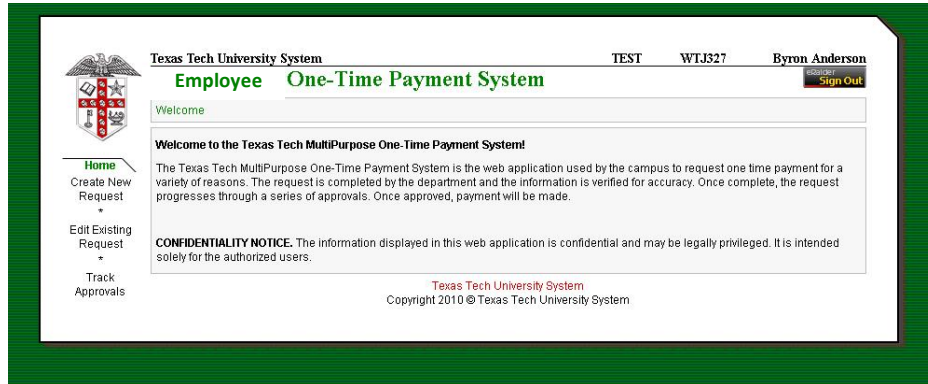


Welcome to the Approval Tracking System

As Used by the Multi-purpose One-time Payment form:

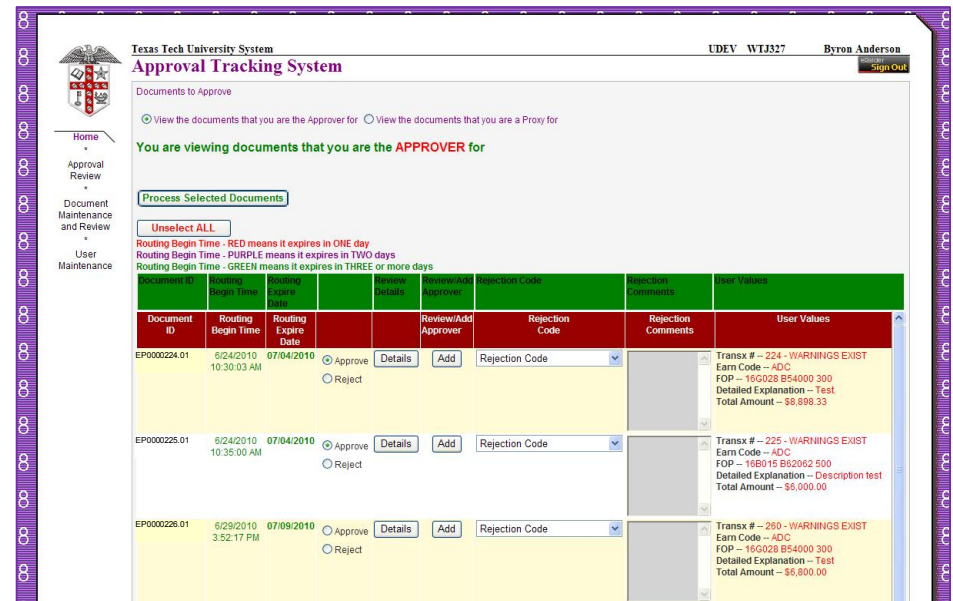
Employee One-time Payment Requests



This is the opening screen for Originators, with three options on the left:

- Create a new request – to open a new form for completion
- Edit Existing Request – to edit/complete a form that has not been submitted
- Track Approvals – to view submitted forms and progress through the approval process.

Approval Tracking System



This is the opening screen for Approvers, with three options on the left:

- Approval Review, pages 2-3
- Document Maintenance and Review, page 4
- User Maintenance, page 5

Email Notices for Approval and Payment Tracking

See samples on pages 6-7.

