Initiating an "Equipment Surplus Workflow"

Initiator User Guide

January, 2020

NOTE: contact assets@gmu.edu for all workflow issues other than access issues (For access issue, take a look at "Accessing Banner Workflow" section in this document).

Table of Contents

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 their activity 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, George Mason, who works for the Fiscal Service Department, needs to request Surplus items to be picked up by the Surplus Property Office and updated in TRAQ system. George is initiating the Equipment Surplus (ES) workflow process on Oct 2nd, 2013. A good name for the workflow transaction would be "ES-GMASON-Fiscal Services-131002". 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 ES transactions can be 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.

Accessing Banner Workflow

Most of GMU employees automatically have workflow accounts and users can log into Workflow after being authenticated through Central Authentication Service(CAS) and Two-Factor Authentication (2FA). For remote access, Cisco VPN is also required.

 NOTE*: GMU affiliates and some of part time employees will not have workflow accounts and they will need to ask equipment liaison to submit surplus request on behalf of them.

For all other login issues, please contact fast@gmu.edu (Tel: 703-993-5250).

What is Equipment Surplus Workflow?

The Equipment Surplus Workflow is an automated process that has been developed to efficiently monitor and complete the equipment surplus business process. The Workflow provides an online surplus form for users to fill out and once submitted, Workflow automatically forwards the completed surplus form to all performers. The main steps within the equipment surplus workflow are as follows:

1. A workflow initiator fills out and submits Equipment Surplus Form on-line.   Upon activity completion, a confirmation Email is sent to the initiator and Equipment liaison, and a task email is sent to the Surplus team.
2. The Surplus Team (Central Receiving) picks up items and updates workflow. Upon activity completion, status update email is sent to the initiator, equipment liaison, and surplus team, and a task email is sent to the assets team (General Accounting).
3. The Assets team updates GMU's TRAQ system and updates the workflow transaction. Upon activity completion, a completion email is sent to all individuals who worked on the specific workflow transaction.
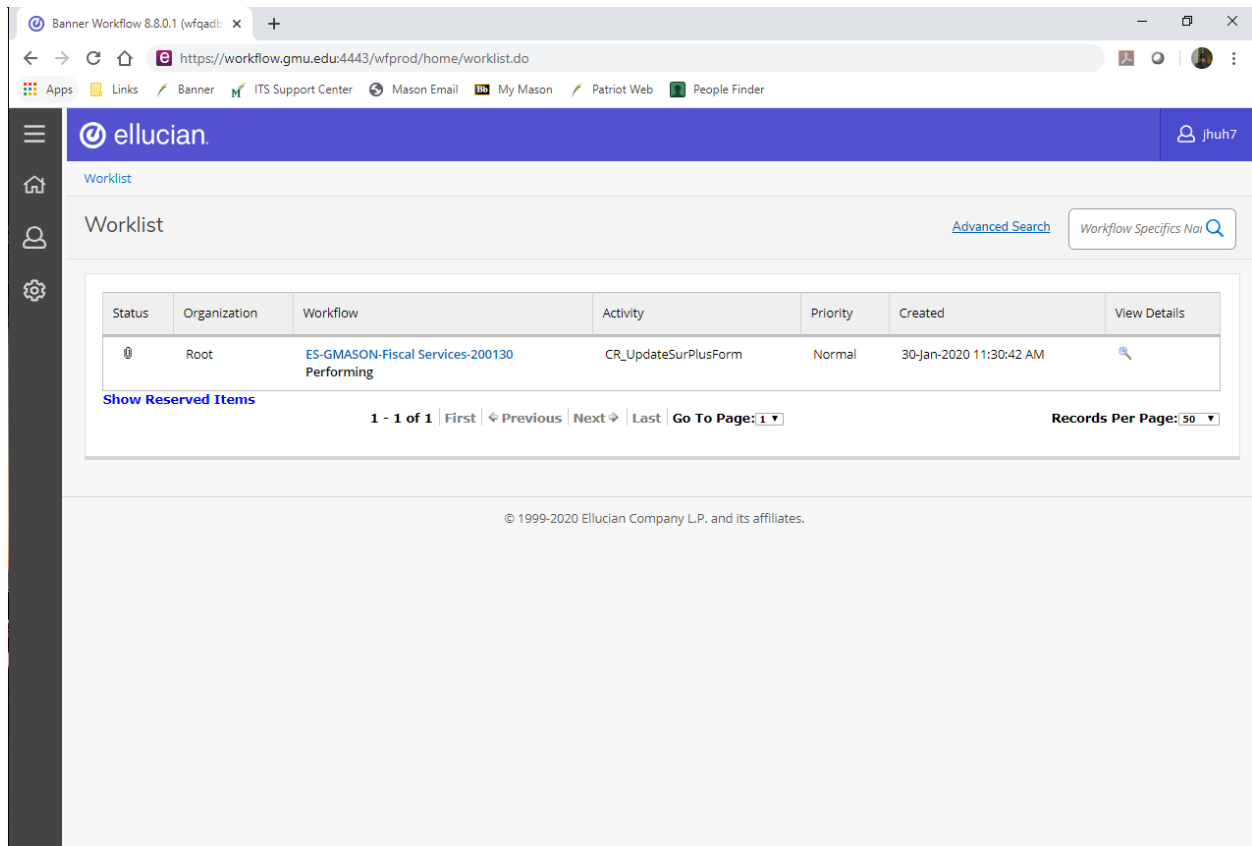
Amongst all those major steps discussed, this document covers only step 1 in depth since this is created for Workflow initiators.

