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EMPLOYEE SERVICES

Human Capital Management: Step-by-Step Guide

Approving Transactions

This guide describes approving transactions submitted in HCM. When HCM was first launched, transactions were submitted through SMART electronic personnel action requests (ePARs). Currently, HCM is going through updates in which the process for updating data is transitioning to using PeopleSoft pages "as delivered," meaning without any customization to the delivered code.

During this transition, users will approve transactions that have been submitted through ePARs as well as through PeopleSoft pages. Eventually, you will no longer be using ePARs to submit transactions for approval.

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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 creation, 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.
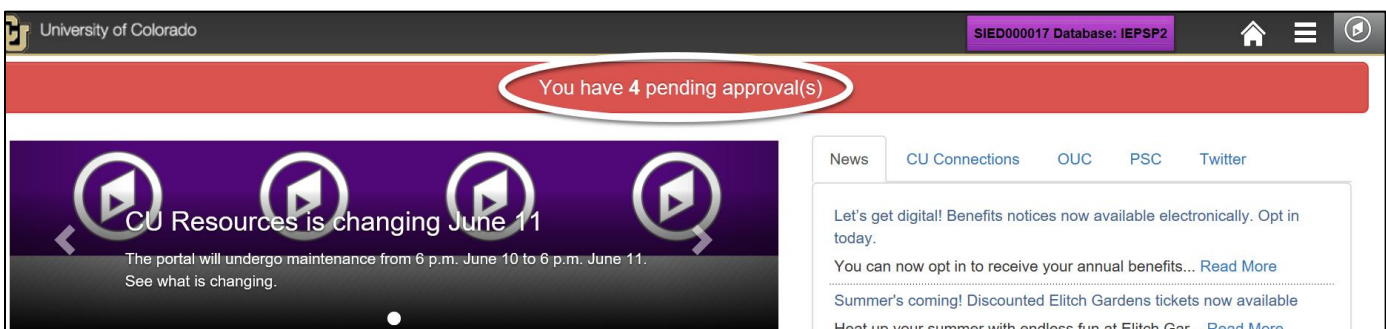

Figure 1. Pending approvals indicated in portal

You can also see pending approvals from the HCM Community Users dashboard:
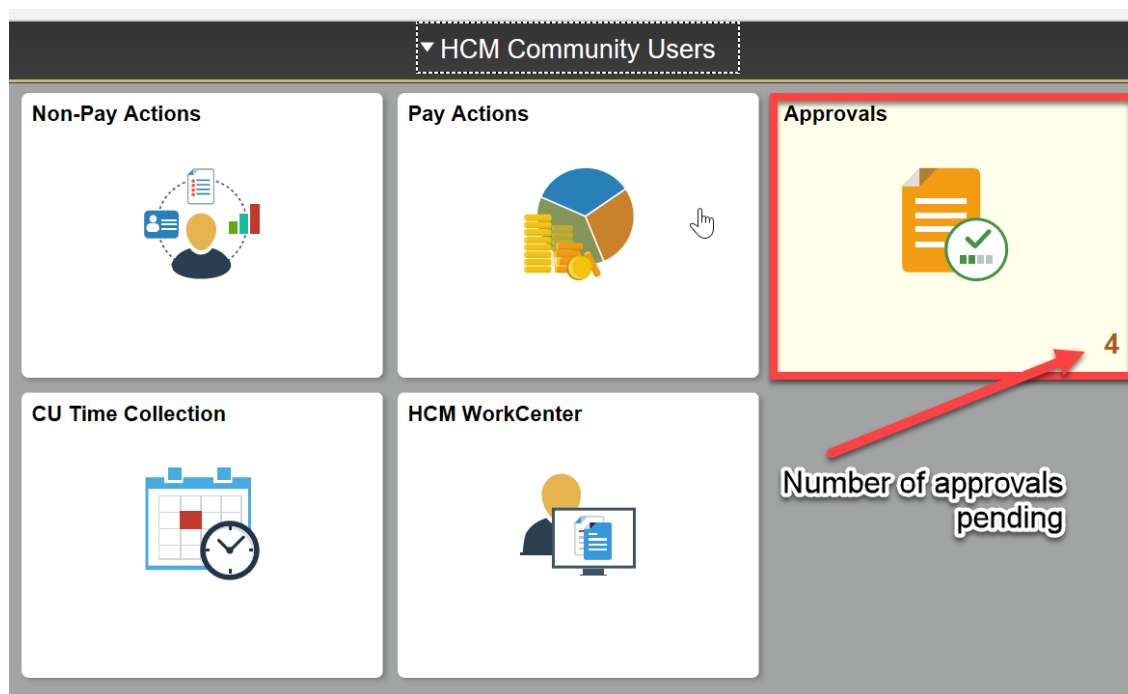

