

“Proposal Routing Approval” in 3 Easy Steps

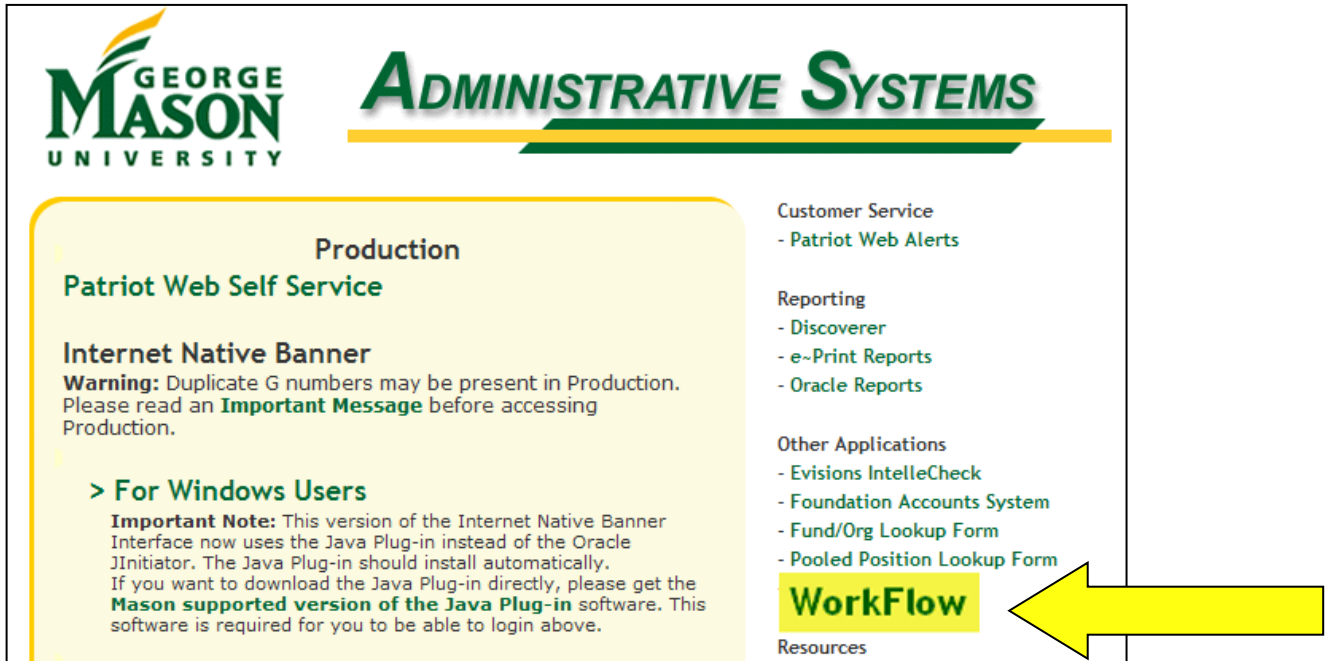
Workflow Approver Quick Reference Guide

Cost-Share Approver

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.



