OUTSIDE ACTIVITY PORTAL

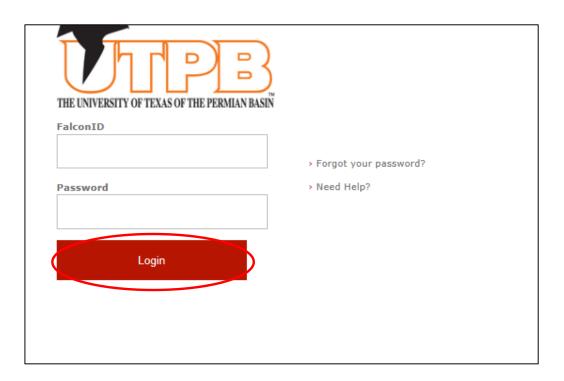## APPROVER

This guide is intended for all faculty and staff who are involved in the conflict of interest/commitment approval chain of command.
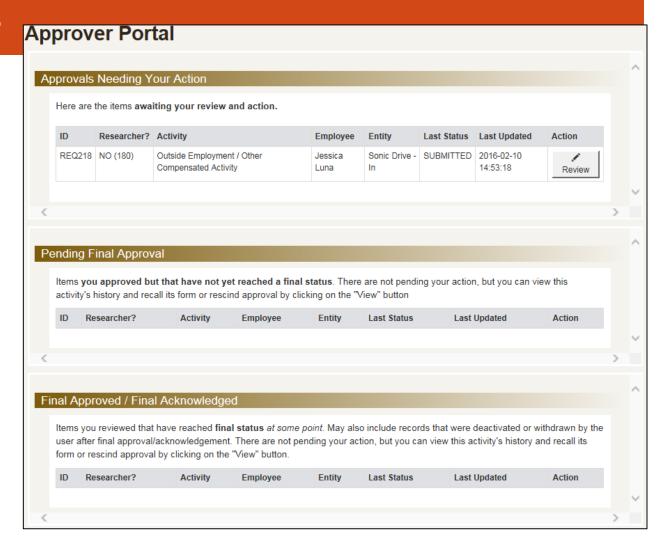
Feb. 2016

LOGGING IN

- In your preferred web browser, go to https://outsideactivity2.utsystem.edu/

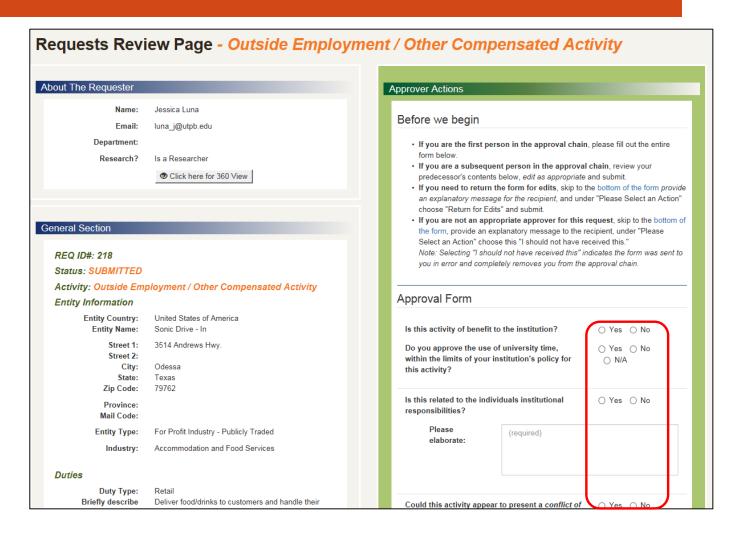- Enter your UTPB credentials and click Login

ACCESSING APPROVER PORTAL

1. From the home screen click 👍 Go to Approver Portal

2. Approval Portal statuses

   a. <u>Approvals Needing Your Action</u> – items awaiting your review and action

   b. <u>Pending Final Approval</u> – items that you have approved but have not yet reached a final status (have not travelled up the approver hierarchy)

   c. <u>Final Approved/Final Acknowledged</u> – items that you have reviewed and approved which have also reached a final status. This section could also include records that were deactivated or withdrawn by the employee

Approver Portal

Approvals Needing Your Action

Here are the items **awaiting your review and action**.

ID	Researcher?	Activity	Employee	Entity	Last Status	Last Updated	Action
REQ218	NO (180)	Outside Employment / Other Compensated Activity	Jessica Luna	Sonic Drive - In	SUBMITTED	2016-02-10 14:53:18	✎ Review

Pending Final Approval

Items **you approved but that have not yet reached a final status**. There are not pending your action, but you can view this activity's history and recall its form or rescind approval by clicking on the "View" button

ID	Researcher?	Activity	Employee	Entity	Last Status	Last Updated	Action

Final Approved / Final Acknowledged

Items you reviewed that have reached **final status** *at some point*. May also include records that were deactivated or withdrawn by the user after final approval/acknowledgement. There are not pending your action, but you can view this activity's history and recall its form or rescind approval by clicking on the "View" button.

