University of Colorado
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EMPLOYEE SERVICES

Human Capital Management: Step-by-Step Guide

Approving Transactions

This guide describes approving transactions submitted in HCM.

HCM has the following types of transactions, and therefore, different procedures for approving them.

- **Template Based Transactions (TBTs):** Certain transactions, like hires and transfers, are created through a TBT and submitted for approval.
- **Standard requests:** Some requests, such as PETs and Position updates, are submitted through PeopleSoft pages as delivered, meaning without any customization to the delivered code.
- **Electronic Personnel Action Requests (ePARs):** Transactions submitted through SMART forms.

Contents

Before You Begin

Navigation tips:

▼ HCM Community Users

Procedures in this guide begin from the HCM Community Users dashboard:

1. From the portal, click the **HCM** tile. The Employee Self Service dashboard appears.
2. Click **Employee Self Service**.
3. Click **HCM Community Users** to display the dashboard.

The NavBar displays options for accessing other systems. Through the NavBar, you can select CU Resources to access systems on the portal.

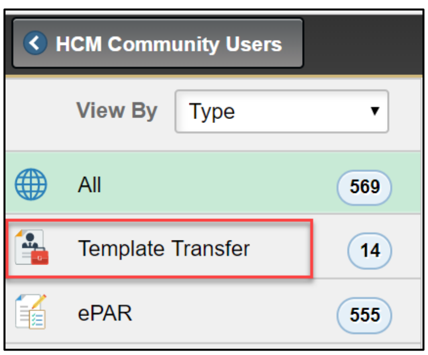
The magnifying glass is called a look up and displays search results for you to select valid field values.

The book and checkmark lets you spell check text boxes.

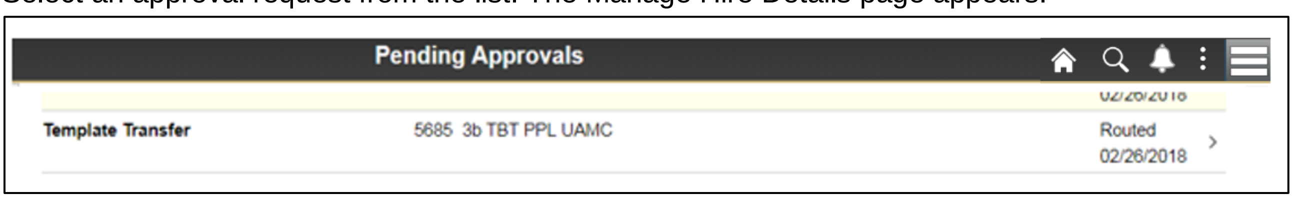
Approving Template Based Transactions

To approve template based transactions, such as hires, rehires, and transfers:

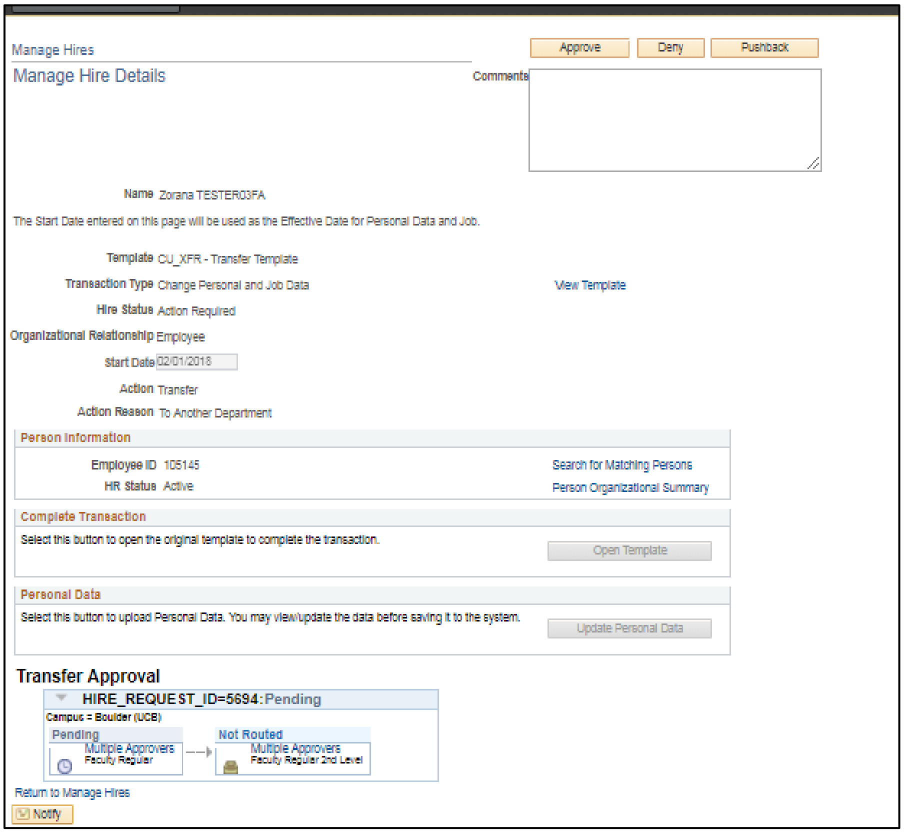
1. From the HCM Community Users dashboard, select the **Approvals** tile. The Pending Approvals page appears.
2. Select the template transactions you want to approve. The example below shows **Template Transfer**.



