Initiating a “New Organization Request” in 4 Easy Steps

Workflow Initiator Quick Reference Guide

Revised 12/11/08

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

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.

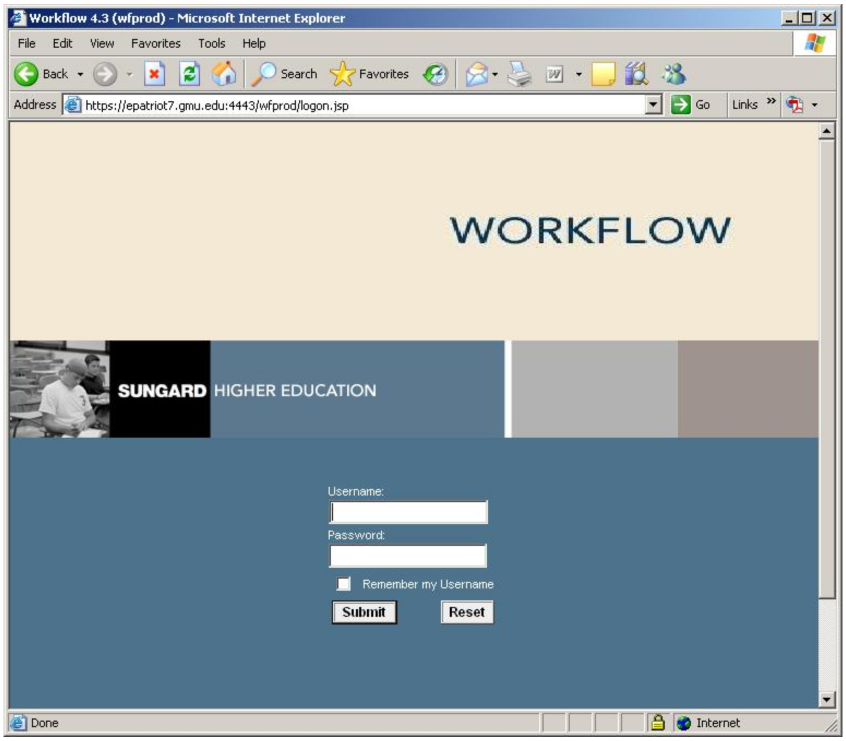
Reject – The action selected by a performer if they want to cancel the transaction. The transaction cannot be restarted once it is rejected.

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.

