Encumbrance Training
Phase 1
Welcome to the WOLF Project at Florida Atlantic University

Today’s instructor is:

Dr. Rosanna Star Berzok
Associate Controller
Controllers Office

Your name

User ID/ Log-in number

Your Password

Revised 05/06
Table of Contents

About Florida Atlantic University 4
Objectives and Goals of the WOLF Project 6
Benefits of the WOLF Project 7
Features of the On-line WOLF Computing 7
The Process 11
WOLF Project Team Members 12
Evaluation 13
Your WOLF Contact People 14
WOLF Guide – Phase I 16
Logging in 17
WOLF Manager Screen 19
Look Up Tar 20
Traveler Information 27
Trip Information 33
Required Approvals 43
Complimentary Tar 48
Edit Tar Values 54
Reports 70
Glossary 79
About Florida Atlantic University

FAU is a rapidly growing, comprehensive public university with an enrollment of approximately 25,000 graduate and undergraduate students. Organizationally, it is most notably characterized by what has come to be known as its distributed campus structure in which the university's programs and services are geographically dispersed while being academically, technologically and administratively linked. This structure has been developed in order to best meet the institutional mission which is to provide public access to higher education along with the necessary support services to an unusually large service area comprising six counties spread over 100 miles along Florida's southeast coast.

Full-service FAU campuses are located in Boca Raton, Davie, downtown Fort Lauderdale, Jupiter and Port St. Lucie. The Open University and Continuing Education Division also in Fort Lauderdale, and SeaTech, an ocean engineering research and graduate education center in Dania Beach, complete the sites of operation. The central administration of the university is headquartered on the Boca Raton campus, the oldest and still largest of all FAU locations.

Academically, the university is organized into eight colleges: the College of Architecture, Urban and Public Affairs; the Dorothy F. Schmidt College of Arts and Letters; the College of Business; the College of Education; the College of Engineering; the Harriet L. Wilkes Honors College; the Christine E. Lynn College of Nursing; the Charles E. Schmidt College of Science. Through these colleges, FAU offers 76 undergraduate majors, 68 masters programs and doctoral degrees in Business Administration, Chemistry, Comparative Studies, Complex Systems and Brain Science, Computer Engineering, Computer Science, Curriculum and Instruction, Educational Leadership, Electrical Engineering, Exceptional Student Education, Mathematical Sciences, Mechanical Engineering, Nursing, Ocean Engineering, Physics and Psychology. Of additional particular interest is a new program in medical sciences offered in cooperation with the University of Miami School of Medicine. Students in this program take their first two years of medical school at FAU and complete their clinical studies at Miami.

FAU’s commitment to the educational needs of all constituencies in its service area is evidenced by the work of the Division of Open University and Continuing Education (OUCE), and of the Lifelong Learning Society (LLS). Through OUCE, in excess of 24,000 students take classes, seminars and workshops in professional training, test preparation, personal growth, languages, investment management and many other pursuits. LLS, the largest organization of its kind in the country, serves 22,000 intellectually vital individuals over the age of 60. They
take non-credit, personal enrichment courses in every conceivable area of human inquiry, designed specifically for this program and taught by regular FAU faculty. This organization and its activities have been so successful that active LLS chapters now exist on four FAU campuses.

Research and scholarship play a vital role in fulfilling the mission of the university. In addition to the many research projects and other creative endeavors being conducted by individual faculty, more than 30 centers and institutes dedicated to specific disciplines and areas of investigation are in operation. Some examples in the fields of science and technology are the Center for Complex Systems and Brain Sciences, the Center for Molecular Biology and Biotechnology, the Florida Center for Electronic Communication and the Institute for Ocean Systems Engineering. Other areas of specialized pursuits can be found in the Anthony James Catanese Center for Environmental and Urban Solutions, the Stuart-James Research Center with on-line access to business data including census tracking information, the Carl DeSantis Business and Economics Center for the Study and Development of the Motion Picture and the Christine E. Lynn Center for Caring.

The FAU Research Park, a thriving complex of nine buildings occupied by twenty five tenants on 60 acres of the Boca Raton campus, provides additional opportunities for research. A number of faculty and graduate student projects are being carried out in cooperation with various concerns located there. The Research Corporation, FAU's technology transfer organization, has its headquarters in the Park.

