CCAS Office of Graduate Studies
Banner Workflow Guide for Graduate Awards

Basic Workflow Concepts
- Workflow is an automation of a business process. When one step of the process is complete, workflow advances to the next step.
- Workflow has users. Each user has a workflow logon like Banner users.
- Work is distributed by role. Each role is associated with one or more users.
- Workflow responsibilities and privileges are also managed by roles. Users have access to different Workflow functions depending on their roles.
- When you logon to Workflow via banwf.gwu.edu, you will see a worklist. The worklist is the work that has been sent to your user ID because of the roles associated with your user id.
- Logging on to workflow via banwf.gwu.edu will let you know if you have work to complete.

Workflow Terminology
- “Activity” is a step in a workflow.
- “Role” is privilege associated with a user logon ID. Roles are associated with users. Roles determine what work each user will see.
- “Worklist” is the “To Do” or work items sent to users.
- “Workitem” is an item or work on the worklist that must be completed by a user.

Things you need to know
This document is meant to introduce you to Banner Workflow. This document will provide generic instructions for logging into Banner Workflow and initiating graduate awards.
Log On
Obtain the Virtual Browser for Banner Workflow from Division of Information Technology at the ITSC website it.gwu.edu. If you have issues with downloading the Virtual Browser contact the ITSC.

You need Banner access for logging into Banner Workflow and virtual browser. Access Banner Workflow at banwf.gwu.edu using Banner login credentials.

Online Tutorial
Complete the online tutorial: gwu.edu/~set/GA_Automation/story.html.

Worklist
The “Worklist” is the first page that is displayed in Banner Workflow. The Worklist organizes work items for the role(s) that the user is assigned to. Each work item represents a unit of work for a single workflow activity for a given Workflow Model.
Initiating a Graduate Award

1. Award Creation
From the “Worklist” screen, go to “My Processes” on the left column under User Profile. Click on “Graduate Award Recommendation” to start workflow.

2. Award Name
For the “Workflow Specifics Name” use student name, name of award, and academic year (Example: John Doe GA/UF 15-16).

Award Name Abbreviations
- GA = Salary only Graduate Assistantship
- UF = University Fellowship (tuition + stipend, or stipend only)
- GA/UF = Graduate Assistantship with full package (salary + stipend + tuition)
- Tuition = tuition only
- GRA = Graduate Research Assistantship (salary + tuition)

Attach documentation for research awards that is required by IRB via “Attach File” in the Attachments section.

After initiating the “Workflow Specifics Name”, click “Start Workflow.” This will initiate the award workitem.
3. Start Workflow
From the "Worklist," select the award to begin the workflow. The screen for "Assistantship and Fellowship Recommendation Form" will appear.

"Enter Student's GWID" and "Select the Academic Year, then click on “Get Student Info.""

“Enter the Award Name to appear in the award letter." NOTE: The name of the award must be entered as noted below so that the award offer email is worded correctly.
- a Graduate Assistantship and University Fellowship
- a University Fellowship
- a Graduate Assistantship (to be used for old IA positions)
- a Tuition (or Half Tuition) Fellowship
- Endowment names should be spelled out in full.

“Click the button to display Student's Degrees and Majors.”

“Department/Program Name to appear in award letter” must be spelled out in full to appear formally in the letter (Example: Department of Anthropology instead of Anthropology or ANTH. Programs should be Environmental Resource Policy Program instead of ENRP or ENRP Program).

Select “Award Period," Study Requirement," Registration Requirement," and “Award Renewable."
NOTE: Start dates must be the first of the month and end date must be the last day of the month. Most awards will be an academic year beginning September 1 and ending May 31. If fall only, then enter September 1 to December 31. If spring only, then enter January 1 to May 31.

“Award Types” require information for each portion of the award (Example: if GA/UF, then enter information for GA portion, UF portion and tuition portion). Select each type from the drop down menu and populate the appropriate information. NOTE: Multiple payment types can be selected from the drop down in the same menu.

“Graduate Assistantship and Fellowship” must be selected for any funds from OGSAF (endowment or other special awards through that office). “School Graduate Student Support” must be selected for any funds from regular CCAS Graduate Support allocation. If “other” is selected as the funding source, then indicate what the source is with the fund number in the comments. NOTE: Tuition credits can be split between sources.

4. Approver Assignment
Select the name of your Department Chair or Program Director as the Chair-level approver from the drop down list.

What the approval email is like for Chairs

Select Katherine Conaty in CCAS as the School Fellowship Coordinator. Leave SFC 2 blank unless this is a cross-school appointment (Example: a CCAS student receiving ESIA funds).

Select Pete Van Riper as an additional approver at OGSAF for any awards from endowments or funds from OGSAF.

Select Geri Rypkema as the OGSAF approver for grant-funded awards with an OGSAF tuition portion.

5. Adding Recipients
Enter email addresses for those who need the award letter and replies.

Add snip.

6. Complete, Save and Close, or Cancel
NOTE: Information entered into the system must be complete and accurate or the workflow will be returned to you for re-working.

“Click to check the form for errors.”
* CLICK TO CHECK THE FORM FOR ERRORS:  

Correct any errors found. Then select “Complete,” Save and Close,” or “Cancel.”

[Complete]  [Save & Close]  [Cancel]

7. Payment Checklist
Add section on payment characterization checklist for payments that include a stipend but no salary.

8. Award Letter
The initiator will receive notice from Workflow when the award letter is ready to prepare. The approval process to create an award letter starts at the Initiator, moves to the Department Chair, then to the school Fellowship Coordinator, and onward to OGSAF. CCAS will send the award letter for CCAS funds. Departments will send the award letter for grants, endowments, and special awards. Departments can add award letter comments if using departmental funds.

Add steps for creating award letter.

9. Acceptance
Award acceptance/decline notification emails

Acceptance is the point at which payment processes should be initiated by the department or awarding office.

10. Award Adjustment
If adding funds to an award midyear, then create a new award letter for the full award. NOTE: Adjust the pay date to be a month later and increase the amount to allow for processing time.

11. Editing Worklist
Add step for deleting item from worklist.

For Help
- IT issues: CCAS OTS 4-8096 (for help with installation of workflow browser).
- Banner Access: DIIT Security sysuid@gwu.edu.
- Banner Access, existing: CCAS Office of Finance, Emrisia Lee emprisia@gwu.edu.
- Workflow Access: CCAS, Katherine Conaty kconaty@gwu.edu.
- Training: DIIT online training gwu.edu/~set/GA_Automation/story.html
- Awards: CCAS Office of Graduate Studies, Katherine Conaty 4-8118, or Melissa Busskohl 4-8571.