Banner Workflow Initiator Process

Updated: July 2022

Sponsored Projects Accounting
System Administration and Project Management

BE BOLD. Shape the Future.
New Mexico State University
Introduction

• Sponsored Projects Accounting (SPA) utilizes Banner’s Workflow tool to assist with the Banner Sponsored Award Index setup. The Banner Workflow tool automates and streamlines both the communication and the task of the prior manual process. Banner Workflow allows SPA to track the status and completion from the start to finish of a workflow item.

• To request access to Banner Workflow, email spa_sysadmin@nmsu.edu and provide the individual’s name, Banner ID and User ID. SPA will notify the individual when access has been approved and will work with the individual to confirm that they are able to access Workflow.
Process:

1. **Login** through my.nmsu.edu.
   a. Enter your user name and password into the correct fields and then click the **Sign In** button.

   ![Sign In Button]

   b. Click on the Workflow tab to open the Workflow system

   ![Workflow Tab]
Worklist in Workflow:

2. To start a request in Banner Workflow click the drop down menu on the top left of the screen.

3. Select User Profile then click My Processes.

4. Click My Processes.

5. Click on the RA_SPA Award Index hyperlink.
This form contains required and optional fields. The required field is marked with an asterisk and must be populated. Workflow will not allow you to continue until the required field is populated.

6. **Required field ‘CX_Workflow_prop_num’**: This field will help identify the initiator and type of request. It will become part of the email subject line. **When populating this field, please begin with the following:**
   
   a. Please add something to your workflow to distinguish your department (ENG, ACES, NMDA, etc.).
   b. ‘INS’ and the proposal number.
   c. The type of workflow being processed:
      - NEW – is requesting a brand new G# be created.
      - MOD – includes any other requests to existing awards.
      - SUB – is requesting a new sub-contract (EQ) or a change to an existing sub-contract.
   d. The associated G# if one has been assigned.

7. Click the **Start Workflow** button to move the workflow to the worklist. The screen will refresh and return to the Worklist.
Workflow Form: Optional fields

Information entered in the **Workflow Specifics Name** field will not appear in the workflow history and is not a required field. Thus, **leave this optional field blank**.

Information entered in the **Workflow Note** field will not appear in the workflow history. It only appears in the Work Item Details when clicking on the magnifying glass in the worklist. Thus, **leave this optional field blank**.
8. In the worklist, click on the title to go to Initiator Attach Documents.
9. The following fields are required:
   a. **PI Name/Comments** - Enter the PI name and any pertinent information using upper case letters for consistency in the final email notification.
   b. **Dept. Email** - Your department will receive notices in reference to the workflow.
   c. **PI Email** - The PI will also receive notices.
   d. **CA Email** - The Contract Administrator(s) you have been working with at RAS.
   e. **Choose Initiator Email** - Always RAS. Select after attaching documents.

10. **Attach File**: Click the button to access the form to attach the required documents to the workflow.

**NOTE**: When entering multiple emails in a field, you must use a comma (instead of a semicolon) to separate email addresses. If commas are not used, it will prevent the final email from generating to the people listed.
11. **Name** options: Click the appropriate radio button for request type. You can create your own name title in the blank field under the *New Index Created Details (FIP and PSL Only)* field if needed.

12. **Comments:** Information entered here will be displayed in the workflow history.

13. **File to attach:** Click the **Browse** icon to find the appropriate file.
   


14. **Upload** button: Used to attach the file and return to the Initiator Attach Documents screen.
15. Attachment(s) appear at the bottom of the form.

16. Choose Initiator Email - Always RAS.

17. Click the **Complete** button at the bottom of the screen.
Workflow in Worklist:

18. When done, the screen will return to the Worklist. Click on the browser’s refresh icon to refresh the page. Your work item should now be visible on the Worklist.

![Worklist screenshot](image)

19. **Initial Email**: When all stages in the ‘Initiator Role’ have been completed, each email address provided in the workflow will receive an email notice.

![Initial Email screenshot](image)
20. The new work item is reflected in **SPA_Review_Docs** in the activity column. 

**Please note** that initiators can only view work items in the **Initiator_Attach_Documents** activity. 

You will not see a work item once it has moved to a SPA activity.

![Worklist Image](image)

21. Once in the **SPA Review Documents status**, SPA is ready to work on your request. A final “Congratulations” email will be received once SPA completes all required actions.
Stop Workflow:

If you started a workflow but never generated an email to SPA, which means you never clicked the complete button, you can request to stop the workflow.

In Work Item Details, select the Stop Workflow Request hyperlink.

If you have initiated a workflow and generated an email to SPA but no longer want the workflow, let SPA know that you want to cancel it via the comments section of workflow, Teams chat or email.
Release Workflow:

If you have a workflow in **Performing**, you are the only one that can see it.

To release the workflow, select the magnifying glass under the **View Details** column of the same row.

In Work Item Details, select the **Release** hyperlink.
Contact Information

Sponsored Projects Accounting

System Administration and Project Management

spa_sysadmin@nmsu.edu