

“New Organization Request” Workflow

User Manual

Revised 12/11/08

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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. 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.

A good practice to follow when naming workflow instances is to 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 for both the user and other performers to search for and keep track of specific workflow instances.

Shortcut – A link to a specific business process map. Users will create shortcuts and use them to start instances of workflows.

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) who completes an activity in a business process map.

Approve – An approval status selected by a performer to show they approve of the transaction. Approving a transaction will move it on to the next performer.

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


Return for Rework – An approval status selected by the performer if they need to send a transaction back to be edited and re-approved by all previous performers.

2 Business Process Map for “New Organization Request”

(Intentionally left blank)

3 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

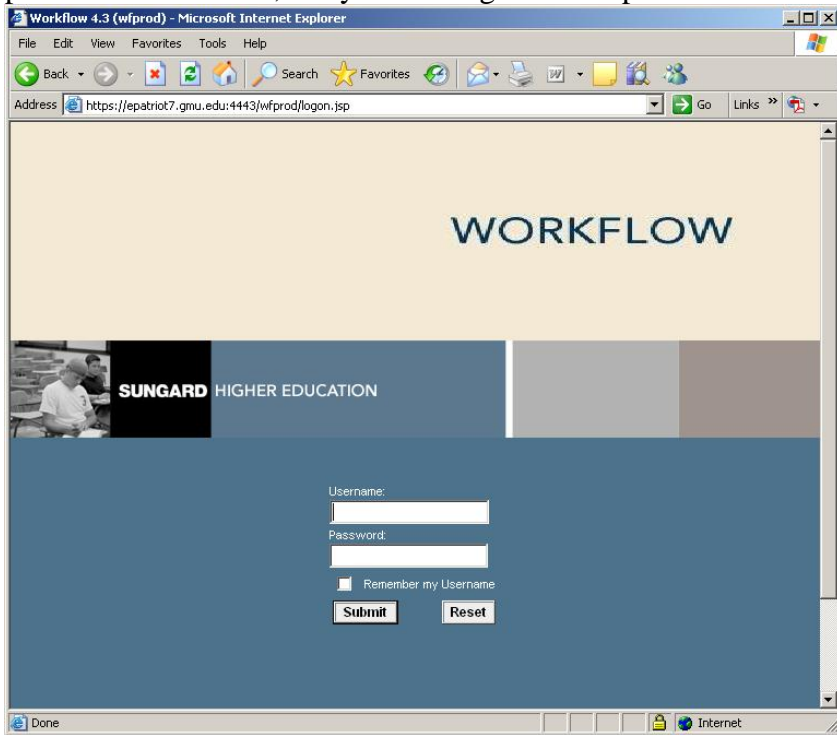
- Foundation Accounts System
- Pooled Position Lookup Form
- WorkFlow

Resources

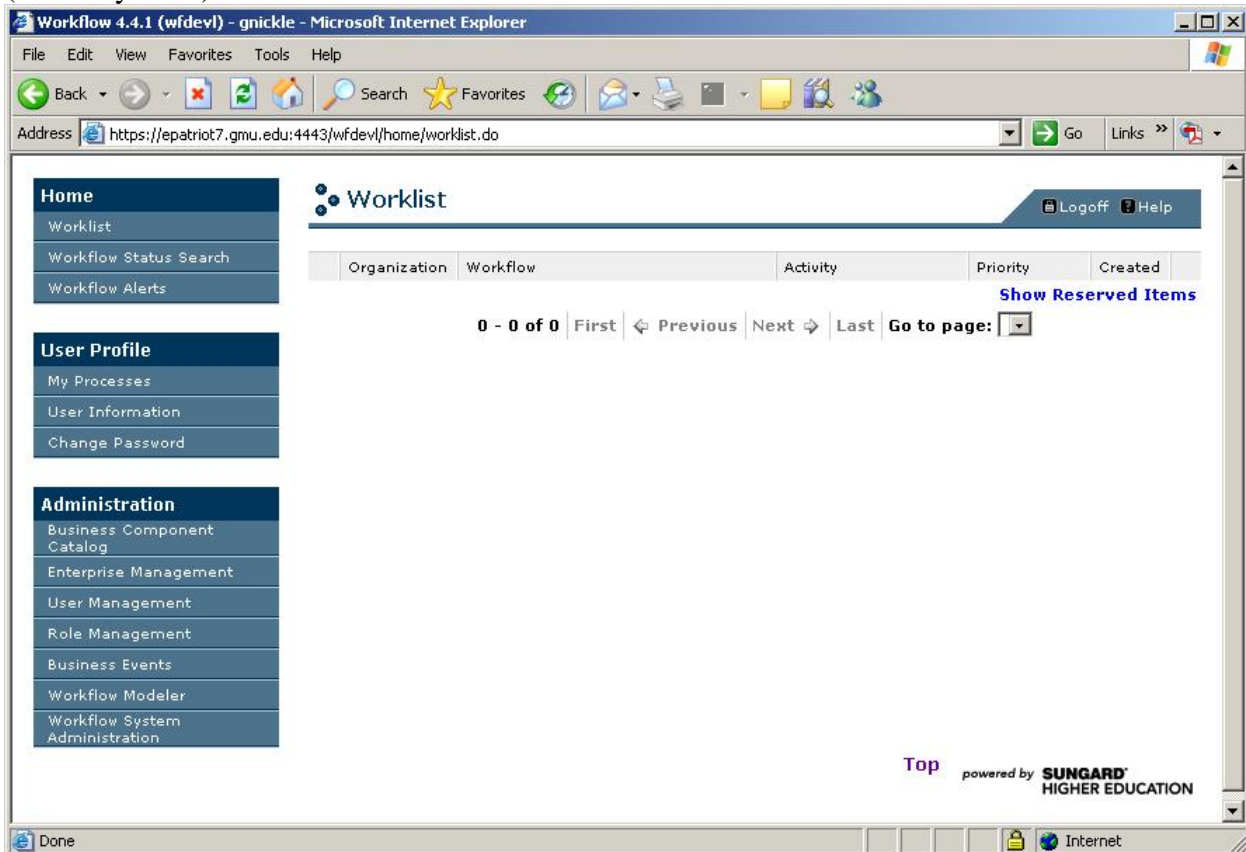
- Data Standards Document (pdf)
- Data Warehouse Information
- Printer Installation Procedure