FAU recently completed a comprehensive institutional self-study for its ten-year reaffirmation of accreditation by the Southern Association of Colleges and Schools. It can be accessed at http://www.fau.edu/sacs. FAU is accredited by the Commission on Colleges of the Southern Association of Colleges and Schools to award Associates, Bachelors, Masters, Specialists and Doctoral degrees.
Objectives and Goals of the WOLF Project

OBJECTIVE: An objective is defined as a specific accomplishment to be reached that can be verified within a given time and under specifiable conditions, which, if attained, advances the system toward the corresponding goal.

Objective 1: To improve services to the campus community by reducing an excess paper trail in the disposition of travel.

Objective 2: To reduce the cost of travel by increasing efficiency.

Objective 3: To provide cost effective access control to real-time departmental budget reports.

Objective 4: To assist fiscal management by providing accessible fiscal reporting.

GOAL: A goal is defined as the purpose by which an endeavor is accomplished.

Goal 1: To support and strengthen Florida Atlantic University’s departments in their knowledge of a “paperless” travel disposition.

Goal 2: To foster and develop programs to enhance travel efficiency for the university’s population.

Goal 3: To investigate and explore new technologies in accessing real-time departmental budgetary reporting.

Goal 4: To adapt quality and functional-specific relational databases for fiscal reporting.
Benefits of the WOLF Project

WOLF is an acronym for web on-line forms. WOLF delivers a comprehensive solution with robust compliance to state regulations, encumbering of state dollars, reimbursement of travel expenditures and provides the end-user analytical reports to address the travel needs of the FAU community. This streamlined process was first introduced with the TARRS application, an acronym for the travel, authorization, request and reimbursement system. Using the authorized signature file, the traveler’s pre-trip authorization is automatically routed to selected approvers and electronically posted to the new SCT Banner accounting module. The selected approval criteria deploys secure, reliable and faster processing of travel management. Drop down menus and simple queries provide more accurate performance by integrating field population. In addition, the initiator can query the database for already established travelers or create a profile for a new traveler on line. Additionally, travel information is stored and easily retrieved for re-processing.

Features of WOLF Computing

Some of the features of the paperless WOLF computing is the capacity to integrate technological delivery systems using relational databases architectural design. The security mechanism is based on Florida Atlantic University’s already effective signature system. Authorization and submission of travel management is done electronically to SCT Banner. Analytical reports assists in travel management with the ease of criteria selection. Drop down menus yield unique information associated with the account user and traveler profiles.
BEFORE WOLF

![Diagram showing the process before using WOLF]

- **WOLF Traveller**
- **Controller/Travel Desk**
- **Travel Agency**
- **Ticket**

Diagram showing the process before using WOLF.
After WOLF

WOLF Traveller

Controller

Travel Agency

Ticket

(via e-mail with provisions to print-out)
WOLF Tar Process Flow: Encumbrance

1. **Initiate TAR**
   - **Yes** to New Traveler
   - **No** to Complete and Submit TAR for Approvals

2. **Complete and Submit TAR for Approvals**
   - **Yes** to Approved?
   - **No** to Travel Desk Creates Vendor

3. **Approved?**
   - **Yes** to Submit to Banner
   - **No** to Investigate and Remedy Lack of Approval

4. **Submit to Banner**
   - **Yes** to Processed? (Batch)
   - **No** to Check Error Report/Resolve

5. **Processed? (Batch)**
   - **Yes** to Posted to Banner
   - **No** to Check Encumbrance Report via Web Finance

**LEGEND**
- **Process**
- **Decision**
- **External**
- **Process**
- **Document**

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Training Manual
WOLF Process

- Login
- WOLF Manager
  - Help
  - Modify
  - Copy
  - Cancel
  - Add Notes
  - Review
    - Create
    - Reports
  - Approve or Reject
  - Resend
- Manager Profiles
**WOLF Project Team Members**

Controllers Office
- Dr. Rosanna Star Berzok – Associate Controller
- Joanne F. Anderson – Executive Secretary/Office Manager
- Matt Barton – Project Coordinator/Analyst