Workflow Steps

Step 1: Log into Banner Workflow

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

Once the user is authenticated through CAS using Mason NetID/password and 2FA, the user is automatically directed to workflow page and see "Worklist" that contains all workflow transaction(s) that require the user's attention.


Step 2: Start a Workflow Instance

To start a workflow transaction, click on the "User Profile" link in the left-hand main menu and click "My Process." The different types of workflow transactions that the user has security access to will be displayed on "My Process" page. If you need to start a particular type of workflow transaction and it doesn't appear in the list, contact the FAST Team (fast@gmu.edu).

To start an Equipment Surplus Processing transaction, select the "FIN_Equipment Surplus Processing" link.
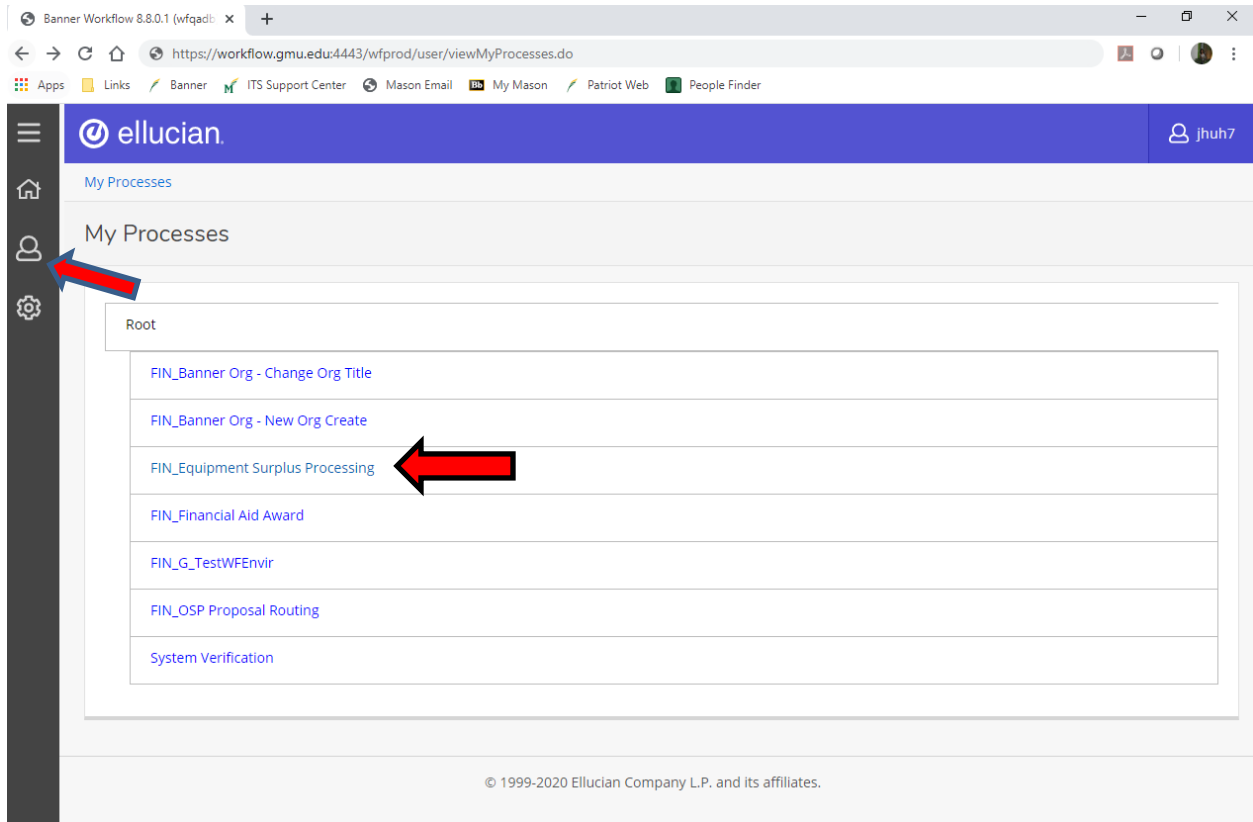