Figure 2. Pending approvals indicated at HCM Community Users dashboard

To access these approval requests:

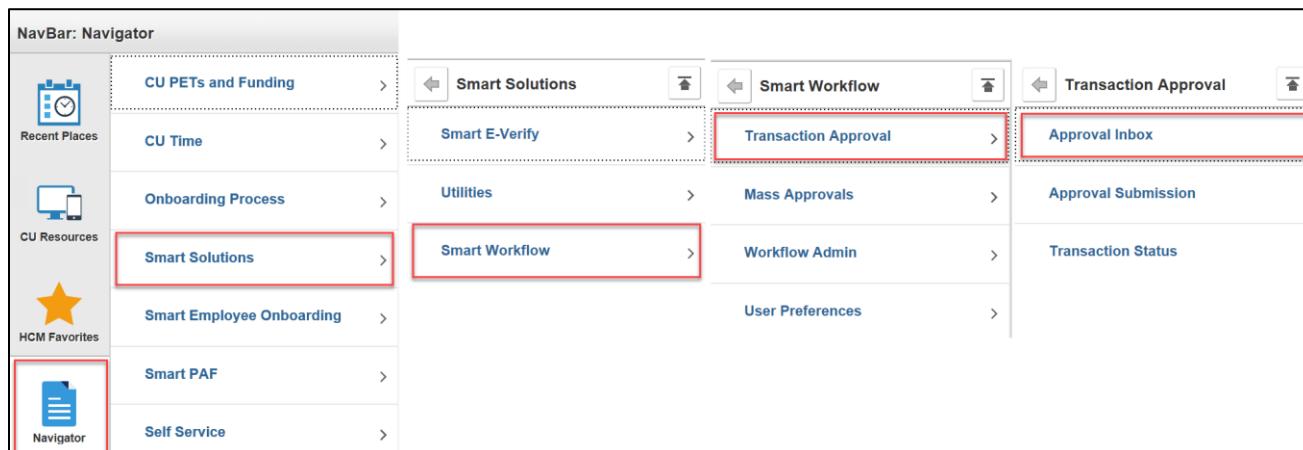1. Either click the notification from the portal or the Approvals tile from the HCM Community Users dashboard. The Pending Approvals page appears:

   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**.
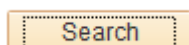
   Below the Search button, the ePAR Approval Inbox will appear, listing all transactions in the workflow.
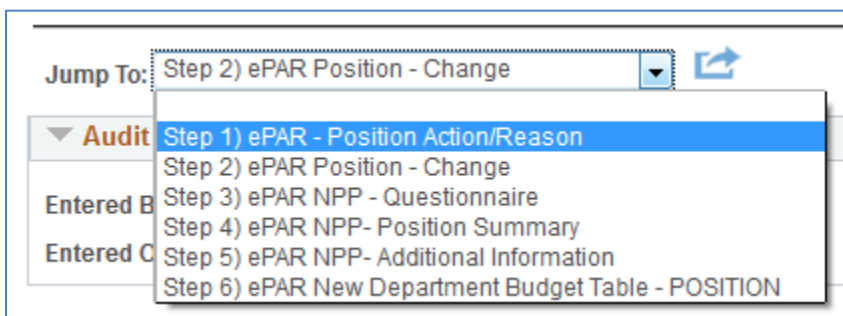
3. Click the **Request ID** link to view the transaction.

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.