Travel Desk
- Barbara Simmons – Accountant
- Charlotte Vest – Accountant
Evaluation

Evaluation is the means to determine a method that advances the end user’s achievement in a particular area and progresses towards achieving those identified goals and objectives. One ideal method for fostering an effective learning model is through the delivery of post response information, also known as feedback. Although the distinction of specific feedback may vary with individual response, it is noteworthy to assert that mechanical techniques, such as surveys or questionnaires, guide important recognition of personal responses. It is the WOLF Project Team members’ intent to provide open conduits for your responses. An open on-line feedback phone line is available for quick “fixes” and a subsequent follow up program is designed to provide the end-user a means to interact with the project members. This may allow the end-user to become invested in the exciting new way of “doing” travel.
Your WOLF Contact People

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The following travel section of Florida Atlantic University’s Controller’s Manual was revised on September 2002. It is important to note that when this manual was written, the only option for travel procedures was through a paper process. With the advent of the electronic TARRS system, new and revised sections of the travel manual are necessary. Therefore, when reviewing this section, please use discretion on the substance. As in many cases, electronic tarrs should be referenced in the attached WOLF Guide.

Please visit the University Controller’s Office travel website at:

http://www.fau.edu/admin/fiscal/controller/travel.htm

This website is a comprehensive resource for:

- Car Rental Contract - PDF Format
- Mileage Information with Mileage Charts and Links to Useful Sites
- TARRS Project - Travel Authorization Request Reimbursement System
- Travel Agency Information - The on-site travel agency is Travel Leaders
- Travel Agency Survey - Complete an on-line form regarding your experiences
- Travel Forms
- TAR, Change Order and Number Log (paper system)
- Travel Links
- Exchange Rates
- State Department Travel Warnings
- CDC Health Information
- Traveler Profile Form - Frequent travelers should complete a Traveler Profile
Getting Started

Florida Atlantic University’s WOLF intranet site will provide the end user effective travel management with a variety of business needs. Traveller profiles and pull down menus are just examples of this innovative and robust solution in the paperless world of the internet. Electronic subroutines are the driving forces which allow interrelated links between the many databases needed to complete the data flow. Administrative Technology Systems, Computing System Services and the University Controller’s Office have worked together to launch this new program to the university community. So let’s begin the journey into the next millennium.
1. **Logging into online WOLF**

   On Florida Atlantic University’s home page (www.fau.edu)

   - a. Type http://www.fau.edu/wolf (WOLF url) in the ‘Address’ field:

   - Make sure you bookmark the location for future use
   - Press Enter. The WOLF – Login window appears.
• **2a** - Type in your User I.D. (lower case only; same as email address, but without the @fau.edu).
• **2b** - Type your Password (lower case only)
• **2c** - Click on the ‘Submit’ button to proceed to the next page.

Contact your WOLF administrator if you have not been assigned clearance to use the WOLF system.
**WOLF manager**

The **WOLF Manager screen** will come up

- On this screen (WOLF Manager) you may Lookup a Form (e.g., a TAR), Create a new TAR, Create a Complimentary TAR, Approve or reject any TAR requests, Manage various profiles and Request reports.

- **3a** – In this section you can look up a Form, individually, or look up all Forms for a specific department.

  - **To look up a specific Form**, e.g., a TAR, type the TAR number in the box and click on ‘Search’.

  - **To look up all TARs for a specific department**, type only the first 2 alpha characters of the TAR number in the box, and click on Search.

- Your security access limits your available view

From the **WOLF Forms grid**, you may choose what Forms to display, select a Form to Review, Edit, Copy, or Cancel or you may add Notes to a Form.
• **3b** – Choose what Forms to be displayed in the grid, by clicking on one of the tabs in the first row.

• **3c** – Select the Status of the Forms you want displayed, by clicking on one of the tabs in the second row.

• **3d** – On the grid, you can view a Form (click on your form number), Edit it, Copy it, Cancel it, or add Notes.

  - **To view a form:** find the Form you want to access, then depress the Form number (e.g., AF0189).
  - **To Edit, Copy or Cancel a Form:** find the Form, then depress Edit or Copy or Cancel.