3. Select an approval request from the list. The Manage Hire Details page appears.

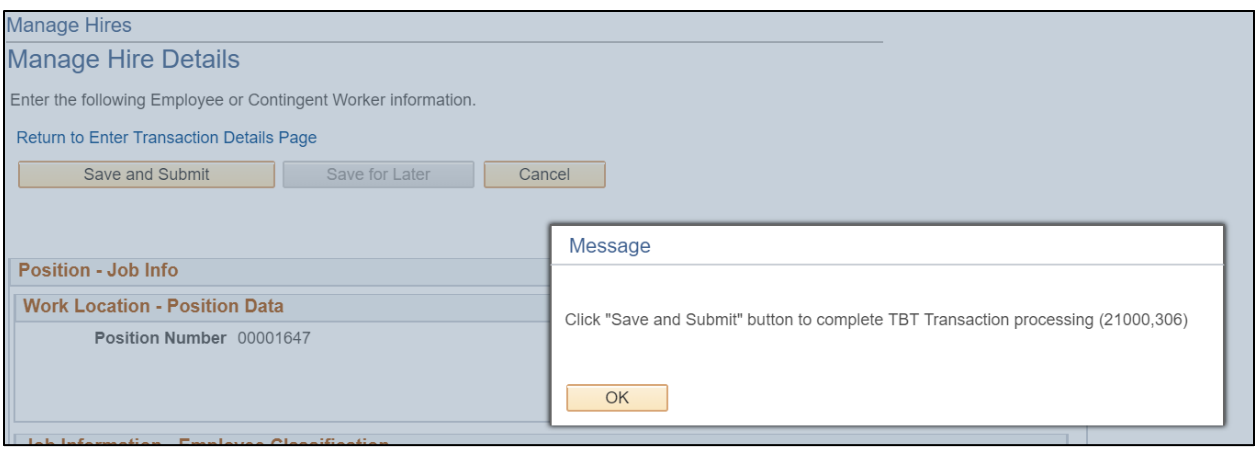


Because the TBT is read only, the first approver can only view the TBT. The final approver in the workflow can make changes to the TBT.



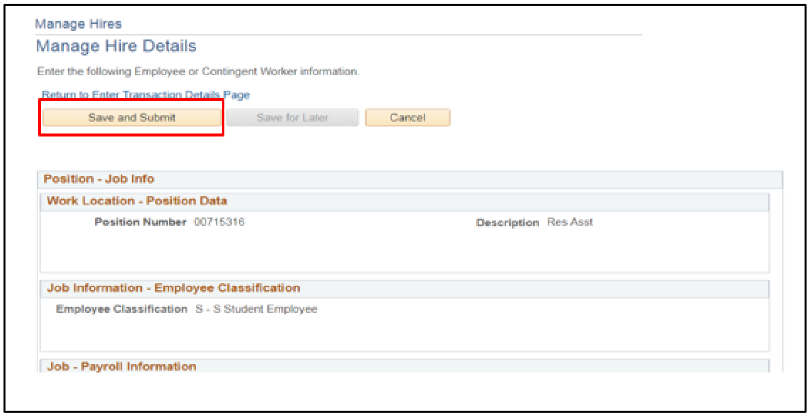
4. To approve the selected transaction, type **Comments** and click **Approve**.

