

“Proposal Routing Approval” in 3 Easy Steps

Workflow Approver Quick Reference Guide


Department Chair, Center Director, Dean

Revised 10/15/15

Step One: Log into Banner Workflow

In Internet Explorer, enter the url: <https://patriotweb.gmu.edu/admin/>

Then click on the “Workflow” link.

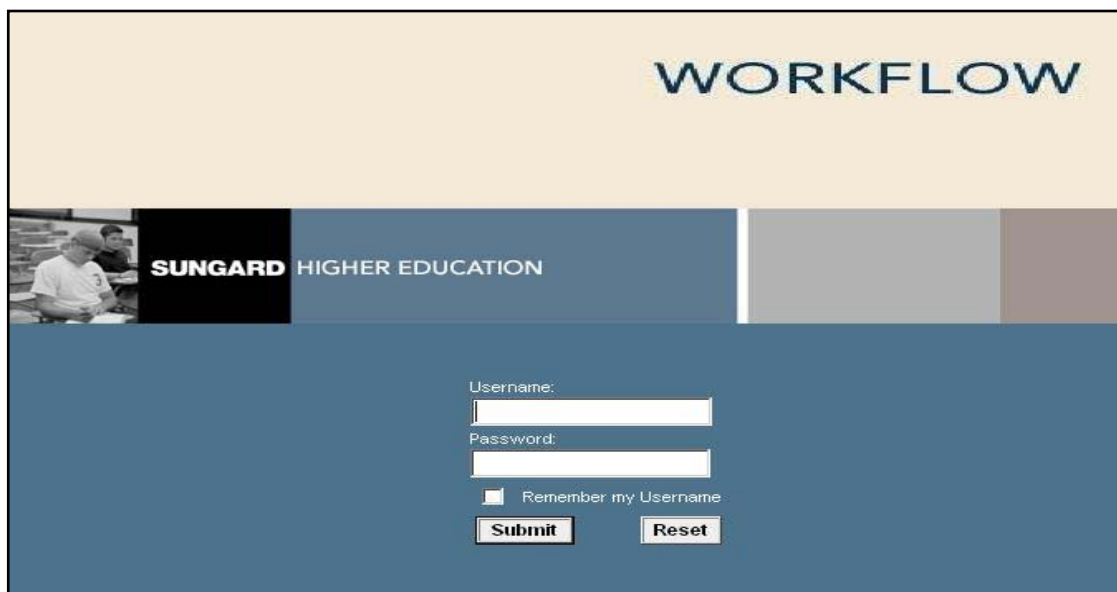


The screenshot shows the 'ADMINISTRATIVE SYSTEMS' menu for George Mason University. The menu is organized into several sections:

- 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**
 - Important Note:** This version of the Internet Native Banner Interface now uses the Java Plug-in instead of the Oracle JInitiator. The Java Plug-in should install automatically. If you want to download the Java Plug-in directly, please get the **Mason supported version of the Java Plug-in** software. This software is required for you to be able to login above.

- Customer Service**
- Patriot Web Alerts
- Reporting**
- Discoverer
- e-Print Reports
- Oracle Reports
- Other Applications**
- Evisions IntelleCheck
- Foundation Accounts System
- Fund/Org Lookup Form
- Pooled Position Lookup Form
- WorkFlow** (highlighted with a yellow arrow)
- Resources**

At the login screen, enter your email user name (e.g., ccourt1).
The password is your email password.