Approval Tracking System

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Approval Tracking System
 UDEV WTJ327 Byron Anderson
 Sign Out

Documents to Approve
 View the documents that you are the Approver for View the documents that you are a Proxy for

You are viewing documents that you are the **APPROVER** for

Process Selected Documents
 Unselect ALL

Routing Begin Time - RED means it expires in ONE day
 Routing Begin Time - PURPLE means it expires in TWO days
 Routing Begin Time - GREEN means it expires in THREE or more days

Document ID	Routing Begin Time	Routing Expire Date	Review/Approve	Rejection Code	Rejection Comments	User Values
EP0000224.01	6/24/2010 10:30:03 AM	07/04/2010	<input checked="" type="radio"/> Approve <input type="radio"/> Reject Details Add	Rejection Code		Transx # -- 224 - WARNINGS EXIST Earn Code -- ADC FOP -- 16G028 B54000 300 Detailed Explanation -- Test Total Amount -- \$8,698.33
EP0000225.01	6/24/2010 10:35:00 AM	07/04/2010	<input checked="" type="radio"/> Approve <input type="radio"/> Reject Details Add	Rejection Code		Transx # -- 225 - WARNINGS EXIST Earn Code -- ADC FOP -- 16B015 B62062 500 Detailed Explanation -- Description test Total Amount -- \$6,000.00
EP0000226.01	6/29/2010 3:52:17 PM	07/09/2010	<input type="radio"/> Approve <input type="radio"/> Reject Details Add	Rejection Code		Transx # -- 260 - WARNINGS EXIST Earn Code -- ADC FOP -- 16G028 B54000 300 Detailed Explanation -- Test Total Amount -- \$6,800.00

Approvers and proxies: Click the radial button to view your list.

You can click to approve or reject a request.

The **DETAILS** button allows review of the full request, page 3.

The **ADD** button allows additional approvers who be placed next in sequence, page 3.

DETAILS button – to View the Request

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After you click on your intended action you must click on the button labeled 'Process Selected Documents' on the next page

Mark for Approve
 Mark for Reject
 Take no action

Originator: Byron Anderson Banner ID: R00902742
 Organization: Admin and Finance Info Systems Mgmt
 eMail: BYRON.ANDERSON@ttu.edu Phone: (806) 742-7070 Ext: 267
 Transaction #: 8000224 Date Submitted: 6/24/2010 10:30 AM

WARNING: Work Performed To is a future date

Work Performed From: 08/01/2010 Work Performed To: 08/15/2010

Form Code: ADC
 Detailed Explanation of Payment:

Additional Questions

Approximate Number of Effort Hours

How does this work relate to the overall objectives of the employing department?

Explain why the proposed work cannot be performed under the job description of this employee or to another employee.

Explain any other pertinent facts that would help justify this payment.

What duties did the employee perform?

COA: TLJGSC Fund: 15026B ORG: 40001
 Center for Professional Development Marketing
 Program: Grant ID:

BannerID	First Name	Last Name	Postal	Prm/Sec	Desc	PayID	Suff	Eclass	Special Rate Amt	Acct
R2051098	Robert	McDonald	T8044	P	Associate Professor	NN	00	F1	5084.75	542011
R2052162	Christine	Quinn	T9687	P	Assistant Professor	NN	00	F1	2542.39	542011
R10357484	Jason	Ronabo	T8366	P	Assessment Director	NN	00	E1	1271.19	542011

Transaction Comments

No Comments have been entered for the selected record.

Individual Comments

No Comments have been entered for the selected record.

Label status from the Approval Tracking System
 Document ID: BP000024.01
 Performed As: Approver, P-Proxy, O-Overrides

Status	Approver	Proxy	Reject Reason	Action By	Performed As	Approved Date
A	Byron Anderson	Penny Simmons		Byron Anderson	A	6/30/2010 9:45:23 AM
PENDING	Byron Anderson	Penny Simmons		Byron Anderson	A	6/30/2010 8:48:39 AM
	Janie Delacercia	Alice Hunt				
	Gena Jones	Janet Coquelin				
	Michael West	Crystal Ferguson				

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ADD button - for Additional Approvers

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One Time Add User Approval

Sequence of Approval Email	Approver	Proxy	Email Frequency	
2	Betty Sanders	Donna Mitchell	F1	Delete
3	Davis Gruver	Byron Anderson	F1	Delete
4	Janie Delacercia	Alice Hunt	F1	Delete
5	Gena Jones	Janet Coquelin	F1	
6	Michael West	Crystal Ferguson	F1	

Select User Select User F1 - Immediate Add

Return to Approval Review

Document ID	SEQ	Approver Name	Proxy Name	Admin Name	Notify Begin Date / Time	Current Approval Step	Approval Date / Time	Last Notify Date / Time	Expiration Date
EP0000225.01	1.00	Byron Anderson	Rose Lesly		14-Jul-2010 03:24 PM	pending approval		14-Jul-2010 03:24 PM	24-Jul-2010
EP0000225.01	2.00	Betty Sanders	Donna Mitchell						24-Jul-2010
EP0000225.01	3.00	Davis Gruver	Byron Anderson						24-Jul-2010
EP0000225.01	4.00	Janie Delacercia	Alice Hunt						24-Jul-2010
EP0000225.01	5.00	Gena Jones	Janet Coquelin						24-Jul-2010
EP0000225.01	6.00	Michael West	Crystal Ferguson						24-Jul-2010

