BOSTON UNIVERSITY

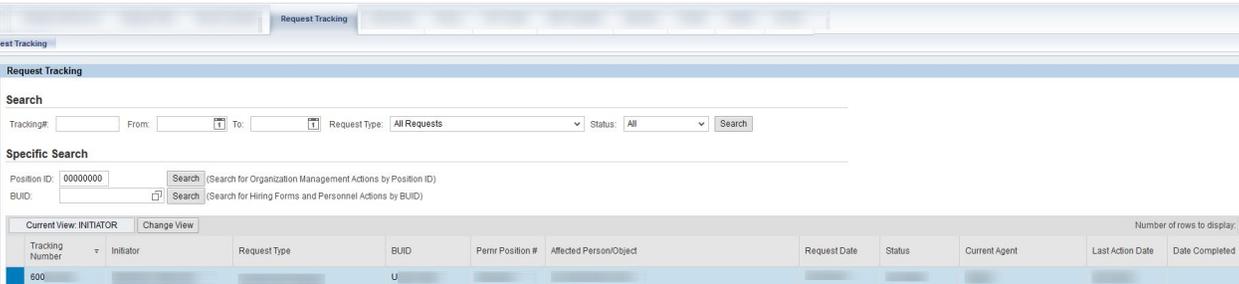# Request Tracker Guide

Form Overview

Overview   The Request Tracker allows Managers and Payroll Coordinators to track the status
of a form.

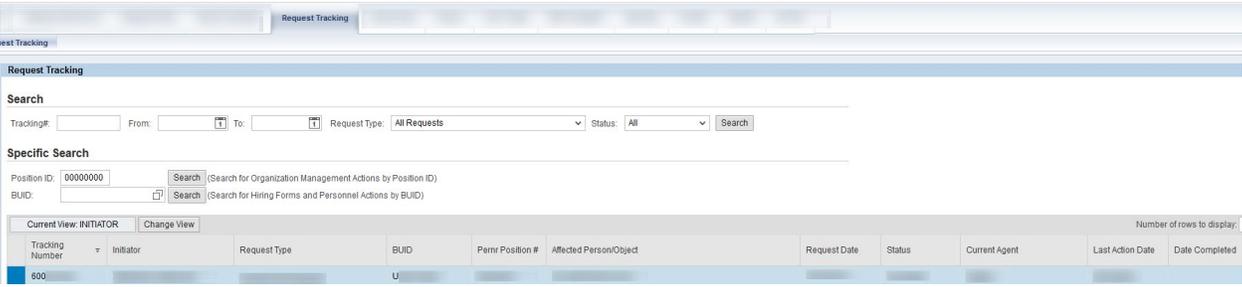**When to use**   Use the request tracker to:

- Check if a form was successfully submitted
- Review the status of forms that are in process
- Confirm that a form has completed workflow
- Check to see if an error occurred after a form has completed workflow
- Review a form that was submitted

Definitions   Review a list of definitions regarding information for each section of the Request
Tracker at the end of this document.

Request Tracker: Viewing a Submitted Form

Step	Action
1	Log into BUWorks using your BU login and Kerberos password at the following URL: https://ppo.buw.bu.edu
2	<table><tr><th>IF your role is…</th><th>THEN click the…</th></tr><tr><td>Manager</td><td>**Manager Self Service** tab.</td></tr><tr><td>Payroll Coordinator</td><td>**Payroll Coordinator** tab.</td></tr></table>
3	Click on **Team** on the ribbon directly below your tabs. ✔ *Result:* The Request Tracking box appears.
4	Once you have searched for a form you are looking for, highlight the row by clicking on the box next to the tracking number:
5	Click **Display Form** at the bottom left corner to open the form. A new tab will open with the form you are reviewing.

Request Tracker: Viewing the Anticipated Path of Approval

Step	Action
1	Log into BUWorks using your BU login and Kerberos password at the following URL: https://ppo.buw.bu.edu
2	<table><tr><td>**IF your role is…**</td><td>**THEN click the…**</td></tr><tr><td>Manager</td><td>**Manager Self Service** tab.</td></tr><tr><td>Payroll Coordinator</td><td>**Payroll Coordinator** tab.</td></tr></table>
3	Click on **Team** on the ribbon directly below your tabs. ✔ *Result:* The Request Tracking box appears.
4	Once you have searched for a form you are looking for, highlight the row by clicking on the box next to the tracking number:
5	Click **Display Approvals** at the bottom left corner to open the form.
6	The approval details will pop up. In this pop up you will see the Anticipated Path of Approval. This is a list of where your form will be going for approval.
7	Below the anticipated path of approval you will see a history of actual approvals such as the date and time of when the form was reviewed/approved by someone.

Request Tracker Definitions

Item	Definition
Tracking #	The tracking number associated with the form that was submitted. Search for a form using the tracking number associated with the form (ex. 600xxxxxx).
From	Search using the **From** field to look up a particular form by the start date.
To	Search using the **To** field to look up a particular form by the start date.
Request Type	Use the **Request Type** field search by a specific form by clicking on the drop-down menu. The field is automatically set up to review All Requests.
Status	The **Status** is automatically set to All. Use the drop-down menu to search for a particular status.
Position ID	Search for Organizational Management (OM) forms using a position ID (ex. 500xxxxx).
BUID	Search for Hiring Forms and Personnel Actions (PA) forms by BUID (ex. Uxxxxxxxx).
Initiator	The employee who submitted the form.
BUID	The BUID of the employee who is having changes made to their record.
Pernr Position #	The personnel number or position number of the employee who is having changes made to their record.
Affected Person/Object	The name of the employee having changes made to their record.
Request date	The effective date of the form.
Status	The current status of the form.
Current Agent	The group/employee currently reviewing the form. Note- if you click on the group or employee listed under Current Agent you can see a list or the name of the person reviewing the form. The pop up of who is reviewing the form should list the username, name, telephone and email address in case they need to be contacted. *Note:* Click on the group or employee listed under Current Agent to see the name of the individual reviewing the form in process. The pop up of who is reviewing the form should list the username, name, telephone and email address in case they need to be contacted.

Item	Definition
Last Action Date	The most recent date the form had been updated by someone reviewing the form.
Date Completed	The date that the form has been completed.
Submitted	The form was submitted but has not gone through any approvals yet. The current agent is the first approver.
In Process	The form is on its way through approvals. The current agent is the next approver.
Returned	The form was returned to the sender for editing. The current agent is the first initiator.
Wait4Payroll	The form was completed after the payroll deadline. The transaction will be processed after payroll is done running.
Correction	A Request Tracker status indicating the form in question crashed and is with HR Information Systems or BUworks to be entered in the backend. The form is considered still in progress when the Request Tracker displays this status. Any changes reflected on the form will not be included in the employee's record or payroll until HR Information Systems confirms through a ticket the issue is corrected. HR Information Systems will be in touch if additional information is needed to resolve the issue.
Error	This is not technically a form status, however some forms fail "in the background" and can only be picked up by the report below.
Rejected	The form was rejected. It cannot be edited; a new form must be entered, if necessary/appropriate.
Completed	The form was fully approved and has updated to the backend.
Cancelled	A live form was cancelled by the initiator, or a failed/error form was cancelled by HR.