   The system displays another page that opens the transaction in read only mode with a message asking you to complete the TBT transaction processing.

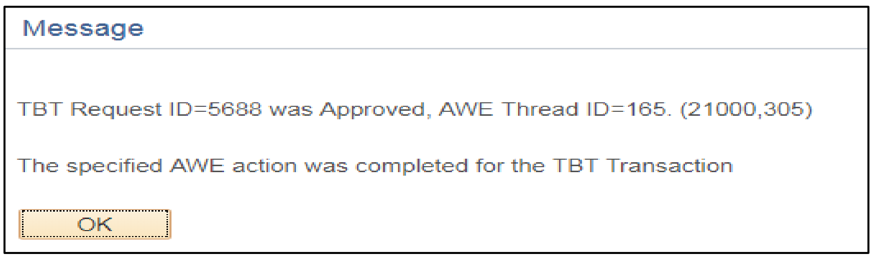


5. Click **OK**.

6. Click **Save and Submit** to close out of the approval process.



A message appears indicating the transaction has been approved.



If there is another approver, the transaction needs final approval.

Making Final Approval

The Final Approver can open the pending transaction and click **Approve**, similar to the previous procedure. The system sends an email notification to the initiator of the transfer request after the transaction has been approved. An email notification is also sent to the employee.

Denying or Pushing Back a Transaction

The person with final approval authority can also choose to deny a transaction or push it back to the originator for modifications.

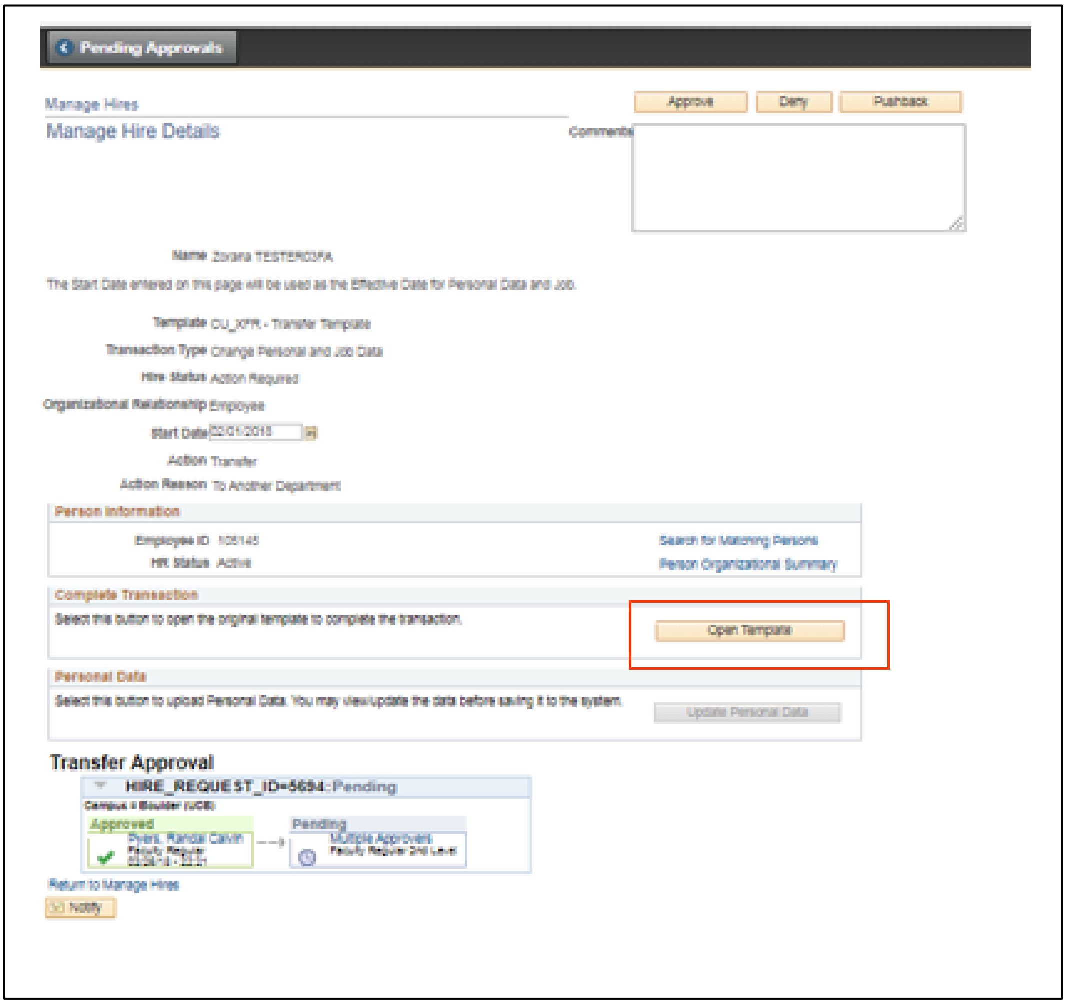
To deny or push back a transfer transaction:

