

TOWSON UNIVERSITY

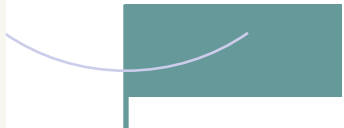
ONLINE INVOICE SYSTEM

TRAINING GUIDE FOR NON-DEPARTMENTAL INVOICES





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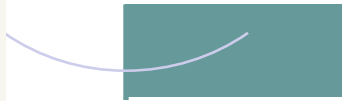
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Part IV: Security Forms

Contact Information:

Online Invoice System Questions: Mike Mullenholz, ext. 44603 or mmullenholz@towson.edu

Technical and Security Questions: Mike Mullenholz, ext. 44603 or mmullenholz@towson.edu



LOGIN

ACCESSING THE ONLINE INVOICE LOGON PAGE

You can access the University Online Invoice logon page from the Bursar's website at ...

<http://www.towson.edu/bursar>

1. From the Bursar's homepage, click on the Faculty & Staff Resources link located on the right hand navigation menu.

2. From the Faculty & Staff Resources page, click on the Online Invoice System link located on the left hand navigation menu.

3. The Online Invoice System page contains links to the Online Invoice page and the Security Authorization forms.

- a. Click on the Online Invoice System link to access the Online Invoices logon page.
- b. To print additional security authorization forms or item type request form, click on the forms repository link.

HOME / BURSAR'S OFFICE

Bursar's Office

The Bursar's Office is Towson University's student business office. Everything you need to know about student bills, payments, rebates and more is available here.

Tuition, Billing, Registration and Refund Information

You will receive an email notification via your campus email address when an eBill is available. It is important to pay your bill balance on time to avoid cancellation of your class schedule and/or a late processing fee. Please make note of the payment due dates listed on the registration and billing schedules below. A \$150 late fee is assessed to any student who does not pay in full or establish a payment plan with the university by their bill payment deadline.

If you do not receive a notification of eBill availability in your campus email at least one week prior to your bill due date, contact the Bursar's Office. You are responsible for paying your tuition and fees by the due date even if you do not receive an eBill notification.

Specific information about tuition and fees, registration and billing, and refunds is provided below.

- BURSAR'S OFFICE
- Your Account
- Tuition, Fees & Other Costs
- Payments & Billing
- Rebates & Refunds
- Faculty & Staff Resources**
- Tax Information

HOME / BURSAR'S OFFICE / FACULTY & STAFF RESOURCES

Faculty & Staff Resources

Information regarding organizational accounts and PeopleSoft item types for faculty and staff.

Organizational Accounts

To view existing ORG accounts scroll through the list or use the find button and type in the ORG name (see detailed search instructions below).

- View current ORG listing (PDF) - List updated 5/9/2017

Requesting New ORG Account

If the ORG account you are searching for does not exist, you will need to request a new ORG account to be opened.

Online Invoice Logon

You can use the online invoice system (production) if you have already completed your training session and have received an activation email. Otherwise, use the test online invoice system.

Security Authorization Forms

The security authorization forms are available in the forms repository. Please mail completed authorization forms to Mike Mullenholz in Enrollment Services room 321. Forms may also be faxed to Mike Mullenholz at x4-2884. Forms must be received 48 hours prior to your training session.

- Item type security request form: creates item types for your department for use with the online invoice system
- Item type authorization form: adds item types to your department for use with the online invoice system
- Creator request form: the creator is the individual who currently types the paper

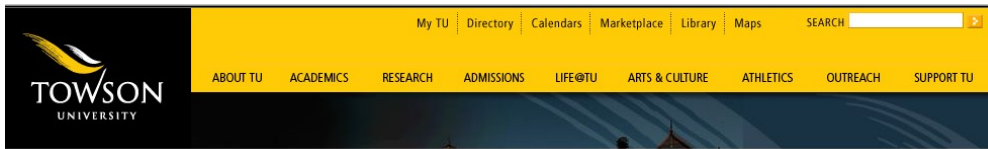
- FACULTY & STAFF RESOURCES
- Online Invoice System



THE CREATOR

LOGGING INTO TU'S ONLINE INVOICE SYSTEM

1. Enter your TU UserName.
2. Enter your TU Password.
3. Click the Login button to enter the Online Invoice.



TOWSON UNIVERSITY AUTHENTICATED LOGIN

Enter your Username and Password:

Username:

Password:

SPECIAL POINTS OF INTEREST

ONLINE INVOICE TERMINOLOGY

- ✚ CREATOR - one who can create an original invoice.
- ✚ APPROVER - one who provides final approval of an invoice before it is submitted for processing. Approvers CANNOT create an original invoice.

USER TYPE: CREATOR

Your Online Invoice security access will determine the page being displayed after you logon. If you are the **CREATOR** for your department, the following page will be displayed.

A. UNDERSTANDING THE CREATOR'S MAIN PAGE

1. The Creator's Main Page will automatically open to My Unapproved Invoices page allowing you to create a New Debit Invoice, a New Credit Invoice, and display a listing of all your unapproved invoices.

Creator's Main Page: My Unapproved Invoices

Do you want to Add New Debit Invoice ?

Enter Debit Invoice Number to Create Credit Invoice

Bursar's Office Auxiliary Serv Admin

Donna Taylor

Invoice Number	Date	Amount	Employee Approval	Dept. Admin Approval	Void	
100065	01/25/2007	\$525.00	<input type="checkbox"/>	Not Approved	<input type="button" value="VOID"/>	<input type="button" value="Edit"/>

2. To view all your Department's unapproved invoices, click on the View All Unapproved Invoices button.

Creator's Main Page: All Unapproved Invoices

Do you want to Add New Debit Invoice ?

Enter Debit Invoice Number to Create Credit Invoice

Bursar's Office Auxiliary Serv Admin Fiscal Plan & Serv

Carol Warner

Invoice Number	Date	Amount	Employee Approval	Dept. Admin Approval	Void	
100060	01/24/2007	\$494.00	Not Approved	Not Approved	N	<input type="button" value="View"/>
100059	01/24/2007	\$175.00	Not Approved	Not Approved	N	<input type="button" value="View"/>
100057	01/24/2007	\$295.00	Not Approved	Not Approved	N	<input type="button" value="View"/>
100055	01/24/2007	\$125.00	Not Approved	Not Approved	N	<input type="button" value="View"/>

Laurie Jones

Invoice Number	Date	Amount	Employee Approval	Dept. Admin Approval	Void	
100092	02/13/2007	\$500.00	Not Approved	Not Approved	N	<input type="button" value="View"/>
100071	01/30/2007	\$10500.00	Not Approved	Not Approved	N	<input type="button" value="View"/>

This page will display all the Unapproved Invoices listed by Creator that are pending in your department.

3. To view all invoices in your department, click on the View All Invoices button.

Creator's Main Page: All Invoices

Do you want to Add New Debit Invoice ?

Enter Debit Invoice Number to Create Credit Invoice

Bursar's Office Auxiliary Serv Admin Fiscal Plan & Serv

Susan Walsh

Invoice Number	Date	Amount	Employee Approval	Dept. Admin Approval	Void	Posted	
100056	01/24/2007	\$25.00			VOIDED		<input type="button" value="View"/>
100054	01/24/2007	\$250.00			VOIDED		<input type="button" value="View"/>
100052	01/24/2007	\$563.93	Approved	Approved	N	Y	<input type="button" value="View"/>
100051	01/24/2007	\$1599.00	Approved	Approved	N	Y	<input type="button" value="View"/>
100049	01/24/2007	\$40.00	Not Approved	Not Approved	N	N	<input type="button" value="View"/>

This page will display all the Approved, Unapproved, and Voided invoices that were created by your department. This page also displays whether the invoice has been Posted. If the Posted flag is a Y, the charges have been posted to the customer's account and an invoice has been printed and mailed to the customer.

4. To return back to the Creator's Main Page, click on the View My Unapproved Invoices button which will return you back to the page that displays only your unapproved invoices. Please note: Once you approve an invoice, the invoice will no longer appear on this page.

Creator's Main Page: My Unapproved Invoices

Do you want to Add New Debit Invoice ?

Enter Debit Invoice Number to Create Credit Invoice

Bursar's Office Auxiliary Serv Admin

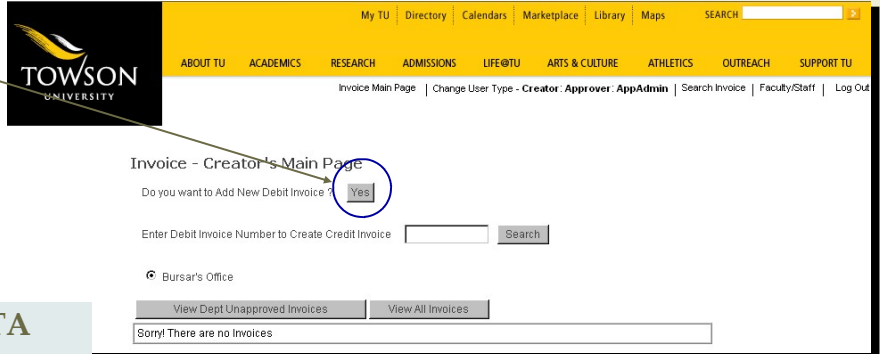
Donna Taylor

Invoice Number	Date	Amount	Employee Approval	Dept. Admin Approval	Void	
100065	01/25/2007	\$525.00	<input type="checkbox"/>	Not Approved	VOID	<input type="button" value="Edit"/>

CREATING THE INVOICE

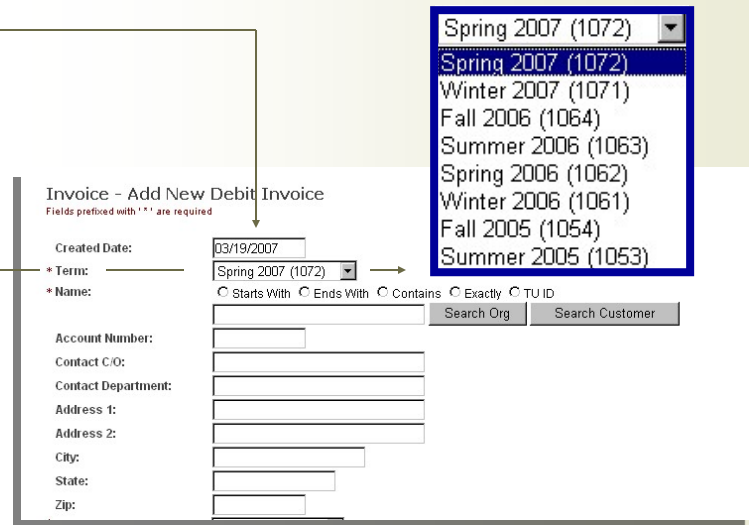
A. CREATING A NEW DEBIT INVOICE

- To create a New Debit Invoice, click on the **Yes** button on the Creator's Main page. The New Debit Invoice page will be displayed.



B. ENTERING THE INVOICE DATA

- Current Date:** The Invoice date will default to the current date.
- Term:** The Term will default to the current term. To select a term, other than the current term, click on the drop down arrow to select the term. The term is needed because it is a required field when posting a charge in PeopleSoft. (see term legend below)



TERM LEGEND

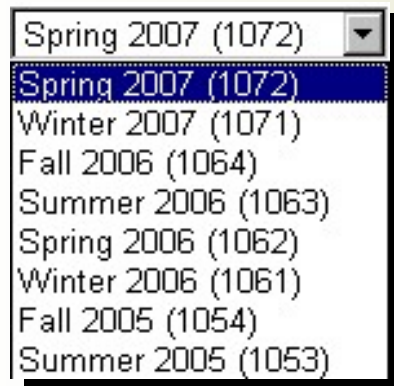
When selecting a term, please consider the following criteria:

For events occurring during the month of **January**, please select the **Winter** term with the corresponding year.

For events occurring during the months of **February thru May**, please select the **Spring** term with the corresponding year.

For events occurring during the months of **June thru August**, please select the **Summer** term with the corresponding year.

For events occurring during the months of **September thru December**, please select the **Fall** term with the corresponding year.



3. **Name:** select a search criteria to find the Organization or Customer name in PeopleSoft:

- ⊕ Starts With
- ⊕ Ends With
- ⊕ Contains
- ⊕ Exactly
- ⊕ TU ID

4. *Type in all or part of the ORG or Customer Name. (Typing in less is better) See note below:

5. Depending on whom you are billing, click on the Search ORG or Search Customer button.

6. A pop-up window will display the results of your search if more than one account meets your search criteria, otherwise, the name and address fields will automatically populate.