4. **Lookup a TAR**

4a. To Look up a TAR, type in the TAR number in the ‘Look Up Form’ box, and
depress the ‘Search’ button

-Or-

Click on the tar number in the WOLF Forms grid:

- To make sure you have all tars listed:
  4b. Click on the ‘TARs’ tab on the first line of the WOLF Manager grid,
  4c. Then click on the ‘All Status’ tab on the second line.
4d. Then locate the TAR you wish to view, e.g., AF0235, and depress.
The requested TAR will come up for your review.

Scroll down to view more of the TAR information
Keep scrolling to view the rest of the TAR information.
4e. Return to the WOLF Manager screen via the button at the bottom.
5. **Create a TAR**

5a. To begin the Create a TAR process, depress ‘Create a New TAR’ on the WOLF Manager screen.
5.1 Traveler Information

At any time during the Create a TAR process, you may return to the WOLF Manager screen by clicking on ‘Return to WOLF Manager’

- **However, this will terminate the TAR you were creating.** All your entered data will be lost. No record of the partially completed TAR will be saved. You cannot retrieve any data on this TAR.
5.1a. If you have multiple departments, you will have a drop-down option.

- Choose the appropriate department
5.1b. Select the traveler from the traveler name drop-down:

-- Or --

5.1c. If your traveler is not on the dropdown, you may search for the traveler by depressing ‘Search for Traveler’
The Traveler Search Screen:

5.1d. Type in the first and last name of the traveler

5.1e. Then depress the ‘Search’ button
All entries matching your search criteria will then be displayed

5.1f. Double click on chosen person and it will populate the field
5.1g. Next, select whether the traveler is Faculty or Staff or Student or Other

5.1h. If traveler is Faculty, you must select whether classes will be missed (Yes/No)

5.1i. If classes will be missed, you must enter in the ‘classes missed’ information.

5.1j. Then depress Next Page
The Trip Information screen is displayed:

5.2a. Enter your own extension for ‘Phone Number’ to call for questions on this trip

5.2b. Select a headquarters – choose where the account is located. A drop-down is provided for your selection
5.2c. **Select the travel dates** – an arrow down or up indicates a dropdown for your convenience.
5.2d. **Fill in the Origin city and state** – this is where the traveler is starting from.

5.2e. **Fill in the Destination city and state** – this is where the traveler is going to.

5.2f. **Select the Travel type**

   - **Instate** = The entire trip takes place within the state of Florida
   - **Out of state** = Some part of the trip is outside Florida
   - **International** = Some part of the trip is outside the United States

*Please call WOLF administrator for “athletics” travel type*

5.2g. **Put in the purpose of the trip**

5.2h. **Late justification** is required when the starting date is prior to today’s date.
5.2i. Note: at any time you can return to the WOLF Manager screen by clicking the hyperlink at the top of your screen.

- **However, this will terminate the TAR you were creating.** All your entered data will be lost. No record of the partially completed TAR will be saved. You cannot bring retrieve any data on this TAR.

5.2j. At any time, you may also go to a prior screen, by clicking on the appropriate button the bottom of your screen.

5.2k. To continue creating the TAR, click on **Next Page**.
The Accounts and Costs screen is displayed

### Account and Costs

#### Select the account for this travel

5.3a. Use the drop-down menu to find your Index (Fund/Org's)

--Or--
5. 3b. If Index isn’t in the drop-down, you may type it in

5.3c. Select whether this is a Blanket TAR or not

- **Blanket TAR** – regular trips to the same destination or for the same purpose. Blanket TARs are limited to within the state of Florida, and may not involve lodging or airfare. If such expenses will occur for one trip of a Blanket TAR, you must create a separate TAR for that trip.

- **Instructional Blanket** – a Blanket TAR for the purposes of instruction.

- **Non-Blanket** – a one-trip TAR.
Fill in the various estimated amounts for the TAR

5.3d. Per diem adheres to state regulations and restrictions, please review the “Controller’s Travel Manual” for current allocation.

5.3e. Incidental Expenses: some examples are ‘taxi, parking, tips’

5.3f. Mileage – put only the number of miles in the ‘Mileage’ box.
   - Do not put the word ‘miles’ in the box.
   - Do not put the abbreviation ‘mi’ in the box
   - Put only a number in the box.

