

“Proposal Routing Approval” in 3 Easy Steps

Workflow Approver Quick Reference Guide

Administrator

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.

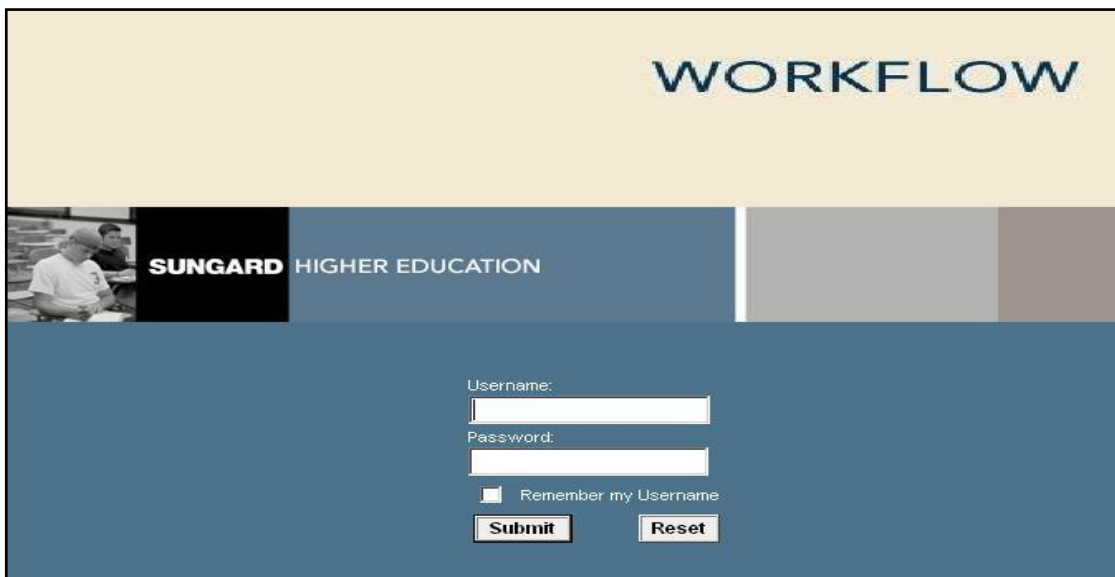


The screenshot shows the 'ADMINISTRATIVE SYSTEMS' menu for George Mason University. The menu is organized into several sections:

- 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., ccourtn1).
The password is your email password.



The screenshot shows the 'WORKFLOW' login screen. The page has a header with 'WORKFLOW' in large letters. Below the header is a banner for 'SUNGARD HIGHER EDUCATION' with a small image of a person. 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 with a sidebar on the left and a main content area. The sidebar contains sections for 'Home', 'User Profile', and 'Administration'. The main content area is titled 'Worklist' and contains a table with columns: 'Org', 'Workflow', 'Activity', 'Priority', and 'Created'. A yellow arrow points to the first row of the table, which has the following data: 'New Orgn - Workflow Education', 'EnterNewOrgnInfo', 'Normal', and '11-Dec-2007 02:30:10 PM'. Below the table, there are navigation controls including '1 - 1 of 1', 'First', 'Previous', 'Next', 'Last', and 'Go to page: 1'. A 'Show Reserved Items' link is also visible.

Step Two: Review Transaction information

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

The screenshot shows a detailed view of a workflow transaction. The page title is 'Worklist' and the subtitle is 'OSP Proposal Routing'. The main content area displays the following information:

- Date:** 12-May-2010 11:03:45 AM
- Grants Admin Name:** Carol-Ann Courtney
- Grants Admin NetID:** ccourtn1
- Grant Admin Comments:** Dear Dr. Smith, 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.'
- Dept Administrator 1 NetID:** ccourtn1
- Dept Administrator 2 NetID:** ccourtn1
- PI Approvers**
 - PI Name:** Carol-Ann Courtney
 - PI NetID:** ccourtn1
 - PI Approval Required?:** Yes
 - Proposal #:** 12345
 - Sponsor Name:** NIH
 - Lead Unit:** CHSS
 - PI Dept Chair Name:** Carol-Ann Courtney
 - PI Dept Chair NetID:** ccourtn1
 - Approval Required:** Yes
 - PI Dean/Director Name:** Carol-Ann Courtney
 - PI Dean/Director NetID:** ccourtn1
 - Approval Required?:** Yes
- Cost Share Approvers**
 - Require Cost-Share Approval?:** Yes
 - Approver #1 NetID:** ccourtn1
 - Approver #1 Name:** Carol-Ann Courtney
 - Approver #2 NetID:**
 - Approver #2 Name:**
 - Approver #3 NetID:**
 - Approver #3 Name:**

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

* Return for Corrections?: No

Enter Return Comments:

Department Administrator: By selecting 'Complete', I confirm I have reviewed the information in this routing form.

Complete Save & Close Cancel

Attachments

Test Routing Form.pdf
Test Routing Form.pdf (106 KB)
15-Oct-2015 10:14:55 AM
[\[Update\]](#) [\[Remove\]](#)

Attach File

Step Three: Complete

Please review the information for accuracy. If everything is correct, press the “Complete” button and the transaction will advance to the PI.

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.