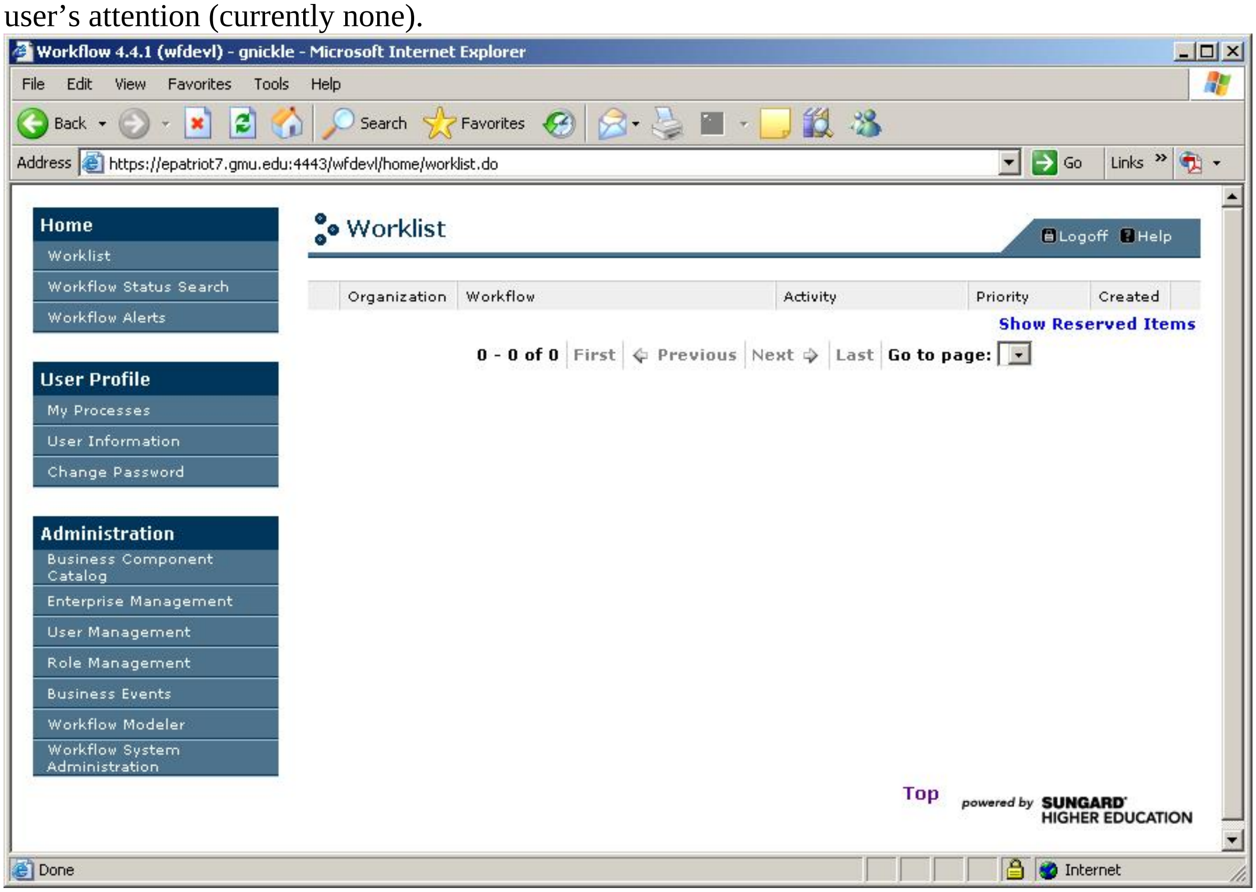
2 Step One: Log into Banner Workflow

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.

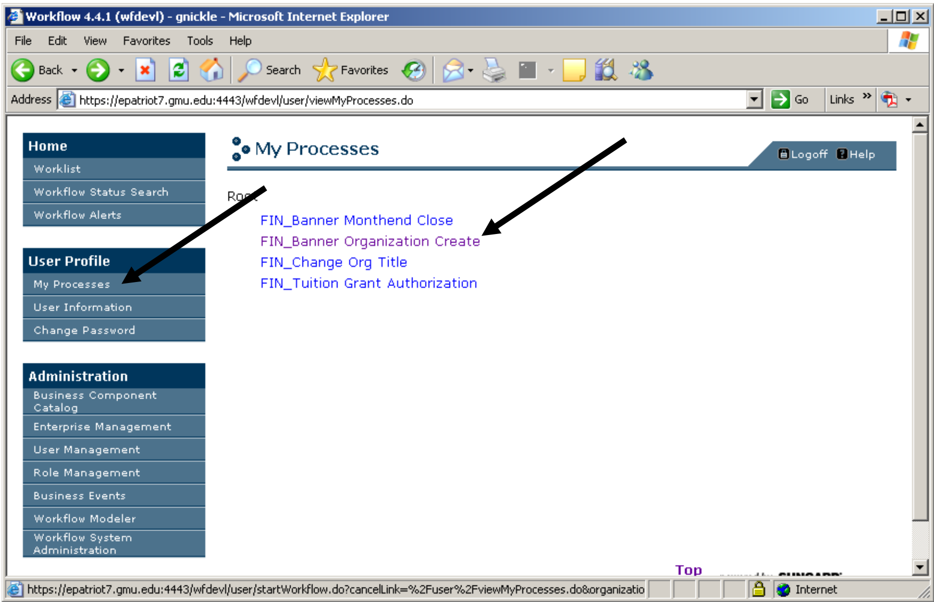


The user's inbox is displayed, which contains the "Worklist" of all workflow instances that require the user's attention (currently none).

