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Workflow Administrator Chartfield Request Approval Overview

Chartfield Request (CFR) workflow Administrator use the Approval Monitor search page, to view search results and utilize the Approval Monitor to reassign, approve, deny or re-submit Account or Department id CFR.


Process Frequency	Chartfield Request will be used when a new Account, Fund or Department is required. Also, when Account, Fund or Department requires update or inactivation.
Dependencies	None
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

The screenshot shows the 'Monitor Approvals' search page. At the top, there is a red navigation bar with a back arrow, the text 'Sac Aw Adm Mon Src', and icons for home, search, menu, and a refresh button. Below the navigation bar, the page title 'Monitor Approvals' is displayed. The main content area is divided into two sections: 'Search Criteria' and 'Administrative Actions'. The 'Search Criteria' section contains several search fields: 'Approval Process' (set to 'FieldRequestApproval'), 'Definition ID', 'Header Status' (a dropdown menu), 'Last Modified' (a date picker), 'Approver' (set to '00309188'), 'Approver Status' (set to 'Pending'), 'Originator', and 'Requester'. A yellow 'Search' button is located below these fields. The 'Administrative Actions' section is currently empty, displaying the message 'There are no search results to reassign.'

1. **Select** Approval Process: FieldRequestApproval
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**  button
 - a. Administration Actions and Approval Process frames display in Monitor Approval page with search results

University of Wisconsin System SFS Business Process GL.3.15 – Workflow Administrator Chartfield Approval

Sac Aw Adm Mon Src

Monitor Approvals

Search Criteria

Approval Process FieldRequestApproval
Definition ID
Header Status
Last Modified
Approver 00309188 FEKETE, KRISTIN
Approver Status Pending
Originator
Requester

Search

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 00309188
Allow Auto Approval
Reassign To
Allow Self-Approval
Comment

Reassign Selected
Approve Selected
Deny Selected

Search Results

Select All
Deselect All

Approval Process: Field Request Approval Process

Request ID
Filter

		Modified	Status	Request ID
1	<input type="checkbox"/>	2018-07-15	Pending	0000000209
2	<input type="checkbox"/>	2018-07-15	Pending	0000000208
3	<input type="checkbox"/>	2018-07-12	Pending	0000000207
4	<input type="checkbox"/>	2018-07-03	Pending	0000000170
5	<input type="checkbox"/>	2018-07-03	Pending	0000000169
6	<input type="checkbox"/>	2018-07-03	Pending	0000000168
7	<input type="checkbox"/>	2018-07-02	Pending	0000000153

II. Mass Approval Processing

Chartfield Request Workflow Administrator can reassign, approve or deny CFR in mass.

Monitor Approvals

Search Criteria

Approval Process: FieldRequestApproval Definition ID:

Header Status: Last Modified:

Approver: 00309188 FEKETE, KRISTIN

Approver Status: Pending

Originator:

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: 00309188 ☐ Allow Auto Approval

Reassign To: 00884637 ☐ Allow Self-Approval

Comment: Reassign because Kristin is out on vacation

Search Results

Approval Process: Field Request Approval Process

Request ID:

	Modified	Status	Request ID
1 <input checked="" type="checkbox"/>	2018-07-15	Pending	0000000209
2 <input checked="" type="checkbox"/>	2018-07-15	Pending	0000000208
3 <input checked="" type="checkbox"/>	2018-07-12	Pending	0000000207
4 <input checked="" type="checkbox"/>	2018-07-03	Pending	0000000170
5 <input checked="" type="checkbox"/>	2018-07-03	Pending	0000000169
6 <input checked="" type="checkbox"/>	2018-07-03	Pending	0000000168

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

Message

Reassignment Successful (18081,5513)

OK

III. Individual Approval Processing

CFR Workflow Administrator can reassign, approve, deny, pushback or restart approval of CFR workflow.

[New Window](#) | [Help](#) | [Personalize Page](#)

Monitor Approvals

Search Criteria

Approval Process:

Definition ID:

Header Status:

Last Modified:

Approver: MILSKI, JACQUELINE

Approver Status:

Originator:

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:

Select All Deselect All

Approval Process: Field Request Approval Process

Request ID:

		Modified	Status	Request ID
1	<input type="checkbox"/>	2018-07-02	Pending	0000000158
2	<input type="checkbox"/>	2018-06-06	Pending	0000000027
3	<input type="checkbox"/>	2018-07-17	Pending	0000000210

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

Monitor Approvals

Approval Process: FieldRequestApproval Definition ID: SHARE

Request ID: 0000000210

Approver: MILSKI, JACQUELINE

Comment: Jacque is out for the remainder of this week

Reassign Pending Tasks

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.

