FGSR Banner Workflow Manual for Line Faculties
Table of Contents

Workflow Overview: ................................................................................................................................. 3
Banner Workflow Username and Password: .................................................................................................. 4
Department Administrative Contact Instructions: ........................................................................................ 5
Supervisor and Coordinator Instructions: .................................................................................................. 7
Associate Dean Instructions: ..................................................................................................................... 10
What is Banner Workflow: ......................................................................................................................... 14
Basic Workflow Concepts: ......................................................................................................................... 14
Logging in to workflow: .............................................................................................................................. 14
Working in workflow: ................................................................................................................................. 14
What is the FGSR Workflow ...................................................................................................................... 15
Workflow Overview:
The FGSR Banner Workflow automates the following common student requests:

- Transfer within a graduate program (TR)
- Change to approved graduate program (PC)
- Leave of Absence (LOA)
- Voluntary Withdraw (VW)
- Program Extension (EXT)
- Progress reporting (PR)

This automated process replaces paper requests. The objective is to electronically share documents between FGSR and the faculties/departments/units involved and to automate the flow of reviews and approvals for various processes as well as to send automatic notifications where applicable.

When a student request is submitted through his/her UR Self Service account an email is generated and sent to his/her supervisor (if applicable) and administrative contact in the students unit notifying them of the request. If no supervisor is listed in Banner the request is sent to the student’s program coordinator. Faculty approvals move the request forward. Any re-work or denied decisions are emailed directly to the student. If a request is sent back for re-work or denied it is closed. If the student would like to make the request again, they must start a brand new request in UR Self Service.

In UR Self Service the student will select Student Services and then select Graduate Student Requests (see image below):
Banner Workflow Username and Password:
How do I find out my username and password?
Your username as password for Banner workflow are the same as your Banner or Caspur username and password. Typically the username is your general uregina user name, however, if you are not sure of this information you will need to contact the IT Support Centre for assistance.
Email: IT.Support@uregina.ca
Phone: 306-585-4685
Webform: http://www.uregina.ca/is/forms/ticket.html
Website: www.uregina.ca/is
In person: ED 137 or Archer Library Commons

Upon obtaining your username you will also be given a new temporary Banner password from the IT Support team. You will have to log into the ‘Banner’ database to set a permanent password before you can login to 'Banner Workflow'.

1. You do not need Banner access you simply click on the following link: https://banner.uregina.ca:8070/forms/frmservlet?config=prod.
2. A pop up will open and request that you enter your temporary password and then your new password.
3. You will be prompted to change your password.
4. You may then exit Banner by clicking on the X or closing the window.
5. You should now be able to log into Banner Workflow: https://banner.uregina.ca:8888/wfprod/logon.jsp
Department Administrative Contact Instructions:

1) Upon submission of a student request from UR Self Service each department contact will be notified via e-mail of the request.
   a. This e-mail is simply a notification that a request has been submitted. An e-mail will also go to the appropriate approver for review and notification that work is required in Banner Workflow.
   b. You will only receive an e-mail at the first stage of the workflow (when the student submits), you will not receive subsequent e-mails at each approval stage. Each request goes through a student’s supervisor (if applicable), the coordinator, the associate dean, the FGSR dean and the FGSR staff.
      i. It is imperative that FGSR is notified of changes to these roles at your earliest so we can ensure the workflow is routing the requests appropriately.

Sample email:

Greetings,

This is to let you know that the following request has been initiated for your department.

Request Type: Transfer
Student Name: Banner Workflow
Student ID: 200393387

Current Program: Master of Education in Curriculum and Instruction Thesis Option
Effective Term: 2017 Fall

Request ID: 2091
Request Date: 2017-06-30 09:42:58

Thank you,
Faculty of Graduate Studies and Research
University of Regina

2) As the line faculty contact you have access to an “Admin Page” tab in UR self-service where you can view all student requests.
   a. This tab was designed so you can audit requests that have come in and where the request is in the approval process and even view decision letters that have been issued to the students. This also gives you the ability to track and assist with questions if needed.
   b. To login you simply go to the UR Self Service login page (https://banner.uregina.ca/prod/sct/twbkwbis.P_WWWLogin) and enter your User ID and PIN. You will then select Student Requests and Graduate Student Requests, then select the ‘Admin Page’ tab.
Students requests will be prioritized by the status, below is a key to identify what the status mean’s.

