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Workflow Administrator Journal Approval Overview

If SFS Journal Entry Approval Workflow is implemented for your Institution, some journals will require approval prior to posting. The Journal Entry Workflow Administrator will need to use the Approval Monitor search page to view search results and utilize the Approval Monitor for a specific approval process.

The Approval Monitor gives the Journal Entry Workflow Administrator a view into all approvals to which he or she has access, as well as the ability to take necessary actions such as mass reassignments.

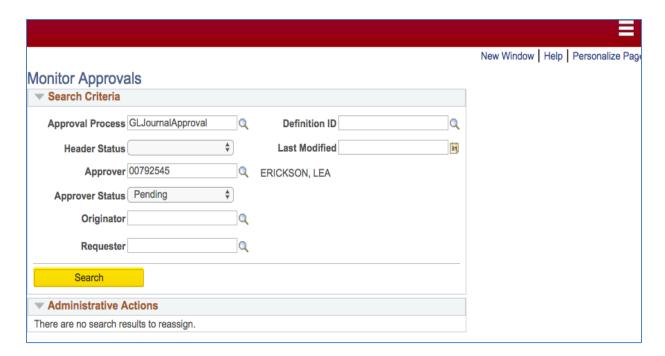
Process Frequency	If journals meet certain requirements, such as a particular Journal Source, they will require approval prior to posting to Ledger. If approvers are not available Workflow Administrators can reassign, approve or deny journals.		
Dependencies	Implementation of Journal Entry Workflow		
Assumptions	None		
Responsible Parties	Specific users at the individual institutions and UWSA perform this business process.		
Alternate Scenarios	None		



Process Detail

I. Monitor Approval Search

Navigation: Enterprise Component > Approval > Approval > Monitor Approvals



- 1. Select Approval Process: GLJournalApproval
- 2. **Select** Header Status: Blank (optional)
- 3. Select Approver: Select Approver user id
- 4. Select Approver Status: Pending
- 5. **Select** Originator: Blank (optional)
- 6. Select Requester: Blank (optional)
- 7. Select Definition ID: Blank (optional)
- 8. Select Last Modified: Blank (optional)
- 9. Select Search button
 - Administration Actions and Approval Process frames display in Monitor Approval page with search results

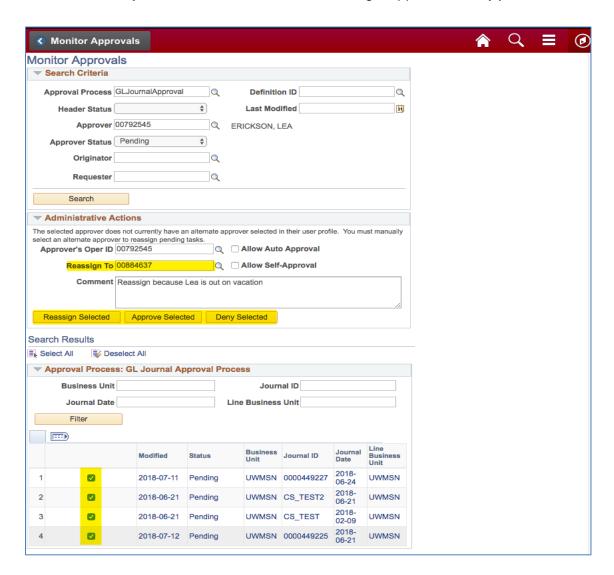






II. Mass Approval Processing

The Journal Entry Workflow Administrator can reassign, approve or deny journals in mass.



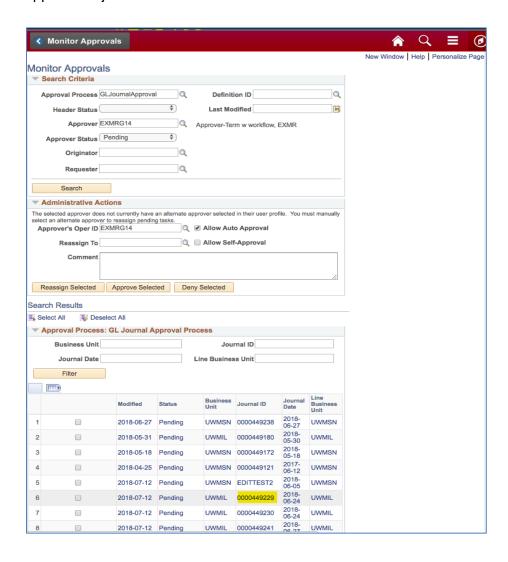
- 1. Select Reassign To: User whom journals will be reassigned to
- 2. **Enter** Comment: Enter text to appear under the approval graphic in the Approval Comment History section.
- 3. Check box
 - a. Select box associated with journals to be reassigned, approved or denied
- 4. Click Reassign Selected, Approve Selected, or Deny Selected button for action to be executed
 - Message dialog box similar to one below will appear





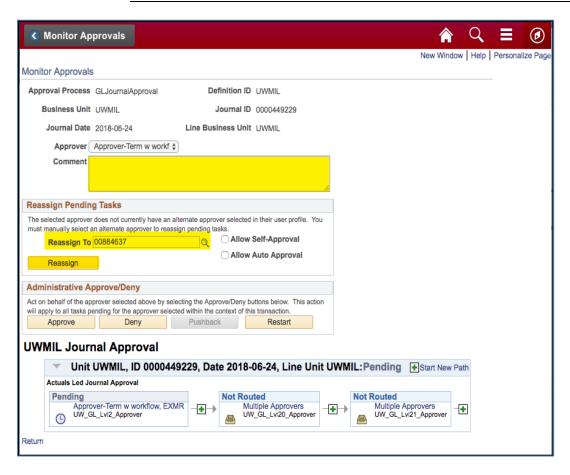
III. Individual Approval Processing

The Journal Entry Workflow Administrator can reassign, approve, deny, pushback or restart approval of journals workflow.