7. Click on the ORG name provided in the list.

- 0255139 --- Univ of Maryland College Park
2220 LeFrak Hall
Criminal Justice Department
College Park, MD 20742
- 0251456 --- Univ of MD Athletic Dept
2740 Comcast Center
College Park, MD 20742
- 0181765 --- Univ of Md Baltimore County
1000 Hilltop Circle
Office of Human Resources
Baltimore, MD 21250
- 0198183 --- Univ of Md Biotech
701 East Pratt Street
Suite 200
Baltimore, MD 21202
- 0181185 --- Univ of Md Eastern Shore
Office of Human Resources
J.T. Williams Bldg - 3rd Floor

NOTE * Less is better than more when typing in your information for the ORG or Customer Search. Should you type in the entire name and the name is not exactly formatted as it is in PeopleSoft, your search will fail to produce any results.

8. Once you have selected the account, the following fields will be populated:

- a. Name
- b. Account Number
- c. Address
- d. City
- e. State
- f. Zip

9. **Contact Information** (optional): at this time you may add the Contact Person and Contact Department information.

10. If the Contact Department information is available in the PeopleSoft tables, the Contact Department may be populated in the Address 2 field, if not, you can enter a department in the Contact Department field.

C. ISSUING DEPARTMENT AND ITEM TYPE

1. **Issuing Department:** click on the drop down arrow to select your department. If you have been assigned to multiple departments, click on the appropriate department. Once the Department has been selected, the Item Description field will change from Undefined to Select An Item allowing you to select an Item Type.

2. **Item Type:** click on the drop down arrow to select the correct Item Type. (see note below)

NOTE

The Item Types available are based on the security tied to your department during setup. If Item types are not available, please contact Toni Serruto at 410-704-3777 or email, tserruto@towson.edu.

3. Once you have made your selection, the Item Description and Item Type number will populate.

Item Description	Item Type	Amount
105000300020 -- Copies Plus Printing Serv Sale	105000300020	
Select An Item		
Select An Item		
Select An Item		

Invoice Total:

4. Tab into the Amount Field and enter the dollar amount.

Item Description	Item Type	Amount
105000300020 -- Copies Plus Printing Serv Sale	105000300020	500.00
105000300025 -- Copies Plus Print Serv Sales T	105000300025	25.00
Select An Item		
Select An Item		

Invoice Total: 525.00

5. Repeat process to add additional Item Types and Amounts.

6. Your Invoice total will automatically calculate as you tab through the fields.

D. DESCRIPTION OF ITEMS AND SERVICES

1. Add the Date of Service to the Invoice by clicking on the calendar icon and selecting the date from the calendar pop-up.

2. The date you select will populate the date field.

*Description of Item or Service: 2000 characters left.

Date:

Amount:

Contact Person:

Contact Phone:

Click Here to Approve Invoice

3. Complete the Item Detail Description field using free form text and enter a dollar amount in the Amount field.

- The free form text area holds 2000 characters. As you type, the system will indicate the remaining characters available.

*Description of Item or Service:	Date	Item Detail Description	Amount
	01/25/2007	Print Spring Cancellation Letters	500.00
	01/25/2007	Taxed item at 5%	25.00
Item Detail Desc Total			525.00

Contact Person: Donna Taylor
 Contact Phone: 410-704-4603

Click Here to Approve Invoice

Submit Invoice Details Cancel

4. If you want your description to appear in a specific format, you must use the <pre> beginning tag and </pre> ending tag. An example of preserving the spacing and indentation of the free form text description can be found on pages 9 and 10.

5. Your total will automatically calculate after you tab out of the field.

6. The Contact Person and Contact Phone will populate. This information is pulled from the PeopleSoft tables according to the logon ID.

7. Click on Submit Invoice Details to save, or Cancel to exit out of the invoice.

PLEASE NOTE:

If you have not completed the invoice but would like to save what you have done, **Do Not** check the Click Here to Approve Invoice box. Click only the Submit Invoice Details button.

- 8. A new page will open with a message displaying the invoice number created.
- 9. This page will close automatically.

Invoice Details Inserted Successfully

Invoice Number 100065 Has Been Created

This page will be redirected to Main Page.

The Creator will be returned back to the Creator's Main page. The Creator's Main page will now display the Creator's Unapproved Invoice.

Creator's Main Page: My Unapproved Invoices

Do you want to Add New Debit Invoice ?

Enter Debit Invoice Number to Create Credit Invoice

Bursar's Office Auxiliary Serv Admin

Donna Taylor

Invoice Number	Date	Amount	Employee Approval	Dept. Admin Approval	Void	
100065	01/25/2007	\$525.00	<input type="checkbox"/>	Not Approved	<input type="button" value="VOID"/>	<input type="button" value="Edit"/>

A. USING <PRE> AND </PRE> TAGS

Using <PRE> Tags allows the user to format the free form text area of the invoice. Below are two examples with the same information and format; however, only one example uses the <pre> and </pre> formatting tags.

1. To preserve the spacing and indentation of your free-form text entry, you must use the <pre> beginning tag and </pre> ending tag around a block of text as displayed in block one.
2. The second block of text entered contains the same information and spacing as block one, but does not contain the <pre> and </pre> tags.
3. The following page will display the printed invoice and how the text appears when you pre-format a block of text with and without the <pre> and </pre> tags.

Invoice - Add New Debit Invoice
Fields prefixed with '*' are required

Created Date: 02/06/2007

*Term: Spring 2007 (1072)

*Name: Starts With Ends With Contains Exactly TU ID
Upper Falls Dance Academy

Account Number: 0170224

Contact C/O:

Contact Department:

Address 1: 7303 Long Field Dr

Address 2:

City: Kingsville

State: MD

Zip: 21087

*Issuing Department: Auxiliary Serv Admin

Item Description	Item Type	Amount
105001600070 -- Parking Fee Event Services	105001600070	300.00
Select An Item		
Select An Item		
Select An Item		
Invoice Total:		300.00

1777 characters left.

*Description of Item or Service:	Date	Item Detail Description	Amount
	02/06/2007	<pre>Admit one parking for each: Mary Smith \$50.00 Lucy Lu \$50.00 Kaite Brown \$50.00</pre>	150.00
	02/06/2007	Admit one parking for each: Mary Smith \$50.00 Lucy Lu \$50.00 Katie Brown \$50.00	150.00
Item Detail Desc Total			300.00

Contact Person: Donna Taylor

Contact Phone: 410-704-4603

Click Here to Approve Invoice

B. VIEWING THE RESULTS OF THE <PRE> AND </PRE> TAGS ON THE INVOICE

Below are the results of the invoice created with one block of the same text using the <pre> and </pre> tags and the other block of text not utilizing the <pre> and </pre> tags.

1. Using the <pre> and </pre> tags during the creation level of the invoice will preserve all the space characters and line breaks.
2. Failure to use the <pre> and </pre> tags at the creation level of the invoice will display the text as one run-on line.

TOWSON UNIVERSITY
[Click for Invoice history.](#)

INVOICE NUMBER: 100091
Billing Department: Auxiliary Serv Admin
Invoice Date:
Net Terms: 15 Days

Item Type	Item Type Description	Amount
105001600070	Parking Fee Event Services	300.00
		Total: \$300.00

To:
 Upper Falls Dance Academy
 7303 Long Field Dr
 Kingsville, MD 21087

Description of Item or Service - INVOICE NUMBER : 100091
 Upper Falls Dance Academy - Account Number : 0170224

Date	Detail Description	Amount
02/06/2007	Admit one parking for each: Mary Smith \$50.00 Lucy Lu \$50.00 Kaite Brown \$50.00	150.00
02/06/2007	Admit one parking for each: Mary Smith \$50.00 Lucy Lu \$50.00 Katie Brown \$50.00	150.00
		Total: \$300.00

Questions or Inquiries
 Donna Taylor / 410-704-4603
 Auxiliary Serv Admin

[Close Window](#)

EDITING THE INVOICE

You may find it necessary to Edit the information that is contained in your invoice. Information can be added or deleted anytime prior to approval.

A. USING THE EDIT BUTTON

1. To view and/or edit an invoice, click on the Edit button.
2. Selecting the Edit button will display the invoice in the creation state allowing you to make any necessary changes. All fields in this state can be modified except for the name and address field.

Creator's Main Page: My Unapproved Invoices

Do you want to Add New Debit Invoice ? Yes

Enter Debit Invoice Number to Create Credit Invoice

Bursar's Office Auxiliary Serv Admin

Donna Taylor						
Invoice Number	Date	Amount	Employee Approval	Dept. Admin Approval	Void	
100065	01/25/2007	\$525.00	<input type="checkbox"/>	Not Approved	VOID	<input type="button" value="Edit"/>

Invoice - Edit Debit Invoice Details

Fields prefixed with '*' are required

Created Date:

*Term:

*Name: Starts With Ends With Contains Exactly TU ID

Account Number:

Contact C/O:

Contact Department:

Address 1:

Address 2:

City:

State:

Zip:

Bursar's Office

Item Description	Item Type	Amount
105000300020 -- Copies Plus Printing Serv Sale	105000300020	500.00
105000300025 -- Copies Plus Print Serv Sales T	105000300025	25.00
Select An Item		
Select An Item		
Invoice Total:		525.00

1951 characters left.

*Description of Item or Service:	Date	Item Detail Description	Amount
	01/25/2007	Print Spring Cancellation Letters	500.00
	01/25/2007	Taxed item at 5%	25.00
Item Detail Desc Total			525.00

Contact Person:

Contact Phone:

Click Here to Approve Invoice -- Employee

Click Here to Void Invoice

3. If you have edited any of the fields on this page, click the Submit Invoice Details buttons to save your changes. If you have not made any changes to the invoice, skip to #6.

4. A new page will open with a message displaying the invoice was successfully updated.

Invoice Details Updated Successfully

5. This page will close automatically.

This page will be redirected to Main Page.

6. If you are viewing your invoice details to verify information, click the Cancel/Return to Previous page button to return back to the Creator's Main page. Do not click the Submit Invoice Details button if no changes were made to the invoice.

Invoice - Edit Debit Invoice Details

Fields prefixed with '*' are required

Created Date: 01/25/2007 Invoice History

*Term: Fall 2006 (1064)

*Name: Starts With Ends With Contains Exactly TUID
 Univ of Md Baltimore County

Account Number: 0181765

Contact C/O:

Contact Department:

Address 1: 1000 Hilltop Circle

Address 2: Office of Human Resources

City: Baltimore

State: MD

Zip: 21250

Bursar's Office

Item Description	Item Type	Amount
105000300020 -- Copies Plus Printing Serv Sale	105000300020	500.00
105000300025 -- Copies Plus Print Serv Sales T	105000300025	25.00
Select An Item		
Select An Item		
Invoice Total:		525.00

1951 characters left.

*Description of Rem or Service:	Date	Item Detail Description	Amount
	01/25/2007	Print Spring Cancellation Letters	500.00
	01/25/2007	Taxed item at 5%	25.00
Item Detail Desc Total			525.00

Contact Person: Donna Taylor

Contact Phone: 410-704-4603

Click Here to Approve Invoice -- Employee

Click Here to Void Invoice

INVOICE CREATED WITH CONFLICTING TOTALS

Invoices that are created and have a discrepancy between amounts in the total fields are easily detected by an Edit to Approve Button that appears under Employee Approval. When all totals match, a radio button for approval appears instead of the Edit to Approve button.

Creator's Main Page: My Unapproved Invoices

Do you want to Add New Debit Invoice ?

Enter Debit Invoice Number to Create Credit Invoice

Bursar's Office Auxiliary Serv Admin

Donna Taylor					
Invoice Number	Date	Amount	Employee Approval	Dept. Admin Approval	Void
100070	01/29/2007	\$3000.00	<input type="button" value="Edit To Approve"/>	Not Approved	<input type="button" value="VOID"/>

A. EDIT TO APPROVE BUTTON

1. Click the Edit to Approve button to view the invoice details. At this point, you can edit all fields, except the name and address fields.
2. Identify where the discrepancy appears. You will find the discrepancy either at the item type detail level or at the free form description level.
3. Correct the amount and tab out of the field. Your total will automatically recalculate at the level the correction was made.
4. Click the submit Invoice Details button to save your changes and return back to the Creator's Main Page.

Invoice - Edit Debit Invoice Details

Fields prefixed with '*' are required

Created Date:
 *Term:
 *Name: Starts With Ends With Contains Exactly TU ID

Account Number:
 Contact C/O:
 Contact Department:
 Address 1:
 Address 2:
 City:
 State:
 Zip:

*Issuing Department:

Item Description	Item Type	Amount
105000200010 -- Bateman's Rent	105000200010	3000.00
Select An Item		
Select An Item		
Select An Item		
Invoice Total		3000.00

2000 characters left.