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>I</td>
<td>In Process (default initial status)</td>
</tr>
<tr>
<td>SR</td>
<td>waiting for student supervisor review</td>
</tr>
<tr>
<td>PR</td>
<td>waiting for program coordinator review</td>
</tr>
<tr>
<td>AR</td>
<td>waiting for Associate Dean</td>
</tr>
<tr>
<td>DR</td>
<td>waiting for Dean Review</td>
</tr>
<tr>
<td>F</td>
<td>Waiting for FGSR staff review</td>
</tr>
<tr>
<td>M</td>
<td>Missing Documents</td>
</tr>
<tr>
<td>A</td>
<td>Request Complete and Approved</td>
</tr>
<tr>
<td>X</td>
<td>Request Complete and Denied</td>
</tr>
<tr>
<td>RS</td>
<td>Restart (Note: sess_wf_restart_ind = 'Y')</td>
</tr>
</tbody>
</table>

WF Status Key (Column 8 above):
Supervisor and Coordinator Instructions:

1) A student’s request will be directed to their supervisor (if one is listed in Banner). If no supervisor is listed in Banner the request will go directly to the Graduate Coordinator for that area. An email notification that a request has been submitted will be sent to the appropriate individual notifying you that work is required.
   a. If a request is sent directly to a coordinator, the supervisor section in workflow will still display but will not have any information attached.

Sample email:

Greetings,

A request is pending your review in FGSR Banner Work Flow.

Request Type: Transfer
Student Name: Banner Workflow
Student ID: 200393387

Current Program: Master of Education in Curriculum and Instruction
Thesis Option
Effective Term: 2017 Fall

Request ID: 2091
Request Date: 2017-06-30 09:42:58

Please login to workflow view this request

Thank you,
Faculty of Graduate Studies and Research
University of Regina

2) Upon receiving the e-mail notification that a request has been submitted, you will need to login to Banner Workflow using the link in the email that is sent to you or by typing this address into your web browser https://banner.uregina.ca:8888/wfprod/logon.jsp
   a. NOTE: For best results please use Firefox

3) Upon logging into Banner Workflow, the student request will appear automatically in your “Worklist”. If you do not see anything you may click on “Worklist” button in the left toolbar to refresh the window.
4) Selecting the request in your worklist will open up the request. Here you will be able to review the details of the student and the request.
   a. Information on the student and the request are listed at the top, and the approval section is near the bottom;
   b. If the student has uploaded any documents they will be attached at the bottom of the screen for your review as well. There is also an option for you to upload further documentation if necessary.

5) As you scroll down and review the request, you will see an area with a label in blue and comments fields, the blue text indicates the approver reviewing the request and where information is required.
   a. The options for you are to approve the request as is, deny the request or send the request back to the student for more information.
   b. If a request is denied or sent back to the student for more information you will be required to enter comments in the “Comments to Student” section. The student will then be sent an email notification including these comments.
      i. If these options are selected any previous reviewer will also be notified by e-mail of this decision.
   c. If you simply want to add comments for the next reviewer, these are to be entered in the internal comments section, and will only be shared with the next reviewer(s), not the student.
      i. Please note, comments are only required if you are denying or sending the request back to the student for Rework. Comments are not required to approve a request.

6) Once you have added your comments (if necessary) and are ready to submit your request you will click on your decision, and then click 'Submit'.
   a. If you would like to save your comments but come back to the request at a later date to submit, you will select “Save & Close”, alternatively if you are not ready to review this request you may select “Cancel”. Cancel will simply put the request back in your worklist to review at a later time.
   b. Once a decision has been submitted a new email is generated to the next approver (if approved), or the student (if denied or sent for rework).
c. The FGSR Dean is the final approver of all requests. The FGSR Dean has more decision choices than the other approvers and in addition to the choices listed above they can also send the request back to any of the previous approvers with comments.
   
   i. If the Dean has a question for the supervisor for example, a selection can be made to send the request back to the supervisor with the question in the internal comments. If this is done the workflow sends the request back to this individual and the process starts over.
   
   d. Once a request has been approved by all approvers it shifts to FGSR staff for processing.
   
   e. Please note that Progress Reports are sent directly to the FGSR Dean for approval, as they are already coming in with signatures from the unit.

7) Upon clicking ‘Submit’ the request moves to the next individual in the workflow and you will no longer see it in your worklist. If you have multiple requests you will need to review following these steps for each one.

Sample email for a declined request:

Dear Banner Workflow,

We regret to inform you that your request (#2092) has been denied. Please see comments below.

Comments:

Your request for an extension has been denied because you have already taken 2 extensions.

