



PEOPLESOFT 9.2 JOURNAL APPROVAL

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JOURNAL APPROVAL SECURITY

PEOPLESOFT 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.

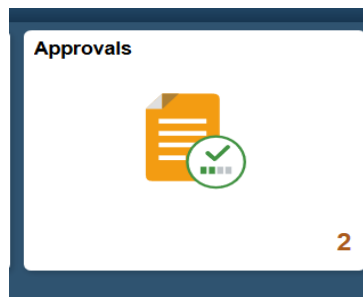
STEP1: APPROVAL NAVIGATION OPTIONS

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.

APPROVAL FROM CAMPUS WORKCENTER

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 screenshot displays the 'Manage GL Journal Approval' page in the PeopleSoft Campus Workcenter. The left sidebar shows a navigation menu with 'GL Journal Approval' highlighted by a red arrow. The main content area includes a search section with the following criteria:

- Business Unit: []
- Line Business Unit: UMBC1
- Journal Date From: 02/02/2018
- To Journal Date: 02/23/2018
- *Approval Status: Pending

Buttons for 'Search' and 'Clear' are present. Below the search criteria is a 'Comments' section with buttons for 'Approve', 'Deny', 'Hold', and 'Pushback'. The 'Journals' section shows a table with the following data:

Select	Journal ID	Unit	Date	Line Unit	Total Debits	Total Credits
<input type="checkbox"/>	0000209517	UMBC1	02/22/2018	UMBC1	\$6.00	\$6.00

Buttons for 'Approve', 'Deny', 'Hold', and 'Pushback' are also present at the bottom of the table.

APPROVAL STEPS

STEP 2: REVIEW PENDING ITEM SUMMARY

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

Journal Entry	Reimbursement for XYZ - UMBC1 / 0000209539 / 2018-02-23 / UMBC1 Michael	Routed
66.00 USD		02/23/2018 >

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.

Reimbursement for XYZ

66.00 USD Approve Deny More


Summary

Business Unit	UMBC1	Journal ID	0000209539
Journal Date	02/23/18	Line Business Unit	UMBC1
Ledger Group	ACTUALS	Year / Period	2018 / 8
Entered by	Michael	Entered on	02/23/18

Lines

Line	Amount	TCODE	Fund Code	Program FIN Name	Department	Account	Program Operational	PC Business Unit	Project	Activity	Source Type	Category	Subcategory	Source of Funds
1 Reimbursement for Nov 2017	66.00 USD		1111	021	10660	7089900								
2 Other Contract Serv - Non DP	-66.00 USD		1111	021	10513	7089900								

Attachments

View Attachments (1) > 

'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.

Reimbursement for XYZ
66.00 USD

Summary

Business Unit UMBC1 Journal ID 0000209539
Journal Date 02/23/18 Line Business Unit UMBC1
Ledger Group ACTUALS Year / Period 2018 / 8
Entered by Michael Entered on 02/23/18

Lines

Line	Amount	TCODE	Fund Code	Program FIN Name	Department	Account	Program Operational	PC Business Unit	Project	Activity	Source Type	Category	Subcategory	Source of Funds
1 Reimbursement for Nov 2017	66.00 USD		1111	021	10660	7089900								
2 Other Contract Serv - Non DP	-66.00 USD		1111	021	10513	7089900								

▼ **Attachments**

View Attachments (1) >

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

Cancel Approve Submit

You are about to approve this request.

Approver Comments

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.

The screenshot displays a software interface for AD-HOC APPROVAL. At the top, there is a section titled "Lines" containing a table with the following data:

Line	Amount	TCODE	Fund Code	Program FIN Name	Department	Account	Program Operational	PC Business Unit	Project	Activity	Source Type	Category	Subcategory	Source of Funds
1 Reimbursement for Nov 2017	66.00 USD		1111	021	10660	7089900								
2 Other Contract Serv - Non DP	-66.00 USD		1111	021	10513	7089900								

Below the table, there is a section titled "Attachments" with a "View Attachments (1)" button. Underneath is a text area for "Approver Comments". At the bottom, there is an "Approval Chain" section with a right-pointing arrow. A large red arrow points from the right towards the "Approval Chain" section.

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.