1. Type **Comments** indicating why you are denying or pushing back the transfer.
2. Click **Deny** or **Pushback**. The system sends a notification email to the initiator of the transaction that includes your comments. The initiator can update transactions that are pushed back and resubmit them for approval. Denied transactions cannot be updated for resubmission.

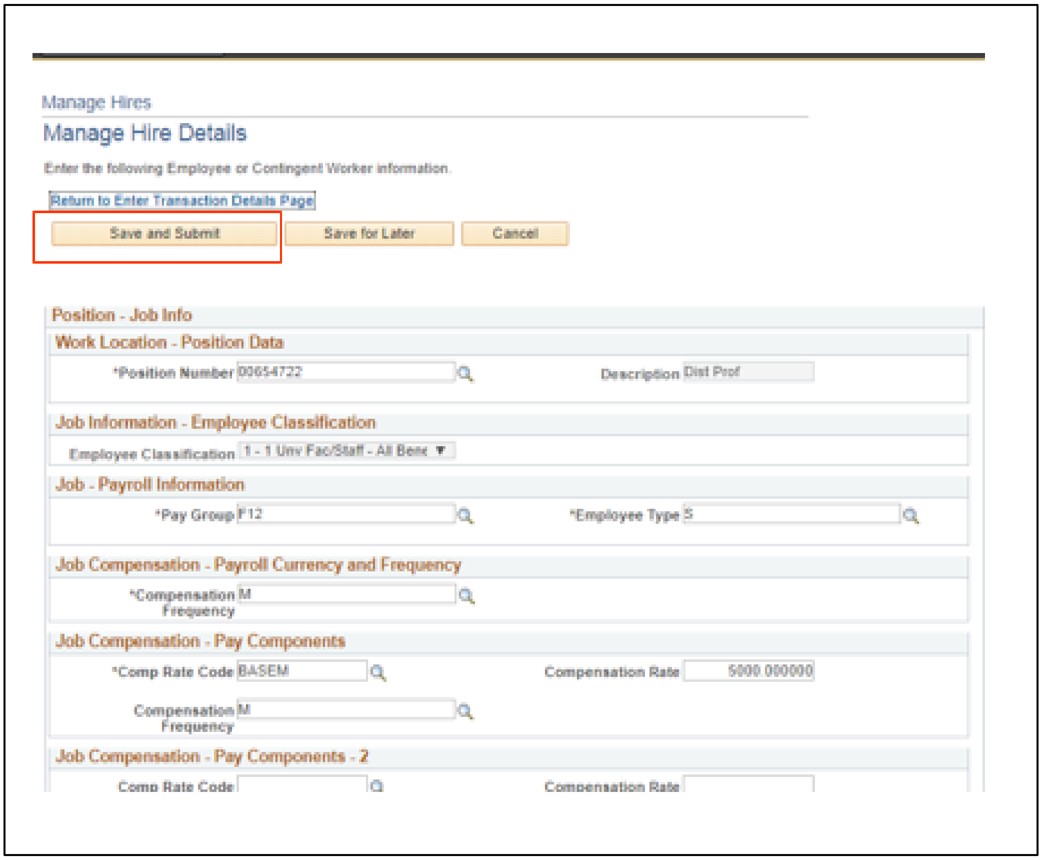
Making Changes to the Transaction before Final Approval

If you are the final approver and want to change job or position information before final approval, you can open the template and make your updates.

