

FIN How-to: Workflow Administrator Approval [1]

As a campus workflow administrator, you have the ability to approve journals for any approver. What you do is tracked in PeopleSoft which maintains the University audit trail.

Read the procedures

1. Determine the approvers you need to approve for by reviewing the approval chain on the journal.

Unit UCOLO Journal ID AP01133693 Date 11/14/2015 Submit

Approval Status

Unit UCOLO
Approval Check Active Y
Approval Status Pending Approval
Approval Action Approve
Deny Comments
254 characters remaining

Approval Stages

Unit UCOLO, ID AP01133693, Date 2015-11-14, Line Unit UCOLO:Pending
UCD Actuals Dept/OGC/OD

Not Routed
BENTZEN, GINGER LEE
CU WF Journal UCD Gmt Act OGC

Not Routed
Bocco, Alougbavi Jeanne
CU WF Journal UCD Gmt Act OGC

Not Routed
Chandler-Thompson, Stephanie De
CU WF Journal UCD Gmt Act OGC

Not Routed
Garcia, Kristin Marie
CU WF Journal UCD Gmt Act OGC

Not Routed
Gnatsidji, Koffi Elue
CU WF Journal UCD Gmt Act OGC

Not Routed
Hahn, Peter A.
CU WF Journal UCD Gmt Act OGC

Not Routed
Hayes, Barbara
CU WF Journal UCD Gmt Act OGC

Pending
Multiple Approvers
CU WF Journal UCD Stu Admin

Not Routed
Multiple Approvers
CU WF Journal UCD Controller

Not Routed
Multiple Approvers
CU WF Journal UCD OGC Mgrs

2. Click on the NavBar icon, in the upper right corner of the screen. Then, click on Navigator. A navigation menu will open to the right.
3. Navigate to the Workflow Administration area, using the menu: **Enterprise Components > Approvals > Monitor Approvals**
4. On the **Award** tab inside the Associated Project grid, click the **Project**

link.

Navigation: Favorites > Main Menu > Enterprise Components > Approvals > Approvals > Monitor Approvals

University of Colorado
Boulder | Colorado Springs | Denver | Anschutz Medical Campus

User: MART000005 on Database: FINTST

Monitor Approvals

Search Criteria

Approval Process: Definition ID:

Header Status: Last Modified:

Approver: Z9ZFN001

Approver Status:

Originator:

Requester:

Administrative Actions

There are no search results to reassign.

5. Click **Search**

6. The list of journals to approve appears. You can sort by clicking the column heading; in the example below, we clicked **Journal Date** twice, ascending order and then descending order.

Administrative Actions

The selected approver does not currently have an alternate approver selected in their user profile. You must manually select an alternate approver to reassign pending tasks.

Approver's Oper ID: Allow Auto Approval

Reassign To: Allow Self-Approval

Comment:

Search Results

Approval Process: GL Journal Approval Process

Business Unit: Journal ID:

Journal Date: Line Business Unit:

		Modified	Status	Business Unit	Journal ID	Journal Date	Line Business Unit
1	<input type="checkbox"/>	2015-11-14	Pending	UCOLO	AP01133693	2015-11-14	UCOLO
2	<input type="checkbox"/>	Never	Pending	UCOLO	0001133682	2015-11-13	UCOLO
3	<input type="checkbox"/>	Never	Pending	UCOLO	0001133674	2015-11-13	UCOLO
4	<input type="checkbox"/>	Never	Pending	UCOLO	KM111315-4	2015-11-13	UCOLO

7. Check the box next to the journals you wish to approve ... then click the **Approve Selected**

button.

Requester

Administrative Actions

The selected approver does not currently have an alternate approver selected in their user profile. You must manually select an alternate approver to reassign pending tasks.

Approver's Oper ID Allow Auto Approval

Reassign To Allow Self-Approval

Comment

Search Results

Approval Process: GL Journal Approval Process

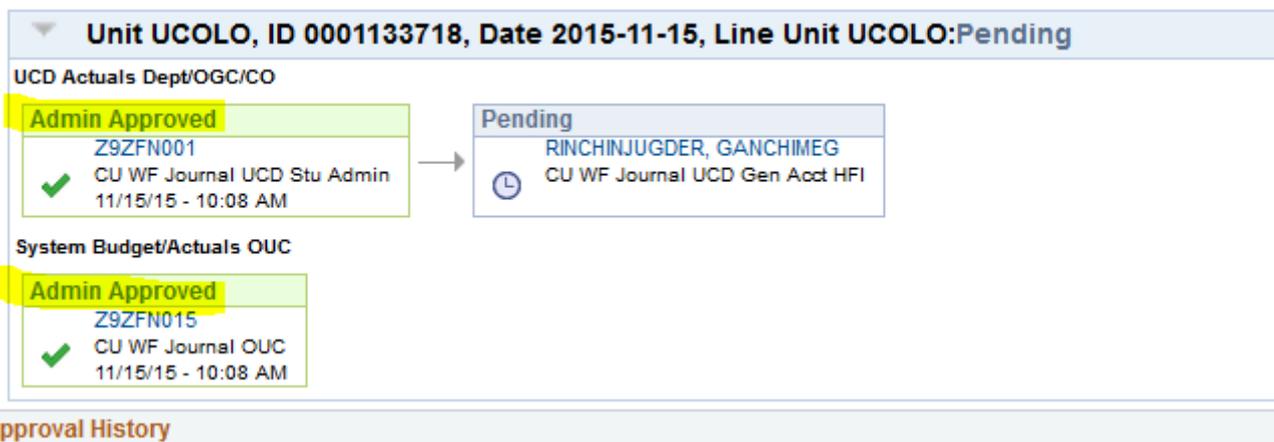
Business Unit Journal ID

Journal Date Line Business Unit

		Modified	Status	Business Unit	Journal ID	Journal Date	Line Business Unit
1	<input checked="" type="checkbox"/>	2015-11-14	Pending	UCOLO	AP01133893	2015-11-14	UCOLO
2	<input type="checkbox"/>	Never	Pending	UCOLO	0001133662	2015-11-13	UCOLO
3	<input type="checkbox"/>	Never	Pending	UCOLO	0001133674	2015-11-13	UCOLO

- Repeat this same process for all the approvers you are approving.
- Review the journal entry to review the approvals. Notice that the journal indicates that the "admin" approved the journal.

Approval Stages



- You will also notice when you open the Approval History area that the journal will show

who actually completed the approval.

Approval History								
Thread ID	Definition ID	Effective Date	Requester	Stage	Path	Step Number	Step Status	
2453	GLJournalApproval	08/09/1902	MART000005	1	1	1.00	Approved	E
2453	GLJournalApproval	08/09/1902	MART000005	1	1	1.00	Approved	G
2453	GLJournalApproval	08/09/1902	MART000005	1	1	1.00	Approved	Y
2453	GLJournalApproval	08/09/1902	MART000005	1	1	1.00	Approved	Z
2453	GLJournalApproval	08/09/1902	MART000005	1	1	1.00	Approved	Z

11. You now have a fully approved journal that will be posted when the process runs next.

Have a question or feedback?

Questions & Feedback [2]

Feedback or Question *

Your Name

Your Email Address

CAPTCHA
This question is for testing whether or not you are a human visitor and to prevent automated spam submissions.

Controller

Source URL: <https://www.cu.edu/controller/fin-how-workflow-administrator-approval>

Links

[1] <https://www.cu.edu/controller/fin-how-workflow-administrator-approval>

[2] <https://www.cu.edu/controller/forms/questions-feedback-0>