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.

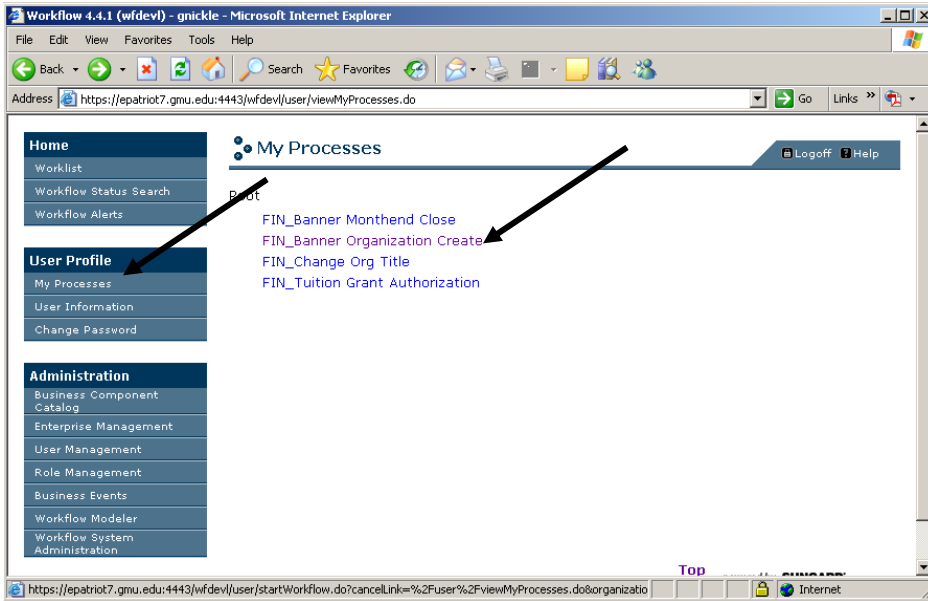


The user's worklist is displayed, containing all workflow instances that require the user's attention (currently none).