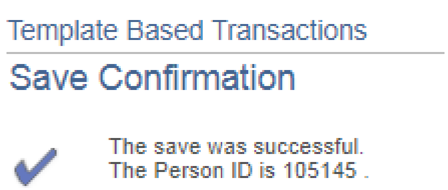
1. Type **Comments** indicating what you are changing and why.
2. Click **Open Template**.



3. Make any changes to the Position and Job Information on the Manage Hire Details page.



4. Click **Save and Submit**. A message appears confirming the information is saved.



5. Click **OK**. The system returns you to the Approval page.

   The transaction will automatically be approved and write to Job Data.

6. Because you have overridden the original information in the TBT, enter notes into the **Job Notes** section in Job Data that explain the changes you are submitting to the system. Indicate that you have overwritten the template and your final changes have been written to the system.

Approving Requests Submitted as Delivered

When you first log on to the portal, you will see whether you have approvals pending (Figure 1). You should also receive an email notification from the system that you have approvals pending.

These notifications apply to transactions that are submitted using PeopleSoft pages as delivered. At the time of this guide's update, the following requests apply:

- Position
- Payroll Expense Transfers (PETs)

Other requests requiring approval are still being submitted through ePARs, as described in the next section of this guide.

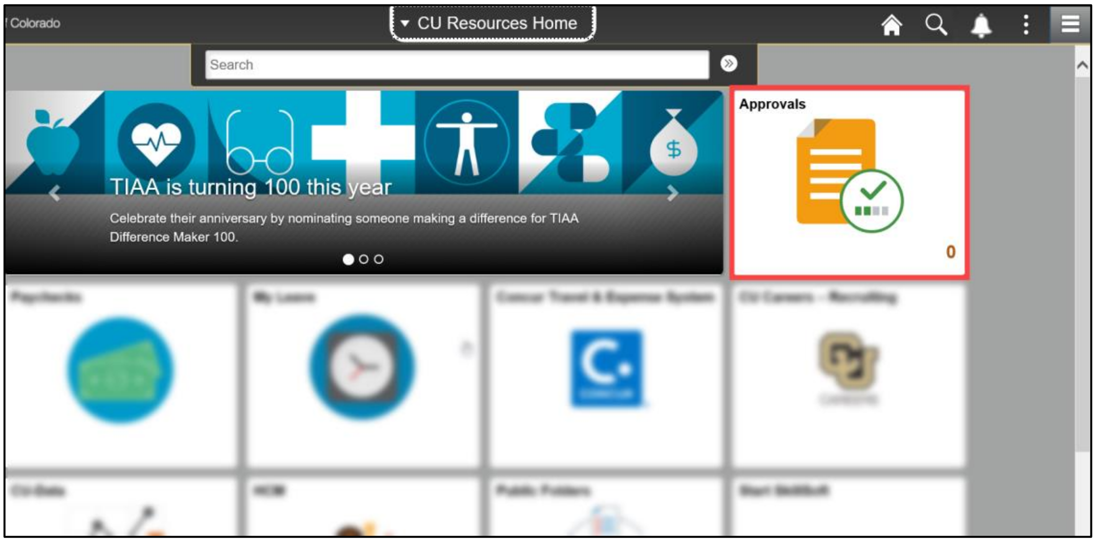
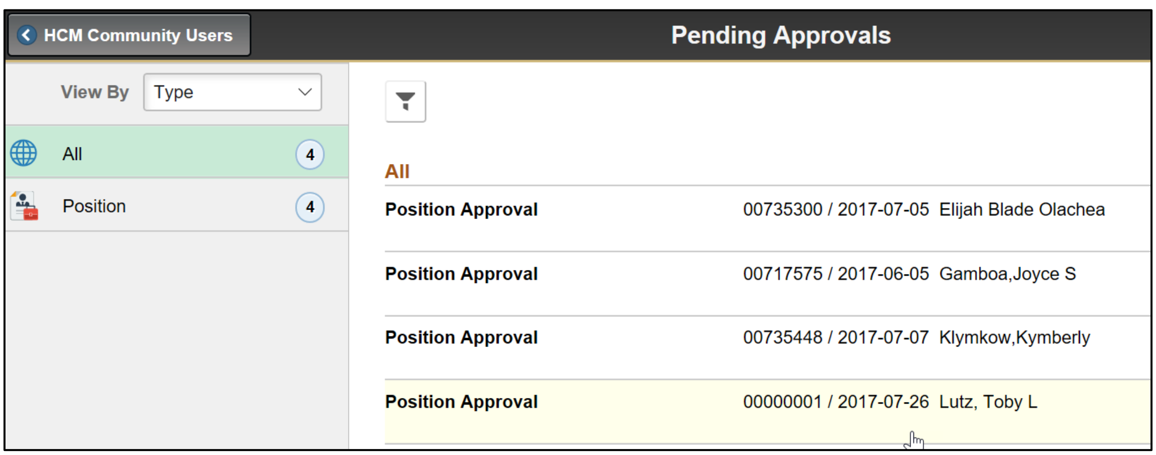