*Description of Item or Service:	Date	Item Detail Description	Amount
	01/29/2007	Rent for October	300.00
Item Detail Desc Total			300.00

Contact Person:
 Contact Phone:

Click Here to Approve Invoice -- Employee

Click Here to Void Invoice

- You will see the Edit to Approve button no longer appears under Employee Approval and a radio box is now displayed for approval.

Creator's Main Page: My Unapproved Invoices

Do you want to Add New Debit Invoice?

Enter Debit Invoice Number to Create Credit Invoice

Bursar's Office Auxiliary Serv Admin

Donna Taylor						
Invoice Number	Date	Amount	Employee Approval	Dept. Admin Approval	Void	
100070	01/29/2007	\$3000.00	<input type="checkbox"/>	Not Approved	<input type="button" value="VOID"/>	<input type="button" value="Edit"/>

APPROVING THE INVOICE

A. USING THE RADIO BUTTON

1. At the Creator's Main Page, you can Approve your invoice.
2. Click on the Employee Approval radio button and then Submit Changes.

Creator's Main Page: My Unapproved Invoices

Do you want to Add New Debit Invoice ?

Enter Debit Invoice Number to Create Credit Invoice

Bursar's Office Auxiliary Serv Admin

Donna Taylor						
Invoice Number	Date	Amount	Employee Approval	Dept. Admin Approval	Void	
100665	01/25/2007	\$525.00	<input type="radio"/>	Not Approved	<input type="button" value="VOID"/>	<input type="button" value="Edit"/>

B. USING THE EDIT BUTTON

1. You can also Approve your invoice by clicking on the Edit button.
2. Selecting the Edit button will display the invoice in the creation state allowing you to make any necessary changes. All fields in this state can be modified, except the name and address field.
3. To Approve the invoice, click on the Click Here to Approve Invoice - Employee, then click Submit Invoice Details.

Invoice - Edit Debit Invoice Details

Fields prefixed with '*' are required

Created Date:

*Term:

*Name: Starts With Ends With Contains Exactly TU ID

Account Number:

Contact C/O:

Contact Department:

Address 1:

Address 2:

City:

State:

Zip:

Bursar's Office

Item Description	Item Type	Amount
105000300020 -- Copies Plus Printing Serv Sale	105000300020	500.00
105000300025 -- Copies Plus Print Serv Sales T	105000300025	25.00
Select An Item		
Select An Item		
Invoice Total:		525.00

1951 characters left.

*Description of Item or Service:	Date	Item Detail Description	Amount
	01/25/2007	Print Spring Cancellation Letters	500.00
	01/25/2007	Taxed item at 5%	25.00
Item Detail Desc Total			525.00

Contact Person:

Contact Phone:

Click Here to Approve Invoice -- Employee

Click Here to Void Invoice

4. A new page will open with a message displaying the invoice was successfully updated.

Invoice Details Updated Successfully

5. This page will close automatically.

This page will be redirected to Main Page.

PLEASE NOTE:

Once you approve an invoice, the invoice will no longer appear on the My Unapproved Invoices page.

VOIDING THE INVOICE (THE CREATOR)

The Creator has two options available to void an invoice. Keep in mind, once the creator has approved an invoice, the creator can no longer void the invoice. The invoice can only be voided by the Approver.

A. USING THE VOID BUTTON

1. To VOID an unapproved invoice from the Creator's Main Page, click on the VOID button.

Creator's Main Page: My Unapproved Invoices

Do you want to Add New Debit Invoice ?

Enter Debit Invoice Number to Create Credit Invoice

Bursar's Office Auxiliary Serv Admin

Donna Taylor						
Invoice Number	Date	Amount	Employee Approval	Dept. Admin Approval	Void	
100066	01/25/2007	\$1000.00	<input type="checkbox"/>	Not Approved	<input type="button" value="VOID"/>	<input type="button" value="Edit"/>

2. A pop-up box will open allowing you to confirm your decision to Void.

- ⊕ Click OK to Void the invoice.
- ⊕ Click Cancel to cancel the request.



3. Once you have indicated OK, a new window will be displayed indicating the invoice has been successfully voided and you will be returned back to the Creator's Main page.

Invoice Voided Successfully

Invoice Number 100070 Has Been Voided.

This page will be redirected to Main Page.

PLEASE NOTE:

Once you void an invoice, the invoice will no longer appear on the My Unapproved Invoices page.

B. USING THE EDIT BUTTON

1. An invoice can also be voided by selecting the Edit button from the Creator's Main Page. The Invoice is displayed in the creation state.
2. To Void the invoice, scroll to the bottom of the page.
3. Click on Click Here to Void Invoice.
4. Click on Submit Invoice Details.

The screenshot shows a form with the following fields and options:

- Contact Person: Donna Taylor
- Contact Phone: 410-704-4603
- Click Here to Approve Invoice -- Employee
- Click Here to Void Invoice

At the bottom of the form are two buttons: "Submit Invoice Details" and "Cancel / Return To Previous Page". A line from step 4 of the instructions points to the "Submit Invoice Details" button. Another line from step 3 points to the "Click Here to Void Invoice" checkbox.

5. A new page will open with a message displaying the invoice was successfully updated.

Invoice Details Updated Successfully

Invoice 100094 has been voided

This page will be redirected to Main Page.

PLEASE NOTE:

Once you void an invoice, the invoice will no longer appear on the My Unapproved Invoices page.

VIEWING YOUR INVOICE

A. VIEWING YOUR APPROVED INVOICE

1. To view your approved invoices, you must select the View All Invoices button.

Creator's Main Page: My Unapproved Invoices

Do you want to Add New Debit Invoice ?

Enter Debit Invoice Number to Create Credit Invoice

Bursar's Office Auxiliary Serv Admin

Donna Taylor						
Invoice Number	Date	Amount	Employee Approval	Dept. Admin Approval	Void	
100065	01/25/2007	\$525.00	<input type="checkbox"/>	Not Approved	<input type="button" value="VOID"/>	<input type="button" value="Edit"/>

2. All of your department's invoices are displayed in this view that are Approved, Not Approved, or Voided. All invoices are grouped by Creator.

Creator's Main Page: All Invoices

Do you want to Add New Debit Invoice ?

Enter Debit Invoice Number to Create Credit Invoice

Bursar's Office Auxiliary Serv Admin

Donna Taylor							
Invoice Number	Date	Amount	Employee Approval	Dept. Admin Approval	Void	Posted	
100065	01/25/2007	\$525.00	Approved	Not Approved	N	N	<input type="button" value="View"/>
100035	09/19/2006	\$1444.03	Approved	Not Approved	N	N	<input type="button" value="View"/>

Susan Walsh							
Invoice Number	Date	Amount	Employee Approval	Dept. Admin Approval	Void	Posted	
100054	01/24/2007	\$250.00	Not Approved	Not Approved	N	N	<input type="button" value="View"/>

3. Click on the View button to display the invoice in billing format.

DO NOT send a printed copy of this page to the customer. An official invoice will be sent from the Bursar's Office. This page is for viewing purposes only.



[Click for Invoice history.](#)

INVOICE NUMBER: 100065

Billing Department: Bursar's Office

Invoice Date:

Net Terms: 15 Days

Item Type	Item Type Description	Amount
105000300020	Copies Plus Printing Serv Sale	500.00
105000300025	Copies Plus Print Serv Sales T	25.00
Total:		\$525.00

To:

Univ of Md Baltimore County
1000 Hilltop Circle
Office of Human Resources
Baltimore, MD 21250

Description of Item or Service - INVOICE NUMBER : 100065

Univ of Md Baltimore County - Account Number : 0181765

Date	Detail Description	Amount
01/25/2007	Spring 2006 Cancellation Letters	500.00
01/25/2007	Taxed Item	25.00
Total:		\$525.00

Questions or Inquiries

Donna Taylor / 410-704-4603
Bursar's Office

[Close Window](#)

B. BREAKING DOWN THE INVOICE

1. The Billing Department populates with your department name.
2. The Invoice Date will populate when the invoice is posted to the customer/organization account and an official invoice is printed.
3. Item Type, Item Type Description, and Amount indicates the item types that were used to charge the service and the amount of each service provided.
4. The To box populates with the Customer/Organization address found in PeopleSoft through the Search function when creating the Invoice.
5. The top portion of the invoice will be mailed back to the Bursar's Office with payment.
6. The Description of Item or Service area contains the Invoice Number, Customer or Organization name and Account number.
7. The Date of Service, Description of Service, and Amount are displayed.
8. The Contact Person, Phone Number, and Billing Department are displayed in the Questions and Inquiries box.



[Click for Invoice history.](#)

1. INVOICE NUMBER: 100065

Billing Department: Bursar's Office

2. Invoice Date:

Net Terms: 15 Days

3.

Item Type	Item Type Description	Amount
105000300020	Copies Plus Printing Serv Sale	500.00
105000300025	Copies Plus Print Serv Sales T	25.00
Total:		\$525.00

4. To:

Univ of Md Baltimore County
1000 Hilltop Circle
Office of Human Resources
Baltimore, MD 21250

6. Description of Item or Service - INVOICE NUMBER : 100065

Univ of Md Baltimore County - Account Number : 0181765

7.

Date	Detail Description	Amount
01/25/2007	Spring 2006 Cancellation Letters	500.00
01/25/2007	Taxed Item	25.00
Total:		\$525.00

8. Questions or Inquiries

Donna Taylor / 410-704-4603
Bursar's Office

[Close Window](#)

C. VIEWING THE VOIDED INVOICE

1. Select the View button on the View All Invoices page for a Voided invoice status.

Creator's Main Page: All Invoices

Do you want to Add New Debit Invoice ?

Enter Debit Invoice Number to Create Credit Invoice

Bursar's Office

Donna Taylor

Invoice Number	Date	Amount	Employee Approval	Dept. Admin Approval	Void	Posted	
100095	02/19/2007	\$5000.00	Approved	Not Approved	N	N	<input type="button" value="View"/>
100094	02/16/2007	\$7500.00		VOIDED			<input type="button" value="View"/>
100068	01/26/2007	\$2000.00		VOIDED			<input type="button" value="View"/>
100067	01/26/2007	\$1500.00		VOIDED			<input type="button" value="View"/>
100066	01/25/2007	\$1000.00		VOIDED			<input type="button" value="View"/>

2. The Invoice will be displayed in billing format stamped **VOIDED**.



INVOICE NUMBER: 100066
Billing Department: Bursar's Office
Invoice Date:
Net Terms: 15 Days

Item Type	Item Type Description	Amount
105000100260	Aux Services Rental	1,000.00
Total:		\$1,000.00

To:
 Baltimore Cnty Public Schools
 Attn: Tim Jones, Budget Office
 6901 Charles Street
 Towson, MD 21204

VOIDED

Description of Item or Service - INVOICE NUMBER : 100066
 Baltimore Cnty Public Schools - Account Number : 0165977

Date	Detail Description	Amount
01/25/2007	Cost for Renting Potomac Lounge	1,000.00
Total:		\$1,000.00

Questions or Inquiries
 Donna Taylor / 410-704-4603
 Bursar's Office

[Close Window](#)

VIEWING THE INVOICE HISTORY

The Invoice History link provides you an Audit of Activity performed on an invoice. This link can be found by opening the invoice through the View or Edit buttons.

1. Click on the [Click for Invoice History](#) link.
2. An Action Date, Action Performed, and Action User will be displayed in the audit.

Action Date	Action Performed	Action User
2006-11-01 11:24:28.0	a. Add	Sievers Rachele
2006-11-01 11:53:39.0	b. Edit	Sievers Rachele
2006-11-01 11:53:39.0	c. Employee Approval	Sievers Rachele
2006-11-01 12:40:45.0	d. Dept. Admin Approval	Susan Walsh
2006-11-06 16:22:08.0	f. Posted/Printed	Jones Laurie
2006-11-09 11:36:25.0	g. Paid	Sandra Erhart

3. The Action Date will be the date of the action.
4. The Action Performed can consist of:
 - a. Add – Invoice was created.
 - b. Edit – Invoice was changed. (Here is where you will see an Edit has been performed on an invoice. If you click the Submit Invoice Details button from the Edit page, an Edit action will be written out to the Invoice History page. If you click Cancel/Return to Previous page, no action is written out to the Invoice History page.)
 - c. Employee Approval – First level of approval.
 - d. Dept Admin Approval - Second level of Approval.
 - e. Void- Invoice was voided.
 - f. Posted/Printed – Charges were posted to customer account and invoice was printed.
 - g. Credit Invoice - Credit Invoice was created.
 - h. Paid – Invoice has been paid.
5. The Action User is the name of the person that performed the action.