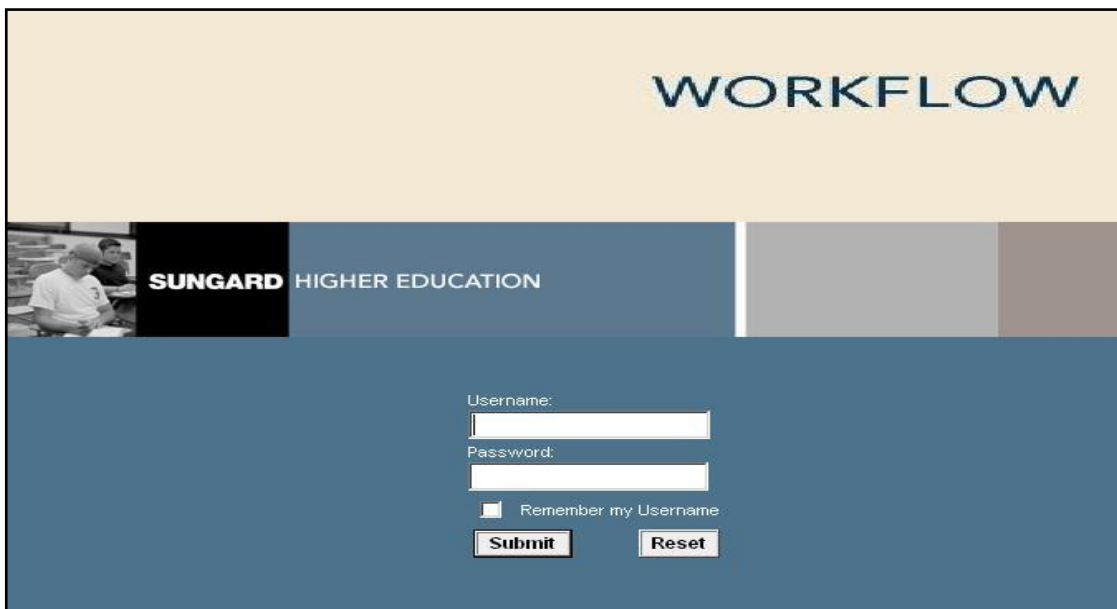
GEORGE MASON UNIVERSITY

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
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**
- Resources

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



WORKFLOW

SUNGARD HIGHER EDUCATION

Username:

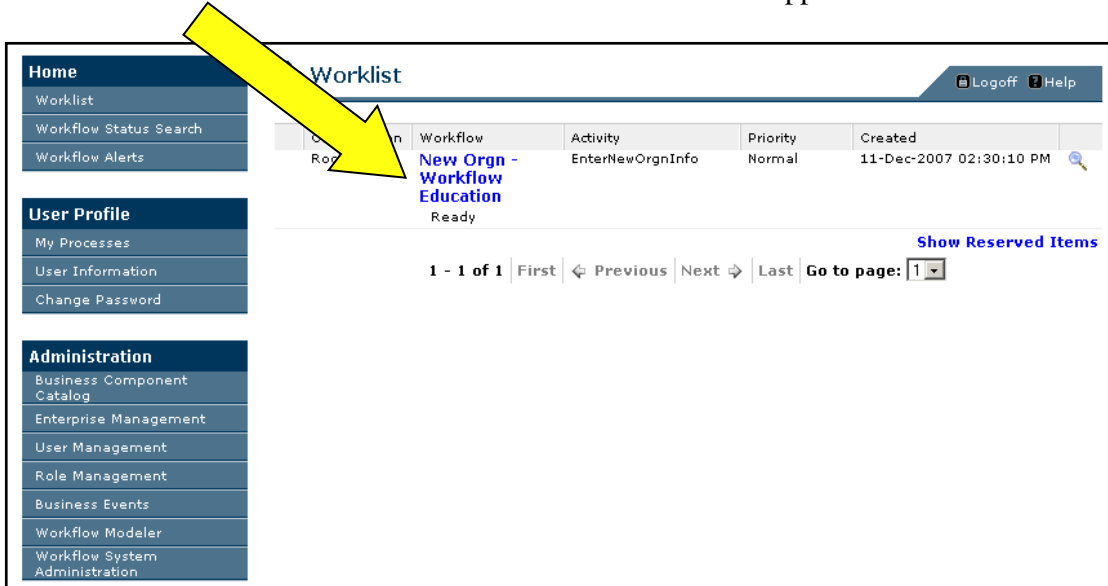
Password:

