Familiarize yourself with upcoming changes to the Approvals workflow [1]

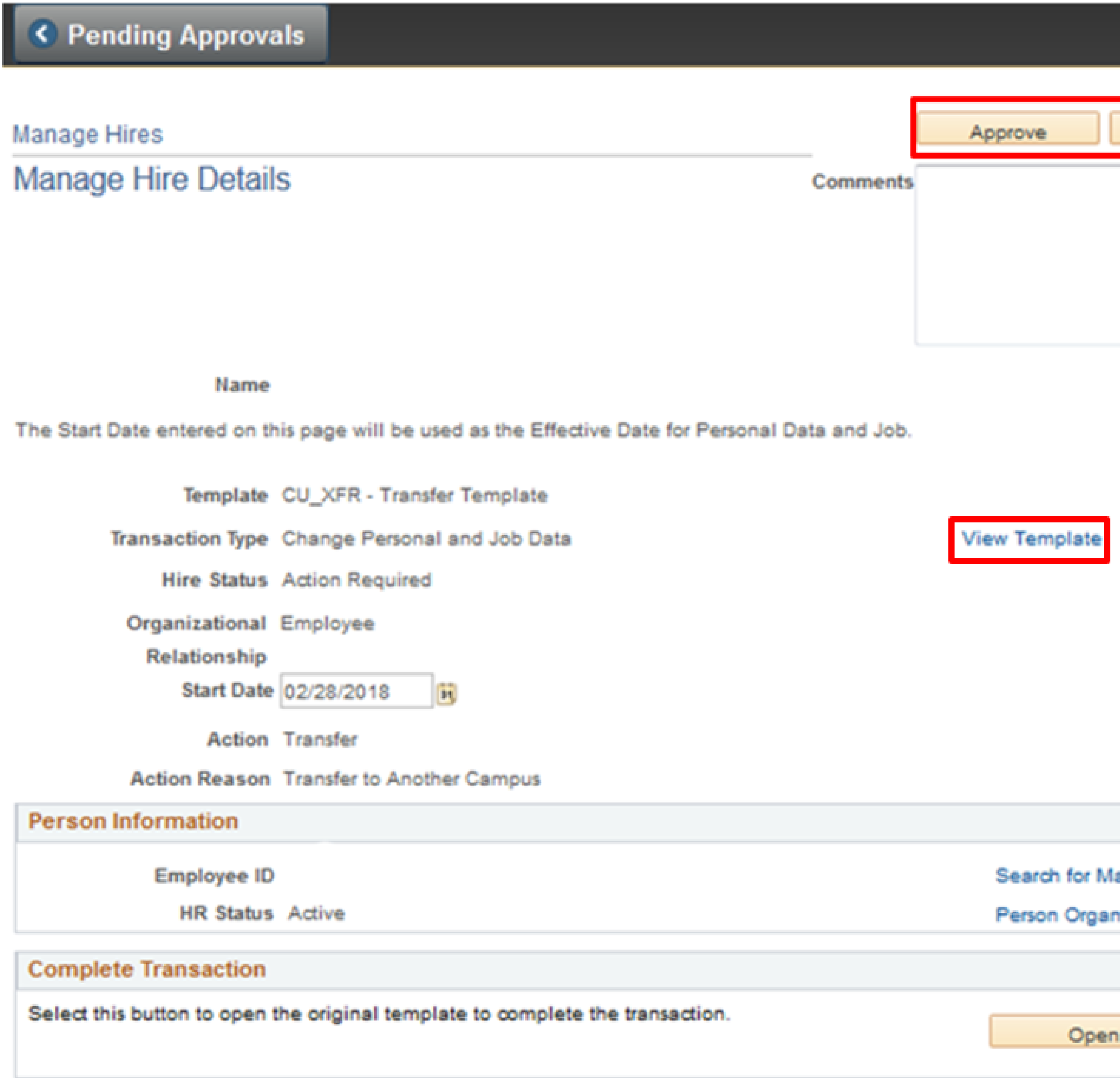
April 5, 2018 by Employee Services [2]

In addition to Transfer’s new Template Based Transaction framework [3], Transfer approvals will change on **April 14**.

How will Approvals change?

Changes begin with how approvers are notified of a submitted transaction. After an initiator submits a Transfer transaction, it will be routed for approval. Approvers will be notified of this through email.

Approvals will be viewable through the **Approval** tile or **Manage Hire Details** page, depicted below.
Note: Click on any image to enlarge it.