Figure 1. Pending approvals indicated in portal

Note: This same tile displays pending approvals from the HCM Community Users dashboard.

To access these approval requests:

1. Either click the notification from the portal or the Approvals tile from the HCM Community Users dashboard. The Pending Approvals page appears:



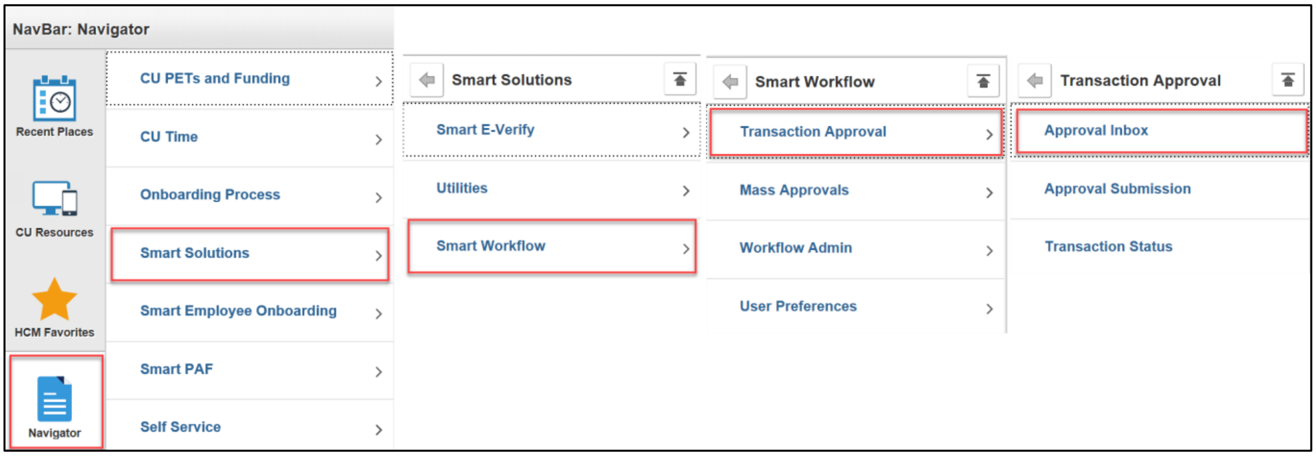
   Notice you can view all approval requests, or filter them by type.

2. Click an approval request from the list to select it. Details specific to the type of request appear.
3. Review the tabs of information for the request.
4. You have the option to click **Comments** and add information regarding your decision to approve or deny the request.
5. Click either **Approve** or **Deny**. The system notifies the requestor that the request has been approved or denied.

