

## Process of Completing a Workflow to Request Banner Finance Access/ Access Changes

Step 1: Access the Banner Single Sign-On menu (<https://cas.morgan.edu/cas/login>)

Step 2: Click on 'Workflow'

Log In Successful

You have successfully logged into the MSU Banner Single Sign-On service.  
For security reasons, please Log Out and Exit your web browser when you are done accessing services that require authentication!

**Banner Single Sign-On**

- ✓ Self-Service Banner (WebSIS)
- ✓ Native Banner (INB)
- ✓ ePrint Banner (INB)
- ✓ StarFish
- ✓ **Workflow** ←
- ✓ Workflow Test

[Logout](#)

Authentication failure/Change Password | © Morgan State University. All rights reserved.

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Step 3: Click on 'My Processes'

The screenshot displays the Banner Workflow 8.3.0.0 web application interface. The browser address bar shows the URL <https://moawkflw.morgan.edu/7002/wfprod/home/worklist.do>. The page title is "Worklist". The left sidebar contains the following sections:

- Home**
  - Worklist
  - Workflow Alerts
- User Profile**
  - My Processes
  - User Information
  - Change Password
- Administration**
  - In-process Monitoring

An orange arrow points to the "My Processes" link in the User Profile section. The main content area shows "0 - 0 of 0" items with navigation buttons for "First", "Previous", "Next", and "Last", and a "Go to page:" dropdown. A "Show Reserved Items" link is visible. The footer includes "© 1999-2015 Ellucian Company L.P. and its affiliates." and a "Top" link. The Windows taskbar at the bottom shows the time as 2:54 PM on 1/10/2017.

Step 4: Click on 'Banner Finance Security Access Request'

The screenshot shows a web browser window with the following elements:

- Address Bar:** <https://moawkflw.morgan.edu:7002/wfprod/user/viewMyProcesses.do>
- Browser Tabs:** MSU Banner Single Sign-On, Banner Workflow 8.3.0.0 (wf... X)
- Page Header:** **My Processes** (with a gear icon), **Logout**, **Help**
- Left Navigation Menu:**
  - Home**
    - Worklist
    - Workflow Alerts
  - User Profile**
    - My Processes
    - User Information
    - Change Password
  - Administration**
    - In-process Monitoring
- Main Content Area:**
  - Root**
  - [Banner Admissions Security Access Request](#)
  - [Banner Bursar Security Access Request](#)
  - [Banner Finance Security Access Request](#) (highlighted with an orange arrow)
  - [Banner Financial Aid Security Access Request](#)
  - [Banner HR Security Access Request](#)
  - [Banner Student Security Access Request](#)
- Page Footer:** [Top](#), © 1999-2015 Ellucian Company L.P. and its affiliates.

The Windows taskbar at the bottom shows the system tray with the time 2:59 PM and date 1/10/2017, and a taskbar with icons for Internet Explorer, File Explorer, and other applications.

## Starting the Banner Finance Security Access Workflow

1. (optional) Workflow Specifics Name (user determined, but could use verbiage such as 'Update Jo Smith 01-10-17')
2. (optional) Workflow Note (user determined)
3. Email Address of person whose access is being requested to be adjusted
4. (optional) Attach file (attaching documentation can happen any time during the Workflow creation)
5. Click 'Start Workflow'

The screenshot shows a web browser window with the URL <https://moawkfiv.morgan.edu:7002/wfprod/user/startWorkflow.do?organizationPKs=>. The page title is "Banner Workflow 8.3.0.0 (wf...)". The interface includes a left sidebar with navigation options: Home (Worklist, Workflow Alerts), User Profile (My Processes, User Information, Change Password), and Administration (In-process Monitoring). The main content area is titled "Start Workflow" and contains the following fields:

- Organization:** Root
- Workflow Name:** Finance Security Set Up Workflow:1
- Workflow Specifics Name:**
- Priority:** Normal (dropdown menu)
- Workflow Note:**
- Required Parameters:**
  - Employee\_Email\_Address:** @morgan.edu
  - Description:** Employee's morgan.edu email address

Buttons for "Start Workflow", "Reset", and "Cancel" are located below the required parameters. An "Attachments" section at the bottom features an "Attach File" button. Two blue callout boxes provide examples: "Ex: Ban. Fin. Security Access Jo Smith 01-18-17" points to the Workflow Specifics Name field, and "Ex: jo.smith@morgan.edu" points to the Employee\_Email\_Address field. The footer includes a "Top" link, copyright information "© 1999-2015 Ellucian Company L.P. and its affiliates", and a system tray showing the time as 3:05 PM on 1/10/2017.

## Starting the Banner Finance Security Access Workflow (continued)

6. Click 'OK'

The screenshot shows a web browser window with the address bar displaying `http://moawkflw.morgan.edu:8003/wftest/custom/workflowStarted.jsp`. The browser tabs include "MSU Banner Single Sign-On", "Oracle Fusion Middleware For...", "Banner Workflow 8.3.0.0 (wftes...", "Oracle Fusion Middleware For...", and "Banner Workflow 8.3.0.0 (wf...". The page content features a navigation menu on the left with sections for "Home" (Worklist, Workflow Alerts) and "User Profile" (My Processes, User Information, Change Password). The main area is titled "Start Workflow" and displays the message "The workflow was started successfully." with an "OK" button. A blue arrow points to the "OK" button. In the bottom right corner, there is a "Top" link and a copyright notice: "© 1999-2015 Ellucian Company L.P. and its affiliates." The Windows taskbar at the bottom shows the system tray with the time 5:38 PM and date 1/10/2017.