[4]

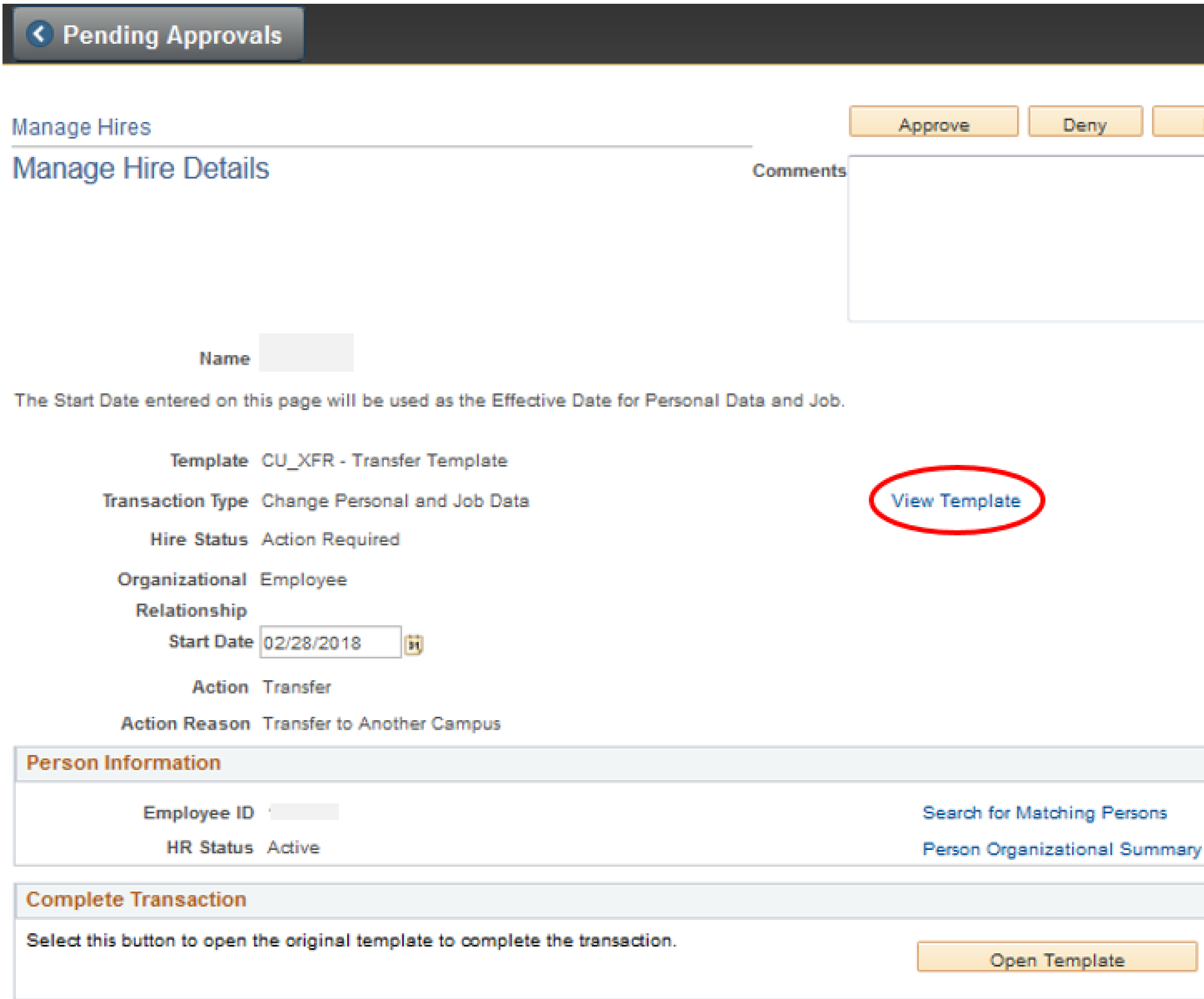
Clicking the **View Template** link from these locations will open the template in read-only mode. Once opened, there will be options to Approve, Deny or Pushback the transaction.

What do these actions do?

- If no corrections are needed, selecting **Approve** will finalize the transaction.
- If **Deny** is selected, the initiator will need to start a new transaction. Approvers are required to enter comments when they deny a transaction. The initiator will receive these comments in an email.
- **Pushback** sends the transaction back to the initiator. The approver must include comments to indicate needed corrections.