Reassign To: 00450050

☐ Allow Self-Approval

☐ Allow Auto Approval

Administrative Approve/Deny

Act on behalf of the approver selected above by selecting the Approve/Deny buttons below. This action will apply to all tasks pending for the approver selected within the context of this transaction.

Approve Deny Pushback Restart

Chartfield Request Approval

Request ID 0000000210: Pending

Shared Chartfield Approval

Pending: Multiple Approvers, Institution Controller

Not Routed: Multiple Approvers, 1st UW System Admin Approval

Not Routed: Approver - No OPRID, EXMRG 15, Institution Approval

Comments

Return

2. Enter comments stating why CFR is being reassigned
3. Select Reassign To: User whom CFR will be reassigned to
4. Click **Reassign** button from Monitor Approval page to reassign CFR approval to another user

Message

Reassignment Successful (18081,5513)

OK

5.
 - a. Click on **View/Hide Comments** for view of transaction after it has been reassigned by Workflow Administrator and comments on reassignment

University of Wisconsin System SFS Business Process GL.3.15 – Workflow Administrator Chartfield Approval

General Ledger WorkCenter

ChartField Requests Pending My Approval

Comments

Select All / Deselect All

Approve Deny Hold Pushback

Business Requests

Request Details More Details

Select	Request ID	SetID	Field Name	Field Action	Field Value	Attachments
<input type="checkbox"/>	0000000007	UWMSN	DEPTID	Add	999550	Attachments (1)
<input type="checkbox"/>	0000000158	SHARE	ACCOUNT	Add	TES0	Attachments (0)

Approval Flow

Chartfield Request Approval

Request ID 0000000158: Pending

Shared Chartfield Approval

Pending Multiple Approvers Institution Controller

Not Routed ENGBLOOM, ERIC 1st UW System Admin Approval

Not Routed Approver - No OPRID, EXMRG 15 Institution Approval

Comments

System at 07/17/18 - 6:12 PM
Jacqueline out of office

System at 07/17/18 - 6:12 PM
Reassigned from 00905864 to 00884637 (18081,2022)

DONNIE-Consultant DOCTOR at 07/02/18 - 1:36 PM
Approver(s): Please make sure the Field Value is not blank and all the info is correct!

Return

6. Select Approver from dropdown list – comment is optional

Monitor Approvals

Approval Process FieldRequestApproval Definition ID UWMSN

Request ID 0000000013

Approver MILSKI, JACQUELINE

Comment

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

University of Wisconsin System SFS Business Process GL.3.15 – Workflow Administrator Chartfield Approval

Monitor Approvals

Approval Process: FieldRequestApproval Definition ID: SHARE

Request ID: 0000000210

Approver: (Invalid Value)

Comment:

Reassign Pending Tasks

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.

Reassign To:

☐ Allow Self-Approval ☐ Allow Auto Approval

Administrative Approve/Deny

Act on behalf of the approver selected above by selecting the Approve/Deny buttons below. This action will apply to all tasks pending for the approver selected within the context of this transaction.

Chartfield Request Approval

Request ID 0000000210: Pending

View/Hide Comments Start New Path

Shared Chartfield Approval

Admin Approved Diring, Linda for Milski, Jacqueline Institution Controller 07/17/18 - 7:42 PM

Admin Approved Engbloom, Eric 1st UW System Admin Approval 07/17/18 - 7:45 PM

Pending Approver - No OPRID, EXMRG 15 Institution Approval

Comments

Comment History

[Return](#)

8. Select Approver from dropdown list – comment is required for Deny

Monitor Approvals

Approval Process: FieldRequestApproval Definition ID: UWMSN

Request ID: 0000000013

Approver: MILSKI, JACQUELINE

Comment:

9. Click button from Monitor Approval page to act on behalf of the original approver to deny further approval of CFR entry
 - a. View of transaction after it has been Denied by Workflow Administrator

