

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

Go to the [Banner Administrative Systems](#) page, and click on the “Workflow” link under the section “Other Applications”. You can also access it directly at: <https://workflow.gmu.edu:4443/wfprod>

At the login screen, enter your Banner Net ID and password.

The user’s “Worklist” is displayed, containing all workflow transactions that require the user’s attention.

2 Step Two: Create and start a workflow instance

To start a workflow transaction, click on the “User Profile” icon on the left side menu and select “My Processes”. The different types of Workflow processes that the current user has security access to will be displayed. If you need to start a particular type of workflow transaction that doesn’t appear in the list, contact your department’s Banner Security Officer. To edit an existing 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, if a user needs to edit the title of an existing Banner organization named “Library Services”, they would enter a name such as, “Change Org Title – Library Services” in the “Workflow Specific Name” field. Using this naming convention makes it easier to search for and keep track of specific workflow instances. You can also use the “Attach File” button to attach documents for other to view during the approval process. Next, click “Start Workflow”. When the message, “The workflow was started successfully”, click “OK”.

The workflow instance you created now appears in your worklist. If it does not appear, wait a minute or two and refresh your inbox. Once the transaction appears in the worklist, click on the transaction name to display the “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:

Initiator ID: gnickle

* Initiator Org:

* Reason for Title Change:

* Org Code:

* Current Org Title:

* New Org Title:

* Effective Date (format: 31-Jan-2006): ...

* Resp Person Name:

* Resp Person UserID:

(NOTE: UserID = 8 character email name)

* Requires Resp Person Approval?:

* Dean/Director Name:

* Dean/Director UserID:

(NOTE: UserID = 8 character email name)

* Requires Dean/Director Approval?:

4 Step Four: Choose an Action

When finished entering the change org information, 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 for approval, select “Save & Close”. You can come in later and select “Complete” to start the workflow instance.

That’s it!! If you have any questions, problems, or comments please contact faateam@gmu.edu.