POSTING A CREDIT TO AN INVOICE

A credit posted to an invoice can only be created after all approvals are obtained and the invoice is flagged as Posted.

Creator's Main Page: All Invoices


Do you want to Add New Debit Invoice ?

Enter Debit Invoice Number to Create Credit Invoice

Bursar's Office Auxiliary Serv Admin Financial Services OTS Main

Susan Walsh						
Invoice Number	Date	Amount	Employee Approval	Dept. Admin Approval	Void	Posted
100056	01/24/2007	\$25.00		VOIDED		<input type="button" value="View"/>
100054	01/24/2007	\$250.00		VOIDED		<input type="button" value="View"/>
100052	01/24/2007	\$563.93	Approved	Approved	N	Y <input type="button" value="View"/>
100051	01/24/2007	\$1599.00	Approved	Approved	N	Y <input type="button" value="View"/>

You can view the status of the invoice by viewing the View All Invoices page or View the [Invoice History](#) link.



Click for Invoice History.

To:
Blue Chip Basketball
Attn: Mike Smith
2009 Darby Road
Haverton, PA 19083

INVOICE NUMBER
Billing Department
Invoice Date: 01/24/2007
Net Terms: 15 Days

Item Type
10500140001
10500190002

Action Date	Action Performed	Action User
2007-01-11 08:45:19.0	Add	Donna Taylor
2007-01-11 08:50:52.0	Edit	Donna Taylor
2007-01-11 08:50:52.0	Employee Approval	Donna Taylor
2007-01-11 09:01:42.0	Edit	Donna Taylor
2007-01-11 09:01:42.0	Dept. Admin Approval	Thom Ruby
2007-01-11 09:03:26.0	Posted/Printed	Laurie Jones

Description of Item or Service - INVOICE NUMBER : 100038

Blue Chip Basketball - Account Number : 0253439

Date	Detail Description	Amount
01/11/2007	Renting sports complex	500.00
01/11/2007	Shuttle transportation to Sports Complex	1,000.00
Total:		\$1,500.00

Questions or Inquiries
Donna Taylor / 410-704-4603
Auxiliary Serv Admin

[Close Window](#)

A. CREATING A CREDIT INVOICE

Creator's Main Page: My Unapproved Invoices

1. From the Creator's Main Page, type in the Debit Invoice Number for which you need to create a credit.
2. Click on the Search button.

Do you want to Add New Debit Invoice ?

Enter Debit Invoice Number to Create Credit Invoice:

Bursar's Office Auxiliary Serv Admin

Sorry! There are no Invoices

3. The Add Credit Invoice page will extract all pertinent information from the original debit invoice. The only field that is available for input is the Credit Amount field. Click in the credit amount field for the item you want to credit.

Invoice - Add Credit Invoice for Debit InvNbr '100038'

Fields prefixed with '*' are required

Original Invoice Date: 01/11/2007
 Term: Winter 2007 (1071)
 Name: Blue Chip Basketball
 Account Number: 0123456
 Attention: Mike Smith
 Attention Department:
 Address 1: 2009 Darby Road
 City: Haverton
 State: PA
 Zip: 19083
 Issuing Department: Auxiliary Serv Admin

Item Description	Item Type	Debit Amount	Credit Amount
New Sports Complex	105001400010	500.00	
Shuttle Transport-Equip Rental	105001900021	1000.00	
Invoice Total		1500.00	

2000 characters left.

*Description Of Item or Service :	Date	Item Detail Description	Amount
<input type="text"/>	<input type="text"/>		<input type="text"/>
<input type="text"/>	<input type="text"/>		<input type="text"/>
<input type="text"/>	<input type="text"/>		<input type="text"/>
Item Detail Desc Total			<input type="text"/>

Contact Person:

Contact Phone:

Click Here to Approve Invoice

4. As you enter the credit amount, tab through the fields. The Invoice Total will automatically calculate the total credit amount.

Item Description	Item Type	Debit Amount	Credit Amount
New Sports Complex	105001400010	500.00	50.00
Shuttle Transport-Equip Rental	105001900021	1000.00	
Invoice Total		1500.00	50.00

5. Enter the date.
6. Type in an explanation as to why the credit is being processed.
7. Enter the credit amount.
8. As you tab through the fields, the Invoice Detail Description Total will automatically calculate the total credit amount.

1960 characters left.

*Description Of Item or Service :	Date	Item Detail Description	Amount
	02/26/2007	Event was overcharged for complex rental	50.00
Item Detail Desc Total			50.00

Contact Person: Donna Taylor
 Contact Phone: 410-704-4603

Click Here to Approve Invoice

Submit Invoice Details Cancel

9. If you are ready to Approve your Credit Invoice, select Click Here to Approve Invoice and then select Submit Invoice Details button.
10. If you want to save your invoice but not approve it at the time of creation, select Click Submit Invoice Details. By selecting this option, the invoice will not be sent for Approval, but will remain in your unapproved listing.

Credit Invoice Details Inserted Successfully

Invoice Number 100069 Has Been Created

This page will be redirected to Main Page.

11. A pop-up box with the credit invoice number will be displayed.
12. You will be returned to the Creator's Main Page.

Creator's Main Page: My Unapproved Invoices

Do you want to Add New Debit Invoice ?

Enter Debit Invoice Number to Create Credit Invoice

Bursar's Office Auxiliary Serv Admin

Donna Taylor						
Invoice Number	Date	Amount	Employee Approval	Dept. Admin Approval	Void	
100069	01/26/2007	\$ 50.00	<input type="checkbox"/>	Not Approved	<input type="button" value="VOID"/>	<input type="button" value="Edit"/>

13. The Credit invoice will remain in your Unapproved Invoice list until it is approved.

12. Once you approve the credit invoice, it will be removed from your Unapproved list.

Creator's Main Page: My Unapproved Invoices

Do you want to Add New Debit Invoice ?

Enter Debit Invoice Number to Create Credit Invoice

Bursar's Office Auxiliary Serv Admin Financial Services OTS Main

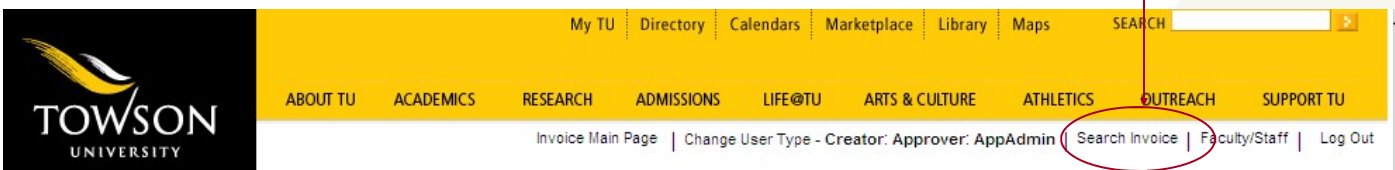
Sorry! There are no Invoices

SEARCHING FOR AN INVOICE

A. INVOICE SEARCH PAGE

The Search Invoice page will allow you to perform a search using several different search criteria: Invoice Number, Org Customer Name, Non-Org Customer Name and Customer ID.

1. To search for an invoice that was created in your department, select the Search Invoice link located on the Main page.



2. The Invoice Search Page will open.

3. Click on the drop down arrow. The available search criteria will be displayed.
4. Select the criteria to perform your search.

5. Type in the necessary Text required for your criteria.
6. Click on the Search Invoice Button.

The Search Result Page will be displayed.

7. Click on the View button to view the invoice.

Invoice - Search Results

Invoice Number	Date	Amount	ID / Customer Name	Void	Posted	Paid	
100025	09/11/2006	\$ 103.06	0161271 / Towson University Foundation	N	Y	N	View

B. SEARCHING FOR MULTIPLE INVOICES

Performing your search using the Invoice Number criteria will produce only one result; however, selecting the Org Name, Non-Org Name and Customer ID may produce multiple results depending on the number of invoices generated.

1. Click on the drop down arrow and select Customer ID.

Invoice - Search Page

Search Criteria:

Search Text:

- Select Criteria
- Invoice Number
- Org Customer Name
- Non-Org Customer Name
- Customer ID**

2. Type the TU Towson Customer ID in the Search Text Box.

3. Click on the Search Invoice Button. The Search Result page will display all invoices created for a customer.

Invoice - Search Page

Search Criteria:

Search Text:

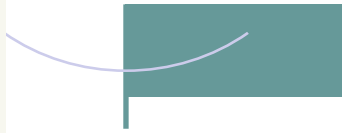
4. Click on the View button to view the invoice.

Invoice - Search Results

Invoice Number	Date	Amount	ID / Customer Name	Void	Posted	Paid	
100004	08/18/2006	\$3710.00	0163167 / Aramark Corporation	N	Y	N	View
100052	01/24/2007	\$ 563.93	0163167 / Aramark Corporation	N	Y	N	View
100095	02/05/2007	\$ 165.25	0163167 / Aramark Corporation	N	Y	N	View
100087	02/05/2007	\$ 710.00	0163167 / Aramark Corporation		VOIDED		View
100088	02/05/2007	\$ 250.00	0163167 / Aramark Corporation		VOIDED		View
100089	02/05/2007	\$ 700.00	0163167 / Aramark Corporation		VOIDED		View
100090	02/05/2007	\$ 200.00	0163167 / Aramark Corporation		VOIDED		View



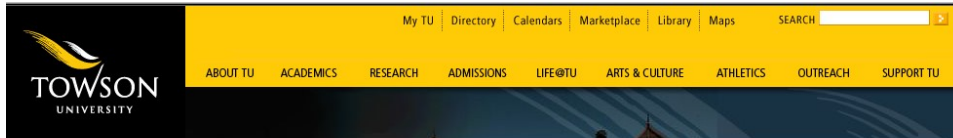
NOTES ...



THE APPROVER

LOGGING INTO TU'S ONLINE INVOICE SYSTEM

1. Enter your TU UserName.
2. Enter your TU Password.
3. Click the Login button to enter the Online Invoice.



TOWSON UNIVERSITY AUTHENTICATED LOGIN

Enter your Username and Password:

Username:

Password:

Login

SPECIAL POINTS OF INTEREST

ONLINE INVOICE TERMINOLOGY

- ✚ CREATOR - one who can create an original invoice.
- ✚ APPROVER - one who provides final approval of the invoice before it is submitted for processing. Approvers CANNOT create an original invoice.

USER TYPE: APPROVER

Your Online Invoice security access will determine the page being displayed after you login. If you are the **APPROVER** for your department, the following page will be displayed.

A. UNDERSTANDING THE APPROVER'S MAIN PAGE

1. The Approver's Main Page will automatically open the View All Unapproved Invoices page. This page will display all the invoices created by your department that have been approved by the Creator and are pending Departmental Approval.
2. To view all invoices in your department, click on the View All Invoices button.

Final Approver's Main Page: All Unapproved Invoices

Bursar's Office Auxiliary Serv Admin

View All Invoices

Dawn Kuessner						
Invoice Number	Date	Amount	Employee Approval	Dept. Admin Approval	Void	
100022	09/11/2006	\$160.00	Approved	<input type="checkbox"/>	VOID	Edit

Rachele Sievers						
Invoice Number	Date	Amount	Employee Approval	Dept. Admin Approval	Void	
100048	01/24/2007	\$65.00	Approved	<input type="checkbox"/>	VOID	Edit
100047	01/24/2007	\$15.00	Approved	<input type="checkbox"/>	VOID	Edit
100046	01/24/2007	\$25000.00	Approved	<input type="checkbox"/>	VOID	Edit

Donna Taylor						
Invoice Number	Date	Amount	Employee Approval	Dept. Admin Approval	Void	
100069	01/26/2007	\$-50.00	Approved	<input type="checkbox"/>	VOID	Edit

Submit Changes

This page will display all the Approved, Unapproved, and Voided invoices that were created by your department.

- To return back to the Approver's Main Page, click on the View All Unapproved Invoices button which will return you back to the page that displays your department's unapproved invoices. Please note: Once you approve an invoice, the invoice will no longer appear on this page.
- As an Approver, you will have the ability to Approve, Edit, View, and Void invoices created by the Creators in your department.