Request Type: Program Extension

Effective Term: 2017 Fall
Program: Master of Education in Curriculum and Instruction Thesis Option

Request ID: 2092
Request Date: 2017-06-30 09:45:26

Thank you,
Faculty of Graduate Studies and Research
University of Regina

Please note, as the requests are being transferred electronically, we ask that you review at your earliest convenience.
Associate Dean Instructions:

1) After the supervisor and/or graduate coordinator have reviewed a request and approved it, an email notification will be sent to the Associate Dean in the line faculties to notify you that a request is pending your review.

Sample email:

Greetings,

A request is pending your review in FGSR Banner Workflow.

Request Type: Transfer
Student Name: Banner Workflow
Student ID: 200393387

Current Program: Master of Education in Curriculum and Instruction Thesis Option
Effective Term: 2017 Fall

Request ID: 2091
Request Date: 2017-06-30 09:42:58

Please login to workflow view this request

Thank you,
Faculty of Graduate Studies and Research
University of Regina

2) Upon receiving the e-mail notification that a request has been submitted, you will need to login to Banner Workflow using the link in the email that is sent to you or by typing this address into your web browser https://banner.uregina.ca:8888/wfprod/logon.jsp

   a. NOTE: We have had best results using Firefox
3) Upon logging into Banner Workflow, the student request will appear automatically in your “Worklist”. If you do not see anything you may click on “Worklist” button in the left toolbar to refresh the window.

4) Selecting the request in your worklist will open up the request. Here you will be able to review the details of the student and the request.
   a. Information on the student and the request are listed at the top, and the approval section is near the bottom;
   b. If the student has uploaded any documents they will be attached at the bottom of the screen for your review as well. There is also an option for you to upload further documentation if necessary.

5) As you scroll down and review the request, you will see each of the previous approver’s information and comments if any were entered, and then an area where you may make comments if you wish, and approve/deny/send request back for more information. You will see an area with a label in blue and comments fields, the blue text indicates the approver reviewing the request and where information is required.
   a. The options for you are to approve the request as is, deny the request or send the request back to the student for more information.
   b. If a request is denied or sent back to the student for more information you will be required to enter comments in the “Comments to Student” section. The student will then be sent an email notification including these comments.
      i. If these options are selected any previous reviewer will also be notified by e-mail of this decision.
   c. If you simply want to add comments for the next reviewer, these are to be entered in the internal comments section, and will only be shared with the next reviewer(s), not the student.
      i. Please note, comments are only required if you are denying or sending the request back to the student for Rework. Comments are not required to approve a request.

6) Once you have added your comments (if necessary) and are ready to submit your request you will click on your decision, and then click ‘Submit’.
   a. If you would like to save your comments but come back to the request at a later date to submit, you will select “Save & Close”, alternatively if you are not ready to review this request you my select “Cancel”. Cancel will simply put the request back in your worklist to review at a later time.
   b. Once a decision has been submitted a new email is generated to the next approver (if approved), or the student (if denied or sent for rework).
   c. The FGSR Dean is the final approver of all requests. The FGSR Dean has more decision choices than the other approvers and in addition to the choices listed above they can also send the request back to any of the previous approvers with comments.
      i. If the Dean has a question for the supervisor for example, a selection can be made to send the request back to the supervisor with the question in the internal comments. If this is done the workflow sends the request back to this individual and the process starts over from that point.
   d. Once a request has been approved by all approvers it shifts to FGSR staff for processing.
   e. Please note that Progress Reports are sent directly to the FGSR Dean for approval, as they are already coming in with signatures from the unit.

7) Upon clicking ‘Submit’ the request moves to the next individual in the workflow and you will no longer see it in your worklist. If you have multiple requests you will need to review following these steps for each one.
Student Request Information

Request Type: Transfer
Student Name: Banner Workflow
Student ID: 200383387
Student Email: wendy.campbell@uregina.ca
Effective Term: 201730
Current Program: Master of Education in Curriculum and Instruction Thesis Option - GEDECM8-M
Request Date: 2017-06-30 09:42:58
(In-progress Request ID: 2091)

New Program: Master of Education in Curriculum and Instruction Course Option - GEDECM8-J-0

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Supervisor

Supervisor:
Date: 30-Jun-2017 12:00:00 AM
Comments:
Coordinator Login: campbell

Program Coordinator

Coordinator: Wendy Campbell
Date: 30-Jun-2017 11:11:56 AM
Comments: Supervisor comments

Associate Dean Decision

Comments to Student:

NOTE: Comments above are only required if you deny this request or send for rework. These comments will appear in an email to the student.

Your internal Comments:

NOTE: Comments above are only required if you deny this request or send for rework. These comments will appear in an email to the student.

* Decision:
  - Approve, continue to next reviewer
  - Re-work, send back to student
  - Deny, student will be notified

Internal code type: TK
NOTE: If additional documents are required for this request, please attach using the function at the bottom of this page. Attachments should be labeled with the student ID number as part of the document name.