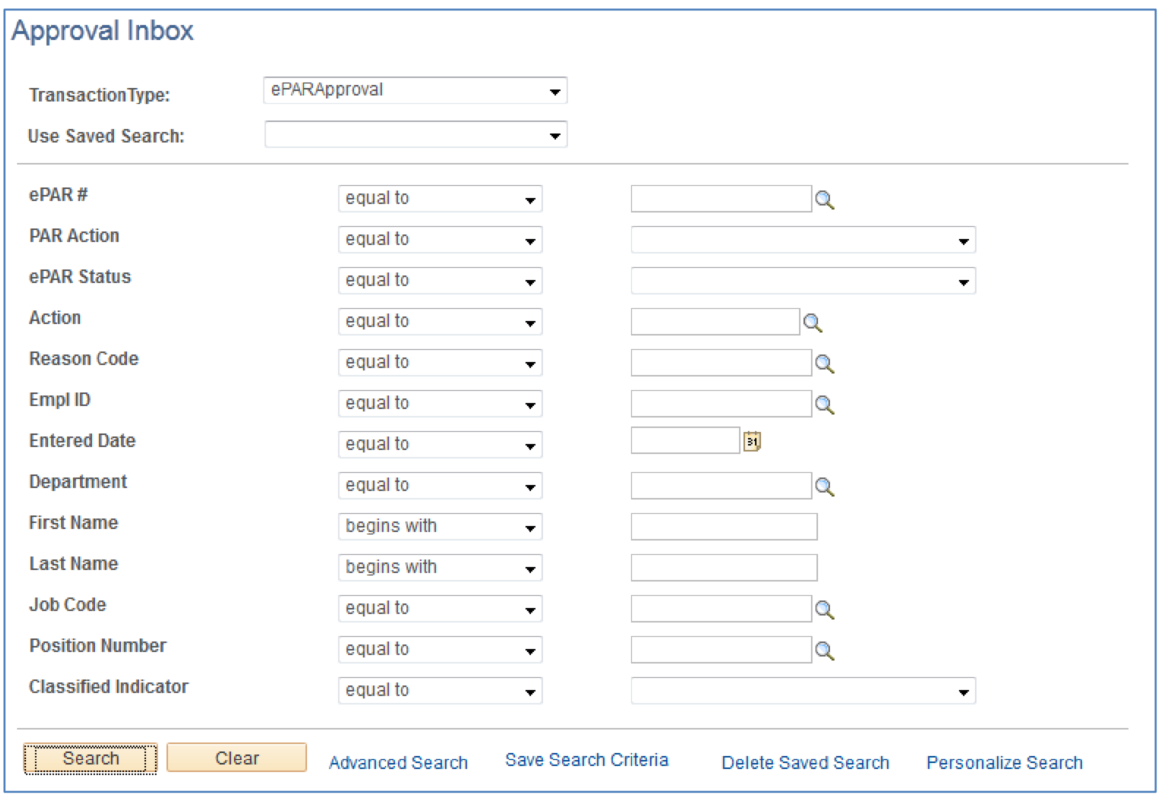
Approving Requests Submitted through ePARs

To approve transactions submitted through ePARs, navigate to the Approvals Inbox. These are transactions that were submitted through the Pay Actions and Non-Pay Actions Document Collections.

1. Navigate to: **NavBar: Navigator**> **Smart Solutions**> **Smart Workflow**> **Transaction Approval**> **Approval Inbox**.