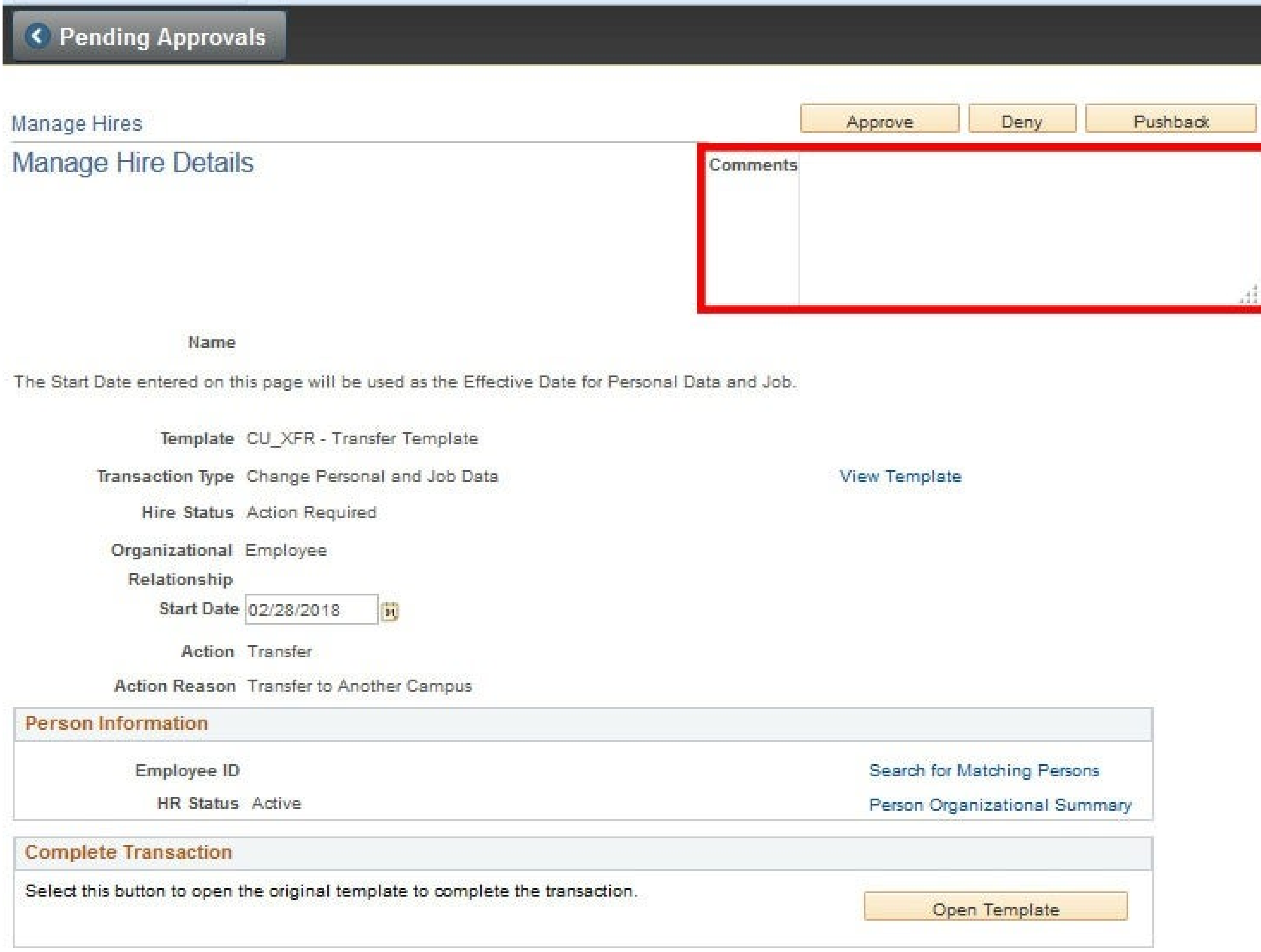
Verifying information is correct and making adjustments

To verify the information (position, department, payroll, etc.) on the transaction if correct, click **View Template** on the **Manage Hire Details** page. This will open the template.



[5]

Approvers must make their approval decision (Approve, Deny or Pushback) or select **Open Template** to make changes. Comments explaining what will be changed will be **required** if the Deny, Pushback or Open Template options are chosen. **Note:** Changes should not be made on a regular basis. They should only be made in time sensitive situations.