Submit  Save & Close  Cancel
Sample email:

Dear Banner Workflow,

We regret to inform you that your request (#2092) has been denied. Please see comments below.

Comments: Your request for an extension has been denied because you have already taken 2 extensions.

Request Type: Program Extension
Effective Term: 2017 Fall
Program: Master of Education in Curriculum and Instruction Thesis Option
Request ID: 2092
Request Date: 2017-06-30 09:45:26

Thank you.
Faculty of Graduate Studies and Research
University of Regina

Please note, as the requests are being transferred electronically, we ask that you review at your earliest convenience.
FGSR Banner Workflow Information for Faculty

What is Banner Workflow:
Banner Workflow is a tool used to automate processes. Information can be collected using web forms and then passed to other users who can add information or approve a transaction. Users are notified by email when items are assigned to their “worklist”. Information can then be stored for record keeping purposes or uploaded to other systems such as Banner for further processes. Overall, Banner Workflow allows the University to improve communication, coordinate processes, improve accuracy, improve efficiency and provide better business controls.

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 (currently the same as your Banner logon).
- Work is defined by role. Each role is associated with one or more users. Everyone in a particular role receives work to do on his or her worklist. Only one person is able to complete the work.
- 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 using your user id, 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 lets you know if you have work to complete.
- Some workflows notify you by email if you have work items to complete. If you receive an email, click on the link to go to the Banner Workflow login screen. Once logged in, you will see the work items that need to be completed.
- A minimum of two approvers are required for each request. If a supervisor or coordinator is also the Associate Dean an Alternate has been included in the security of Workflow to direct the request accordingly.

Logging into Workflow:
- Click on the emailed link or enter the following URL: https://banner.uregina.ca:8888/wfprod/logon.jsp
- We recommend using Firefox for the best results.
- When the Logon window opens, enter your logon ID and password. (This is the same user id and password used for Banner or Caspur Reports).
- Click Submit
- If logged into Workflow for 30 minutes or more, your session may time out and you will be prompted to re-login.
- If you are off campus you may still complete these request remotely, however, you will be required to sign into the UofR's VPN network for security purposes. Information on configuring the VPN at your remote location is available online at: https://www.uregina.ca/is/infrastructure/network/technotes/569.html

Working in Workflow:
- When you open Workflow, you will be on the Worklist
- Worklist is a “to do” list – work you see is sent to you because of the roles associated with your user id.
- To return to the Worklist on the home page, click Worklist.
- Note: Users with the same roles all receive the same work.
- Work is sent to all users with a specific role. Sometimes, it is only sent to one person with that role.
- The status of the work item will show as “Ready”. The first person that starts the work will take it away from all the other users. This is called “reserving” the work. When the work is reserved or started, the work item status shows as “Performing”. To release the work back to all other users, there is a “release” option to change the status back to “Ready”.

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• The status will remain “Performing” until the user completes the work. If the workflow step requires updates in Banner “Completing” the work in Banner is done by clicking the “Workflow submit” button.
• Work not done in Banner is generally done by clicking the “Complete” button at the bottom of the page or form.
• When the activity is complete the workflow goes to the next step.
• If you are not ready to complete this workflow step, click ‘Cancel’. It will remain on the worklist and can be completed later. Note that any data entered is not saved
• Use the ‘Save and Close’ option if you have entered some data but are not ready to complete the work item yet. This option saves the data that was entered, and the workitem will remain on the worklist.
• If you have not completed your work and wish to “reserve” it for later, click the “workflow release” button or click on save and close button.
• Click the Workflow Submit button to submit your data. The system should return to Workflow. If you are not returned to Workflow, click the Workflow button on the Taskbar to front to return to your worklist.

What is the FGSR Workflow
The FGSR Workflow automates the following common student requests:
• transfer within a graduate program
• change to approved graduate program
• Leave of Absence (LOA)
• Voluntary withdraw
• Program Extension
• Progress reporting
This automated process with replace paper requests. The objective is to electronically share documents between FGSR and the faculties/departments/units involved and to automate the flow of reviews and approvals for various processes as well as to send automatic notifications where applicable.

When a student request is submitted through his/her UR Self Service account an email is generated and sent to his/her supervisor (if applicable) and secretarial contact in the student’s unit notifying them of the request. If no supervisor is listed in Banner the request is sent to the student’s program coordinator. Faculty approvals move the request forward; any re-work or denied decisions are emailed directly to the student. If a request is sent back for re-work or denied it is closed. If the student would like to make the request again, they must start a brand new request in UR Self Service.