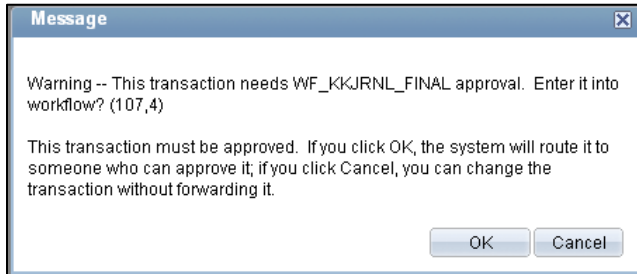


If you have the **intermediate user role**, the following message will be displayed:



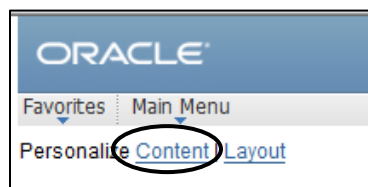
You will receive this message if:


- a. you are approving a budget journal that came to your Worklist from a college/division user and the DEPT – COLL/DIV – PROVOST – BUDGET approval path was chosen OR
- b. you are creating the budget journal and you have chosen the DEPT – COLL/DIV – PROVOST – BUDGET approval path. NOTE: Intermediate users **should not** choose the DEPT – COLL/DIV – BUDGET approval path.

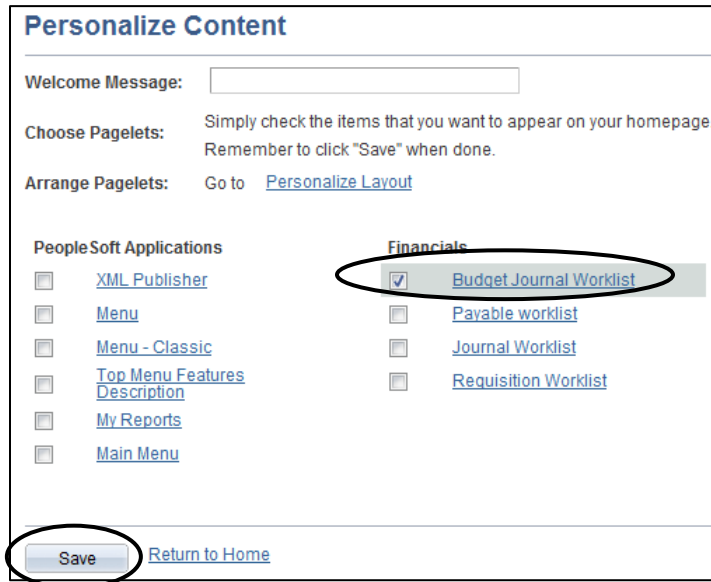
Click  and the budget journal will be entered into the workflow.

How to place the Budget Journal Worklist on the Home Page

Step 1: To place the Budget Journal worklist on your home page, click the [Content](#) hyperlink. This link is on your Home Page.



Step 2: The Personalize Content page is displayed. Click the Budget Journal Worklist checkbox and then click .



Personalize Content

Welcome Message:

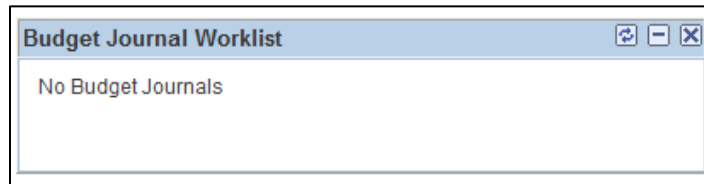
Choose Pagelets: Simply check the items that you want to appear on your homepage. Remember to click "Save" when done.

Arrange Pagelets: Go to [Personalize Layout](#)

PeopleSoft Applications	Financials
<input type="checkbox"/> XML Publisher	<input checked="" type="checkbox"/> Budget Journal Worklist
<input type="checkbox"/> Menu	<input type="checkbox"/> Payable worklist
<input type="checkbox"/> Menu - Classic	<input type="checkbox"/> Journal Worklist
<input type="checkbox"/> Top Menu Features Description	<input type="checkbox"/> Requisition Worklist
<input type="checkbox"/> My Reports	
<input type="checkbox"/> Main Menu	

[Return to Home](#)

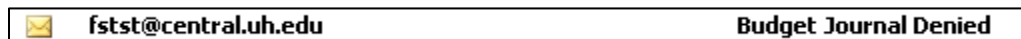
Now the Budget Journal Worklist Pagelet is set up on the Home Page.