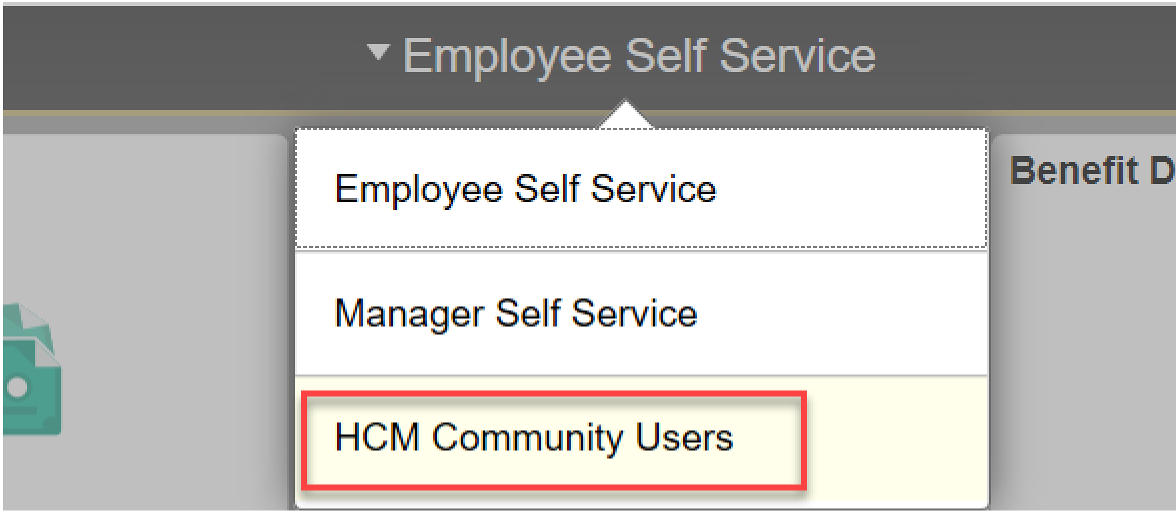
[7]

After changes are made to the template, click **Save and Submit**. The transaction will submit itself to the database, and the user will be brought back to the **Manage Hire Detail** page. Actions on the page will be greyed out to prevent further action and an email will be sent to the initiator notifying them of the update and comments.

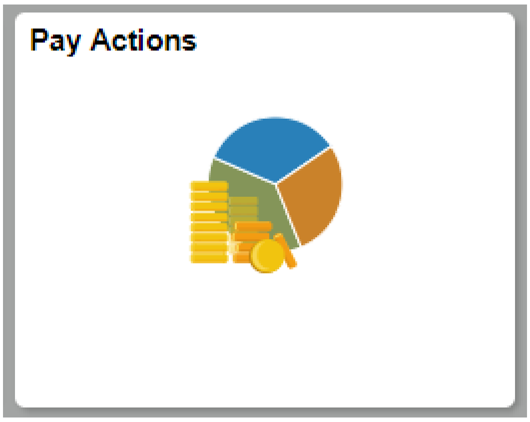
Viewing the Approval Chain

Users will have the option to view where a transaction sits in the approval chain by following these steps:

1. Visiting the HCM Community Users dashboard using this path: **NavBar** > **CU Resources** > **Business Tools** > **HCM** > **Employee Self Service** > **HCM Community Users**.