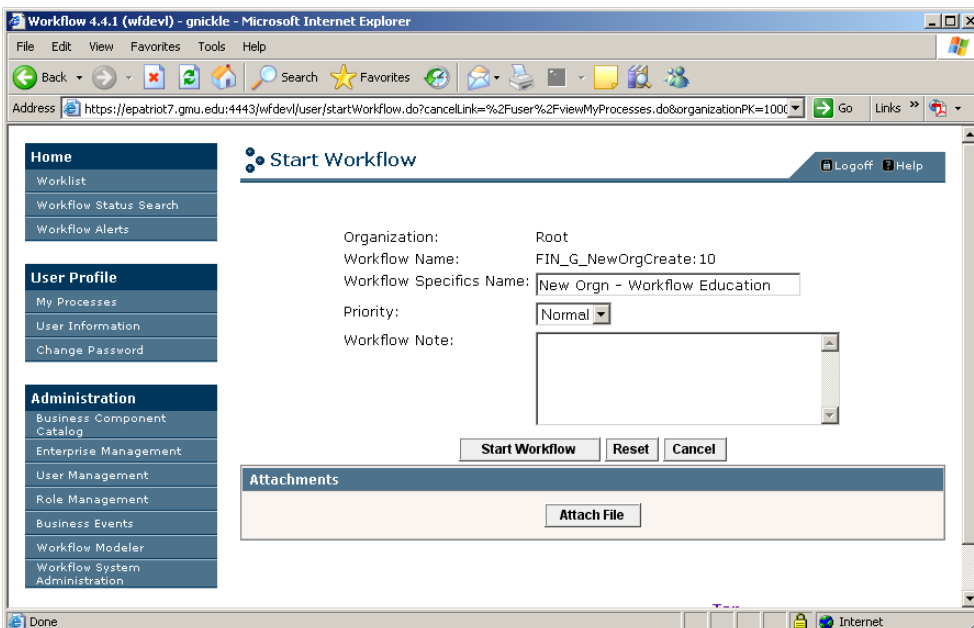


4 Create and start a workflow instance

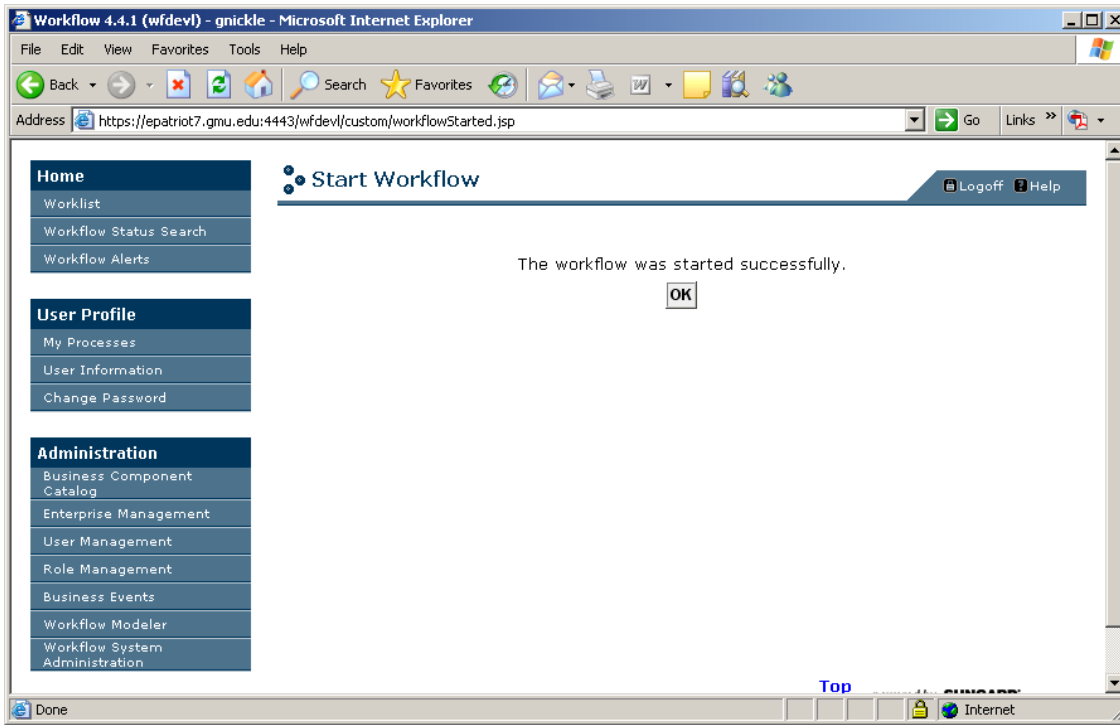
To start a workflow transaction, click on the “My Processes” link in the left-hand menu. The different types of Workflow transactions that the user has security access to will be displayed. If you need to start a particular type of workflow transaction and it doesn’t appear in the list, contact your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



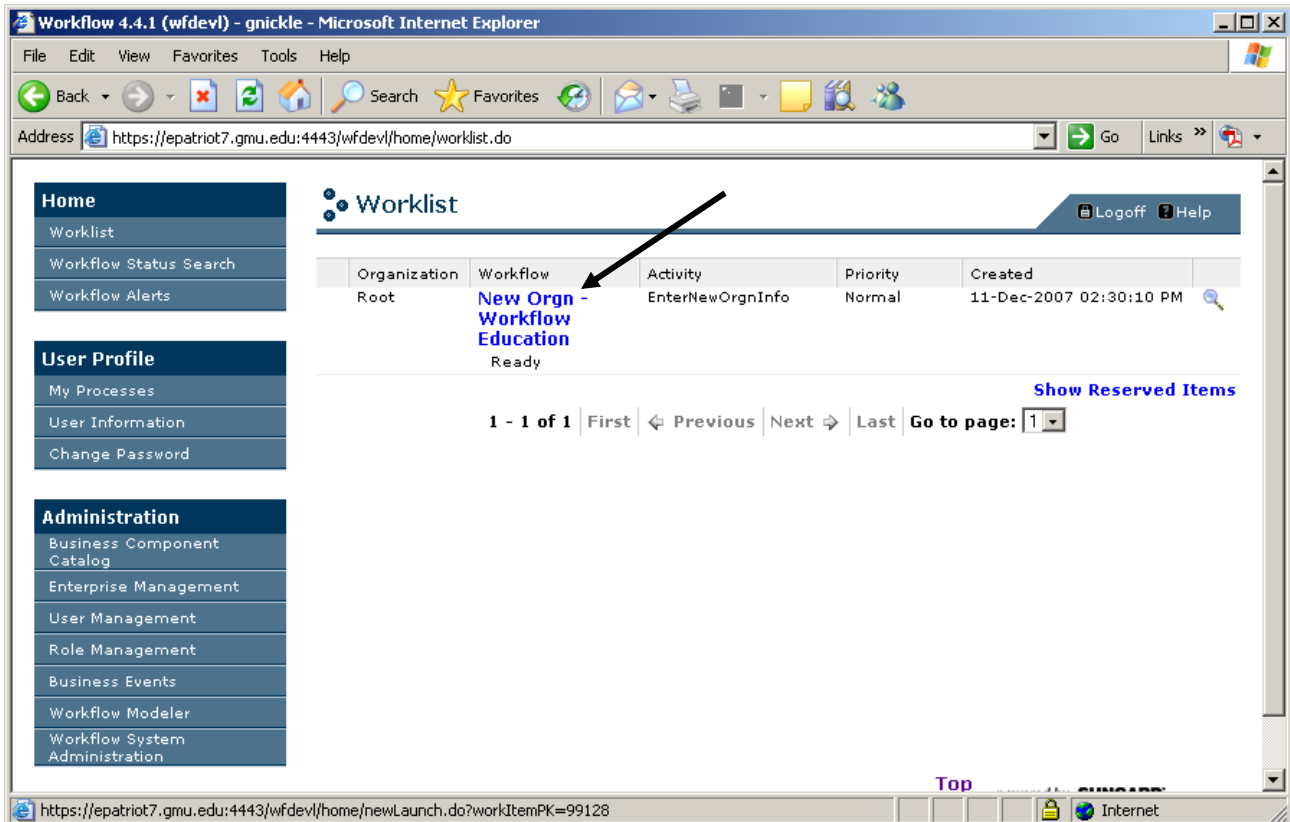
Enter a UNIQUE workflow instance name into the “Workflow Specifics Name” field. NOTE: When naming workflow instances, make the name a combination of both the actual business process name and the name of what is being created or worked on. For example, a user needs a new Banner organization created called “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. (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.