The screenshot shows the 'WORKFLOW' login screen. The page has a header with the word 'WORKFLOW' in large, dark letters. Below the header is a navigation bar with the 'SUNGARD HIGHER EDUCATION' logo on the left. The main content area is a dark blue box containing the login form:

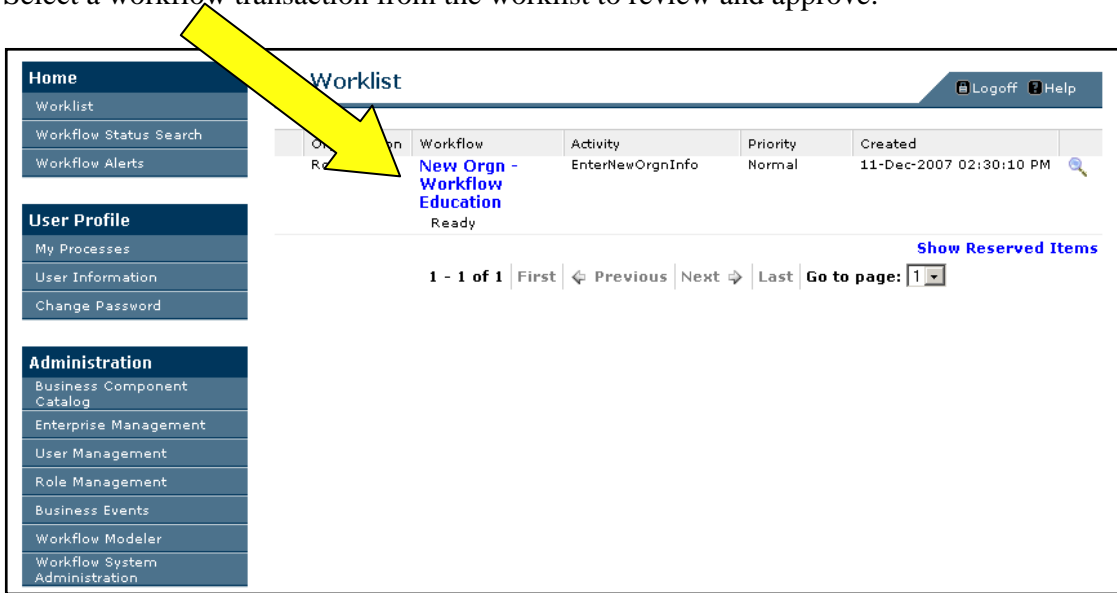
Username:

Password:

Remember my Username

The user's inbox is displayed, containing all workflow instances that require the approver's attention.

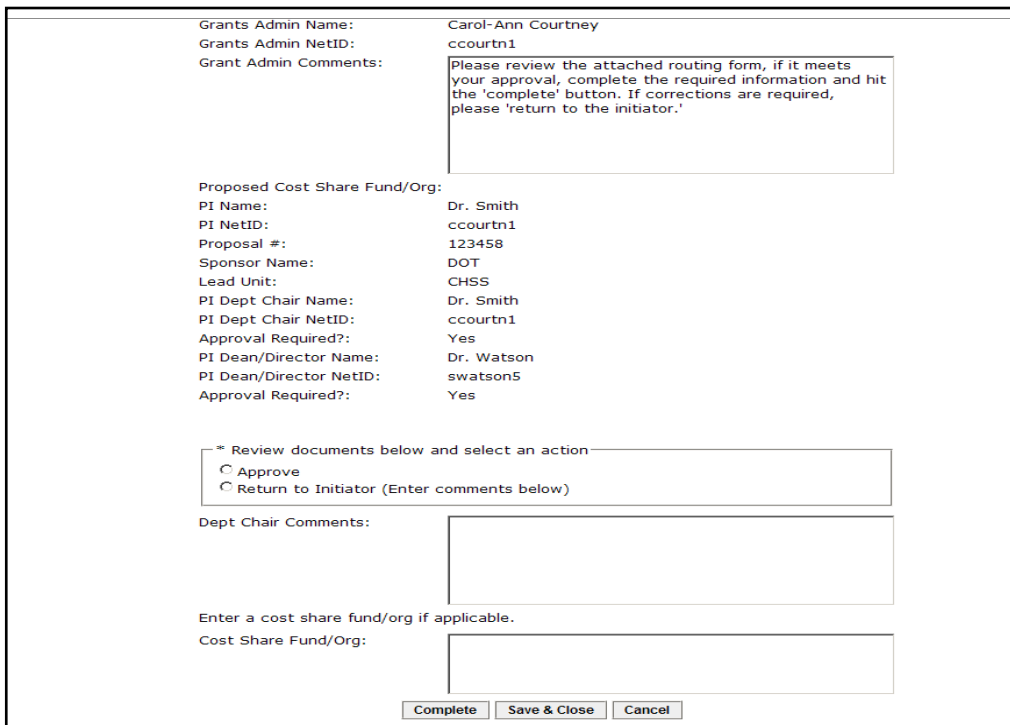
Select a workflow transaction from the worklist to review and approve.