User to add as an Approver

Click to add user as an Approver

User ID Lookup

Enter First Name

Enter Last Name

Enter eRaider ID

Enter Oracle ID

Banner R Number

Name
 eRaider
 Oracle
 Banner R Number

User ID Lookup Results

User Listing - Select to Add or Edit

First Name	Last Name	Oracle ID	eRaider ID	Spriden ID
Byron	Anderson	WTJ327	byanders	R00902742

You cannot select yourself.

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Document Maintenance and Review

Documents currently being processed

Select User: [Satellite Document ID] Approver Name: [Byron Anderson] Proxy Name: [Byron Anderson]

Routing Begin Time - RED means it expires in ONE day
 Routing Begin Time - PURPLE means it expires in TWO days
 Routing Begin Time - GREEN means it expires in THREE or more days

Document ID	S E Q	Approver Name	Proxy Name	Admin	Notify Begin Date / Time	Current Approval Step	Approval Date / Time	Last Notify Date / Time	Expiration Date
EP0000223.01	1.00	Dale Rhoades	No one assigned		23-Jun-2010 09:52 AM	pending		23-Jun-2010 08:52 AM	03-Jul-2010
EP0000223.01	2.00	Dale Rhoades	No one assigned			approval			03-Jul-2010
EP0000223.01	3.00	Allen Madnes	No one assigned						03-Jul-2010
EP0000223.01	4.00	Davis Gruver	Donna Mitchell						03-Jul-2010
EP0000223.01	5.00	Lisa Hillis	Jonathan Stokes						03-Jul-2010
EP0000223.01	1.00	Byron Anderson	Perry Simmons		24-Jun-2010 10:30 AM	pending		24-Jun-2010 10:30 AM	04-Jul-2010
EP0000224.01	2.00	Byron Anderson	Perry Simmons			approval			04-Jul-2010
EP0000224.01	3.00	Byron Anderson	Perry Simmons						04-Jul-2010
EP0000224.01	4.00	Jantle Delacorda	Alice Hunt						04-Jul-2010
EP0000224.01	5.00	Gena Jones	Janet Coquelin						04-Jul-2010

On the Document Maintenance and Review screen

- Assign Documents option is not activated
- Processing Status (top screen shot on left)
- Document History (bottom screen shot on left)

Documents currently being processed (top screen shot on left)

The routing list of approvers and proxies for each request is presented with the progress of the form.

Notify/Begin Date and Time – indicates when the approver was first notified the request was waiting approval.

Approval Date and Time – indicates when the request was approved

Last Notify Date and Time – indicates the most recent email notice

Expiration Date – indicates when the request will be returned to the originator if no action is taken.

History of Archived Documents

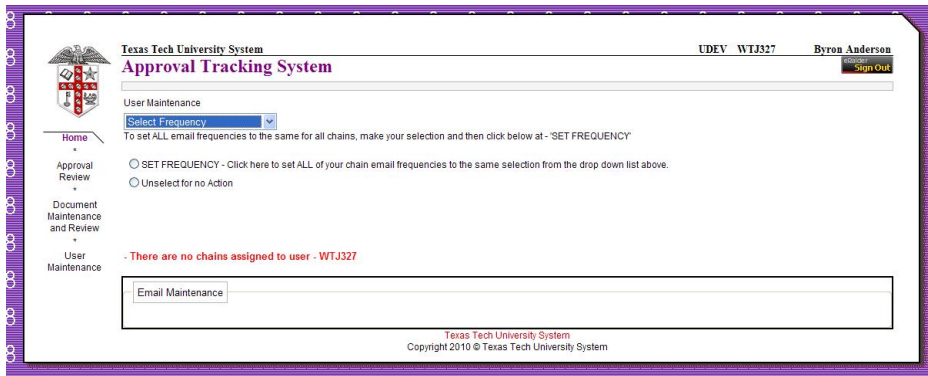
Select User: [Satellite ID] Approver Name: [Jantle Delacorda Alice Hunt] Proxy Name: [Gena Jones Janet Coquelin]