Final Approver's Main Page: All Invoices

Bursar's Office
 Auxiliary Serv Admin
 Fiscal Plan & Serv

View All Unapproved Invoices

Dawn Kuessner							
Invoice Number	Date	Amount	Employee Approval	Dept. Admin Approval	Void	Posted	
100023	09/11/2006	\$130.00	VOIDED				View
100022	09/11/2006	\$160.00	VOIDED				View
100020	09/11/2006	\$1446.00	Approved	Approved	N	Y	View
100019	09/11/2006	\$1075.00	Approved	Approved	N	Y	View

Rachele Sievers							
-----------------	--	--	--	--	--	--	--

Final Approver's Main Page: All Unapproved Invoices

Bursar's Office
 Auxiliary Serv Admin
 Fiscal Plan & Serv

View All Invoices

Rachele Sievers							
Invoice Number	Date	Amount	Employee Approval	Dept. Admin Approval	Void		
100048	01/24/2007	\$65.00	Approved	<input type="checkbox"/>	VOID		Edit
100047	01/24/2007	\$15.00	Approved	<input type="checkbox"/>	VOID		Edit
100045	01/24/2007	\$1250.00	Approved	<input type="checkbox"/>	VOID		Edit
100044	01/24/2007	\$5000.00	Approved	<input type="checkbox"/>	VOID		Edit
100037	11/01/2006	\$88.55	Approved	<input type="checkbox"/>	VOID		Edit

APPROVING THE INVOICE

A. APPROVING THE INVOICE ... FROM THE EDIT MODE

- From the Approver's Main page, click on the edit button to open up the invoice details.

Final Approver's Main Page: All Unapproved Invoices

Bursar's Office
 Auxiliary Serv Admin
 Fiscal Plan & Serv

View All Invoices

Linda Makowske							
Invoice Number	Date	Amount	Employee Approval	Dept. Admin Approval	Void		
100039	01/17/2007	\$123.00	Approved	<input type="checkbox"/>	VOID		Edit

Laurie Jones							
Invoice Number	Date	Amount	Employee Approval	Dept. Admin Approval	Void		
100062	01/24/2007	\$109.75	Approved	<input type="checkbox"/>	VOID		Edit

Submit Changes

Invoice - Edit Debit Invoice Details

Fields prefixed with '*' are required

Created Date: 01/17/2007 Invoice History
 *Term: Fall 2006 (1064)
 *Name: Chartwells/Compass Group
 Account Number: 0161274
 Contact C/O:
 Contact Department:
 Address 1: 8000 York Road
 Address 2: UU, Susquehanna 200A
 City: Towson
 State: MD
 Zip: 21252
 *Issuing Department: Fiscal Plan & Serv

Item Description	Item Type	Amount
105002000150 -- Towerlight Advertising	105002000150	25.00
105002000075 -- Tiger Talk Telephone Service	105002000075	52.00
105002100030 -- University Store	105002100030	46.00
Select An Item		
Invoice Total		123.00

*Description of Item or Service:

2000 characters left.

Date	Item Detail Description	Amount
01/17/2007	Charge for advertising	25.00
01/17/2007	Long distance service	52.00
01/17/2007	Sweatshirts	46.00
Item Detail Desc Total		123.00

Contact Person: Linda Makowske
 Contact Phone: 410-704-5864

Approved By Creator on -- 01/17/2007
 Click Here to Approve Invoice -- Supervisor
 Click Here to Void Invoice

Submit Invoice Details Cancel / Return To Previous Page

2. If all the information is correct, select Click Here to Approve Invoice-Supervisor.
 3. Click the Submit Invoice Details button to save.

4. Following your approval of the invoice, you will be returned to the Final Approver's Main Page displaying all remaining Unapproved Invoices.

Final Approver's Main Page: All Unapproved Invoices

Bursar's Office Auxiliary Serv Admin Fiscal Plan & Serv

View All Invoices

Laurie Jones						
Invoice Number	Date	Amount	Employee Approval	Dept. Admin Approval	Void	
100062	01/24/2007	\$109.75	Approved	<input type="checkbox"/>	VOID	Edit

Submit Changes

5. Once the invoice is approved, it will no longer appear in your Unapproved list on the Final Approver's Main Page.

B. APPROVING THE INVOICE ... FROM THE FINAL APPROVER'S MAIN

1. You can Approve an invoice from the Final Approver's Main page without having to view the invoice details. If an Edit to Approve button appears in the Dept Admin Approval field, skip to section C, Edit to Approve Button.
2. Click on the Dept. Admin Approval button and then click on the Submit Changes button to save.

Final Approver's Main Page: All Invoices

Bursar's Office

View All Unapproved Invoices

Paul's Invoices							
Invoice Number	Date	Amount	Employee Approval	Dept. Admin Approval	Void	Posted	
100000	08/14/2006	\$500.00	Approved	<input type="checkbox"/>	VOID	N	Edit

Donna's Invoices							
Invoice Number	Date	Amount	Employee Approval	Dept. Admin Approval	Void	Posted	
100001	08/16/2006	\$275.00	Approved	<input type="checkbox"/>	VOID	N	Edit
100017	09/05/2006	\$525.00	Approved	<input type="checkbox"/>	VOID	N	Edit
100024	09/11/2006	\$103.06	Approved	<input type="checkbox"/>	VOID	N	Edit
100025	09/11/2006	\$103.06	Approved	<input type="checkbox"/>	VOID	N	Edit
100035	09/19/2006	\$2444.03	Approved	<input type="checkbox"/>	VOID	N	Edit

Submit Changes

PLEASE NOTE:

Please keep in mind, approving an invoice with this feature **WILL NOT** allow you to review the invoice before approving.

4. A new page will open with a message displaying the invoice was successfully approved. This page will close automatically.

Invoice(s) Approved Successfully

This page will be redirected to Main Page.

5. Once the invoice is approved, the invoice will no longer appear in your Unapproved list on the Final Approver's Main Page.

Final Approver's Main Page: All Unapproved Invoices

Bursar's Office Auxiliary Serv Admin Fiscal Plan & Serv

View All Invoices

Donna Taylor						
Invoice Number	Date	Amount	Employee Approval	Dept. Admin Approval	Void	
100095	02/19/2007	\$5000.00	Approved	<input type="checkbox"/>	VOID	Edit

Submit Changes

C. APPROVING THE INVOICE ... EDIT TO APPROVE BUTTON APPEARS

1. If you are attempting to approve an invoice and you see an Edit to Approve button appearing in the Dept Admin Approval field, it means there is a discrepancy between the Item Type total and the Item Description total.
2. You must click on the Edit to Approve button to view the invoice details.
3. Identify where the discrepancy appears and correct the amount either at the item type detail level or at the free form description level.
4. Tab out of the field and your amount will recalculate at the level the correction was made.
5. Click the Submit Invoice Details button to save your changes and return back to the Final Approver's Main Page.

Final Approver's Main Page: All Unapproved Invoices

Bursar's Office
 Auxiliary Serv Admin
 Fiscal Plan & Serv

Donna Taylor						
Invoice Number	Date	Amount	Employee Approval	Dept. Admin Approval	Void	
100095	02/19/2007	\$5000.00	Approved	<input type="checkbox"/>	VOID	<input type="button" value="Edit"/>
100035	09/19/2006	\$1444.03	Approved	<input type="button" value="Edit To Approve"/>	VOID	

Created Date: 08/14/2006

*Term: Summer 2006 (1063)

*Name: Starts With Ends With Contains Exactly TUID

Account Number:

Contact C/O:

Contact Department:

Address 1:

Address 2:

City:

State:

Zip:

*Issuing Department:

Item Description	Item Type	Amount
000110240100 -- Conversion-Debit	000110240100	500.00
Select An Item		
Select An Item		
Select An Item		
Invoice Total		500.00

2000 characters left.

*Description of Item or Service:	Date	Item Detail Description	Amount
<input type="text"/>	08/12/2006	this is a test...	1000.00
<input type="text"/>			
Item Detail Desc Tot			1000.00

Contact Person:

Contact Phone:

Approved By Creator on -- 08/14/2006

Click Here to Approve Invoice -- Supervisor

Click Here to Void Invoice

- You will see the Edit to Approve button no longer appears under Dept Admin Approval, but a radio box is now displayed for approval.
- Final Approval can be accomplished by completing either section A or B of Approving the Invoice.

Final Approver's Main Page: All Invoices

Bursar's Office Auxiliary Serv Admin

[View All Unapproved Invoices](#)

Paul's Invoices

Invoice Number	Date	Amount	Employee Approval	Dept. Admin Approval	Void	Posted	
100000	08/14/2006	\$500.00	Approved	<input type="checkbox"/>	N	N	View

Donna's Invoices

Invoice Number	Date	Amount	Employee Approval	Dept. Admin Approval	Void	Posted	
100001	08/16/2006	\$275.00	Approved	<input type="checkbox"/>	VOID	N	Edit
100016	09/05/2006	\$575.00	Approved	Approved	N	N	View
100017	09/05/2006	\$525.00	VOIDED				View
100024	09/11/2006	\$103.06	VOIDED				View
100025	09/11/2006	\$103.06	Approved	<input type="checkbox"/>	VOID	N	Edit
100035	09/19/2006	\$1444.03	Approved	Edit To Approve	VOID	N	

EDITING THE INVOICE ... FROM THE APPROVER'S MAIN PAGE

A. USING THE EDIT BUTTON

Editing the invoice is limited to a few functions for the approver. You may only add Contact C/O information and Contact Department information to the invoice. In case changes need to be made after a creator has approved an invoice, the approver may change the item type and dollar amounts associated with an invoice.

- Click on the edit button to review the invoice in the creation state.

Final Approver's Main Page: All Unapproved Invoices

Bursar's Office Auxiliary Serv Admin

[View All Invoices](#)

Dawn Kuessner

Invoice Number	Date	Amount	Employee Approval	Dept. Admin Approval	Void	
100022	09/11/2006	\$160.00	Approved	<input type="checkbox"/>	VOID	Edit

Rachele Sievers

Invoice Number	Date	Amount	Employee Approval	Dept. Admin Approval	Void	
100048	01/24/2007	\$65.00	Approved	<input type="checkbox"/>	VOID	Edit
100047	01/24/2007	\$15.00	Approved	<input type="checkbox"/>	VOID	Edit
100046	01/24/2007	\$25000.00	Approved	<input type="checkbox"/>	VOID	Edit

Donna Taylor

Invoice Number	Date	Amount	Employee Approval	Dept. Admin Approval	Void	
100069	01/26/2007	\$-50.00	Approved	<input type="checkbox"/>	VOID	Edit

[Submit Changes](#)

B
E
F
O
R
E

Invoice - Edit Debit Invoice Details

Fields prefixed with '*' are required

Created Date: 09/05/2006 Invoice History

*Term: Fall 2006 (1064)

*Name: Starts With Ends With Contains Exactly

Univ of Md Baltimore County

Account Number: 0181765

Contact C/O:

Contact Department:

Address 1: 1000 Hilltop Circle

Address 2: Office of Human Resources

City: Baltimore

State: MD

Zip: 21250

2. Add Contact C/O Information and Contact Department Information to the Invoice.

A
F
T
E
R

Invoice - Edit Debit Invoice Details

Fields prefixed with '*' are required

Created Date: 09/05/2006 Invoice History

*Term: Fall 2006 (1064)

*Name: Starts With Ends With Contains Exactly

Univ of Md Baltimore County

Account Number: 0181765

Contact C/O: Mary Smith

Contact Department:

Address 1: 1000 Hilltop Circle

Address 2: Office of Human Resources

City: Baltimore

State: MD

Zip: 21250

B
E
F
O
R
E

*Issuing Department: Bursar's Office

Item Description	Item Type	Amount
105000300020 -- Copies Plus Printing Serv Sale	105000300020	500.00
105000300025 -- Copies Plus Print Serv Sales T	105000300025	25.00
Select An Item		
Select An Item		
Invoice Total		525.00

2000 characters left.

Date	Item Detail Description	Amount
08/16/2006	Fall 2006 semester correspondence	500.00
08/16/2006	Taxed Item at 5%	25.00

3. Change the Item Type and/or Dollar Amounts associated with the invoice details.

A
F
T
E
R

*Issuing Department: Bursar's Office

Item Description	Item Type	Amount
105002100030 -- University Store	105002100030	550.00
105000300025 -- Copies Plus Print Serv Sales T	105000300025	25.00
Select An Item		
Select An Item		
Invoice Total		575.00

1946 characters left.

Date	Item Detail Description	Amount
08/16/2006	Fall 2006 Purchase at University Store	550.00
08/16/2006	Taxed Item at 5%	25.00

Item Detail Desc Total 575.00

4. Click on Submit Invoice Details button to save changes, or click Cancel/Return to Previous Page to clear any changes made.
5. Ready to Approve? See section, Approving the Invoice.