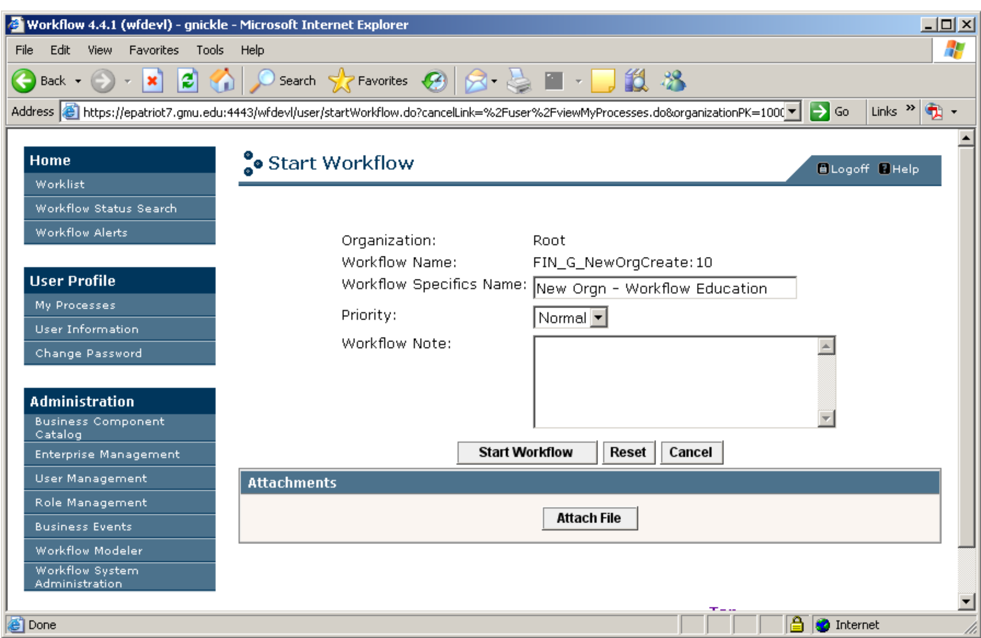


3 Step Two: Create and start a workflow instance

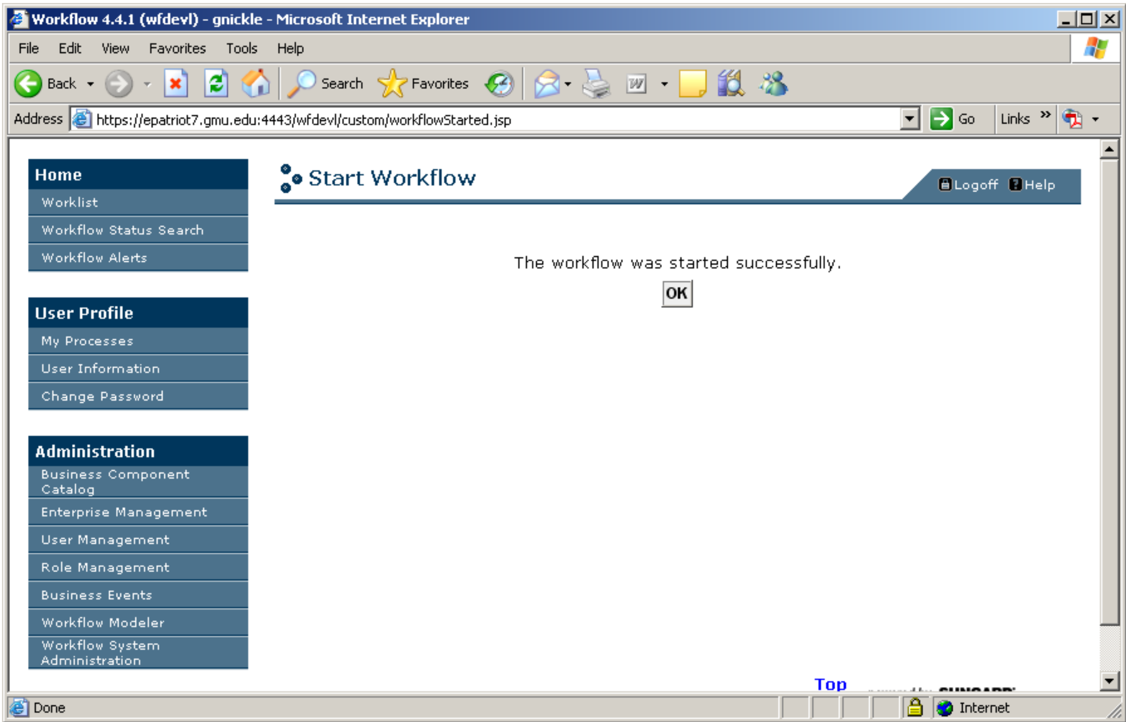
To start a workflow transaction, click on the "My Processes" link in the left-hand menu. The different types of Workflow transactions that the user has security access to will be displayed. If you need to start a particular type of workflow transaction and it doesn't appear in the list, contact your department's Banner Security Officer. To request a new organization, select the link "FIN_Banner Organization Create".