5 Complete “New Organization Request” Forms

5.1 Initiator’s “New Organization Request” form

Note: greyed-out fields are “read-only” and required fields are prefaced with an asterisk. When finished entering the new organization information, select “Complete” to send the transaction to the first approver.

New Organization Request – New Org Initiator

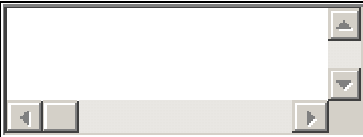
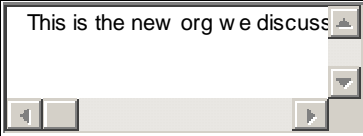


	TRANSACTION INFORMATION:	
	Current Approval Status:	Pending
	Last Review Date:	
	Last Reviewed By:	
	Last Reviewer Action:	
	Last Reviewer’s Comments:	
	Date Initiated:	05/05/2005, 09:47 AM
*	Initiator Name:	<input type="text"/>
	Initiator Username:	gnickle
*	Initiator Organization:	<input type="text"/>
	Optional Approver Name:	N/A
	Optional Approver Username:	N/A
*	Responsible Person Name:	<input type="text"/>
*	Resp. Person Username:	<input type="text"/>
*	Requires Responsible Person's Approval?:	No 
*	Responsible Person MSN:	<input type="text"/>
*	Dean/Director Name:	<input type="text"/>
*	Dean/Director Username:	<input type="text"/>
*	Requires Dean/Director's Approval?:	No 
	NEW ORGANIZATION INFORMATION:	
*	New Organization Title:	<input type="text"/>

* New Organization Description/Purpose:	
* Predecessor (Roll up) Org Code:	<input type="text"/>
Give org access to (Name and Username):	<input type="text" value="N/A"/>
* Reconciler Name, if different from Resp Person:	<input type="text" value="N/A"/>
* Reconciler Username:	<input type="text" value="N/A"/>
FUNDING INFORMATION:	
* Activity supported by own revenue?:	<input type="text" value="No"/>
* Will org require creation of new perm positions?:	<input type="text" value="No"/>
* Non permanent positions?:	<input type="text" value="No"/>
Source if moving funds from another org:	
From organization:	<input type="text" value="N/A"/>
From account:	<input type="text" value="N/A"/>
Amount to be moved:	<input type="text" value="N/A"/>
OSP OFFICE ONLY:	
* Predecessor Fund:	<input type="text" value="N/A"/>
* Fund:	<input type="text" value="N/A"/>
* Program:	<input type="text" value="N/A"/>
* Campus:	<input type="text" value="N/A"/>
Initiator Comments:	<input type="text" value="NONE"/>

5.2 Optional Approver New Organization Request Form

The Optional Approver can edit all of the fields, except for the ones that are greyed-out (read-only). Required fields are prefaced with an asterisk. When finished, the Optional Approver chooses an action: Approve, Reject, or Return for Rework.

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 
* 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 
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:	
* 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

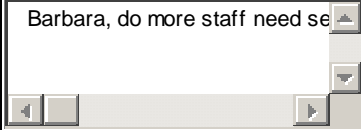
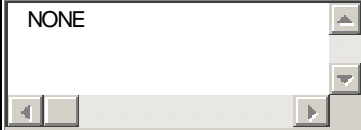
Complete Save & Close Cancel

5.3 Responsible Person's New Organization Request form.

The Responsible Person can edit all of the fields, except for the ones that are greyed-out (read-only). Required fields are prefaced with an asterisk. When finished, the Responsible Person chooses an action: Approve, Reject, or Return for Rework.