Contact Person

Contact Phone

Approved By Creator on -- 09/19/2006

Click Here to Approve Invoice -- Supervisor

Click Here to Void Invoice

VIEWING THE APPROVED INVOICE

Final Approver's Main Page: All Unapproved Invoices

Bursar's Office
 Auxiliary Serv Admin
 Fiscal Plan & Serv

[View All Invoices](#)

1. Click on the View All Invoices button to view all invoices created by your department.

Donna Taylor

Invoice Number	Date	Amount	Employee Approval	Dept. Admin Approval	Void	
100035	09/19/2006	\$1444.03	Approved	Edit To Approve	VOID	

[Submit Changes](#)

2. Once the invoice is approved by the Creator and the Approver, a View button appears.
3. If the Invoice is not approved by all levels, an Edit button appears.
4. Click on the View button to open up the Invoice in Billing Format.

Final Approver's Main Page: All Invoices

Bursar's Office

[View All Unapproved Invoices](#)

Paul's Invoices

Invoice Number	Date	Amount	Employee Approval	Dept. Admin Approval	Void	Posted	
100000	08/14/2006	\$500.00	Approved	<input type="checkbox"/>	VOID	N	Edit


Donna's Invoices

Invoice Number	Date	Amount	Employee Approval	Dept. Admin Approval	Void	Posted	
100001	08/16/2006	\$275.00	Approved	<input type="checkbox"/>	VOID	N	Edit
100016	09/05/2006	\$575.00	Approved	Approved	N	Y	View
100017	09/05/2006	\$525.00	Approved	<input type="checkbox"/>	VOID	N	Edit
100024	09/11/2006	\$103.06	Approved	<input type="checkbox"/>	VOID	N	Edit
100025	09/11/2006	\$103.06	Approved	<input type="checkbox"/>	VOID	N	Edit
100034	09/19/2006	\$2444.03	Approved	Approved	N	Y	View
100035	09/19/2006	\$2444.03	Approved	<input type="checkbox"/>	VOID	N	Edit

[Submit Changes](#)

BREAKING DOWN THE INVOICE

1. The Billing Department populates with the department name.
2. The Invoice Date will populate when the invoice is posted to the customer/organization account and an official invoice is printed.
3. Item Type, Item Type Description, and Amount indicates the item types that were used to charge the service and the amount of each service provided.
4. The To box populates with the Customer/Organization address found in PeopleSoft through the Search function when creating the Invoice.
5. The top portion of the invoice will be mailed back to the Bursar's Office with payment.
6. The Description of Item or Service area contains the Invoice Number, Customer or Organization name and Account number.
7. The Date of Service, Description of Service, and Amount are displayed.
8. The Contact Person, Phone Number, and Billing Department are displayed in the Questions and Inquiries box.



Click for Invoice history.

1. INVOICE NUMBER: 100016

2. Billing Department: Bursar's Office
Invoice Date: 11/06/2006 - [1064]
Net Terms: 15 Days

3. Item Type	Item Type Description	Amount
105002100030	University Store	550.00
105000300025	Copies Plus Print Serv Sales T	25.00
		Total: \$575.00

4. To:

Univ of Md Baltimore County
 Attn: Mary Smith
 1000 Hilltop Circle
 Office of Human Resources
 Baltimore, MD 21250

6. Description of Item or Service - INVOICE NUMBER : 100016

Univ of Md Baltimore County - Account Number : 0181765

7. Date	Detail Description	Amount
08/16/2006	Fall 2006 Purchase at University Store	550.00
08/16/2006	Taxed Item at 5%	25.00
		Total: \$575.00

8. Questions or Inquiries

Donna Taylor / 410-704-4603
 Bursar's Office

VOIDING THE INVOICE

A. VOIDING THE INVOICE ... FROM THE FINAL APPROVER'S MAIN

The Approver has two options available to void an invoice. Keep in mind, once the creator has approved an invoice, only the Approver has the ability to void the invoice.

1. To Void an invoice from the Final Approver's Main page, click on the VOID button.

2. A pop-up box will open allowing you to confirm your decision to Void.

⊕ Click OK to Void the invoice.

⊕ Click Cancel to cancel the request.

3. Once you have indicated OK, a new window will be displayed indicating the invoice has been successfully voided.

4. You will be returned back to the Final Approver's Main Page.

5. The voided invoice will be removed from the View All Unapproved Invoice page.

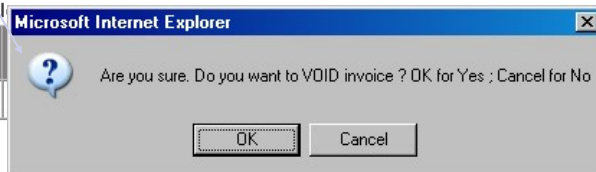
Final Approver's Main Page: All Unapproved Invoices

Bursar's Office Auxiliary Serv Admin Fiscal Plan & Serv

View All Invoices

Rachele Sievers						
Invoice Number	Date	Amount	Employee Approval	Dept. Admin Approval	Void	
100048	01/24/2007	\$65.00	Approved	<input type="checkbox"/>	VOID	Edit
100047	01/24/2007	\$15.00	Approved	<input type="checkbox"/>	VOID	Edit
100046	01/24/2007	\$25000.00	Approved	<input type="checkbox"/>	VOID	Edit
100045	01/24/2007	\$1250.00	Approved	<input type="checkbox"/>	VOID	Edit
100044	01/24/2007	\$5000.00	Approved	<input type="checkbox"/>	VOID	Edit
100037	11/01/2006	\$88.55	Approved	<input type="checkbox"/>	VOID	Edit

Donna Taylor	
Invoice Number	
100069	Edit



Invoice Voided Successfully

Invoice Number 100046 Has Been Voided.

Final Approver's Main Page: All Unapproved Invoices

Bursar's Office Auxiliary Serv Admin Fiscal Plan & Serv

View All Invoices

Rachele Sievers						
Invoice Number	Date	Amount	Employee Approval	Dept. Admin Approval	Void	
100048	01/24/2007	\$65.00	Approved	<input type="checkbox"/>	VOID	Edit
100047	01/24/2007	\$15.00	Approved	<input type="checkbox"/>	VOID	Edit
100045	01/24/2007	\$1250.00	Approved	<input type="checkbox"/>	VOID	Edit
100044	01/24/2007	\$5000.00	Approved	<input type="checkbox"/>	VOID	Edit
100037	11/01/2006	\$88.55	Approved	<input type="checkbox"/>	VOID	Edit

B. VOIDING THE INVOICE ... USING THE EDIT BUTTON

1. To Void an invoice from the Edit Mode, click on the Edit button from the Final Approver's Main page.
2. The Invoice in the edit mode will be displayed.

Final Approver's Main Page: All Unapproved Invoices

Auxiliary Serv Admin

View All Invoices

Dawn's Invoices

Invoice Number	Date	Amount	Employee Approval	Dept. Admin Approval	Void	Edit
100022	09/11/2006	\$160.00	Approved	<input type="checkbox"/>	VOID	Edit

Rachele's Invoices

Invoice Number	Date	Amount	Employee Approval	Dept. Admin Approval	Void	Edit
100028	09/18/2006	\$150.01	Approved	<input type="checkbox"/>	VOID	Edit
100037	11/01/2006	\$88.55	Approved	<input type="checkbox"/>	VOID	Edit

Donna's Invoices

Invoice Number	Date	Amount	Employee Approval	Dept. Admin Approval	Void	Edit
100038	01/11/2007	\$1500.00	Approved	<input type="checkbox"/>	VOID	Edit

Invoice - Edit Debit Invoice Details

Fields prefixed with * are required

Created Date: 09/11/2006 [Invoice History](#)

*Term: Summer 2006 (1063)

*Name: Whiting-Turner Contracting Co

Account Number: 0253440

Contact C/O:

Contact Department:

Address 1: 300 East Joppa Road

Address 2:

City: Baltimore

State: MD

Zip: 21286

*Issuing Department: Auxiliary Serv Admin

Item Description	Item Type	Amount
Select An Item		
Select An Item		
Select An Item		
Select An Item		
Invoice Total		160.00

2000 characters left.

Date	Description of Item or Service	Item Detail Description	Amount
07/28/2006		Wrap up Meeting \$860.00 less deposit \$700.00	160.00
Item Detail Desc Total			160.00

Contact Person: Dawn Kuessner

Contact Phone: 410-704-5239

Approved By Creator on -- 09/11/2006

- Click Here to Approve Invoice -- Supervisor
- Click Here to Void Invoice

Submit Invoice Details

Cancel / Return To Previous Page

3. Click on the Click Here to Void Invoice
4. Click on Submit Invoice Details to save.

5. A message will be displayed indicating the invoice was successfully voided.

Invoice Details Updated Successfully

Invoice 100022 has been voided

This page will be redirected to Main Page.

You will be automatically returned to the Final Approver's Main Page with the updated information.

6. Once the invoice is Voided, the invoice will be removed from the View All Unapproved Invoice page.

Final Approver's Main Page: All Invoices

Bursar's Office Auxiliary Serv Admin Fiscal Plan & Serv

View All Unapproved Invoices

Dawn Kuessner

Invoice Number	Date	Amount	Employee Approval	Dept. Admin Approval	Void	Posted	
100023	09/11/2006	\$130.00			VOIDED		View
100022	09/11/2006	\$160.00			VOIDED		View
100020	09/11/2006	\$1446.00	Approved	Approved	N	N	View
100019	09/11/2006	\$1075.00	Approved	Approved	N	N	View

Rachele Sievers

Invoice Number	Date	Amount	Employee Approval	Dept. Admin Approval	Void	Posted	
100048	01/24/2007	\$65.00	Approved	<input type="checkbox"/>	VOID	N	Edit

VIEWING THE VOIDED INVOICE

1. To view the Voided invoice from the Final's Approver's Main Page, click on View All Invoices.

Final Approver's Main Page: All Unapproved Invoices

Bursar's Office Auxiliary Serv Admin Fiscal Plan & Serv

[View All Invoices](#)

Donna Taylor						
Invoice Number	Date	Amount	Employee Approval	Dept. Admin Approval	Void	
100035	09/19/2006	\$1444.03	Approved		<input type="button" value="VOID"/>	

2. A voided status will be displayed across the Approval boxes.

Final Approver's Main Page: All Invoices


Bursar's Office Auxiliary Serv Admin Fiscal Plan & Serv

[View All Unapproved Invoices](#)

Dawn Kuessner							
Invoice Number	Date	Amount	Employee Approval	Dept. Admin Approval	Void	Posted	
100023	09/11/2006	\$130.00			VOIDED		<input type="button" value="View"/>
100022	09/11/2006	\$160.00			VOIDED		<input type="button" value="View"/>

3. Click on the View button and the invoice will be displayed in the Billing Format with the word VOIDED marked on the invoice.

4. You can also view the [Invoice History](#). Please refer to Invoice History on Page 44.



[Click for Invoice history.](#)

INVOICE NUMBER: 100022
Billing Department: Auxiliary Serv Admin
Invoice Date:
Net Terms: 15 Days

Item Type	Item Type Description	Amount
105001800120	Rental Bldg Grnd Events Conf S	160.00
Total: \$160.00		

To:
 Whiting-Turner Contracting Co
 300 East Joppa Road
 Baltimore, MD 21286

VOIDED

Description of Item or Service - INVOICE NUMBER : 100022
Whiting-Turner Contracting Co - Account Number : 0134567

Date	Detail Description	Amount
07/28/2006	Wrap up Meeting \$860.00 less deposit \$700.00	160.00
Total: \$160.00		

Questions or Inquiries
 Dawn Kuessner / 410-704-5239
 Auxiliary Serv Admin

[Close Window](#)

5. To close the window, click on the [Close Window](#) link.

VIEWING THE INVOICE HISTORY

The Invoice History link provides you an Audit of Activity performed on an invoice. This link can be found by opening the invoice through the View or Edit buttons.

1. Click on the [Click for Invoice History](#) link.
2. An Action Date, Action Performed, and Action User will be displayed in the audit.