A blank "Start Workflow" screen is displayed.
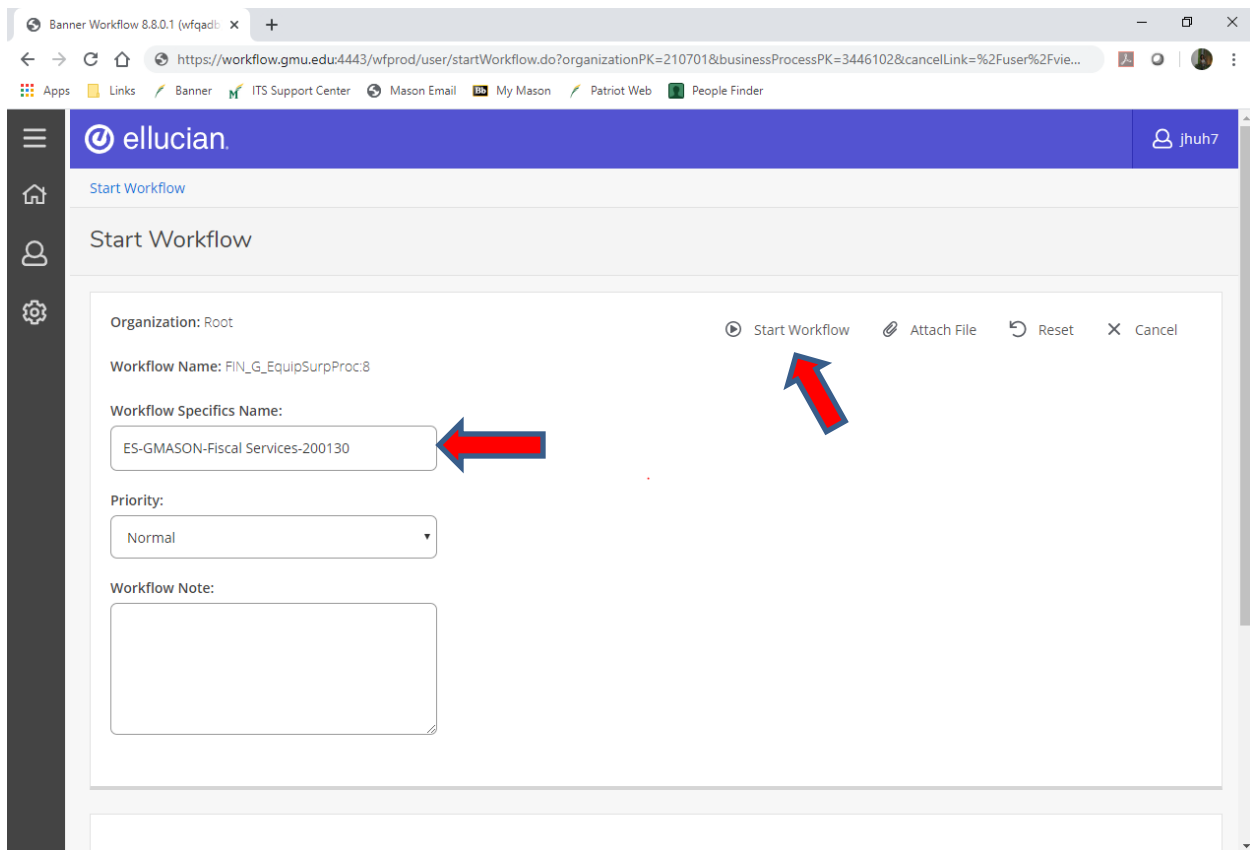
Enter a UNIQUE workflow instance name in the "Workflow Specifics Name" field. NOTE: A good practice to follow when naming workflow instances is to make the transaction name a combination of actual business process name, initiator's net id, department name and Date in YYMMDD format. For example, George Mason who works for Fiscal Service Department needs to submit a request for his Surplus items to be picked up. George is initiating the Equipment Surplus (ES) workflow instance on Oct [2nd], 2013. Using the naming convention, an appropriate name for the workflow transaction would be "ES-GMASON-Fiscal Services-131002". Using this naming convention makes it easier for both the user and other performers to search for and keep track of specific workflow instances. Next, click on "Start Workflow".

