

## ORIGINATOR – Get Started in EPAF

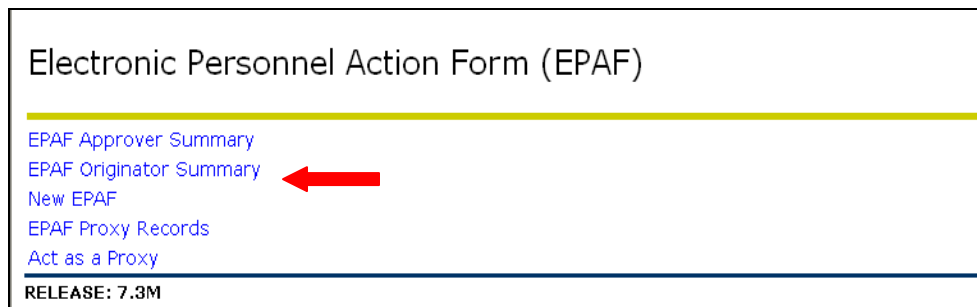
### SETTING-UP – EPAF DEFAULT ROUTING QUEUE



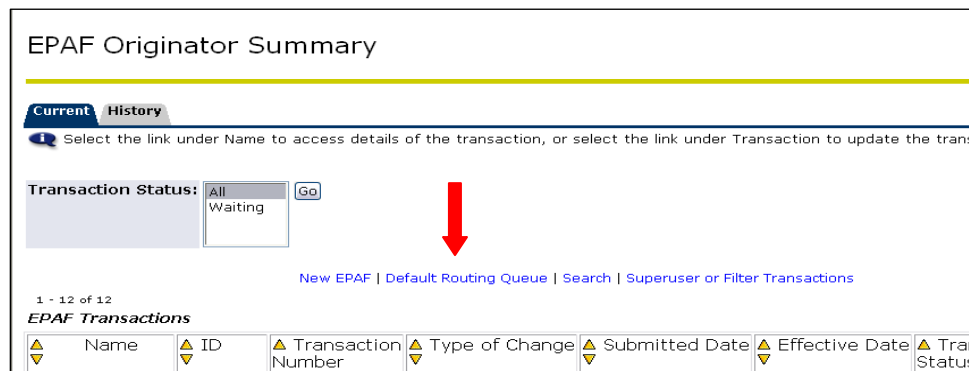
Please note. The system will not allow you to make adjustments to the pre-defined approval levels and required action columns. However you can include additional levels within the transaction itself if necessary. If you have populated NTRROUT in Banner production environment (INB) then your routing is already set up.

To define a default routing queue for an approval category:

Steps	Instructions	Comments
1	Go to the EPAF menu and select the EPAF Originator Summary menu option.	



Steps	Instructions	Comments
2	Select the <u>Default Routing Queue</u> link located on the page.	



Steps	Instructions	Comments
3	Choose an approval category from the pull-down list and Click on "Go".	

**EPAF Default Routing Queue**

Select an Approval Category and Go. Once the page refreshes, select the Approval Level, User ID and action.

**Approval Category:** Employee Separation, SEPAR

Approval Queue	Approval Level	Required Action
Not Selected	Change of Source of Funds, COSF	Not Selected
Not Selected	Labor Distribution, LDIS	Not Selected
Not Selected	Merit Salary and Lump Sum, MERCLS	Not Selected
Not Selected	Merit Salary Increase, MERSBI	Not Selected
Not Selected	Organizational Code Change, ORGCOD	Not Selected
Not Selected	Employee Separation, SEPAR	Not Selected
Not Selected	Sign On Bonus, SGNBNS	Not Selected
Not Selected	Salary Adjustment - Exempt, SALADJ	Not Selected
Not Selected	Merit Hourly Increase, MERHBI	Not Selected
Not Selected	Lump Sum Payment, LMPSUM	Not Selected
Not Selected	Salary Adjustment - Hourly, SALADH	Not Selected
Not Selected	House Staff Separation, HSTERM	Not Selected

[EPAF Originator Summary](#) [Return to EPAF Menu](#)

Steps	Instructions	Comments
4	The mandatory levels and Required Action will appear for that Approval Category. (The mandatory levels are different for each Approval Category.)	

### EPAF Default Routing Queue

Select an Approval Category and Go. Once the page refreshes, select the Approval Level, User ID and action.

**Approval Category:** Employee Separation, SEPAR

**Approval Queue**

Approval Level	User Name	Required Action
20 - (DEPTAP) Department Approvers	<input type="text"/>	Approve
25 - (HRADM1) HR Data Administration	<input type="text"/>	Approve
50 - (BUDGET) Budget	<input type="text"/>	FYI
70 - (PAYROL) Payroll	<input type="text"/>	Approve
99 - (APPLY) Appliers	<input type="text"/>	Apply
Not Selected	<input type="text"/>	Not Selected

Steps	Instructions	Comments
5	Type in the Banner UserIDs in the <u>User Name</u> columns for each level. These are the people who are eligible to approve transactions for the Category identified.	

**EPAF Default Routing Queue**

Select an Approval Category and Go. Once the page refreshes, select the Approval Level, User ID and action.

