

Banner Workflow Update, November 2008

A software revision of Banner Workflow as of 11/2008 has resulted in minor changes to some Workflow screens, as described in this update.

This update applies to everyone who uses the Workflow Worklist view.

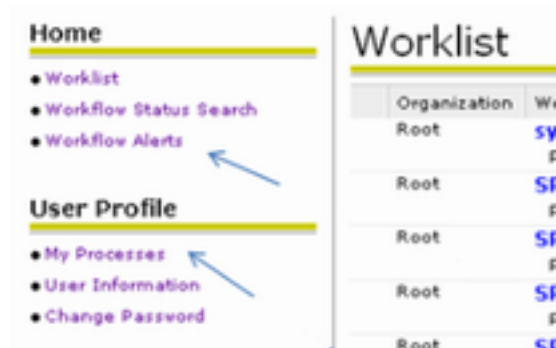
1. Worklist Menu Change

The option **Workflow Alerts** now appears on the Home menu of every Workflow user, however this option is available only to workflow administrators.

The option formerly titled **Shortcuts** in the User Profile menu has been renamed **My Processes**. The function of this tool has not changed.



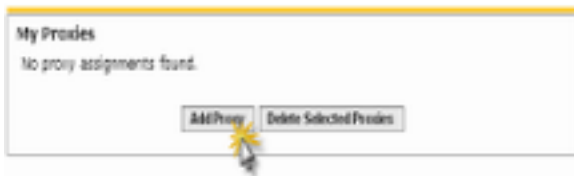
Old Worklist Menus



New Worklist Menus

2. Add Proxy Button Location Change


Previously the **Add Proxy** button appeared beneath the list of proxy assignments, as seen below:



Old Add Proxy Button Location

The **Add Proxy** button now appears in the last column of the assignment list, with a separate button for each role:

Role Assignments						
	Organization	Role Name	Effective From	Effective To	Type	Proxy Assignment
<input type="checkbox"/>	Root	All_Users	06-Jul-2007 08:26:35 AM		Primary	Add Proxy
<input type="checkbox"/>	Root	Department Approvers	20-Jun-2007 11:40:03 AM		Primary	Add Proxy
<input type="checkbox"/>	Root	Division Approvers	20-Jun-2007 11:39:58 AM		Primary	Add Proxy
<input type="checkbox"/>	Root	FIN_All_Users	20-Jun-2007 11:39:44 AM		Primary	Add Proxy
<input type="checkbox"/>	Root	Unit Approvers	20-Jun-2007 11:39:49 AM		Primary	Add Proxy



New Add Proxy button Location

3. No Change to the Proxy Details

When you click the **Add Proxy** button for a role, you will select the **User** name, specify the **Effective dates** of the proxy assignment, and check the **Non-Confidential** checkbox as usual.

This step has not changed.

User Information

Proxy Details

[Workflow Help](#)

Role: FIN_ALL_USERS

User:

Effective From:

Effective To:

Confidential:

Non-Confidential:

The Proxy Details screen is the same as it was; no change here

Understanding Workflow Roles and Assignments

Workflow roles do not always suggest their actual workflow function. This table of Workflow roles will help you make proxy assignments.

role name in the Proxy List	What the Role Means / who has the role
Department Approvers	POSITION REQUEST AUTHORIZATION and Tuition Benefit Department Approvers
Unit Financial Manager Approvers	POSITION REQUEST AUTHORIZATION Unit Financial Managers
Unit Approvers	POSITION REQUEST AUTHORIZATION Unit Approvers
Budget Officer	POSITION REQUEST AUTHORIZATION Division Budget Officer
Division Approvers (Final Approver)	POSITION REQUEST AUTHORIZATION Final Division Approver
Compensation Approver	POSITION REQUEST AUTHORIZATION Approvers in the Compensation department
EOAA Approvers (Waiver Approval)	PRA Approvers in the Affirmative Action Department
Research and Graduate Studies Approvers (Grant Approval)	POSITION REQUEST AUTHORIZATION Approvers in the RAGS office for Grant accounts
Employment Manager (PRA Employment)	POSITION REQUEST AUTHORIZATION Processors in the Staffing Office
SPAF-Authorizers	Departmental or College approvers of SPAF workflows
SFA-SPAF	SPAF Financial Aid processors
All_Users	General Review Activities and Return for Rework Activities for all workflows
FIN_All_Users	Expense Reimbursement Approval Activities
STU Graduate Admissions Reviewers	Graduate Application workflow coordinator reviewers
STU Grad Dean	Graduate application workflow dean level approvers in Research and Graduate Studies areas
STU International Affairs	International Affairs Office Staff