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JOURNAL APPROVAL SECURITY

PEOPLESOF Online Approval For Department Form 9.2

Security for Journal Entry Approval is granted via the PeopleSoft Online Approval For Department 9.2 Form.

The person keying the Journal Entry enters their DEPARTMENT ID on Line 1 -- the approvers for that DEPARTMENT ID will be notified.

Additionally, the Journal Entry person can notify additional people via the NOTIFY Button.

STEP1: APPROVAL NAVIGATION OPTIONS

APPROVAL FROM EMAIL

If an Approver is NOTIFIED via email, the email link will direct the approver to the exact journal to approve.

APPROVAL FROM APPROVAL TILE

Approver may also access the “Approval Tile” via this navigation: From Employee Self Service Home Page>Approvals Tile. The “Approval Tile” below has 2 pending item for Approval as indicated by the number in lower right corner.

Clicking on the “Approval Tile” will bring the Approver to see the list of Pending Items. This screen will display summary information.

If there are different types of Pending Items for approval, the type and number of Pending items will be listed.

PeopleSoft 9.2 Journal Entry 3.1
If an Approver is already in PeopleSoft Campus Workcenter, the Journal Approval menu option is available here, also. It is a search option to find Journals that are either awaiting your approval or something that was previously approved.

Campus Workcenter includes a link to the GL Journal Approval.
The full screen will show the Description of the Pending Items. In this case, they are Journal Entry Pending Items.

- Journal Entry indicates the type
- Amount, USD
- The **Journal Header Description for second Journal Listed is “Reimbursement for XYZ”** This JE Entry person types this Description manually. Best Practices will be suggested in training.
- UMBC1 is business unit
- 0000209539 is Journal ID
- 2018-02-23 is Entry date
- UMBC1 “Michael” is person that keyed this journal
- Routed is the date it was routed to the approver
STEP 3: REVIEW PENDING DETAIL / ATTACHMENTS

The approver can click on the Pending Item to review the details. The details appear below:

The line details of the Journal show that there are two lines, their descriptions, amounts, and chartstring information.

'View Attachments' available for review:

- Different Colleges or Units will use this for Business Processes.
- Sponsored Funding requires Attachments
STEP 4: BUSINESS PROCESS FOR JE ATTACHMENTS

The next step is to approve the journal, by clicking the green “Approve” Button in the upper right corner.

A smaller box appears to Submit. The Approval Comments are optional for APPROVALS.
DENIAL

STEP 5: DENY TRANSACTION

The same Steps are followed if a Journal is Denied.

Please include explanation in the Deny Comments for the Entry person. The Entry person will receive an email with a link to access this journal.

AD-HOC

AD-HOC APPROVAL

An approver may also choose to add an Ad-Hoc Approver or Ad-hoc Reviewer to the Approval Chain. Ad-hoc Approver requires that the person that is added approve the transaction.

AD-HOC REVIEW

An approver may also choose to add an Ad-hoc Reviewer to the Approval Chain. The pending item is sent to the Ad-hoc Reviewer for ‘information only’ and requires no “Approval” Action.