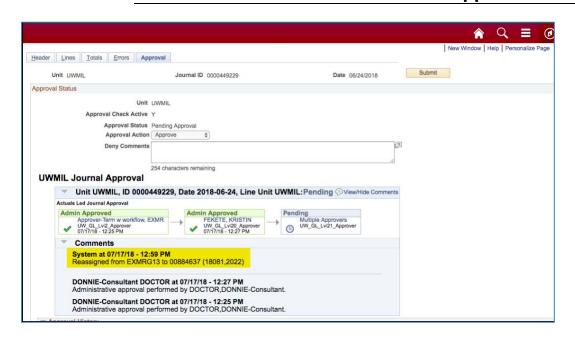
- 1. Click hyper-link for journal to be reassigned
 - a. Approval detail for journal selected will appear



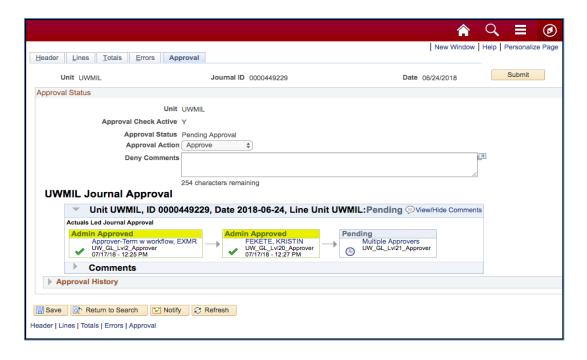


- 2. Enter comments stating why journal is being reassigned
- 3. **Select** Reassign To: User whom journals will be reassigned to
- Click Reassign button from Monitor Approval page to reassign journal approval to another user
 - a. View of transaction after it has been reassigned by Workflow Administrator



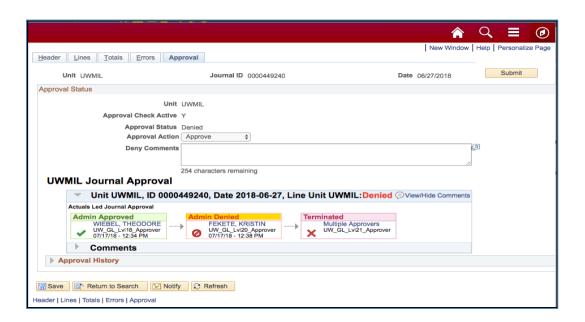


- 5. **Click** Approve button from Monitor Approval page to act on behalf of the original approver to approve journal entry
 - a. View of transaction after it has been approved by Workflow Administrator



- 6. **Click** Deny button from Monitor Approval page to act on behalf of the original approver to deny further approval of journal entry
 - a. View of transaction after it has been denied by Workflow Administrator



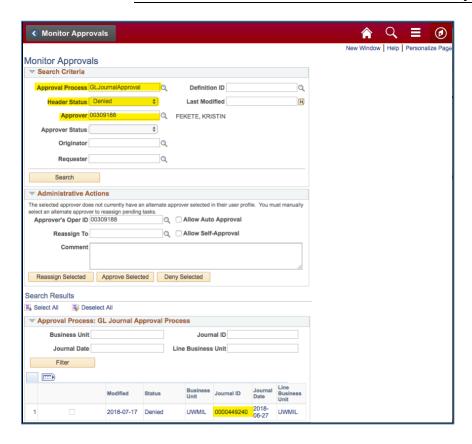


IV. Resubmit After Denial

If a journal is inadvertently denied it can be resubmitted for approval. Click to resubmit a completed transaction to all approvers in the approval path. This button is only available when the transaction is complete. The transaction can only be resubmitted in its current state and cannot be modified before resubmitting for approval

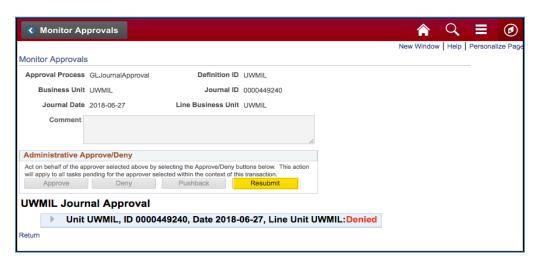
Navigation: Enterprise Component > Approval > Approval > Monitor Approvals



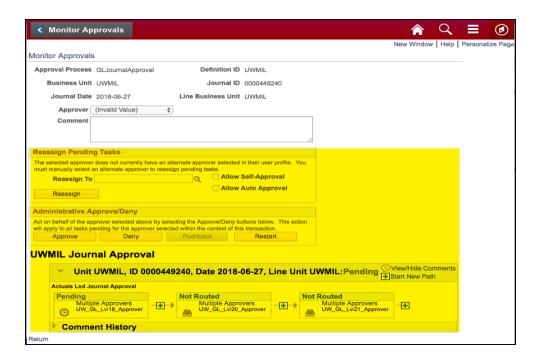


- 1. Select Approval Process: GLJournalApproval
- 2. Select Header Status: Denied
- 3. Select Approver: Select Approver user id
- 4. Select Search button
 - a. Administration Actions and Approval Process frames display in Monitor Approval page with search results
- 5. Click hyper-link for journal to be reassigned
 - a. Approval detail for journal selected will appear





- 6. Select Resubmit button
 - Administration Actions and Approval Process frames display in Monitor Approval page with search results





Revision History

Author	Version	Date	Description of Change
Donnie Doctor	1.10	07/17/2018	Initial draft of document
Linda Diring	1.10	07/20/2018	Review/update