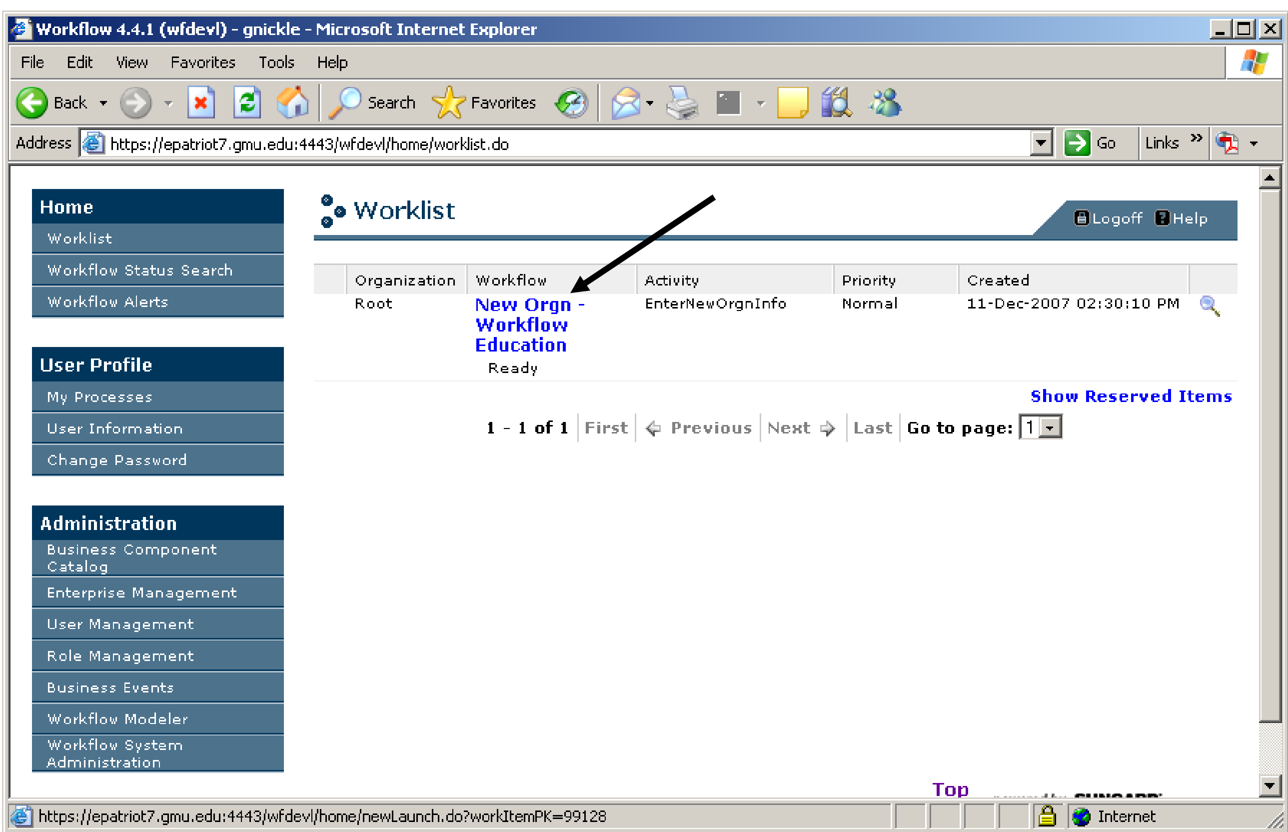
Enter a UNIQUE workflow instance name into the "Workflow Specifics Name" field. NOTE: When naming workflow instances, make the name a combination of both the actual business process name and the name of what is being created or worked on. For example, a user needs a new Banner organization created called "Library Services". So they will create an instance of the "New Organization Request" map and name their instance, "New Org Request – 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. (During peak times, 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 “start” the workflow, which will display to data entry form.