On next page, the workflow instance will appear in your worklist page. (Hit the browser's "Refresh" button periodically, since it may take 10 or 15 seconds during peak business hours for the transaction to appear in your inbox). Once the transaction appears, click the name of transaction to start the workflow.

Step 3 : Fill out "Equipment Surplus" Form

Workflow will present the initiator with a data entry screen for the Equipment Surplus form. Below are descriptions for the form's data entry fields. **Note that an attachment listing individual surplus item is required before clicking "Complete" button.**

| Field Name	DESCRIPTION
Workflow Specific Name	Read only field - Name of specific workflow instance that has been given by initiator.
Initiator Submit Date/Time	Read only field - Date and Time of when a workflow is initiated.
Initiator Mesa Login Id:	Read only field - GMU Email ID ("GMASON" for gmason@gmu.edu) of initiator.
Initiator Name:	Read only field – Initiator name (First Name + Last Name).
Initiator Phone No.	Initiator's phone number.
Initiator Comment	Optional Field – Note by initiator (e.g.. direction to location, special instruction for item pick up, etc..)
Department	Department that the surplus item belongs to.
Equipment Liaison Mesa Login ID	GMU Email ID of Equipment Liaison. Do **NOT** enter full email address. Just enter ID. *The id is required for Equipment liaison to keep a record of the surplus submission. Make sure the id for current liaison is entered.
Equipment Liaison List	This is a hyperlink that opens "Equipment Liaison List" which will help workflow initiator to confirm his/her Department Equipment Liaison.
Workflow Stop Option(Yes/No)	If the workflow instance was initiated in error and needs to be ended, click 'Yes'. Please note that workflow does not even let you stop the workflow unless you have all other mandatory fields filled out. Enter some values quickly and select 'Yes' to stop the workflow.

Equipment Surplus Form Link	This is a hyperlink that opens "Equipment Surplus" excel form when an initiator clicks the link.
Attachment	The Equipment Surplus excel file that lists all the surplus items must be attached to workflow. When the document is attached, choose "EquipmentSurplusForm" radio button. Without having attachment uploaded properly as described, workflow will send an error email to the initiator and the initiator needs to go back to his/her workflow instance and correct the error so that workflow activity can be passed to the next performer.

Step 4 : Download Surplus Excel Form and attach the file to the workflow

When finished entering data into the Equipment Surplus form, click "Equipment Surplus Form Link", the link will open in a **new** window. Make sure you keep the workflow window open to be able to attach the file and complete the form. When the "File Download" pop-up window appears, click "Save" in excel format and change the file name to be the same as, or close to, the workflow instance name (See recommended naming convention for the workflow instance on the "Workflow Terminology" page in this document - e.g. "ES-GMASON-Fiscal Services– 131002.xls) and save the file to your local machine. Open the saved excel file from your local machine and list all surplus items and save the file again before closing the window.

When the excel file is saved and all the mandatory fields are entered, click "Attach File" on the workflow form.