WOLF will compute the dollars associated with the miles you enter (presently compensated for cost of fuel adjustment)

*Use the hyperlink next to mileage to review the Controllers Mileage Chart online.*
Continue filling in the estimated amounts for the travel

5.3g. **Lodging** - if there is a lodging cost, you must select whether this is a **Direct Bill** airfare. **Select Yes or No.**

- If no airfare is involved, then selecting the Direct Billed Yes/No indicator is not required

3h. **Common Carrier / Airfare** – if there are airfare costs, you must select whether this is a **Direct Bill** airfare. **Select Yes or No.**

- If no airfare is involved, then selecting the Direct Billed Yes/No indicator is not required.

Continue filling in the rest of the costs.
5. 3i. Note: **Other Expenses** requires a description of the estimated costs.

5. 3j. Note: **pCard Expenses** requires a description of the estimated costs.

5. 3k. Note: **Purchase Order Costs** requires a description of the estimated costs. Please include the Purchase Order Number.
WOLF will total your costs, as you enter them.

5.3k. **Total Costs** represents total cost of the trip

5.3l. **Encumbered Amount** is the Total Cost, less the Lodging Direct Billed, Common Carrier Direct Billed, pCard and Purchase Order costs.

5.3m. **Cash advance** – This a future feature. When implemented this will create a Request for Advance. Currently, entering a number here does not create a Request for Advance. You must request an Advance through the paper forms procedure. If this field is filled in, will disallow electronic reimbursement processing. Ensure field is blank when continuing to next page to allow electronic reimbursement processing.

5.3n. At any time, you may go to a prior screen, by clicking on the appropriate button the bottom of your screen

5.3o. Depress ‘Next Page’ to continue creating this TAR
The Approvals screen is displayed

5.4 Required approvals

Select the approvers necessary for this TAR.
5. 4a. Choose appropriate Supervisor(s) by check-marking the box *(a reminder, all chosen must approve/reject the tar before any further action will take place).*

5. 4b. Add any additional Supervisors you may need, by typing in their id (i.e., their email address without the '@fau.edu') in the box provided. Additionally, you can search for a WOLF User-ID using SCT Banner Soundex™. If you need more than one approver in this box, separate them by commas. Spaces are optional between approvers.

5. 4c. Choose the appropriate account signer(s), by check-marking any you want *(a reminder, all chosen must approve/reject the tar before any further action will take place).*

5. 4d. You may opt to receive notification of all approvals/rejections for this TAR, as they occur, by selecting Yes or No for 'Track Approvals'.

5. 4e. Click on Next Page
WOLF will display a recap of your TAR information, for your review. At this point, your TAR has not been submitted yet. You may change anything as needed.

5.5 Details

Keep scrolling until you reach the last page!!
On the final screen, continue making sure all your entries are correct.

**5.5a. Your TAR has not yet been submitted**, you can change anything you wish, by returning to particular screens via the buttons at the bottom of the screen.

**5.5b.** If everything is correct, **depress Submit** and submit your tar to WOLF. 
*You must click on ‘Submit’ to complete the process.*

The tar is created, a tar number is generated, and WOLF automatically presents the TAR, with its new number, on the screen.
5.6a. **Note your TAR number.** This is the number you will use in all future references to this TAR. It is advised that you keep a record of all the TARs you create.
Creating a Complimentary TAR works very similar to creating a regular TAR. The only difference is that the Complimentary TAR has no dollars, no account, and, as a result, no account signers are needed.

6a. To create a Complimentary TAR, click on the 'Create a New Complimentary TAR' selection on the WOLF Manager screen.
The first screen of a new Complimentary TAR is displayed:

### 6.1 Traveler information

**6.1a.** Fill this in as described in section 5.1, above, for Create a TAR.

**6.1b.** Depress ‘Next Page’ button to continue
The second screen of creating a Complimentary TAR is presented:

6.2. **Trip Information**

6.2a. Fill this in as described in section 5.2, above, for Create a TAR.

6.2b. Then depress *Next Page* button to continue.
Since a Complimentary TAR has no dollars associated with it, the next screen displayed is the Approvals screen.

