Banner Workflow
Creating FOAPAL Requests

Workflow’s automated processes allow business events to trigger user emails, automated activities, and notifications. Workflow’s automated approval notifications will replace sending paper forms around campus to receive the appropriate signatures for approvals.

Learn how to request new FOAPAL’s (like the old Account Notification Forms) and to process FOAPAL requests.
Workflow Main Menu

What is Workflow?
Workflow is a program that initiates and directs the flow of information across the campus automatically routing documents to the appropriate personnel for review and decision making.

Worklist
Worklist is a “to do” list. Work you see here is sent to you because of the roles associated with your user id.

Workflow Alerts
If a workflow process encounters an error, the Controller's office will receive an alert message.

My Processes
Shows all the workflow processes you have access to initiate.

User Information
Includes information about your Workflow profile and assigned roles. This shows if you have added a proxy to any of these roles, and if you are a proxy for anyone else.

Proxy Example:
Workflow allows managers to proxy some of their files to other managers to help with the workload.

Change Password is disabled in Workflow

Things to Know About Setting Up a Proxy
Although it is easy to set up a proxy for a specific role, this does not remove you from the process, it just allows someone else to act in a similar role as yourself. So instead of you being the only one to approve the process, you or your proxy can approve the process.

If you do set a proxy, you will still see the open processes in your Worklist. If you select the process the proxy will no longer see the process (only one person can access and take responsibility for a process). So make sure you do not select processes from your Worklist that you have set a proxy for (even if you get an email) or else the proxy will not be able to access the process. Setting a proxy will NOT re-route an email.
Starting a New Process Request

To Begin Using Banner Workflow...

When you open Workflow for the first time you will not have any processes listed until you initiate a process request however you may see processes listed you need to approve.

**1** Initiating a workflow

CLICK > on the My Processes link to access the list of processes that can be initiated.

**2** SELECT > the workflow process you would like to initiate, in this case the FOAPAL and AR Detail Code Creation.

**3** Fill in the required fields.

**Workflow Specifics Name** - will be the name given to this new process being initiating. The name should be relevant to what you are doing.

**Example:** if you want to create a new fund for the controller’s office you might name the process, “New Fund for Controller” or “Controller Grant Fund.” If you are deactivating a fund the name might be, “Deactivate Controller Fund.” This name will follow the processes until the very end and show up in emails for all approvers, so be sure to use a logical name.

**Workflow Note** - add a comment to clarify the request.

**4** Attach a File

You can also attach supporting documentation to the request. Give the attachment a name and add a comment.

In the example shown an attachment and comment has been added.
Starting a New Process Request Cont.

5. **SELECT > the Start Workflow button.** A confirmation screen will appear, click OK to return to your Worklist. Your request will be authorized.

6. **Receiving an email**
   
   An email will be sent to you once the request has been validated. You will not be able to continue your Workflow process until you receive the email.

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**You will receive an email after you submit your request.**

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**Office of Information Technology, Ball State University**

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4
If you need to check on the status of a particular workflow that has been initiated, you can perform a Workflow Status Search.

SELECT > the Workflow Status Search link in the navigation menu.

Enter the workflow name or select the type of process you are searching. Once your results appear you can select the appropriate process.

Note: If you can’t remember the exact name of your workflow you can use a wild card character to help your search.

Example: using the Workflow Name field type...

%New% - lists all entries that contain “New” in the title.
%New - lists all entries that end with “New”
New% - lists all entries that begin with “New”

Note: Searches are case sensitive. If “new” (all lower case) was in the name of a workflow it would not be retrieved from a search using New.
Viewing Workflow Status and Details

Select the desired process. You will see a screen that has two tabs under the workflow name, Workflow Status and Workflow Details.

Workflow Status - shows a graphical representation of the workflow and its progress.
- a green check mark means the step has been completed.
- a running man shows the step the process is on.
- email status
- the boxes without an icon show the remaining processes to be completed.

Workflow Details - an outline that shows the original initiator, notes, attachments, and other details of the process.
Filling Out the Process Request Form

Filling the form out for a new FOAPAL request.

The Organization code is the code that is responsible for the chart element. You may have to conduct a search in SSB, if you are unsure what your Organization code is. The Organization code will dictate the approval routing for the process.

Select if the Request Type is a New FOAPAL, a revision of a FOAPAL, or if you are requesting to inactivate a current FOAPAL.

This will determine what steps need to be completed on the rest of the form.

The Effective Date is also required. Please be sure to select the box next to the Effective date field and chose the date, do not try to manually enter the date, it requires a time stamp, so it will be best to use the calendar.

Make sure to read the instructions for each section to determine if you need to fill in the information or to determine what type of information is needed.

New FOAPAL fund.

You must fill out the box for all changes.
Filling Out the Process Request Form Continued

- Take special notice in Part 5 if you are creating a Fund code, it is not necessary to complete each section within the Part. You will have to read the directions to each section to determine if you need to complete the particular section.

- If you are requesting a new Fund, you will need to enter the name of the fund, chose a Revenue Source (where did you receive the funds from) and an expense purpose. You may wish to review the expense program code descriptions via the website.

- It is also mandatory to indicate how a deficit will be funded for this new fund.

- Be sure to follow the directions to determine if you need to complete each section. For example, if you are requesting a new Fund, you do not need to complete steps 3, 4, and 6. However, if you are requesting an activity code you don’t need to complete steps 3, 5, and 6.
Filling Out the Process Request Form Continued

Once you have completed all the required fields on the form, you must select Submit.

If you wish to send a message to approvers of this form, you can do so via the Submit Comments box.

Select the Complete button to complete the workflow or Save & Close to save the workflow to come back to later.

Be sure to follow the directions to determine if you need to complete each section.

Shows any attachment to this document and you can add an additional attachment before you complete the form.