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

The following are descriptions for the data entry fields on the "New Organization Request" form. An example of a completed "New Organization Request" follows after this table.

Initiator Name:	Name of person initiating the request
Initiator Organization:	Initiator's organization name
Optional Approver Name:	Name of Optional Approver, who can approve the transaction in place of or in addition to the Resp. Person and/or Dean/Director
Optional Approver Username:	Optional Approver username
Responsible Person Name:	Name of person who will be responsible for managing the budget and approving transactions for the new organization
Resp. Person Username:	Resp. Person's Banner username
Responsible Person MSN:	Resp. Person's mail stop number
Dean/Director Name:	Name of Dean or Director who will oversee the new organization
Dean/Director Username:	Dean/Director's Banner username
NEW ORGANIZATION INFORMATION:	
New Organization Title:	Name of new organization
New Organization Description/Purpose:	Description of the types of activities accounted for by the new organization
Predecessor (Roll up) Orgn Code:	Organization code that new organization rolls up to – one level up the hierarchy
Give organization access to:	Names of staff that should be given security access to view the new organization. After the transaction is approved, the names are emailed to the FAST team in order to set up the security privileges.
Reconciler Name:	Person who is responsible for reconciling Banner financial reports
Reconciler Username:	Reconciler's Banner username
FUNDING INFORMATION:	
Activity supported by own revenue?:	Yes/No
Will orgn require creation of new permanent positions?:	Yes/No
Non permanent positions?:	Yes/No - HR Position Control receives an email of the transaction if this field is set to "Yes"
Source if moving funds from another orgn:	
From organization:	Organization funds would be moved out from, if applicable
From account:	Account funds would be moved out from, if applicable
Amount to be moved:	Dollar amount to move

OSP OFFICE ONLY:	
Predecessor Fund:	Predecessor fund assigned by OSP. Fill in either the Predecessor Fund field OR the Fund
Fund:	Fund assigned by OSP. Fill in either the Predecessor Fund field OR the Fund field
Program:	Program assigned by OSP
Campus:	Campus assigned by OSP
BUDGET OFFICE INFORMATION:	
Budget Office Approver Name:	Name of Budget Office Approver
Suggested Predecessor Fund:	Fill in either the Predecessor Fund field OR the Fund field
Suggested Fund:	Fill in either the Predecessor Fund field OR the Fund field
Suggested Program:	Program code suggested by Budget Office
Suggested Campus:	Campus suggested by Budget Office
GENERAL ACCOUNTING INFORMATION:	
Gen Accounting Approver Name:	Name of General Accounting Approver
Assigned Predecessor Fund:	Predecessor Fund value to be entered into Banner, if applicable
Assigned Fund:	Fund value to be entered into Banner
Assigned Program:	Program value to be entered into Banner
Assigned Campus:	Campus value to be entered into Banner

Completed "New Organization Request" Form Example

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

New Organization Request – New Org Initiator

	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 Name:	
	Initiator Username:	gnickle
*	Initiator Organization:	
	Optional Approver Name:	N/A
	Optional Approver Username:	N/A
*	Responsible Person Name:	
*	Resp. Person Username:	
*	Requires Responsible Person's Approval?:	No
*	Responsible Person MSN:	
*	Dean/Director Name:	
*	Dean/Director Username:	
*	Requires Dean/Director's Approval?:	No
	NEW ORGANIZATION INFORMATION:	
*	New Organization Title:	
*	New Organization Description/Purpose:	
*	Predecessor (Roll up) Org Code:	

	Give org access to (Name and Username):	N/A
*	Reconciler Name, if different from Resp Person:	N/A
*	Reconciler Username:	N/A
	FUNDING INFORMATION:	
*	Activity supported by own revenue?:	No
*	Will org require creation of new perm positions?:	No
*	Non permanent positions?:	No
	Source if moving funds from another org:	
	From organization:	N/A
	From account:	N/A
	Amount to be moved:	N/A
	OSP OFFICE ONLY:	
*	Predecessor Fund:	N/A
*	Fund:	N/A
*	Program:	N/A
*	Campus:	N/A
	Initiator Comments:	NONE

Complete | Save & Close | Cancel

5 Step Four: Choose an Action

When finished entering the new organization 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 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.