Remember my Username

Submit **Reset**

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

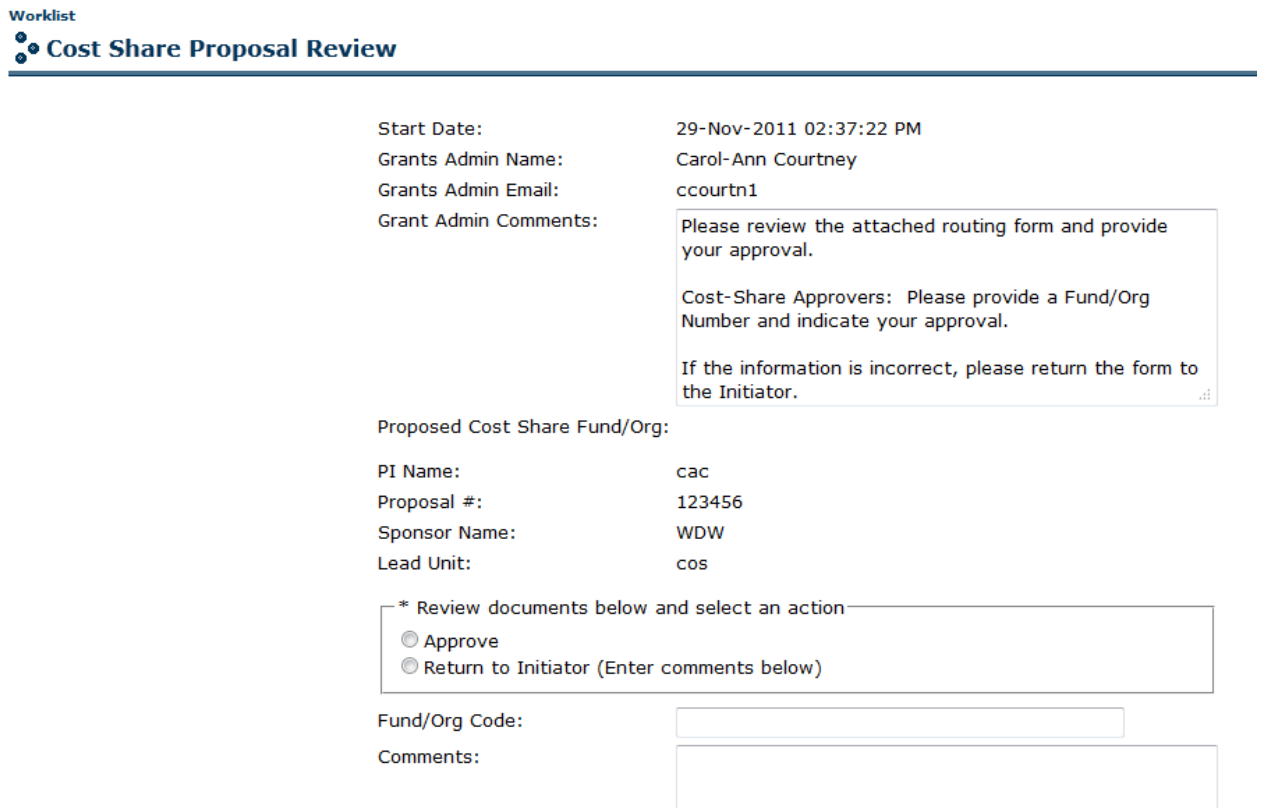
Select a workflow transaction from the worklist to review and approve.



The screenshot shows a web application interface titled "Worklist". On the left is a navigation menu with sections: "Home" (Worklist, Workflow Status Search, Workflow Alerts), "User Profile" (My Processes, User Information, Change Password), and "Administration" (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 to this row. Below the table, there is a pagination control showing "1 - 1 of 1" and "Go to page: 1". A "Show Reserved Items" link is also present.

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 titled "Cost Share Proposal Review". The page includes the following information:

- Start Date:** 29-Nov-2011 02:37:22 PM
- Grants Admin Name:** Carol-Ann Courtney
- Grants Admin Email:** ccourtn1
- Grant Admin Comments:** Please review the attached routing form and provide your approval.
Cost-Share Approvers: Please provide a Fund/Org Number and indicate your approval.
If the information is incorrect, please return the form to the Initiator.

Below the comments, there is a section for "Proposed Cost Share Fund/Org:" with the following details:

- PI Name:** cac
- Proposal #:** 123456
- Sponsor Name:** WDW
- Lead Unit:** cos

At the bottom, there is a section for actions:

* Review documents below and select an action

- Approve
- Return to Initiator (Enter comments below)

Below the action section, there are input fields for "Fund/Org Code:" and "Comments:".

Step Three: Complete

Please review the information for accuracy. Provide a fund/org (account) number for the GMU cost-share and/or in-kind contribution.

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.

If the information is incorrect, please return the form to the Initiator. .:|

Proposed Cost Share Fund/Org:

PI Name:	cac
Proposal #:	123456
Sponsor Name:	WDW
Lead Unit:	cos

* Review documents below and select an action

Approve

Return to Initiator (Enter comments below)

Fund/Org Code:

Comments:

Attachments