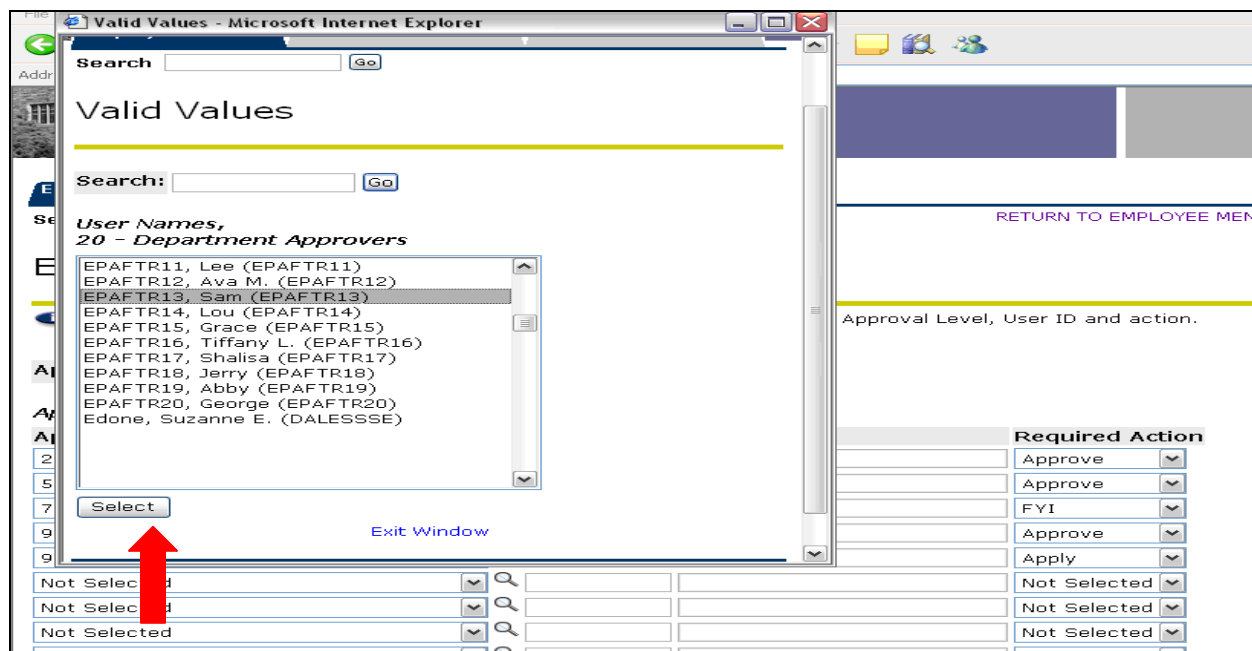
**Approval Category:** Merit Hourly Increase, MERHBI

**Approval Queue**

Approval Level	User Name	Required Action
20 - (DEPTAP) Department Approvers	EPAFTR12 Ava M. EPAFTR12	Approve
50 - (BUDGET) Budget		Approve
70 - (PAYROL) Payroll		FYI
90 - (HRADMN) HR Data Administration		Approve
99 - (APPLY) Appliers		Apply
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected

Mandatory Levels defaulted from Electronic Approval Category Form (NTRACAT).

Steps	Instructions	Comments
6	If you do not know your Approver's Banner UserID, click on the Search button next to the User Name field. A pop-up box will appear showing you a list of eligible approvers. Select your Approver for that level and click on "Select". (The list is sorted by last name.)	



**Valid Values - Microsoft Internet Explorer**

Search:

**Valid Values**

Search:

**User Names, 20 - Department Approvers**

- EPAFTR11, Lee (EPAFTR11)
- EPAFTR12, Ava M. (EPAFTR12)
- EPAFTR13, Sam (EPAFTR13)
- EPAFTR14, Lou (EPAFTR14)
- EPAFTR15, Grace (EPAFTR15)
- EPAFTR16, Tiffany L. (EPAFTR16)
- EPAFTR17, Shalisa (EPAFTR17)
- EPAFTR18, Jerry (EPAFTR18)
- EPAFTR19, Abby (EPAFTR19)
- EPAFTR20, George (EPAFTR20)
- Edone, Suzanne E. (DALESSE)

Steps	Instructions	Comments
7	Once you click on “Select”, the person’s UserID and name will populate the User Name field.	
8	Complete inputting the rest of the User Names for each level. After entering all the names, click on “Save and Add New Rows” to save your selection.	

**EPAF Default Routing Queue**

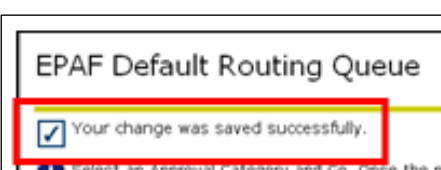
Select an Approval Category and Go. Once the page refreshes, select the Approval Level, User ID and action.

Approval Category: Merit Hourly Increase, MERHBI

**Approval Queue**

Approval Level	User Name	Required Action
20 - (DEPTAP) Department Approvers	EPAFTR13 Sam EPAFTR13	Approve
50 - (BUDGET) Budget	MARTINM1 Miriam E Martinez	Approve
70 - (PAYROL) Payroll	LANES Sharie A Lane	FYI
90 - (HRADMN) HR Data Administration	ROGERSB1 Semper B Rogers	Approve
99 - (APPLY) Appliers	ROGERSB1 Semper B Rogers	Apply
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected

Mandatory Levels defaulted from Electronic Approval Category Form (NTRACAT).

Steps	Instructions
9	Once you save your routing queue, you will receive a message that your changes was saved successfully. 
<b>NOTE:</b>	The mandatory approval levels are pre-defined by Human Resources and will automatically default into this page. Select the user ID to be associated with each approval level defined in the queue.
10	To exit out of the EPAF Default Routing Queue, click on Return to EPAF Menu <a href="#">EPAF Originator Summary</a> <a href="#">Return to EPAF Menu</a> 