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FIN How-to: Approving Journal Entries [1]

Watch the video

Read the procedures

When a Journal Entry has been submitted to you for approval, it will be added to your Worklist for your review and approval.

1. Log into the Finance System.
2. From the **Finance Inquiry** or **Finance & Accounting** homepage, click the **Worklist** tile. This is your list of JEs to approve.
3. You can click on the column titles to sort your Worklist. Select the link to the Journal Entry that you are reviewing/approving.
4. If there are attachments associated with this Journal Entry, the number of attachments will appear in parentheses in the Attachments link. To view attachments, click the **Attachments** link.
5. Select the file name of the attachment to view it. If the attachment does not appear, check to see if your browser pop-up blocker is on.
   You can add or remove attachments, as needed, even after a journal has posted.
   Want to know what makes a good attachment? See the video. [2]
6. After viewing the attachment, click **OK**.
7. Click the **Go to Journal Entry Page** link to view the actual JE in greater detail.
8. On the Lines tab, use the **Process** dropdown to select **Print Journal**. This will generate a PDF that shows more detail, including the entire Long Description and full detail of the journal lines.
   Note – You do not need to physically print or save this file. We recommend running this PDF because it shows additional information that is helpful to your review, including SpeedType and Account descriptions.
9. When you're done reviewing the PDF, close it.
10. To approve the journal, you can go to the **Approval** tab, however, you can also approve the journal from the GL Journal Approval page. To return to the GL Journal Approval page, click **OK**.
11. On the **GL Journal Approval** page, you may also add another approver.
    Note - Journal Entries requiring multiple stages of approval will already have that set up through the workflow process.

    To add another approver: Select the **green plus sign** in the Approval Stages area. To search for the additional approver by name, select the magnifying glass. Change the Name dropdown menu to ***Contains***. Enter the name of the additional approver, and select **Search**. Select the name of the additional approver from the Search Results. Select **Insert**. Select **Save Approval Flow Changes**.
12. Select one of the following options:

a. **Approve**: Selecting approve will continue the workflow process for the Journal Entry. If there are no additional stages of approval, selecting Approve will approve the Journal Entry. If there are additional stages of approval, selecting Approve will route the Journal Entry to the next approval stage. Selecting Approve will also remove the Journal Entry from your worklist, and from the worklist of any other approvers at this approval stage.
b. **Deny**: Selecting Deny will prompt you to enter comments as to why you are denying the Journal Entry, and it will place the Journal Entry on the worklist of the user who submitted the Journal Entry for approval. Denying the Journal Entry will also remove the Journal Entry from your worklist, and from the worklist of any other approvers at this approval stage.
c. **Hold**: Selecting Hold will remove the Journal Entry from the worklist of any other approvers at this approval stage, and will allow you to pause the workflow process until any questions you have on the Journal Entry have been satisfied. Once your questions have been satisfied, you will remove the Hold on the Journal Entry, and either Approve, or Deny, the Journal Entry.

13. You can select **Add Comments** for any of the options you have selected.
14. When the Journal is approved, it will be noted in the Approval Stages.

Have a question or feedback?

For questions or feedback contact

Source URL:https://www.cu.edu/controller/fin-how-approving-journal-entries

Links
[1] https://www.cu.edu/controller/fin-how-approving-journal-entries [2] https://www.cu.edu/controller/fin-how-what-makes-good-attachment
[3] mailto:fss@cu.edu?subject=Question%20or%20Feedback%20&body=What%20page%20this%20is%20from:%20' + window.location.href +