (8 char email name)	Resp. Person's Banner userID
Requires Resp. Person Approval?	Yes/No
Dean/Director Name:	Name of Dean or Director who will oversee the new organization
Dean/Director UserID: (8 char email name)	Dean/Director's Banner username
Requires Dean/Director Approval?	Yes/No

An example of a completed "Change Org Title" form follows on the next page.

Completed “New Organization Request” Form Example

Note: greyed-out fields are “read-only” and required fields are prefaced with an asterisk.

Change Organization Title

Last Review Date:	N/A
Last Reviewed By:	N/A
Last Reviewer Action:	N/A
Last Reviewer's Comments:	<input type="text"/>
Initiator ID:	gnickle
* Initiator Org:	<input type="text" value="Fiscal Services"/>
* Reason for Title Change:	<input type="text" value="New name is more accurate"/>
* Org Code:	<input type="text" value="12345"/>
* Current Org Title:	<input type="text" value="Library Services"/>
* New Org Title:	<input type="text" value="Library Information Services"/>
* Effective Date (format: 31-Jan-2006):	<input type="text" value="11-Dec-2008 02"/> ...
* Resp Person Name:	<input type="text" value="John Doe"/>
* Resp Person UserID:	<input type="text" value="jdoe1"/>
(NOTE: UserID = 8 character email name)	
* Requires Resp Person Approval?:	<input type="text" value="Yes"/> ▼
* Dean/Director Name:	<input type="text" value="Jane Smith"/>
* Dean/Director UserID:	<input type="text" value="jsmith1"/>
(NOTE: UserID = 8 character email name)	
* Requires Dean/Director Approval?:	<input type="text" value="Yes"/> ▼

4 Step Four: Choose an Action

When finished entering data into the “Change Org Title” form, select “Complete” to send the transaction to the first approver. You will receive an email notification that the transaction was entered into Workflow. If you want to save the transaction data without entering it into Workflow, select “Save & Close”. You can come in later and select “Complete” to start the workflow instance.

Either perform another workflow operation 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.