## Starting the Banner Finance Security Access Workflow (continued)

7. The newly created Workflow will appear on your Worklist
8. Click on the new Workflow

The screenshot displays a web browser window with the URL <http://moawkflw.morgan.edu:8003/wftest/home/worklist.do>. The browser tabs include "MSU Banner Single Sign-On", "Oracle Fusion Middleware For...", "Banner Workflow 8.3.0.0 (wftes...", "Oracle Fusion Middleware For...", and "Banner Workflow 8.3.0.0 (wf...".

The application interface features a left-hand navigation menu with sections for "Home" (containing "Worklist" and "Workflow Alerts"), and "User Profile" (containing "My Processes", "User Information", and "Change Password"). The main content area is titled "Worklist" and contains a table with the following data:

Organization	Workflow	Activity	Priority	Created
Root	<a href="#">00184157, Wanda Wiggins Request Finance Security Access</a>	SupervisorBannerFinanceSecurityRequest	Normal	10-Jan-2017 05:38:46 PM

Below the table, the status "Ready" is displayed. A blue arrow points to the workflow name in the table. The pagination controls show "1 - 1 of 1" and include buttons for "First", "Previous", "Next", and "Last", along with a "Go to page:" dropdown menu set to "1". A "Show Reserved Items" link is also present.

At the bottom right of the page, there is a "Top" link and a copyright notice: "© 1999-2015 Ellucian Company L.P. and its affiliates." The Windows taskbar at the bottom shows the system clock as 5:43 PM on 1/10/2017.

### Completing the Banner Finance Security Access Workflow

9. All fields marked with a \* are mandatory
10. Fill in the specific fields for the changes requested for Banner Finance access
11. To complete the Workflow, check 'I approve the request' and 'Complete'.
  - a. To put the Workflow on hold, click 'Save and Close'.
  - b. To cancel the Workflow, click 'Cancel'.
12. Once the Workflow is completed and approved, it will be forwarded to the Comptroller's Office for further processing.

- Home
- Worklist
- Workflow Alerts

- User Profile
- My Processes
- User Information
- Change Password

**Banner Finance Supervisor Approval -- Employee Banner Security Access Request Form**

Hide Menu Logout Help

Request Date: 10-Jan-2017 04:53:53 PM  
**EMPLOYEE'S INFORMATION**  
 Employee Name: Wanda Wiggins  
 Employee Class: Classified Non-Exempt FT  
 Employee Id #: 00184157  
 Employee Department: F1301 - Comptroller's Office Dept Budget  
 EmployeeDepartment Financial Manager: O'Brien, Patrick M.  
 Employee Campus Email Address: wanda.wiggins@morgan.edu  
 Employee Phone Number:   
 Affiliation: Staff

**SUPERVISOR'S INFORMATION**  
 Supervisor's Name: Patrick O'Brien  
 Supervisor Department: F1301 - Comptroller's Office Dept Budget  
 Warning: No Department Mismatch  
 Supervisor's Email: patrick.obrien@morgan.edu  
 Supervisor's Phone:

**REQUESTED SERVICES**  
 Banner Oracle Id: WWIGGINS  
 Type of Request: Add New Banner User  
 Terminate Banner Finance Access: No  
 Select the Banner environment: PROD  
 Mirror this user's access with Banner Oracle Id# or name:   
 Access Start Date:    
 Access End Date:

**SELECT THE APPROPRIATE TYPE OF BANNER FINANCE ACCESS**  
 Banner Finance access is defined within classes.  
 A user can only serve as either a requisitioner or an approver; not both.  
 Select the appropriate class(es) listed below (in alignment with the MSUemployee?role):

Approver:  Yes  No  
 Assigned to Approval Queue Id: Assigned to Queue  
 Budget Transfer:  Yes  No  
 Purchasing Card:  Yes  No

**\* Purchasing Card**  
 Yes  No

**\* Budget Query**  
 Yes  No

**\* Create Requisitions**  
 Yes  No

**Other Access:**

**PROVIDE USER PROFILE INFORMATION FOR BANNER FINANCE ACCESS**

Select the Cost Centers to be added or terminated.

<b>* Cost Center Index 1:</b>	<input type="text" value="Select Cost Center Index"/>
<b>* Cost Center Index 1 Access:</b>	<input type="text" value="Query Only"/>
<b>* Cost Center Index 2:</b>	<input type="text" value="Select Cost Center Index"/>
<b>* Cost Center Index 2 Access:</b>	<input type="text" value="Query Only"/>
<b>* Cost Center Index 3:</b>	<input type="text" value="Select Cost Center Index"/>
<b>* Cost Center Index 3 Access:</b>	<input type="text" value="Query Only"/>
<b>* Cost Center Index 4:</b>	<input type="text" value="Select Cost Center Index"/>
<b>* Cost Center Index 4 Access:</b>	<input type="text" value="Query Only"/>
<b>* Cost Center Index 5:</b>	<input type="text" value="Select Cost Center Index"/>
<b>* Cost Center Index 5 Access:</b>	<input type="text" value="Query Only"/>

If you need more than 5 cost centers, please specify what you need and why you need it.

**More Cost Centers Explanation:**

Click 'I approve this request' then click 'Complete' to submit the request to the coordinator.

**\* Supervisor Approval**  
 I approve this request

**\* Approval Date:**

Attachments