New Organization Request – Resp Person Approval

TRANSACTION INFORMATION:	
Current Approval Status:	Pending
Last Review Date:	05/05/2005, 09:58 AM
Last Reviewed By:	Yolanda Tamayo
Last Reviewer Action:	Approve
Last Reviewer's Comments:	Barbara, do more staff need se
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:	This is the new org we discuss
Responsible Person Name:	Barbara Doane
*Responsible Person MSN:	1B5
*Dean/Director Name:	Beth Brock
*Dean/Director Username:	ebroch
*Requires Dean/Director's Approval?:	Yes
NEW ORGANIZATION INFORMATION:	
*New Organization Title:	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:	
* Predecessor Fund:	N/A
* Fund:	N/A
* Program:	N/A
* Campus:	N/A
APPROVER INFORMATION:	
Optional Approver Name:	Yolanda Tamayo
Date Approved:	05/05/2005, 09:58 AM
Optional Approver Comments:	Barbara, do more staff need se 
Responsible Person Approval * <input type="checkbox"/> Approve <input type="checkbox"/> Return to Initiator for Rework <input type="checkbox"/> Reject	
Responsible Person Comments:	NONE 

5.4 Dean/Director's New Organization Request form.

Many of the fields are already filled in with data entered by previous performers. The Dean/Director can edit all of the fields, except for ones that are greyed-out (read-only). Required fields are prefaced with an asterisk. When finished, the Dean/Director chooses an action: Approve, Reject, or Return for Rework.

New Organization Request – Dean/Director Approval

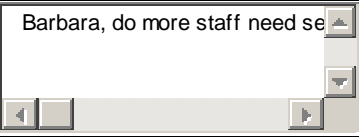
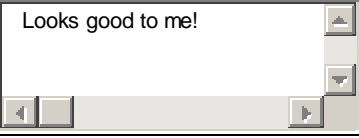
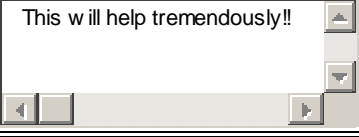
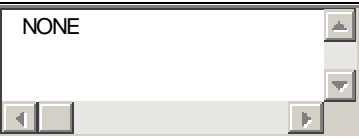
TRANSACTION INFORMATION:	
Current Approval Status:	Pending
Last Review Date:	05/05/2005, 10:02 AM
Last Reviewed By:	Barbara Doane
Last Reviewer Action:	Approve
Last Reviewer's Comments:	Looks good to me!
Date Initiated:	05/05/2005, 09:47 AM
Initiator Submit/Resubmit Date:	05/05/2005, 09:51 AM
Initiator Name:	Gerri Nickle
Initiator Organization:	Fiscal Services
Initiator Comments:	This is the new org we discuss
NEW ORGANIZATION INFORMATION:	
*New Organization Title:	Workflow Education
*New Organization Description/Purpose:	Teach staff how to use workflc
*Predecessor (Roll up) Org 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:	
*Predecessor Fund:	N/A
*Fund:	N/A
*Program:	N/A
*Campus:	N/A
APPROVER INFORMATION:	
Optional Approver Name:	Yolanda Tamayo
Date Approved:	05/05/2005, 09:58 AM
Optional Approver Comments:	Barbara, do more staff need se
Responsible Person Name:	
Barbara Doane	
Date Approved:	05/05/2005, 10:02 AM
Responsible Person Comments:	Looks good to me!
Dean/Director Name:	
Beth Brock	
Dean/Director Approval *	
<input type="checkbox"/> Approve <input type="checkbox"/> Return to Initiator for Rework <input type="checkbox"/> Reject	
Dean/Director Comments:	
NONE	

5.5 Budget Office's New Organization Request form.

Many of the fields are already filled in with the data entered by previous performers. The Budget Office can edit all of the fields, except for the ones that are greyed-out (read-only). Required fields are prefaced with an asterisk. The Budget Office is required to add information in the "Budget Office Information" section. In addition to the standard actions of "Approve, Reject, and Return for Rework", the Budget Office also has the ability to send the transaction to an additional approver.

New Organization Request – Budget Approval	
TRANSACTION INFORMATION:	
Current Approval Status:	Pending
Last Review Date:	05/05/2005, 10:15 AM
Last Reviewed By:	Beth Brock
Last Reviewer Action:	Approve
Last Reviewer's Comments:	This will help tremendously!!
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:	This is the new org we discuss
NEW ORGANIZATION INFORMATION:	
* New Organization Title:	Workflow Education
* New Organization Description/Purpose:	Teach staff how to use workf
* Predecessor (Roll up) Org 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 org require creation of new perm positions?:	Yes
* Non permanent positions?:	Yes

Source if funds are moved from another orgn:	
From organization:	55555
From account:	44444
Amount to be moved:	300.00
BUDGET OFFICE INFORMATION:	
* Budget Office Approver Name:	
Suggested Predecessor Fund:	
Suggested Fund:	
Suggested Program:	
Suggested Campus:	
APPROVER INFORMATION:	
Optional Approver Name:	Yolanda Tamayo
Date Approved:	05/05/2005, 09:58 AM
Optional Approver Comments:	Barbara, do more staff need se 
Responsible Person Name:	Barbara Doane
Date Approved:	05/05/2005, 10:02 AM
Responsible Person Comments:	Looks good to me! 
Dean/Director Name:	Beth Brock
Date Approved:	05/05/2005, 10:15 AM
Dean/Director Comments:	This w ill help tremendously!! 
Budget Additional Approver Name:	N/A
Date Approved:	N/A
Budget Additional Approver Comments:	NONE 

