

“New Organization Request” in 3 Easy Steps

Workflow Approver Quick Reference Guide

Revised 12/11/07

*To view the entire “New Organization Request User Manual”, go to:
<http://fiscal.gmu.edu/Resources/NewOrgUserManual.pdf>*

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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.

The screenshot shows the 'Production Patriot Web Self Service' page. At the top left is the George Mason University logo. To its right is the text 'ADMINISTRATIVE SYSTEMS' in a large, stylized font. Below the logo, the page is divided into several sections:

- 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.

On the right side of the page, there is a navigation menu with the following categories and links:

- 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

At the bottom of the page, there is a disclaimer: 'Unauthorized use of this system and its material is strictly forbidden and may constitute a violation of state and/or federal law. This is unpublished material and contains confidential information. Unauthorized reproduction, distribution, display, disclosure, and/or possession of this material are prohibited. By using this system, you agree to abide by George Mason University's [Responsible Use of Computing Policy - Number 1301](#) and the [Student Information Security Statement](#).'

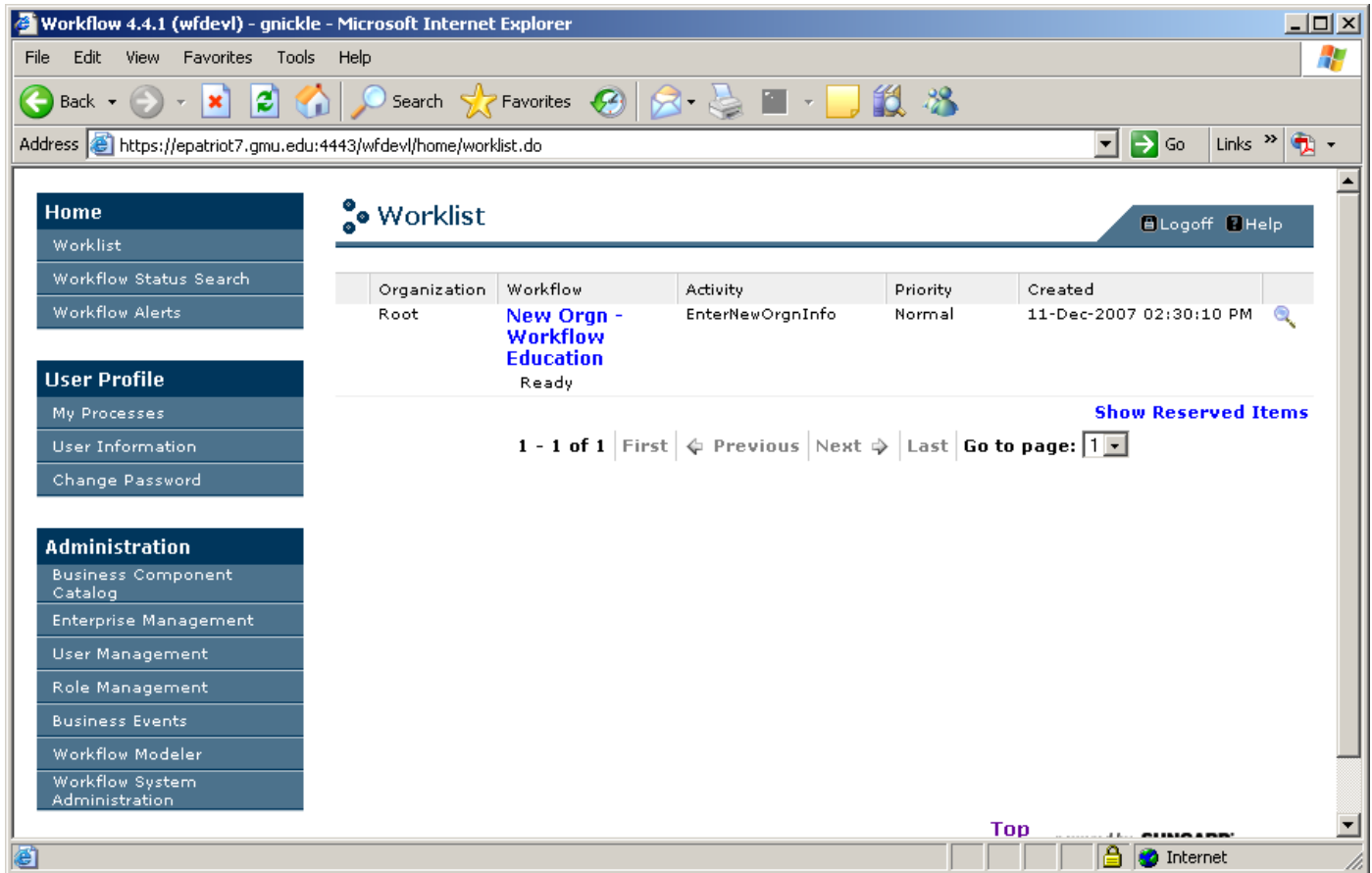
At the login screen, enter your email user name (e.g., cmcginn2). The password depends on whether you have access to e-Print/Internet Native Banner (INB). If you have e-Print/INB access, use your e-Print/INB password. Otherwise, use your six-digit Banner pin.