On the "Attach File" screen, click "Browse" to locate the excel file saved on your local machine and select the "EquipmentSurplusForm" radio button (**IMPORTANT!!!- without this step, the attachment will not be sent to the surplus team via email**) and then upload.
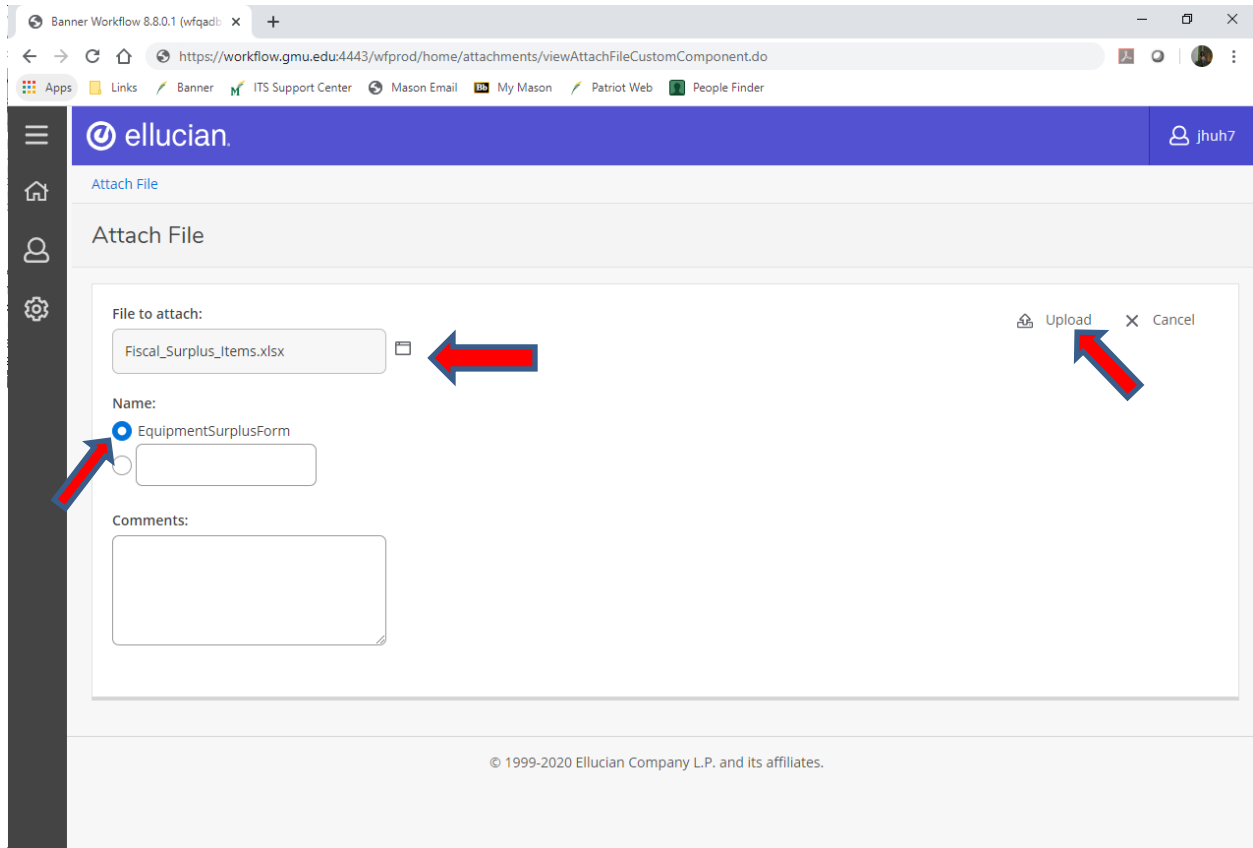
On the main "Equipment Surplus Form", select "Complete" to send the transaction to the surplus team for items to be picked up. You will receive an email notification that the transaction was entered into Workflow. If you want to stop in the middle and save the transaction data without entering it into Workflow, select "Save & Close". You'll be able to return to Workflow at a later time to finish the data entry and "Complete" the workflow instance. Hit "Cancel" to reenter all data on the Equipment Surplus workflow form.

NOTE*: Make sure to consolidate all surplus items and attach **one** file only. If there are multiple files attached, the extra files will not be sent in workflow emails.

That's all there is to entering equipment Surplus form! See the next section for details on how to view Workflow status.