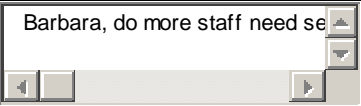
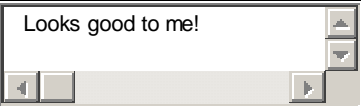
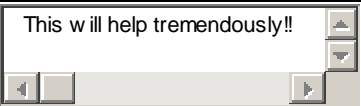
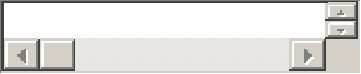
Budget Office Approval *	
<input type="checkbox"/> Approve	<input type="checkbox"/> Return to Dean/Director for Rework
<input type="checkbox"/> Return to Initiator for Rework	<input type="checkbox"/> Send to Additional Approver for Approval
<input type="checkbox"/> Return to Resp Person for Rework	<input type="checkbox"/> Reject
Additional Approver Name (optional):	<input type="text"/>
Additional Approver Username (optional):	<input type="text"/>
Budget Office Comments:	<div style="border: 1px solid gray; padding: 2px;"> <p>NONE</p> <div style="text-align: right;"> <input type="button" value="▲"/> </div> <div style="text-align: right;"> <input type="button" value="▼"/> </div> <div style="text-align: center; border-top: 1px solid gray; border-bottom: 1px solid gray;"> <input type="button" value="◀"/> <input type="button" value="▶"/> </div> </div>

5.6 Additional Approver's New Organization Request form.

The Additional Approver only receives transactions from the Budget Office. They can edit the fields that are not greyed-out (read-only) and when finished, the Additional Approver can choose to either "Approve" or "Reject" a transaction. If approved, the transaction gets sent back to the Budget Office for approval.

New Organization Request – Additional Approval

TRANSACTION INFORMATION:	
Current Approval Status:	Pending
Last Review Date:	05/05/2005, 10:21 AM
Last Reviewed By:	Barbara Maddox
Last Reviewer Action:	Send to Additional Approver for Approval
Last Reviewer's Comments:	Rhonda, I wanted you to approve
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:	This is the new org we discuss
NEW ORGANIZATION INFORMATION:	
* New Organization Title:	Workflow Education
* New Organization Description/Purpose:	Teach staff how to use workf
* Predecessor (Roll up) Org 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 org require creation of new perm positions?:	Yes
* Non permanent positions?:	Yes




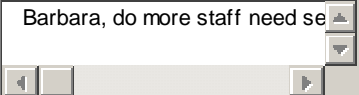
Source if funds are moved from another orgn:	
From organization:	55555
From account:	44444
Amount to be moved:	300.00
BUDGET OFFICE INFORMATION:	
Budget Office Approver Name:	Barbara Maddox
Suggested Predecessor Fund:	
Suggested Fund:	
Suggested Program:	
Suggested Campus:	
Additional Approver Name (optional):	Rhonda Baumgartner
Additional Approver Username (optional):	rbaumga
APPROVER INFORMATION:	
Optional Approver Name:	Yolanda Tamayo
Date Approved:	05/05/2005, 09:58 AM
Optional Approver Comments:	Barbara, do more staff need se 
Responsible Person Name:	Barbara Doane
Date Approved:	05/05/2005, 10:02 AM
Responsible Person Comments:	Looks good to me! 
Dean/Director Name:	Beth Brock
Date Approved:	05/05/2005, 10:15 AM
Dean/Director Comments:	This w ill help tremendously!! 
Additional Approver Approval * <input type="checkbox"/> Approve <input type="checkbox"/> Reject	
Additional Approver Comments:	

5.7 General Accounting's New Organization Request form.

Many of the fields are already filled in with the data entered by previous performers. The General Accounting reviewer can edit all of the fields, except for the ones that are greyed-out (read-only). The General Accounting reviewer is required to add information in the "General Accounting Information" section. When finished, the General Accounting reviewer chooses an action: Approve, Reject, or Return for Rework.

New Organization Request – General Accounting Approval

TRANSACTION INFORMATION:	
Current Approval Status:	Pending
Last Review Date:	05/05/2005, 10:50 AM
Last Reviewed By:	Barbara Maddox
Last Reviewer Action:	Approve
Last Reviewer's Comments:	Please create org ASAP!!!
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:	This is the new org we discuss
NEW ORGANIZATION INFORMATION:	
* New Organization Title:	Workflow Education
* New Organization Description/Purpose:	Teach staff how to use workf
* Predecessor (Roll up) Org 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 org 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:	
Predecessor Fund:	N/A
Fund:	N/A
Program:	N/A
Campus:	N/A
BUDGET OFFICE INFORMATION:	
Suggested Predecessor Fund:	66666
Suggested Fund:	55555
Suggested Program:	44444
Suggested Campus:	Arlington
GENERAL ACCOUNTING INFORMATION:	
* Gen Acctg Approver Name:	
Assigned Predecessor Fund:	66666
Assigned Fund:	55555
Assigned Program:	44444
Assigned Campus:	Arlington
APPROVER INFORMATION:	
Optional Approver Name:	Yolanda Tamayo
Date Approved:	05/05/2005, 09:58 AM
Optional Approver Comments:	Barbara, do more staff need se 
Responsible Person Name:	Barbara Doane
Date Approved:	05/05/2005, 10:02 AM