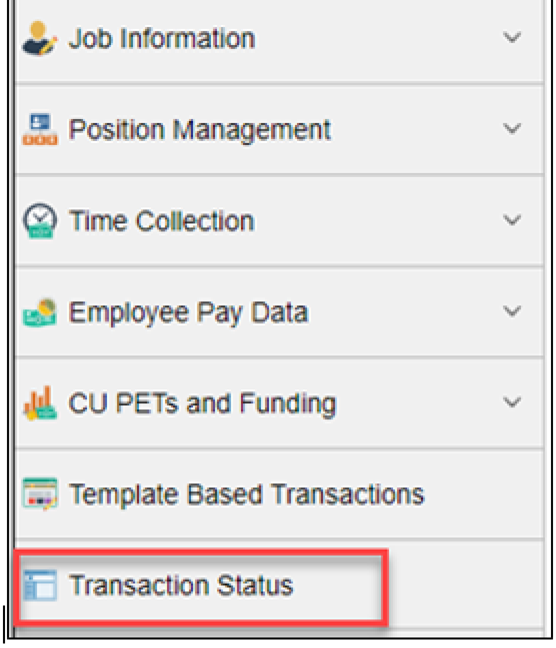


2. Clicking the **Pay Actions** tile.

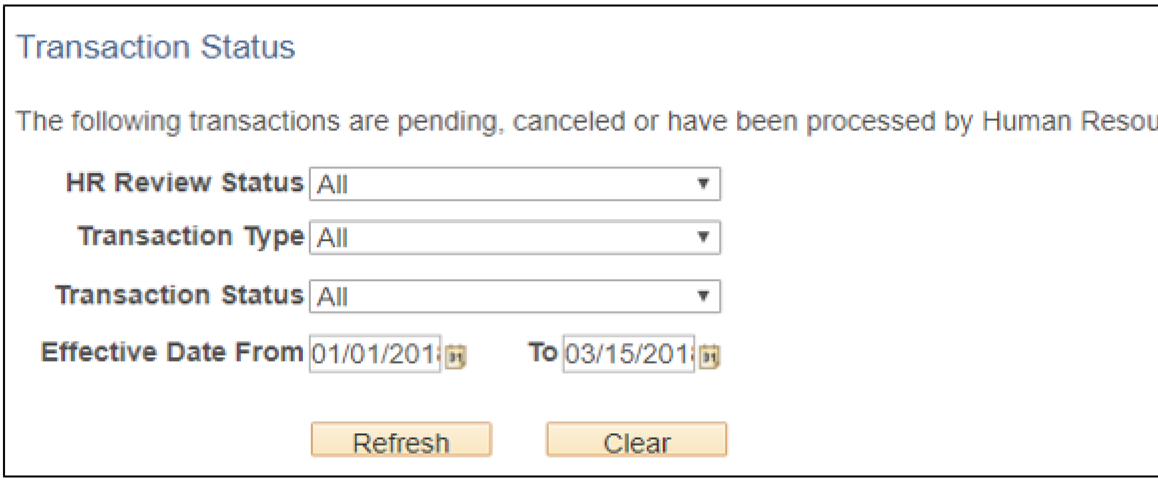


[9]

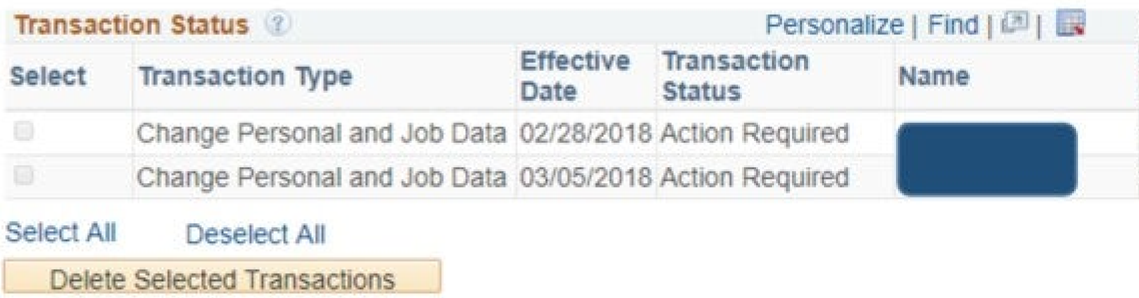
3.



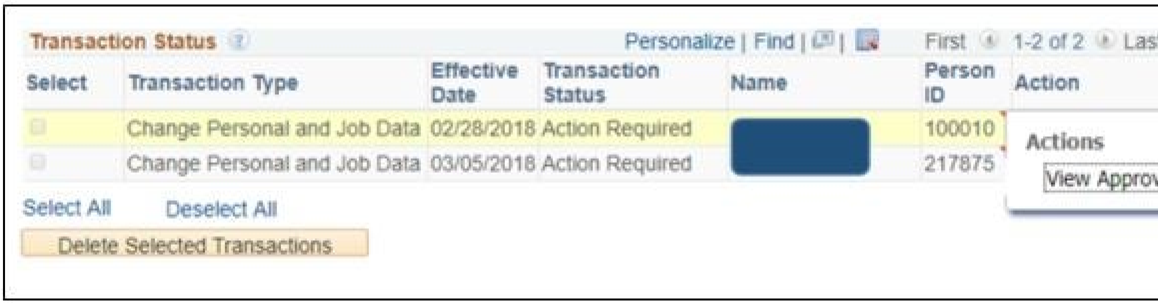
Clicking **Transaction Status**.



4. Entering parameters to search for transactions. The system displays a list of transactions matching this criteria. [11]



5. Right-clicking on the **Related Content** indicator and clicking **View Approval Chain**. **Helpful hint:** Some faculty transfers on the Boulder campus will show two approvers in the Approved box



HCM project [13], HCM development [14], Transfer [15], Approvals [16]
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