View Workflow Status

You can check status of a workflow instance by selecting "Workflow Status Search" from the "Home" menu on the left-hand side of the page.
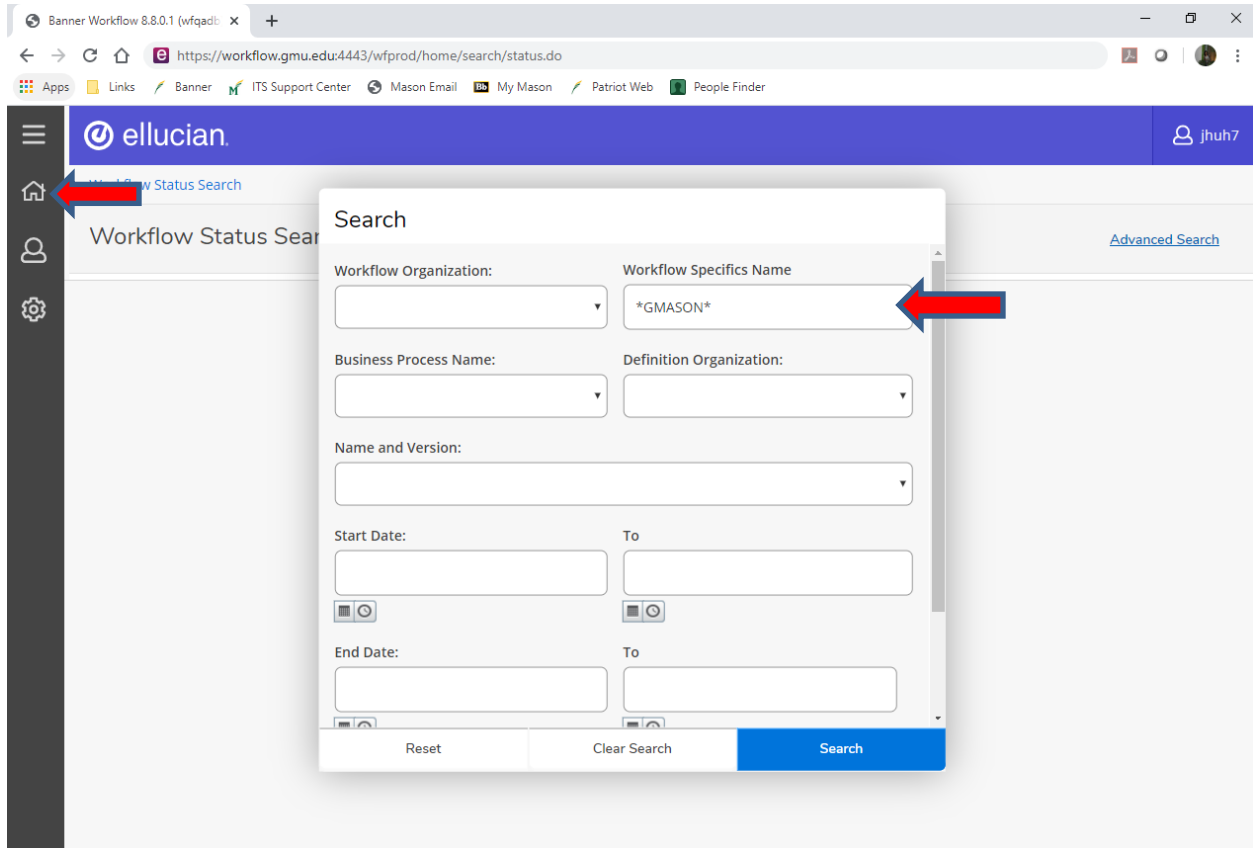
Enter the EXACT name of the workflow instance or enter only a portion of the name with wildcard characters ('*') into the "Workflow Specifics Name" field. Note that entering "*GMASON*" will display all transactions that contains the string "GMASON" (like "ES-GMASON-Fiscal Services-131002", etc). Select "FIN_Equipment Surplus Processing" for the "Business Process Name" and select a transaction status to further refine the search (Ready, Completed, Stopped) or leave it blank to search on any status. Then click the "Search".

Select the transaction name (link) you want to look at and it will bring up workflow map on next page.

Once the map of the workflow transaction appears, you can review the map to see what step it is on. To find out where the active transaction is, scroll down the map to find the step that contains a little running figure in it. (Note*: steps that contain a green check mark are "completed" and steps with a circular arrow

are steps that are completed, but have been performed multiple times).

For a description of each activity, single click on each activity and "Description" will be displayed in small pop up screen.