Responsible Person Comments:	Looks good to me!
Dean/Director Name:	Beth Brock
Date Approved:	05/05/2005, 10:15 AM
Dean/Director Comments:	This will help tremendously!!
Budget-Additional Approver Name:	Rhonda Baumgartner
Date Approved:	05/05/2005, 10:46 AM
Budget-Additional Approver Comments:	Barbara, this looks good.
Budget Office Approver Name:	Barbara Maddox
Date Approved:	05/05/2005, 10:50 AM
Budget Office Comments:	Please create org ASAP!!!
General Accounting Approval * <input type="checkbox"/> Approve <input type="checkbox"/> Return to Initiator for Rework <input type="checkbox"/> Return to Budget for Rework <input type="checkbox"/> Reject	
General Accounting Comments:	NONE

5.8 New Org creator “New Organization Request” form.

The New Org Creator assigns the FOAP information to the new organization. When finished, the New Org Creator submits the transaction by clicking the “Complete” button.

New Organization Request – Org Code Assignment

	NEW ORGANIZATION INFORMATION:	
	New Organization Title:	Workflow Education
	Predecessor (Roll up) Orgn Code:	12345
	GENERAL ACCOUNTING INFORMATION:	
	General Accounting Approver Name:	Carol McGinnis
	General Accounting Comments:	<div style="border: 1px solid gray; padding: 5px;"> <p>IMPORTANT - create ASAP!! Tr</p> </div>
	NEW ORGANIZATION ASSIGNED INFO:	
	Assigned Predecessor Fund:	66666
	* Assigned Fund:	55555
	Assigned Program:	44444
	Assigned Campus:	Arlington
	* Assigned Organization Code:	33333

5.9 New Org Creator - FTMORGN

New Org Creator enters the new organization information into Banner.

The screenshot shows the Banner Internet Native application window titled "Organization Code Maintenance FTMORGN 6.0.1 (TRNG)". The window has a menu bar with "File", "Edit", "Options", "Block Item", "Record", "Query", "Tools", "Help", and "Window". Below the menu bar is a toolbar with various icons. The main area contains a form with the following fields and options:

- Chart of Accounts: Active Status Last Activity:
- Organization: Title:
- Dates -> Effective: 29-MAR-2005 Termination:
- Data Entry Next Change:
- Financial Manager:
- Predecessor Orgn:
- Default Fund:
- Default Program:
- Default Activity:
- Default Location:
- Budget Control Orgn:
- Combination Budget Control

At the bottom of the window, there is a status bar with the text "Enter Chart of Accounts." and a table with the following content:

Record: 1/1	List of Valu...	<OSC>
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6 Descriptions for data entry fields

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
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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

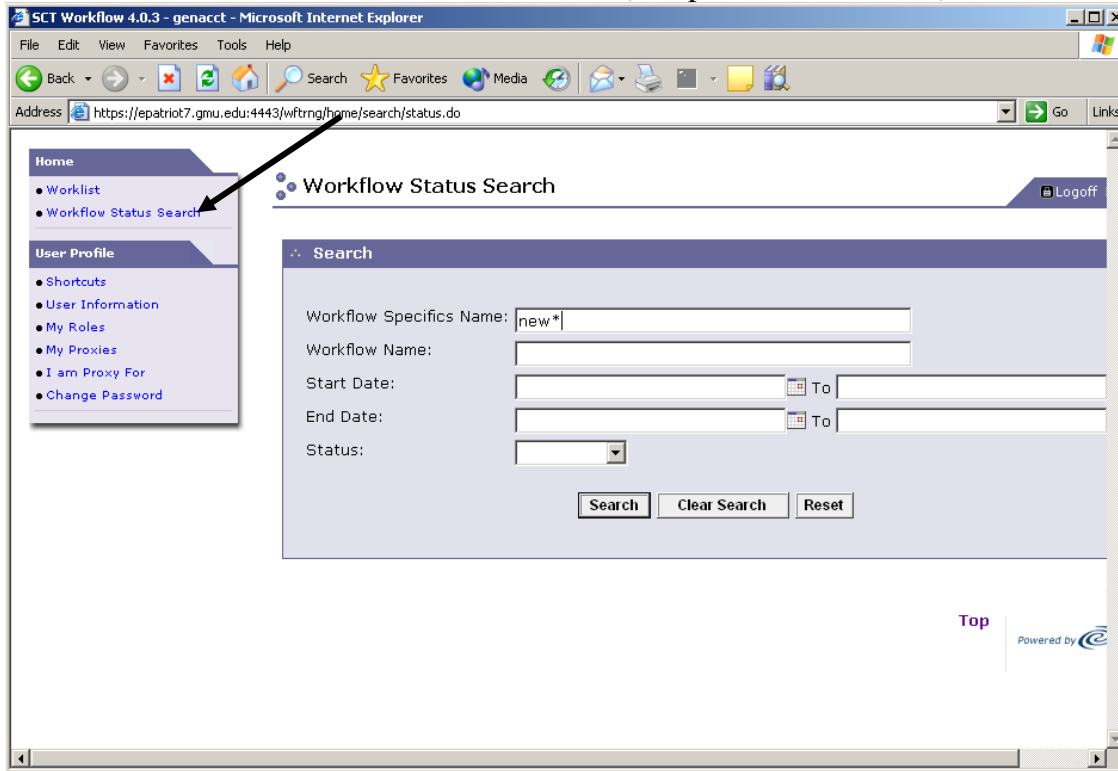
7 Sample emails to participants

NOTE: Emails are sent to each performer when it is their turn to perform an activity in the workflow. Emails are also sent to specific performers after an instance of the “New Organization Request” workflow successfully completes. Currently, emails confirming the creation of the new organization are sent to:

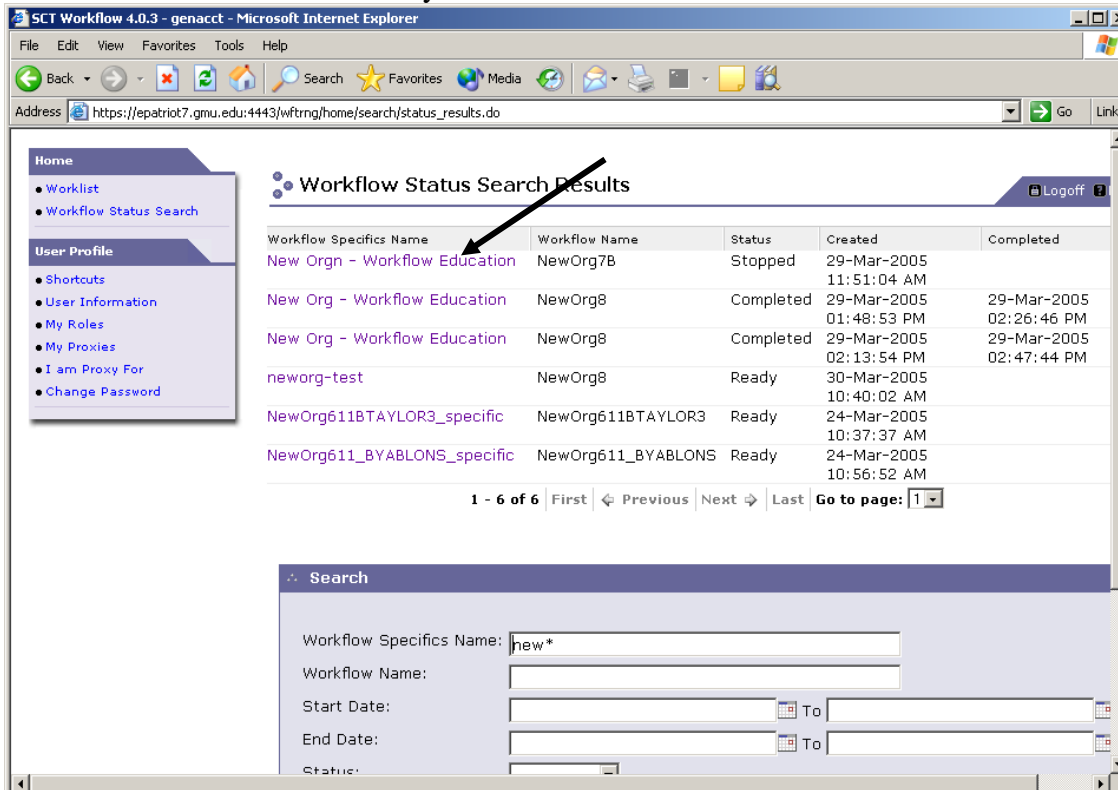
1. Workflow initiator
2. Responsible Person
3. Orgn Reconciler
4. Budget Office, if it's a non-OSP organization
5. General Accounting
6. Finance Administrative Systems Team (FAST), if staff security privileges need to be added
7. HR-IS
8. HR Position Control, if new non-permanent positions need to be created
9. Purchasing, A/P

8 “Workflow Status Search” to view status

You can check what step an instance of a workflow is on by selecting “Workflow Status Search” from the menu. Enter the name of the workflow instance (or a portion of the name) and click “Search”.



Select which workflow instance you want more details about.



The business process map is displayed, showing the step that the workflow instance is currently on.

The screenshot shows a Microsoft Internet Explorer browser window titled "SCT Workflow 4.0.3 - genacct". The address bar contains the URL "https://epatriot7.gmu.edu:4443/wftmg/home/viewStatus.do?key=212237". The page content is titled "Workflow Status" and includes a navigation menu on the left with options like "Home", "Worklist", and "User Profile". The main area displays a workflow process map with steps: "PopulateDefaultFormValues", "EnterNewOrgInfo", "GetInitiatorSubmitDate", "ConfirmationEmailToInitiator", and "GenerateRespPersonEmailAddress". A "ReworkEmailToInitiator" step is also present, with arrows pointing to it from the right. A black arrow points to the "EnterNewOrgInfo" step, indicating the current step in the workflow. On the right, a "Workflow Summary" panel shows details for "New Orgn - Workflow Education" and includes buttons for "Append Note" and "Advanced Details".