6.3  Required Approvals

Note that only Supervisors are required to approve Complimentary TARs, as there are no dollars associated with the TAR.

6.3a  Select the Supervisor(s) that are required to approve this TAR. As with a regular TAR, you may add more supervisors via the box provided – see details in 5.4, above, for a regular TAR.

6.3b  Click on Next Page to continue
The recap screen is now displayed.

6.4 Details

Check all the information for validity.

6.4a. Depress ‘Submit’ to submit the Complimentary TAR for processing.

Until you depress Submit, your TAR will not be processed.
Your Complimentary TAR is now complete. WOLF displays the TAR for your convenience.
Editing (modifying) a TAR

In WOLF, the screen for editing prior to encumbering is the same as the screen for editing after a TAR is encumbered.

In either case, each time you edit a TAR it must go through the approval cycle; be extremely careful on your adjustments as each time you generate an edit, emails will be sent out to the managers and account signers.

To select a TAR for editing: On the WOLF Manager Screen

- **7a** – Select ‘TARs’ from the top row of tabs. This will limit the WOLF Forms grid to only TARs.
- **7b** – Select ‘All Status’ from the second row of tabs. This will include all TARs on the grid.
- **7c** – Locate the TAR you want to edit, on the grid. You may need to scroll down to locate the one you want.
- **7d** – Click on Edit in the ‘Actions’ column of the grid.

<table>
<thead>
<tr>
<th>Form ID</th>
<th>Actions</th>
<th>Type</th>
<th>Form Status</th>
<th>Approval Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>22061</td>
<td>Edit - Copy - Notes - Cancel</td>
<td>TAR</td>
<td>Active</td>
<td>Awaiting Approval</td>
</tr>
<tr>
<td>22062</td>
<td>Edit - Copy - Notes - Cancel</td>
<td>TAR</td>
<td>Active</td>
<td>Awaiting Approval</td>
</tr>
</tbody>
</table>
7e. Or, you can Look Up the TAR (see section 3a) and from there, choose Edit TAR Values.
WOLF displays the Modify a TAR screen:

Note: The screens are very similar to those for Create a TAR – see that discussion for more detailed information.

7. 1a. Whenever you modify a TAR, you must enter a **Reason for Modification**. This text box is limited to 1000 characters. Please be brief but informative.

7. 1b. You may, at any time click on ‘Return to WOLF’ on any screen within Modify a TAR (before clicking on the final Submit), to end this Modify and return to the WOLF Manager screen.

- **However, this will terminate the editing, your changes will not be saved. No record of your changes will be kept; you cannot retrieve your changes. You will have to re-type the information.**

7. 1c. When you have finished making changes on this screen, click on **Next Page**.
WOLF next displays the Trip Information screen.

7.2 Trip information

You may change anything on this screen, as needed (see rules and information provided in ‘Create a TAR’ section of this manual)

7.2a You will need to provide ‘Justification for Late Submission’ if you change the dates of travel and the trip begins prior to today’s date.

7.2b When you have finished changing items on this screen, click on the ‘Next Page’ button.
WOLF will display the ‘Accounts and Costs’ screen, for any changes you may wish to make.

7.3 Accounts and Costs

You may change anything on this screen, as needed (see on Create a TAR, earlier in this manual, for details on various rules and information on the costs.)

Note: to change an amount, put in the new value you want. Enter this in place of the old value that is displayed. DO NOT put in the difference between the old amount and the new amount. WOLF will compute the difference between the old values and the new values, and will adjust the Total lines as you go.
Continue scrolling down the screen, changing costs and other information as needed.

Below, the changes are made.
This is the screen after changes were entered:

In this example,

7. 3a. Index remains the same

7. 3b. Per Diem, Incidental remains the same

7. 3c. Mileage has been changed.

7. 3d Note that the new total

7. 3e. When you have completed all the changes needed for Accounts and Costs, click on Next Page.
WOLF now displays the Approvals screen.

Each time you edit a TAR it must go through the approval cycle. However, for your convenience, the approvers last chosen for this TAR are displayed as pre-selected. You may change any of these as needed.

### 7.4 Required Approvals

7.4a. To change any of the pre-selected approvers, simply click on that approver to check or uncheck it.