Document ID	S E Q	Approver Name	Proxy Name	Notify Begin Date / Time	Approval Date / Time	Last Notify Date / Time	Rejection Code	Approver - A Proxy - P Admin - O Deleted - D DELETED ID	Admin User Override
EP00000011.01	1.00	Byron Anderson	Rose Lesly	07-Jun-2010 10:23 AM	07-Jun-2010 11:46 AM	07-Jun-2010 10:23 AM		A	
EP00000011.01	2.00	Byron Anderson	Rose Lesly	07-Jun-2010 11:23 AM	07-Jun-2010 11:46 AM	07-Jun-2010 11:23 AM		A	
EP00000011.01	3.00	Davis Gruver	Byron Anderson	07-Jun-2010 11:35 AM	07-Jun-2010 11:46 AM	07-Jun-2010 11:35 AM		A	
EP00000022.01	1.00	Byron Anderson	Rose Lesly	07-Jun-2010 10:55 AM	07-Jun-2010 11:44 AM	07-Jun-2010 10:55 AM		A	
EP00000022.01	2.00	Byron Anderson	Rose Lesly	07-Jun-2010 11:35 AM	07-Jun-2010 11:44 AM	07-Jun-2010 11:35 AM		A	
EP00000022.01	3.00	Davis Gruver	Byron Anderson	07-Jun-2010 11:35 AM	07-Jun-2010 11:44 AM	07-Jun-2010 11:35 AM		A	
EP00000024.01	1.00	Byron Anderson	Rose Lesly	07-Jun-2010 10:57 AM	07-Jun-2010 11:46 AM	07-Jun-2010 10:57 AM		A	

History of Archived Documents (bottom screen shot on left)

In Document History, you can see the routing list with the dates and times of approver actions.

User Maintenance



The User Maintenance feature is not currently used.

Email Notices

Once a request has been submitted, email notices are generated to advise approvers and originators of pending and required actions. The following emails are generated by the Approval Tracking System.

Notice to the Approver

- Notice to Approve

Notice to Recipient

- Payment Notice, when the employee is scheduled for a pay date

Notices to the Originator

- Rejection
- Approved
- Expiration
- Payment Notice, when the employee is scheduled for a pay date

Approver: Notice to Approve

- The following document(s) have been added to the Approval Tracking System. Please log in and begin reviewing the documents that have been assigned to you.
- https://ban8-udevbanapps.ttu.edu/IS_ApprovalTrackingSystem/Approvers.aspx
- EP0000243.01

Recipient Email

- Kristi Huguley,

The following one time payment has been approved and submitted for payment for the SM pay date of 07/09/2010.

Trans #	Employee	TechID	Amount	Earn Code
216	Kristi Huguley	R00910322	200.00	CPE

- If you have any questions, please contact webmaster.payroll@ttu.edu.

Originator: Rejection

- The following document(s) have been REJECTED in the Approval Tracking System.
- Please log into the system EMPLOYEE ONE TIME PAYMENT where the documents originated from and review.
- Use this link to review - https://ban8-udevbanapps.ttu.edu/iPY_Multipurpose_OTP
- EP0000227.01 -- Gena Jones entered the following rejection reason: Insufficient Funding -
- EP0000232.01 -- Gena Jones entered the following rejection reason: Insufficient explanation -

Originator: Approved

- The following document(s) have been approved in the Approval Tracking System.
- Please log into the system MULTIPURPOSE ONE TIME PAYMENT where the documents originated from and review.
- Use this link to review - https://ban8-udevbanapps.ttu.edu/PY_Multipurpose_OTP
- EP0000240.01

Originator: Expiration

- The following document(s) are scheduled to EXPIRE in 2 days in the Approval Tracking System.
- https://ban8-udevbanapps.ttu.edu/IS_ApprovalTrackingSystem/Approver.aspx
- EP0000262.01 - waiting on approver Lesley Wilmeth - Last time user was notified - 7/2/2010 5:32:00 PM

Originator: Payment Notice

- Janet Coquelin,

The following one time payments have been approved and submitted for payment for the MN pay date of 09/01/2010.

Trans #	Employee	TechID	Amount	Earn Code
179	Raj Ranganathan	R00541005	1000.00	ADC
179	Melissa Watson	R10362532	1000.00	ADC
179	Melinda Salazar	R00301742	2000.00	ADC

- If you have any questions, please contact webmaster.payroll@ttu.edu.