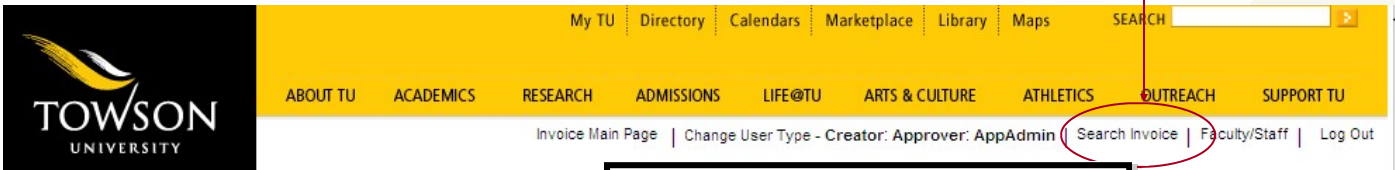
Action Date	Action Performed	Action User
2006-11-01 11:24:28.0	a. Add	Sievers Rachele
2006-11-01 11:53:39.0	b. Edit	Sievers Rachele
2006-11-01 11:53:39.0	c. Employee Approval	Sievers Rachele
2006-11-01 12:40:45.0	d. Dept. Admin Approval	Susan Walsh
2006-11-06 16:22:08.0	f. Posted/Printed	Jones Laurie
2006-11-09 11:36:25.0	g. Paid	Sandra Erhart

3. The Action Date will be the date of the action.
4. The Action Performed can consist of:
 - a. Add – Invoice was created.
 - b. Edit – Invoice was changed. (Here is where you will see an Edit has been performed on an invoice. If you click on the Submit Invoice Details button from the Edit page, an Edit action will be written out to the Invoice History page. If you click Cancel/Return to Previous page, no action is written out to the Invoice History page.)
 - c. Employee Approval – First level of approval.
 - d. Dept Admin Approval - Second level of Approval.
 - e. Void- Invoice was voided.
 - f. Posted/Printed – Charges were posted to customer account and invoice was printed.
 - g. Credit Invoice - Credit Invoice was created.
 - h. Paid – Invoice has been paid.
5. The Action User is the name of the person that performed the action.

SEARCHING FOR AN INVOICE

A. INVOICE SEARCH PAGE

1. To search for an invoice that was created in your department, select the Search Invoice link located on the Main page.



2. The Invoice Search Page will open.

PLEASE NOTE:

The Search Invoice page will allow you to perform a search using several different search criteria: Invoice Number, Org Customer Name, Non-Org Customer Name and Customer

3. Click on the drop down arrow. The available search criteria will be displayed.
4. Select the criteria to perform your search.

5. Type in the necessary Text required for your criteria.
6. Click on the Search Invoice Button.

The Search Result Page will be displayed.

- Click on the View button to view the invoice.

Invoice - Search Results

Invoice Number	Date	Amount	ID / Customer Name	Void	Posted	Paid	
100025	09/11/2006	\$ 103.06	0161271 / Towson University Foundation	N	Y	N	View

B. SEARCHING FOR MULTIPLE INVOICES

Performing your search using the Invoice Number criteria will produce only one result; however, selecting the Org Name, Non-Org Name and Customer ID may produce multiple results depending on the number of invoices generated.

- Click on the drop down arrow and select Customer ID.

Invoice - Search Page

Search Criteria:

Search Text:

- Select Criteria
- Invoice Number
- Org Customer Name
- Non-Org Customer Name
- Customer ID**

- Type the TU Customer ID in the Search Text Box.
- Click on the Search Invoice Button. The Search Result page will display all invoices created for a customer.

Invoice - Search Page

Search Criteria:

Search Text:

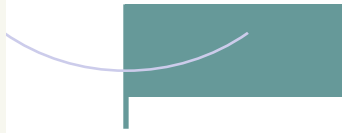
- Click on the View button to view the invoice.

Invoice - Search Results

Invoice Number	Date	Amount	ID / Customer Name	Void	Posted	Paid	
100004	08/18/2006	\$3710.00	0163167 / Aramark Corporation	N	Y	N	View
100052	01/24/2007	\$ 563.93	0163167 / Aramark Corporation	N	Y	N	View
100085	02/05/2007	\$ 165.25	0163167 / Aramark Corporation	N	Y	N	View
100087	02/05/2007	\$ 710.00	0163167 / Aramark Corporation		VOIDED		View
100088	02/05/2007	\$ 250.00	0163167 / Aramark Corporation		VOIDED		View
100089	02/05/2007	\$ 700.00	0163167 / Aramark Corporation		VOIDED		View
100090	02/05/2007	\$ 200.00	0163167 / Aramark Corporation		VOIDED		View



NOTES ...



THE CASHIER

LOGGING INTO TU'S ONLINE INVOICE SYS-

1. Enter your TU UserName.
2. Enter your TU Password.
3. Click the Login button to enter the Online Invoice.

The screenshot shows the Towson University website header with navigation links: My TU, Directory, Calendars, Marketplace, Library, Maps, and a search bar. Below the header is a secondary navigation bar with links: ABOUT TU, ACADEMICS, RESEARCH, ADMISSIONS, LIFE@TU, ARTS & CULTURE, ATHLETICS, OUTREACH, and SUPPORT TU. The main content area is titled "TOWSON UNIVERSITY AUTHENTICATED LOGIN" and contains the following text: "Enter your Username and Password:". Below this are two input fields: "Username:" and "Password:". A "Login" button is positioned below the password field.

USER TYPE: CASHIER

Your Online Invoice security access will determine the page being displayed after you logon. If you are a Payment Center Associate for the Bursar's Office, the following page will be displayed.

A. POSTING THE PAYMENT FLAG

Flagging the Invoice as Paid is performed by the Bursar's Office to mark an invoice paid when a payment is received that covers the total invoice amount.

The screenshot shows the "Invoice - Cashier's Main Page" of the Towson University Online Invoice system. The page header includes the Towson University logo and navigation links: My TU, Directory, Calendars, Marketplace, Library, Maps, and a search bar. Below the header is a secondary navigation bar with links: ABOUT TU, ACADEMICS, RESEARCH, ADMISSIONS, LIFE@TU, ARTS & CULTURE, ATHLETICS, and OUT. The main content area displays "Invoice Main Page" and "Change User Type - Creator: AppAdmin: PrProc | Search Invoice".

1. To mark the Invoice as paid, enter the Invoice Number in the Invoice Nbr field on the Cashier's Main Page.

Invoice - Cashier's Main Page

The screenshot shows the "Search Invoice to Mark Paid" form. It features a search bar with the placeholder text "Enter invoice number to search invoice". Below the search bar is an input field labeled "Invoice Nbr:". At the bottom of the form are two buttons: "Click to Search Invoice" and "Reset Form".

Entering the incorrect Invoice Number will display an error message and return the Payment Center Associate back to the Cashier's Main Page.



Sorry! No Invoice found with search criteria Invoice Nbr - '1000016'

This page will be redirected to Main Page.

Entering the correct Invoice Number will display the invoice in billing format.

2. At this time the Payment Center Associate will verify the invoice number and amount before marking the invoice Paid.

3. To mark the Invoice Paid, click on the Click to mark INVOICE PAID button.

INVOICE NUMBER: 100016
 Billing Department: Bursar's Office
 Invoice Date: 11/06/2006 - [1064]
 Net Terms: 15 Days

Item Type	Item Type Description	Amount
105002100030	University Store	550.00
105000300025	Copies Plus Print Serv Sales T	25.00
		Total: \$575.00

[Click to mark INVOICE PAID](#)

To:
 Univ of Md Baltimore County
 Attn: Mary Smith
 1000 Hilltop Circle
 Office of Human Resources
 Baltimore, MD 21250

Description of Item or Service - INVOICE NUMBER : 100016
 Univ of Md Baltimore County - Account Number: 0134567

Date	Detail Description	Amount
08/16/2006	Fall 2006 Purchase at University Store	550.00
08/16/2006	Taxed Item at 5%	25.00
		Total: \$575.00

Questions or Inquiries
 Donna Taylor / 410-704-4603
 Bursar's Office

[Return to search](#)




4. A new page will open with a message displaying the invoice was successfully paid. →
5. This page will close automatically.

Invoice: 100016 Paid Successfully

This page will be redirected to Main Page.

Once the Invoice has been marked paid by the Payment Center Associate, it will no longer be available to view in the Creator's or Approver's View All Invoice page.

6. To view the paid Invoice, follow the search procedure on pages 45 - 46.
7. The paid invoice will be displayed with a PAID watermark.



Click for Invoice history.

INVOICE NUMBER: 100016
 Billing Department: Bursar's Office
 Invoice Date: 11/06/2006 - [1064]
 Net Terms: 15 Days

Item Type	Item Type Description	Amount
105002100030	University Store	550.00
105000300025	Copies Plus Print Serv Sales T	25.00
		Total: \$575.00

To:
 Univ of Md Baltimore County
 Attn: Mary Smith
 1000 Hilltop Circle
 Office of Human Resources
 Baltimore, MD 21250

Description of Item or Service - INVOICE NUMBER : 100016
 Univ of Md Baltimore County - Account Number :0134567

Date	Detail Description	Amount
08/16/2006	Fall 2006 Purchase at University Store	550.00
08/16/2006	Taxed Item at 5%	25.00
		Total: \$575.00

Questions or Inquiries
 Donna Taylor / 410-704-4603
 Bursar's Office

[Close Window](#)

PLEASE NOTE:

If you choose not to mark the invoice paid at this time, you can click on the [Return to search](#) link. This will return you to the Cashier's Main page without marking the invoice paid.

B. VOIDING THE PAYMENT FLAG

If a Paid Flag has been posted erroneously to the wrong invoice, the Payment Center Associate will need to void the payment flag.

1. From the Cashier's Main Page, enter the Invoice Number in the Invoice Nbr field.

The screenshot shows the Towson University website header with navigation links like 'My TU', 'Directory', 'Calendars', etc. Below the header is the 'Invoice - Cashier's Main Page' section. It features a search bar with the text 'Search Invoice to Mark Paid' and a prompt 'Enter invoice number to search invoice'. There is an input field labeled 'Invoice Nbr:' and two buttons: 'Click to Search Invoice' and 'Reset Form'.

2. The Paid Invoice will be displayed.
3. To Void the payment flag, click the Click to Void payment button.

The screenshot shows the 'Invoice has been paid' confirmation page. It includes the Towson University logo and a 'Click for Invoice history.' link. The main content area displays invoice details for invoice number 100016, including the billing department (Bursar's Office), invoice date (11/06/2006), and net terms (15 Days). A table lists the items: 'University Store' for \$550.00 and 'Copies Plus Print Sev Sales T' for \$25.00, with a total of \$575.00. Below the table, it states 'Invoice has been paid.' and provides a 'Click to VOID payment' button. At the bottom, there is a 'To:' section with contact information for the University of Md Baltimore County, a 'Description of Item or Service' table for invoice 100016, and a 'Questions or Inquiries' section with contact info for Donna Taylor. A 'Return to search' link is located at the bottom right.

Item Type	Item Type Description	Amount
105002100030	University Store	550.00
105000300025	Copies Plus Print Sev Sales T	25.00
		Total: \$575.00

Description of Item or Service - INVOICE NUMBER : 100016		
Univ of Md Baltimore County - Account Number :0134567		
08/16/2006	Fall 2006 Purchase at University Store	550.00
08/16/2006	Taxed Item at 5%	25.00
		Total: \$575.00

- 4. A new page will open with a message displaying the invoice was successfully voided.
- 5. This page will close automatically.

Payment VOIDED Successfully for Invoice: 100016

This page will be redirected to Main Page.

- 6. To verify the paid flag was removed, re-enter the Invoice Number in the Invoice Nbr field.

Invoice - Cashier's Main Page

Search Invoice to Mark Paid

Enter invoice number to search invoice

Invoice Nbr:

- 7. The invoice will be displayed. The PAID watermark is no longer visible on the invoice.