7.4b. Add any additional Supervisors you may need, by typing in their id (i.e., their email address without the '@fau.edu') in the box provided. Additionally, you can search for a WOLF User-ID using SCT Banner Soundex™. If you need more than one approver in this box, separate them by commas. Spaces are optional between approvers.
Here is the changed screen.

7.4c. One Supervisor has been unchecked. A different Supervisor has been checked. A new Supervisor has been added via the Supervisor type-in box provided.

7.4d. Note that at any time, you may return to a prior screen, by depressing the appropriate button the bottom of your screen.

7.4e. When you have completed your selection of approvers, click on **Next Page to continue.**
WOLF presents a recap of your edited TAR for your review.

This is a scrollable screen. Scroll down the screen, verifying all the information.

You have not yet submitted the modified TAR for posting! **Do not stop here!**
Scroll down to the bottom of the screen, verifying all information.

You have not yet submitted your changes!

7. 5a. At this point you may still make changes, by returning to any prior screen. To do this, click on any of the buttons at the bottom of the screen.

You may even cancel all your editing if you wish. To cancel all your editing, click on the ‘Return to WOLF’ Manager button at the top of your screen.

- **WARNING:** Doing so will terminate the editing; your changes will not be saved. No record of your changes will be kept; you cannot retrieve your changes. You will have to re-type the information.

7. 5b. If you are satisfied with all the information contained in the recap on the ‘5. Details’ screen, click on ‘Submit’ to enter your changes.
**Depressing** 'Submit' sends your revisions to the email recipients. Once the approvals are in place the record will be sent to Banner as part of an overnight batch processing file.

WOLF now displays the Review TAR screen for your revised TAR.
Approvals (this will be the same for ‘Complimentary Tarrs’).

Whenever a TAR is created or modified, emails are sent to the selected Approvers.

Approval email:

8a. To Approve or Reject a TAR from email, bring up the email request,
8b. To Approve or Reject, click on the ‘Approve’ radio button or the ‘Reject’ radio button within the email, and depress submit button.
   • If you are using the ‘Click for Quick Approval’, do not fill in radio button and submit. By depressing the hyperlink it will automatically bring up a new window and approve the tar.
8c. If you reject the approval request, you must provide a reason for the Rejection in the text box provided.
8d. To finish your approval or rejection, you must click on the ‘Submit’ button
OnLine Approval: Click on ‘Approve / Reject Outstanding Forms’ on the WOLF Manager screen

It brings up the list of Forms waiting for approval
In the last column, click on ‘Approve?’. It will automatically update and approve the tar.
Web On-Line Forms

Training Manual
9.1a. To see a report of Approvals, click on ‘Approvals Report’ on the WOLF Manager screen.
The WOLF Approvals Report selection screen is presented.

9.1b. Select what type(s) of approval status to include on the report – you may checkmark multiple types.

- Example: If you only wanted to see TARs awaiting approval, you would checkmark ‘Awaiting Approval’

You may also choose the order in which the report is presented.

9.1c. The ‘Primary Key’ is what the report will be primarily sorted by

- Example: If you want the report ordered such that all TARs for a given person were grouped together, you would choose ‘Person’ as the ‘Primary Key’ – this would become your primary sort order.

9.1d. The ‘Secondary Key’ is the second criteria for sorting the report.
• Example: If, within all TARs for a given person, above, you wanted to see all approved TARs grouped together, all rejected TARs grouped together, etc, for this person, you would choose ‘Approval’ as your ‘Secondary Key’.

9.1e. After you have selected the report criteria, depress ‘Generate the Report’ to view the report.
Here is the sample report, based on the criteria selected above:

**This is a scrollable report**

9.1e. Note that the number of entries found for the report is listed at the bottom

9.1f. **To return to the WOLF Manager screen**, depress ‘Return to the WOLF Manager’ hyperlink
9.2a. To view a report of selected TARs, click on the ‘TARs Report’ link on the WOLF Manager screen.
The TARs Report selection screen is presented:

From this screen you can select various criteria, to tailor your report to your needs.

9.2b. Under ‘TARS Included’, select what type(s) of TARs you want included in your report. You may select multiple types.

