

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.

[Manage Hires](#)

Manage Hire Details

[Approve](#)

Comments

Name

The Start Date entered on this page will be used as the Effective Date for Personal Data and Job.

Template CU_XFR - Transfer Template

Transaction Type Change Personal and Job Data

[View Template](#)

Hire Status Action Required

Organizational Employee

Relationship

Start Date 02/28/2018 ⓘ

Action Transfer

Action Reason Transfer to Another Campus

Person Information

Employee ID

[Search for Ma](#)

HR Status Active

[Person Organ](#)

Complete Transaction

Select this button to open the original template to complete the transaction.

[Open](#)

[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.

[Pending Approvals](#)

Manage Hires

Approve

Deny

Manage Hire Details

Comments

Name

The Start Date entered on this page will be used as the Effective Date for Personal Data and Job.

Template

CU_XFR - Transfer Template

Transaction Type

Change Personal and Job Data

Hire Status

Action Required

Organizational

Employee

Relationship

Start Date

02/28/2018

Action

Transfer

Action Reason

Transfer to Another Campus

View Template

Person Information

Employee ID

Search for Matching Persons

HR Status

Active

Person Organizational Summary

Complete Transaction

Select this button to open the original template to complete the transaction.

Open 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.

[Pending Approvals](#)

Manage Hires

Manage Hire Details

ApproveDenyPushback

Comments

Name

The Start Date entered on this page will be used as the Effective Date for Personal Data and Job.

TemplateCU_XFR - Transfer Template

Transaction TypeChange Personal and Job DataView Template

Hire StatusAction Required

OrganizationalEmployee

Relationship

Start Date02/28/2018

ActionTransfer

Action ReasonTransfer to Another Campus

Person Information

Employee ID

Search for Matching Persons

HR StatusActive

Person Organizational Summary

Complete Transaction

Select this button to open the original template to complete the transaction.

Open Template

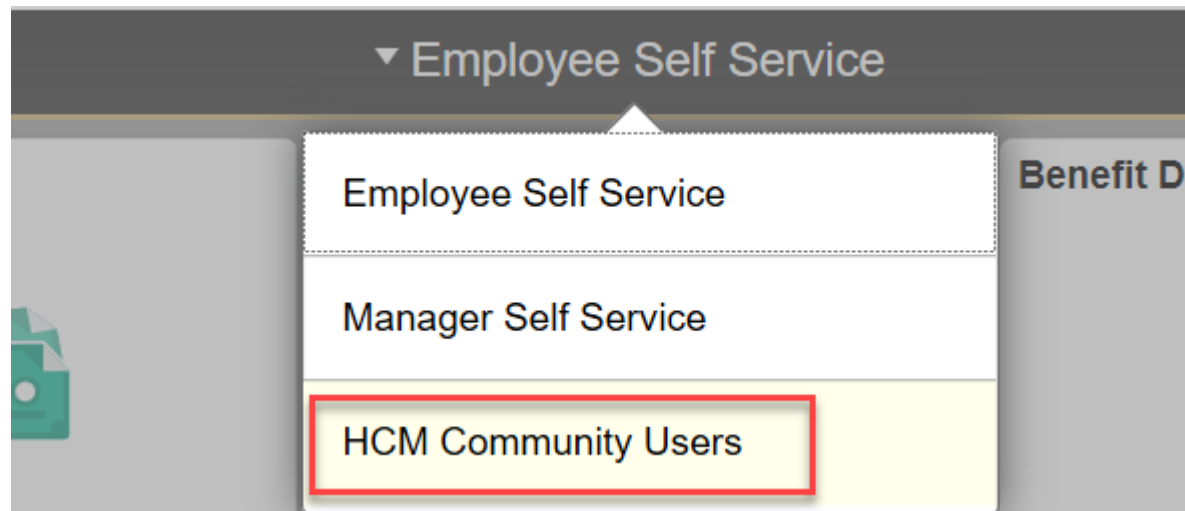
[7]