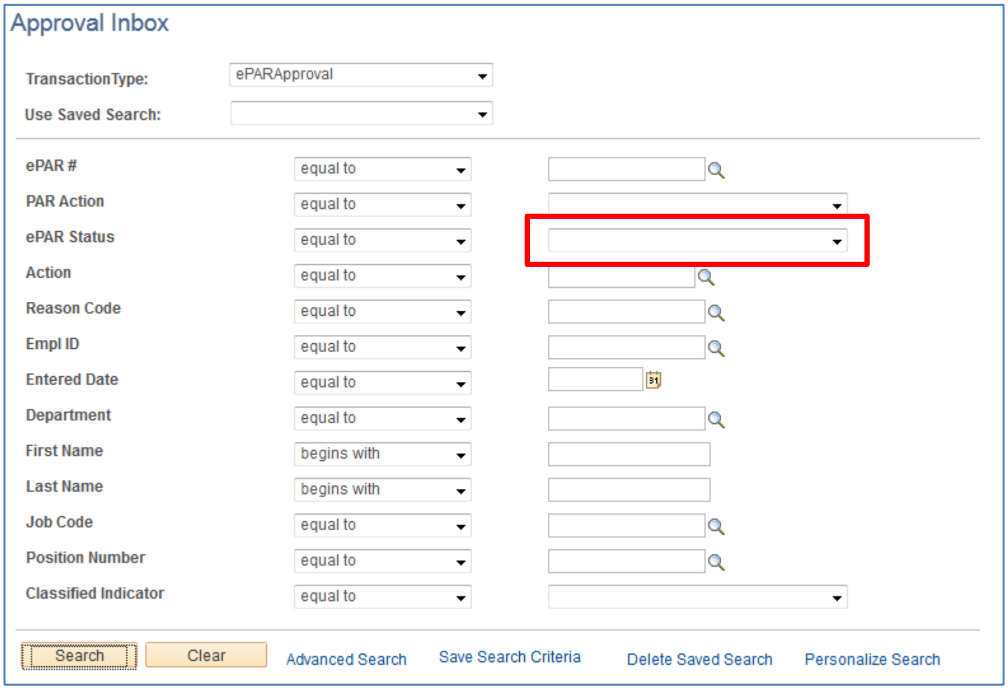


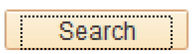
You will see the **Approval Inbox** search window.



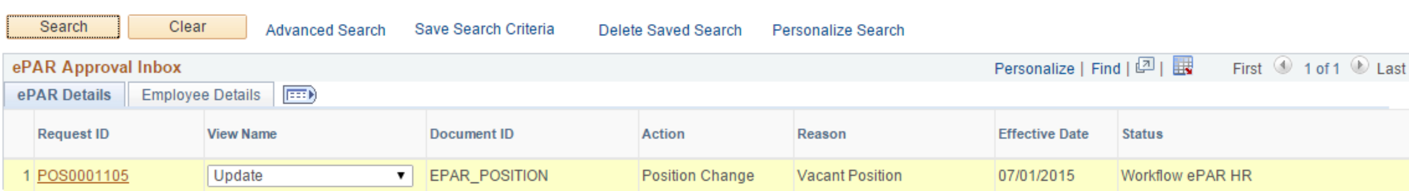
Searching for ePAR Transactions Awaiting Approval

1. To the right of the line labeled **ePAR Status**, select **In Workflow** from the drop-down list.



2. Click **Search**. 

   Below the Search button, the ePAR Approval Inbox will appear, listing all transactions in the workflow.

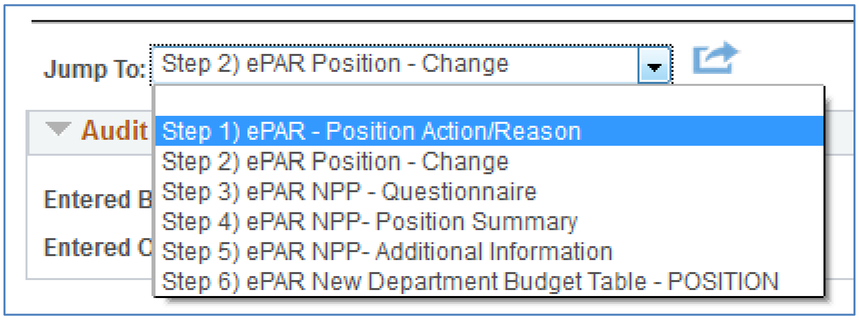


3. Click the **Request ID** link to view the transaction.

Reviewing and Approving ePAR Transactions

1. To review the details of the transaction, you can use the Previous and Next buttons to see each Step.

Or, you can jump to a step, using the drop-down at the bottom of the page.



2. Once you have reviewed the details of the transaction, you have the option to **Approve**, **Deny**, or **Hold**.

- **Approve**: Sends the transaction through to HCM if you are the final approver or to the next group of approvers.
- **Deny**: Pushes the transaction back one step.
- **Hold:** Lets you hold the transaction and prevents others from taking action on it.

3. When you click **Approve**, you will be prompted to enter comments.

4. Click **Approve** again.