INVOICE NUMBER: 100016

Billing Department: Bursar's Office

Invoice Date: 11/06/2006 - [1064]

Net Terms: 15 Days

Item Type	Item Type Description	Amount
105002100030	University Store	550.00
105000300025	Copies Plus Print Serv Sales T	25.00
Total:		\$575.00

To:

Univ of Md Baltimore County
 Attn: Mary Smith
 1000 Hilltop Circle
 Office of Human Resources
 Baltimore, MD 21250

Description of Item or Service - INVOICE NUMBER : 100016

Univ of Md Baltimore County - Account Number :0134567

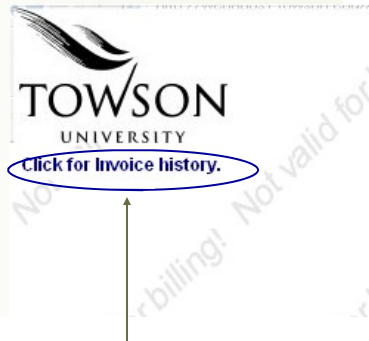
Date	Detail Description	Amount
08/16/2006	Fall 2006 Purchase at University Store	550.00
08/16/2006	Taxed Item at 5%	25.00
Total:		\$575.00

Questions or Inquiries

Donna Taylor / 410-704-4603
 Bursar's Office

[Return to search](#)

C. VIEWING THE INVOICE HISTORY



Action Date	Action Performed	Action User
05-Sep-06 12:12:01 PM	Add	Shelly Sievers
05-Sep-06 12:12:01 PM	Employee Approval	Shelly Sievers
20-Sep-06 09:09:17 AM	Edit	Susan Walsh
20-Sep-06 09:09:17 AM	Dept. Admin Approval	Susan Walsh
06-Nov-06 04:04:05 PM	Posted/Printed	Laurie Jones
12-Jan-07 10:10:27 AM	Paid	Sandra Erhart
06-Feb-07 09:09:52 AM	Payment VOIDED	Sandra Erhart

Close

1. Click on the [Click for Invoice History](#) link.
2. An Action Date, Action Performed, and Action User will be displayed in the audit.
3. The Action Date will be the date of the action.
4. The Action Performed can consist of:
 - a. Add – Invoice was created.
 - b. Edit – Invoice was changed. (Here is where you will see an Edit has been performed on an invoice. If you click on the Submit Invoice Details button from the Edit page, an Edit action will be written out to the Invoice History page. If you click Cancel/Return to Previous page, no action is written out to the Invoice History page.)
 - c. Employee Approval – First level of approval.
 - d. Dept Admin Approval - Second level of Approval.
 - e. Void- Invoice was voided.
 - f. Posted/Printed – Charges were posted to customer account and invoice was printed.
 - g. Credit Invoice - Credit Invoice was created.
 - h. Paid – Invoice has been paid.
5. The Action User is the name of the person that performed the action.

SECURITY FORMS

Located on the Bursar's Web site ... <http://www.towson.edu/bursar>

Please refer to Logon details at the beginning of the Training Guide.

- Item Type Security Request
- Creator Request
- Approver Request
- View All Request (Bursar and Financial Services Personnel)
- Cashier Request (Bursar's Office Only)
- Print Processor Request (Bursar's Office Only)



Please select the appropriate box below.	
<input type="checkbox"/>	Add Item Type (s)
<input type="checkbox"/>	Delete Item Type (s)

DEPARTMENT NAME: _____ DEPT. BUDGET CODE: _____

REQUESTOR: _____

PHONE NO.: 4- _____ (enter 4 digit number)

E-MAIL ADDRESS: _____

BUILDING: _____ ROOM NO: _____

Please list **ITEM TYPES** below: (only item types listed on this form will be available for your department on the online invoice)

ITEM TYPE DESCRIPTION (e.g., LOST KEYS)	ITEM TYPE NUMBER – 12 DIGITS (105001200400)

_____ Date

Supervisor's or Department Head's Signature

The required signature must be obtained and the completed form returned to the Bursar's Office, Mike Mullenholz, ESC building, Room 321.

BURSAR OFFICE USE ONLY
ITEM TYPES ADDED DATE _____ Email Sent Date: _____



AUTHORIZATION FORM

CHECK OFF ROLE ACCESS	
<input type="checkbox"/>	ADD CREATOR
<input type="checkbox"/>	DELETE CREATOR

CREATOR AUTHORIZATION FORM

Please use this form if you need to obtain new access or modify current access to the Online Invoice System. **Electronically complete or print information for required fields. Return completed and signed form by mail.**

DEPARTMENT NAME: _____ **DEPT.BUDGET CODE:** _____

CREATOR'S INFORMATION:

LAST_NAME: _____ EMPL ID: _____

FIRST_NAME: _____ TITLE: _____

E-MAIL: _____

PHONE: 4- _____ BLDG: _____ ROOM NO: _____
(enter 4 digit number)

SUPERVISOR'S OR DEPARTMENT HEAD'S INFORMATION:

LAST_NAME: _____ EMPL ID: _____

FIRST_NAME: _____ TITLE: _____

.....
 In signing, you state that you have read and agreed to the "University Guidelines for Responsible Computing" and the "Certification of Security for Towson University Information Systems".

SIGNATURES REQUIRED FOR CREATORS:

Creator's Signature	Date	Supervisor's or Department Head's Signature	Date

The required signatures must be obtained and the completed form returned to the Bursar's Office, Mike Mullenholz, ES building, Room 321, x4-4603, fax 4-6043.
 For **New Accounts** – You, the Approver will be notified by e-mail when the Approver account is complete. A carbon copy of the e-mail will also be forwarded to the Supervisor or Department Head.
 For **Deleted Accounts** – You, the Supervisor or Department Head, will be notified by e-mail when the Approver account has been deleted.

BURSAR OFFICE USE ONLY – TEST SYSTEM	
<input type="checkbox"/> ACCOUNT CREATED - DATE: _____	<input type="checkbox"/> ACCOUNT DELETED - DATE: _____
BURSAR OFFICE USE ONLY – PRODUCTION	
<input type="checkbox"/> ACCOUNT CREATED - DATE: _____	<input type="checkbox"/> ACCOUNT DELETED - DATE: _____
BURSAR OFFICE USE ONLY	
<input type="checkbox"/> COMMUNICATION SENT - DATE: _____	



AUTHORIZATION FORM

CHECK OFF ROLE ACCESS	
<input type="checkbox"/>	ADD APPROVER
<input type="checkbox"/>	DELETE APPROVER

APPROVER AUTHORIZATION FORM

Please use this form if you need to obtain new access or modify current access to the Online Invoice System. **Electronically complete or print information for required fields. Return completed and signed form by mail.**

DEPARTMENT NAME: _____ **DEPT.BUDGET CODE:** _____

APPROVER'S INFORMATION:

LAST_NAME: _____ **EMPL ID:** _____

FIRST_NAME: _____ **TITLE:** _____

E-MAIL: _____

PHONE: 4- _____ **BLDG:** _____ **ROOM NO:** _____
 (enter 4 digit number)

SUPERVISOR'S OR DEPARTMENT HEAD'S INFORMATION:

LAST_NAME: _____ **EMPL ID:** _____

FIRST_NAME: _____ **TITLE:** _____

.....
 In signing, you state that you have read and agreed to the "University Guidelines for Responsible Computing" and the "Certification of Security for Towson University Information Systems".

SIGNATURES REQUIRED FOR APPROVERS:

<p>Approver's Signature _____</p> <p>Date _____</p>	<p>Supervisor's or Department Head's Signature _____</p> <p>Date _____</p>
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The required signatures must be obtained and the completed form returned to the Bursar's Office, Mike Mullenholz, ES building, Room 321, x4-4603, fax 4-6043.

For **New Accounts** – You, the Approver will be notified by e-mail when the Approver account is complete. A carbon copy of the e-mail will also be forwarded to the Supervisor or Department Head.

For **Deleted Accounts** – You, the Supervisor or Department Head, will be notified by e-mail when the Approver account has been deleted.

BURSAR OFFICE USE ONLY – TEST SYSTEM	
<input type="checkbox"/> ACCOUNT CREATED - DATE: _____	<input type="checkbox"/> ACCOUNT DELETED - DATE: _____
BURSAR OFFICE USE ONLY – PRODUCTION	
<input type="checkbox"/> ACCOUNT CREATED - DATE: _____	<input type="checkbox"/> ACCOUNT DELETED - DATE: _____
BURSAR OFFICE USE ONLY	
<input type="checkbox"/> COMMUNICATION SENT - DATE: _____	



**AUTHORIZATION
FORM FOR the
BURSAR'S OFFICE
AND FINANCIAL
SERVICES**

ROLE ACCESS	
<input type="checkbox"/>	ADD VIEW ALL
<input type="checkbox"/>	DELETE VIEW ALL

VIEW ALL AUTHORIZATION FORM

Please use this form if you need to obtain new access or modify current access to the Online Invoice System. **Electronically complete or print information for required fields. Return completed and signed form by mail.**

DEPARTMENT NAME: _____ **DEPT.BUDGET CODE:** _____

USER'S INFORMATION:

LAST_NAME: _____ **EMPL ID:** _____

FIRST_NAME: _____ **TITLE:** _____

E-MAIL: _____

PHONE: 4- _____ **BLDG:** _____ **ROOM NO:** _____
(enter 4 digit number)

SUPERVISOR'S or DEPARTMENT HEAD'S INFORMATION:

LAST_NAME: _____ **EMPL ID:** _____

FIRST_NAME: _____ **TITLE:** _____

.....
In signing, you state that you have read and agreed to the "University Guidelines for Responsible Computing" and the "Certification of Security for Towson University Information Systems".

SIGNATURES REQUIRED:

_____ **User's Signature** **Date** _____ **Supervisor's or Department Head's Signature** **Date**

The required signatures must be obtained and the completed form returned to the Bursar's Office, Mike Mullenholz, ES Room 321, x4-4603, fax x4-6043.

For **New Accounts** – You will be notified by e-mail when the View All Records account is complete. A carbon copy of the e-mail will also be forwarded to the Department Head.

For **Deleted Accounts** – You, the department head, will be notified by e-mail when the View All Records account has been deleted.

BURSAR OFFICE USE ONLY	
ROLE ADDED DATE: _____	ROLE DELETED DATE: _____
COMMUNICATION SENT – DATE: _____	



AUTHORIZATION FORM

CHECK OFF ROLE ACCESS	
<input type="checkbox"/>	ADD CASHIER
<input type="checkbox"/>	DELETE CASHIER

PAYMENT CENTER CASHIER AUTHORIZATION FORM

Please use this form if you need to obtain new access or modify current access to the Online Invoice System. **Electronically complete or print information for required fields. Return completed and signed form by mail.**

DEPARTMENT NAME: _____ **DEPT.BUDGET CODE:** _____

PAYMENT CENTER CASHIER'S INFORMATION:

LAST_NAME: _____ **EMPL ID:** _____

FIRST_NAME: _____ **TITLE:** _____

E-MAIL: _____

PHONE: 4- _____ **BLDG:** _____ **ROOM NO:** _____
 (enter 4 digit number)

UPERVISOR'S OR DEPARTMENT HEAD'S INFORMATION:

LAST_NAME: _____ **EMPL ID:** _____

FIRST_NAME: _____ **TITLE:** _____

.....

In signing, you state that you have read and agreed to the "University Guidelines for Responsible Computing" and the "Certification of Security for Towson University Information Systems".

Cashier's Signature	Date	Supervisor's or Department Head's Signature	Date

The required signatures must be obtained and the completed form returned to the Bursar's Office, Mike Mullenholz, ES Room 321, x4-4603, fax x4-6043.

For **New Accounts** – You, the Cashier will be notified by e-mail when the Cashier account is complete. A carbon copy of the e-mail will also be forwarded to the Supervisor.

For **Deleted Accounts** – You, the Supervisor, will be notified by e-mail when the Cashier account has been deleted.

BURSAR OFFICE USE ONLY	
ROLE(S) ADDED: _____	DATE ADDED: _____



AUTHORIZATION FORM

CHECK OFF ROLE ACCESS	
<input type="checkbox"/>	ADD PRINT PROCESSOR
<input type="checkbox"/>	DELETE PRINT PROCESSOR

PRINT PROCESSOR AUTHORIZATION FORM

Please use this form if you need to obtain new access or modify current access to the Online Invoice System.
Electronically complete or print information for required fields. Return completed and signed form by mail.

DEPARTMENT NAME: _____ **DEPT.BUDGET CODE:** _____

PRINT PROCESSOR'S INFORMATION:

LAST_NAME: _____ EMPL ID: _____

FIRST_NAME: _____ TITLE: _____

E-MAIL: _____

PHONE: 4- _____ BLDG: _____ ROOM NO: _____
 (enter 4 digit number)

UPERVISOR'S or DEPARTMENT HEAD'S INFORMATION:

LAST_NAME: _____ EMPL ID: _____

FIRST_NAME: _____ TITLE: _____

In signing, you state that you have read and agreed to the "University Guidelines for Responsible Computing" and the "Certification of Security for Towson University Information Systems".

Print Processor's Signature	Date	Supervisor's or Department Head's Signature	Date

The required signatures must be obtained and the completed form returned to the Bursar's Office, Mike Mullenholz, ES Room 321, x4-4603, fax x4-6043.

For **New Accounts** – You, the print processor will be notified by e-mail when the print processor account is complete. A carbon copy of the e-mail will also be forwarded to the Supervisor or Department Head.

For **Deleted Accounts** – You, the Supervisor, will be notified by e-mail when the print processor account has been deleted.

BURSAR OFFICE USE ONLY	
ROLE ADDED DATE: _____	ROLE DELETED DATE: _____
COMMUNICATIONS SENT – DATE: _____	



NOTES ...