The screenshot shows the 'Workflow 4.3 (wfprod) - Microsoft Internet Explorer' window. The address bar shows the URL: <https://epatriot7.gmu.edu:4443/wfprod/login.jsp>. The main content area displays the word 'WORKFLOW' in large, blue, capital letters. Below this, there is a navigation bar with the 'SUNGARD HIGHER EDUCATION' logo. The login form consists of the following elements:

- Username:** A text input field.
- Password:** A text input field.
- Remember my Username
- Submit** button
- Reset** button

The status bar at the bottom of the browser window shows 'Done' and 'Internet'.


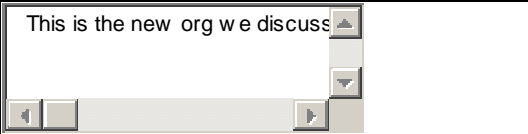
The user's inbox is displayed, containing all workflow instances that require the approver's attention. Select a workflow transaction from the worklist to review and approve.



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

TRANSACTION INFORMATION:	
Current Approval Status:	Pending
Last Review Date:	
Last Reviewed By:	
Last Reviewer Action:	
Last Reviewer's Comments:	
Date Initiated:	05/05/2005, 09:47 AM
Initiator Submit/Resubmit Date:	05/05/2005, 09:51 AM
Initiator Name:	Gerri Nickle
Initiator Organization:	Fiscal Services
Initiator Comments:	
Optional Approver Name:	Yolanda Tamayo
Optional Approver Username:	ytamayo
*Responsible Person Name:	<input type="text" value="Barbara Doane"/>
*Responsible Person Username:	<input type="text" value="bdoane"/>
*Required Resp Person Approval?:	Yes <input type="button" value="v"/>
*Responsible Person MSN:	<input type="text" value="1B5"/>
*Dean/Director Name:	<input type="text" value="Beth Brock"/>
*Dean/Director Username:	<input type="text" value="ebroch"/>
*Requires Dean/Director Approval:	Yes <input type="button" value="v"/>
NEW ORGANIZATION INFORMATION:	
*New Organization Title:	<input type="text" value="Workflow Education"/>

* New Organization Description/Purpose:	Teach staff how to use workf...
* 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:	N/A
* Predecessor Fund:	N/A
* Fund:	N/A
* Program:	N/A
* Campus:	N/A
APPROVER INFORMATION:	
Optional Approver Approval * <input type="checkbox"/> Approve <input type="checkbox"/> Return to Initiator for Rework <input type="checkbox"/> Reject	
Optional Approver Comments:	NONE

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.