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

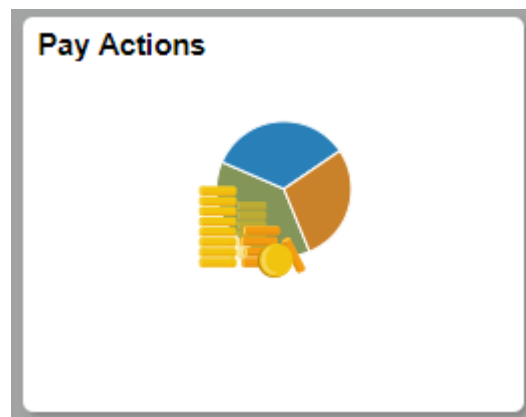
Users will have the option to view where a transaction sits in the approval chain by following these steps:

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



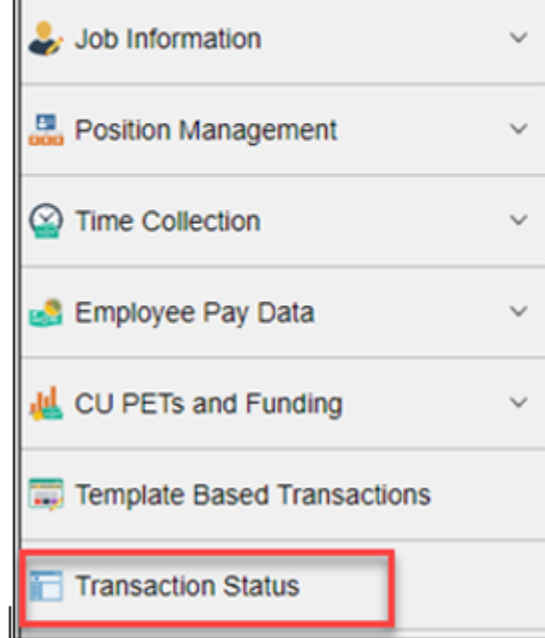
- 2.

Clicking the **Pay Actions** tile.



[9]

3.



Clicking
**Transaction
Status.**

Transaction Status

The following transactions are pending, canceled or have been processed by Human Resources

HR Review Status



Transaction Type

Transaction Status

Effective Date From **To**

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

[11]

Transaction Status ?					Personalize Find  
Select	Transaction Type	Effective Date	Transaction Status	Name	
<input type="checkbox"/>	Change Personal and Job Data	02/28/2018	Action Required		
<input type="checkbox"/>	Change Personal and Job Data	03/05/2018	Action Required		
Select All Deselect All					
<input type="button" value="Delete Selected Transactions"/>					

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

Transaction Status				Personalize	Find	First	1-2 of 2	Last
Select	Transaction Type	Effective Date	Transaction Status	Name	Person ID	Action		
<input type="checkbox"/>	Change Personal and Job Data	02/28/2018	Action Required		100010	Actions View Approval Chain		
<input type="checkbox"/>	Change Personal and Job Data	03/05/2018	Action Required		217875			
Select All		Deselect All						
Delete Selected Transactions								

Transfer Approval

HIRE_REQUEST_ID=5307:Approved

Campus = Systems (USYS)

Approved

Frakes, Ashley Marie

University Staff

03/01/18 - 1:36 PM

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

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Links

- [1] <https://www.cu.edu/blog/hcm-community/familiarize-yourself-upcoming-changes-approvals-workflow>
- [2] <https://www.cu.edu/blog/hcm-community/author/10695> [3] <https://www.cu.edu/blog/hcm-community/preview-transfer%E2%80%99s-new-template-based-transaction-approach-learn-about-additional> [4] https://www.cu.edu/sites/default/files/Pending%20Approvals_4.png
- [5] <https://www.cu.edu/sites/default/files/View%20Template.png>
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