The screenshot shows a web application interface titled "Worklist". On the left is a navigation menu with sections: "Home" (containing Worklist, Workflow Status Search, Workflow Alerts), "User Profile" (containing My Processes, User Information, Change Password), and "Administration" (containing Business Component Catalog, Enterprise Management, User Management, Role Management, Business Events, Workflow Modeler, Workflow System Administration). The main area displays a table with columns: "Workflow", "Activity", "Priority", and "Created". A single row is visible with the following data: "New Orgn - Workflow Education", "EnterNewOrgnInfo", "Normal", and "11-Dec-2007 02:30:10 PM". A yellow arrow points from the top left towards the "New Orgn - Workflow Education" entry. Below the table, there is a "Show Reserved Items" link and pagination controls showing "1 - 1 of 1" with "First", "Previous", "Next", and "Last" buttons, and a "Go to page:" dropdown set to "1".

Step Two: Review Transaction information

The transaction information will be displayed. A sample page is shown below.



The screenshot shows a form for reviewing transaction information. It contains the following fields and sections:

- Grants Admin Name: Carol-Ann Courtney
- Grants Admin NetID: ccourtn1
- Grant Admin Comments: Please review the attached routing form, if it meets your approval, complete the required information and hit the 'complete' button. If corrections are required, please 'return to the initiator.'
- Proposed Cost Share Fund/Org:
- PI Name: Dr. Smith
- PI NetID: ccourtn1
- Proposal #: 123458
- Sponsor Name: DOT
- Lead Unit: CHSS
- PI Dept Chair Name: Dr. Smith
- PI Dept Chair NetID: ccourtn1
- Approval Required?: Yes
- PI Dean/Director Name: Dr. Watson
- PI Dean/Director NetID: swatson5
- Approval Required?: Yes
- * Review documents below and select an action:
 - Approve
 - Return to Initiator (Enter comments below)
- Dept Chair Comments: [Text area]
- Enter a cost share fund/org if applicable.
- Cost Share Fund/Org: [Text area]
- Buttons: Complete, Save & Close, Cancel

To view the routing form and the F&A distribution, please click on the attached PDF.
The document will open for your review.

PI NetID: ccourt1
Proposal #: 123458
Sponsor Name: DOT
Lead Unit: CHSS
PI Dept Chair Name: Dr. Smith
PI Dept Chair NetID: ccourt1
Approval Required?: Yes
PI Dean/Director Name: Dr. Watson
PI Dean/Director NetID: swatson5

Review documents below and select an action

Approve
 Return to Initiator (Enter comments below)

Dept Chair Comments:

Enter a cost share fund/org if applicable

Cost Share Fund/Org:

Attachments

Blank Test Routing Form.pdf
Blank Test Routing Form.pdf (43 KB)
19-May-2010 01:58:59 PM
[\[Update\]](#) [\[Remove\]](#)

Step Three: Complete

Please review the information for accuracy. If the information is correct, select “Approve” and press the “Complete” button.

If modifications are necessary, please contact the Initiator (Grants Administrator).

If you are unable to complete the transaction during this session, press the “Save & Close” button and exit Workflow.