ID	Researcher?	Activity	Employee	Entity	Last Status	Last Updated	Action

REVIEWING ITEMS

1. Under Approvals Needing Your Action, click Review

   a. You will see the Requests Review Page which includes all details of the request submitted by your employee on the left and your actions on the right in green. There are instructions at the top that coincide with your role in the approver chain.

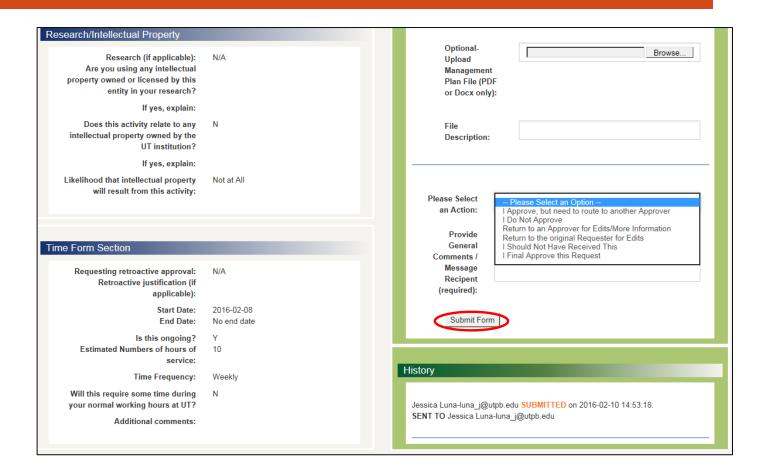2. Complete all fields in the Approver Actions section on the right

REVIEWING ITEMS – CONT.

3. Select an action from the drop-down menu and add comments for the next person in the approver chain

   a. Note: the approval must follow the organizational chart all the way to the President so keep that in mind when choosing an action. If you are routing to another person, you will enter their name in the box that appears.
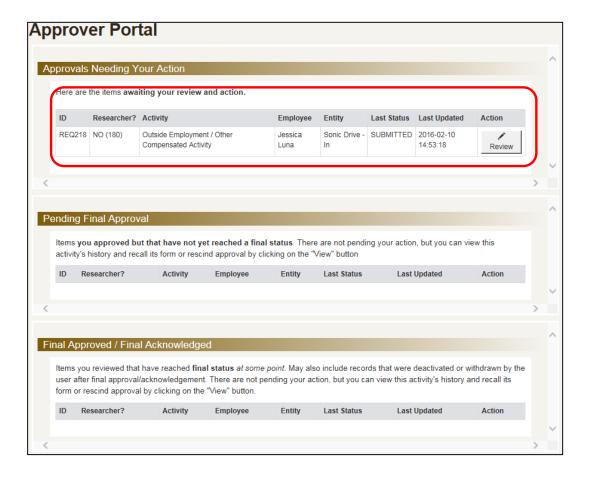
4. Click Submit Form

   a. You will see a confirmation of your action at the top of the green section. The approval has now been routed to the next person and you will see it under Pending Final Approval in the Approver Portal.
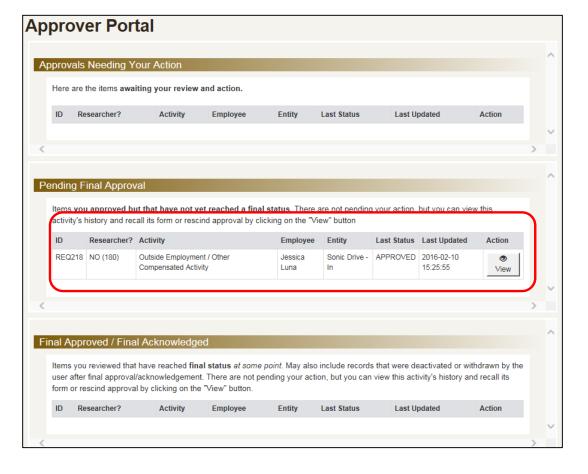
APPROVAL PORTAL VIEW – BEFORE & AFTER

Before Your Action

After Your Action

HAVE QUESTIONS?

- For policy and situational questions contact:
  - Doug Binnion – Compliance Manager (Binnion_d@utpb.edu, 432-552-3702)
  - Narita Holmes – Title IX Coordinator (holmes_n@utpb.edu, 432-552-2697)

- For portal use questions contact:
  - Jessica Luna – Training Coordinator (luna_j@utpb.edu, 432-552-4701
  - Doug Binnion – Compliance Manager (Binnion_d@utpb.edu, 432-552-3702)
  - Narita Holmes – Title IX Coordinator (holmes_n@utpb.edu, 432-552-2697)