

# “Proposal Routing Approval” in 3 Easy Steps

## Workflow Approver Quick Reference Guide

### Co-Principal Investigator

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.

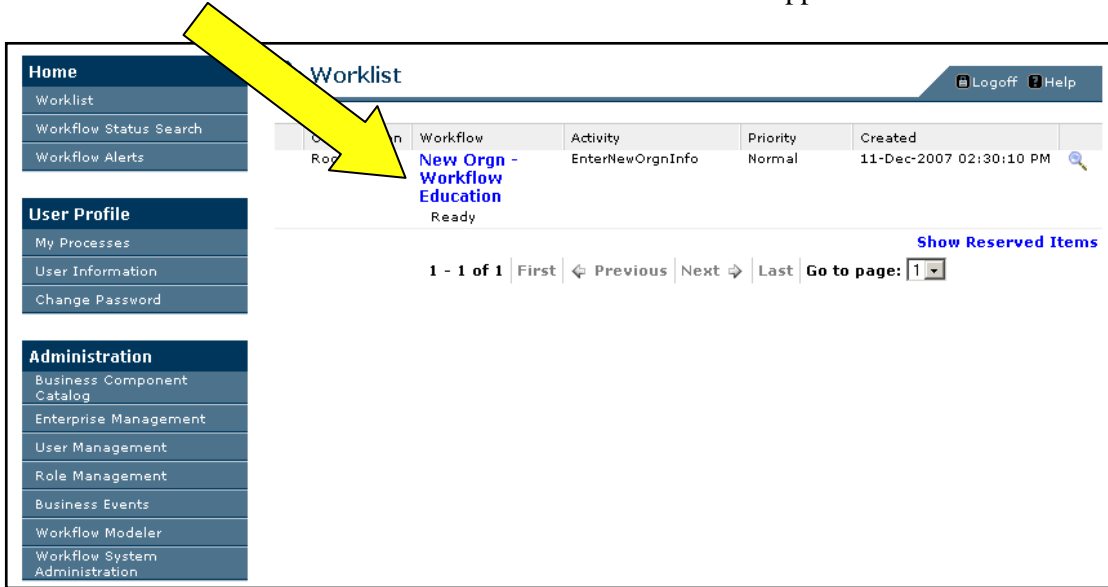
The screenshot shows the George Mason University Administrative Systems interface. On the left, there is a 'Production' section with 'Patriot Web Self Service' and 'Internet Native Banner'. A warning message is displayed below the banner link. To the right, there are several menu categories: 'Customer Service' (with 'Patriot Web Alerts'), 'Reporting' (with 'Discoverer', 'e-Print Reports', and 'Oracle Reports'), and 'Other Applications' (with 'Evisions IntelleCheck', 'Foundation Accounts System', 'Fund/Org Lookup Form', and 'Pooled Position Lookup Form'). The 'WorkFlow' link is highlighted in a yellow box, and a yellow arrow points to it from the right. Below the 'WorkFlow' link is a 'Resources' link.

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

The screenshot shows the Banner Workflow login screen. At the top, the word 'WORKFLOW' is displayed in large, bold, blue letters. Below this, there is a banner for 'SUNGARD HIGHER EDUCATION' with a small image of a person. The main area is a dark blue background with a white login form. The form includes a 'Username:' label and a text input field, a 'Password:' label and a text input field, a checkbox labeled 'Remember my Username', and two buttons: 'Submit' and 'Reset'.

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 of workflow instances. A yellow arrow points to the first row, which has the following data: Role, New Orgn - Workflow Education, EnterNewOrgnInfo, Normal, 11-Dec-2007 02:30:10 PM. Below the table are pagination controls: "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.

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:

Enter a cost share fund/org if applicable.

Cost Share Fund/Org:

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: 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)

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.