- Example: If you wanted all TARs that have been successfully Posted, check-mark ‘Posted Successfully’.

9.2c. Next, select what columns you want included in the report.

- Example: If you want to know if the TAR has been approved or not, whether it was in-state or out-of-state, and when it was posted, check-mark ‘Approval Status’, ‘Trip Type’, and ‘Posted Date’ respectively to limit the report to those items.
Next, select how the report is to be sorted.

9.2d. The **Primary Key** is the column which will become the primary sort criteria for the report.

- Example: If you wanted the report sorted by whether it is approved or not, checkmark 'Approval Status' as your Primary Key.

9.2e. Then, select the **Secondary Key**, which will become your secondary sort criteria.

- Example: If, for a given Approval status, you wanted all the TARs listed in TAR order, you would check-mark 'Form ID' as your Secondary Key.

9.2f. When you have completed selecting the report criteria, click on 'Generate Report' to view the report.
The report is then presented. Here is the report generated by the example above.

The report is scrollable up and down, and if you have chosen many columns, it will also be scrollable left and right.

**9.2g.** At the bottom of the screen is a tally of how many entries satisfied your report criteria.

**9.2h.** To return to the WOLF Manager screen, click on the link at the bottom of the report.
Logging off of WOLF

10.1. To log off of WOLF, click on Log-Off on the WOLF Manager screen.

Hope you enjoyed this comprehensive journey through WOLF!!
Web Glossary

**Bookmark** - A hyperlink that is saved in the bookmark list, a file in your browser. You can use bookmarks to keep track of favorite or important sites and to return there whenever you are on the World Wide Web.

**Browser** - The software that allows a user to access and view Web documents. It is a program, which interprets HTML and presents the Web page. The two most popular browsers are the Internet Explorer and Netscape.

**Cache** - A Cache Memory is a small but very fast memory used to store frequently used data or instructions. Files viewed on the Web are temporarily stored in the cache and can be recalled quickly.

**Domain Name** - A domain name is a unique name that represents each computer on the Internet. "www.fau.edu" is an example of a domain name.

**Download** - To transfer to your computer a copy of a file that resides on another computer.

**Form** - A form is an online document on which you can enter and look up information in a database. Each form is specific to the information you are entering. Similar to paper form, electronic forms can be comprised of more than one screen.

**GIF (Graphic Interchange Format)** - GIFs are compressed graphics or images, including backgrounds, used in Web files.

**Home Page** - The page by which a user normally enters a Web site. The document displayed when you first open your Web browser. Home Page can also refer to the first document you come to at a Web site.

**HTML (HyperText Markup Language)** - The text based language used to construct WWW pages and interpreted by Web browsers. The html coding of a page can be viewed by using the View HTML Source option from your Browsers menu. HTML.

**HTTP (HyperText Transmission Protocol)** - A Protocol that Computers on the Internet use to communicate with each other.

**Hypertext** - This term describes the system that allows documents to be linked in such a way that the user can explore related documents by clicking on a highlighted word or symbol.
Internet - The Internet is a worldwide computer network with the Web and e-mail being two popular features. Each computer in the network acknowledges the existence of all of the others.

JPEG - Type of image file used on the Internet. Like GIF files, JPEG files are compressed.

Links - These are the hypertext connections between Web pages. This is a synonym for hotlinks or hyperlinks.

Search Engine - A collection of programs that gather information from the Web, index it, and put it in a database so it can be searched. The search engine takes the keywords or phrases entered, searches the database for words that match the search expression, and returns them to you. The results are hyperlinks to sources that have descriptions, titles, or contents matching the search expression.

The search engines are basically huge databases containing millions of records, which include the address of a particular Web page along with information relating to the content of the Web page.

The most popular search engines are Alta Vista, Excite, Hotbot, Infoseek, Lycos, Webcrawler and Yahoo.

URL (Uniform Resource Locator) - The address of a Web page - www.fau.edu is an URL. It is the addressing system used in the World Wide Web. The URL contains information about the method of access, the server to be accessed and the path of any file to be accessed.

Web Page - An HTML document which contains information, which can be seen on the Internet.

Web Site - A group of Web Pages that collectively represent a company, or individual on the WWW.