The screenshot shows the 'Monitor Approvals' page in the SFS system. At the top, there's a navigation bar with icons for home, search, menu, and a play button. Below the navigation bar, the page title 'Monitor Approvals' is displayed. The main content area shows the 'Approval Process' as 'FieldRequestApproval' and 'Definition ID' as 'SHARE'. The 'Request ID' is '0000000210'. There is a 'Comment' field. Below this, there's a section titled 'Administrative Approve/Deny' with instructions: 'Act on behalf of the approver selected above by selecting the Approve/Deny buttons below. This action will apply to all tasks pending for the approver selected within the context of this transaction.' Below the instructions are four buttons: 'Approve', 'Deny', 'Pushback', and 'Resubmit'. The 'Resubmit' button is highlighted in orange. Below this section, there's a 'Chartfield Request Approval' section. It shows a flowchart for 'Request ID 0000000210: Denied'. The flowchart starts with 'Admin Approved' by 'DIRING, LINDA for MILSKI, JACQUELINE' on 07/17/18 at 7:42 PM. This is followed by 'Admin Approved' by 'ENGBLOOM, ERIC' on 07/17/18 at 7:45 PM. The final step is 'Admin Denied' by 'Approver - No OPRID, EXMRG 15' on 07/17/18 at 7:51 PM. Below the flowchart, there are sections for 'Comments' and 'Comment History'. A 'Return' link is at the bottom left.

IV. Resubmit After Denial

If a CFR is inadvertently denied it can be resubmitted for approval immediately on the page. Click

This is a close-up of the 'Administrative Approve/Deny' section. It contains the same instructions as the previous screenshot: 'Act on behalf of the approver selected above by selecting the Approve/Deny buttons below. This action will apply to all tasks pending for the approver selected within the context of this transaction.' Below the instructions are four buttons: 'Approve', 'Deny', 'Pushback', and 'Resubmit'. The 'Resubmit' button is highlighted in orange.

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

OR

Navigation: Enterprise Component > Approval > Approval > Monitor Approvals

Monitor Approvals

Search Criteria

Approval Process: FieldRequestApproval
Header Status: Denied
Approver: EXMRG15
Definition ID:
Last Modified:
Approver Status:
Originator:
Requester:
Search

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: EXMRG15
Reassign To:
Comment:
Reassign Selected Approve Selected Deny Selected

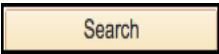
Search Results

Select All Deselect All

Approval Process: Field Request Approval Process

Request ID:
Filter

	Modified	Status	Request ID
1	2018-07-17	Denied	0000000210

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

University of Wisconsin System SFS Business Process GL.3.15 – Workflow Administrator Chartfield Approval

Monitor Approvals

Approval Process FieldRequestApproval Definition ID SHARE

Request ID 0000000210

Comment

Administrative Approve/Deny

Act on behalf of the approver selected above by selecting the Approve/Deny buttons below. This action will apply to all tasks pending for the approver selected within the context of this transaction.

Approve Deny Pushback Resubmit

Chartfield Request Approval

Request ID 0000000210: **Denied** View/Hide Comments

Shared Chartfield Approval

Admin Approved
DIRING, LINDA for MILSKI, JACQUELINE
Institution Controller
07/17/18 - 7:42 PM

→

Admin Approved
ENGBLOOM, ERIC
1st UW System Admin Approval
07/17/18 - 7:45 PM

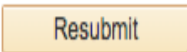
→

Admin Denied
Approver - No OPRID, EXMRG 15
Institution Approval
07/17/18 - 7:51 PM

Comments

Comment History

Return

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

Monitor Approvals

Approval Process FieldRequestApproval Definition ID SHARE

Request ID 0000000210

Approver (Invalid Value)

Comment

Reassign Pending Tasks

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.

Reassign To Allow Self-Approval

Reassign Allow Auto Approval

Administrative Approve/Deny

Act on behalf of the approver selected above by selecting the Approve/Deny buttons below. This action will apply to all tasks pending for the approver selected within the context of this transaction.

Approve Deny Pushback Restart

Chartfield Request Approval

Request ID 0000000210: **Pending** View/Hide Comments Start New Path

Shared Chartfield Approval

Pending
Multiple Approvers
Institution Controller

→

Not Routed
ENGBLOOM, ERIC
1st UW System Admin Approval

→

Not Routed
Approver - No OPRID, EXMRG 15
Institution Approval

Comment History

Return

Revision History

Author	Version	Date	Description of Change
Donnie Doctor	1.10	07/17/2018	Initial draft of document