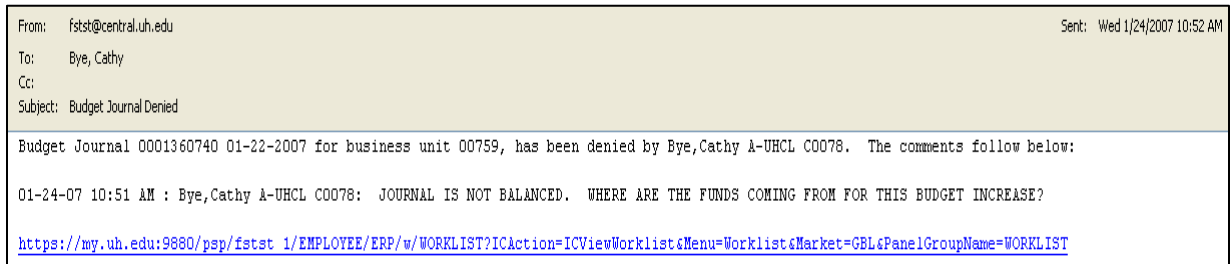
How to process a "denied" budget journal

If a budget journal has been given an Approval Status of "Deny", an automated email will be sent to the originator of the budget journal. The budget journal will also move to the originator's budget journal worklist. The journal is updatable by the originator and can be corrected and re-entered into the workflow process.

The deny email looks like this on the Outlook Inbox:



When the email is opened, it looks like this:



As you can see, a hyperlink is provided. To be automatically directed to the budget journal, sign into PeopleSoft Finance first and then click the hyperlink. The budget journal pages will be displayed automatically – no navigation is needed.

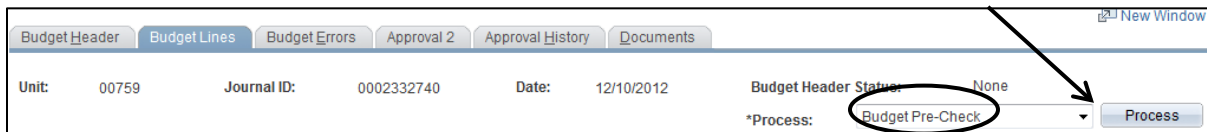
In addition to an automated email, the denied budget journal moves to the originator’s worklist. This is what the worklist looks like:



Notice the Worklist Action states "Approval Denied" in red. Click the [View Item](#) hyperlink to access the budget journal.

Step 1: Click the Approval 2 tab and read the Long Description to know what needs to be corrected on the budget journal.

Step 2: Once the correction has been made, click the Budget Lines tab and do the “Budget Pre-Check” again.



Once the status is “C”, click the Approval 2 tab, change the Approval Action to “Approve” and click [Apply](#). The budget journal has been re-entered into the workflow.

How to Use Approval History

The Approval History tab provides the status of the budget journal along the current approval path. The history provided does not list the complete history of the budget journal. To see the complete history, run the public query UHS_WF_BUD.

Step 1: Click the Approval History tab for the budget journal.

Step 2: Click the  button and the current history will be displayed. The data displayed is:

- a. **Instance** – the process instance number for the transaction
- b. **Step** – the steps of the approval path the journal has taken
- c. **Path** – the path that was chosen by the originator of the journal.
- d. **Status** – the status of the budget journal at each step in the path. The values are:
 - A (Approved)** The budget journal has been approved and moved to the next step in the approval process
 - D (Denied)** The budget journal has been denied routing the budget journal back to the originator
 - I (Initiated)** The budget journal has been created
 - P (Pending)** Approval action for the budget journal has not been selected yet for each step in the approval process
 - R (Recycled)** The budget journal has been moved back one step in the approval process
 - S (Skipped)** Prior approval levels that have been "skipped". For example, the budget office creates and posts a budget journal. The first step would have "I" for Initiate and the "S" for Skip at the COLL/DIV level.

- e. **Date/Time** – This is the date and time stamp of the approval action
- f. **User ID** – This is the User ID of the person choosing the approval action along the approval path.
- g. **Awaiting Approval From** – This is the security role for the next step in the Approval process.

Budget Header
Budget Lines
Budget Errors
Approval 2
Approval History
Documents

Unit: 00759 Journal ID: 0002319717 Date: 09/01/2012

Budget Header Status: P

[Get History](#)

Instance	Step	Path	Status	Date/Time	User ID	Name
1	2113260		A	I	08/22/12 11:15:29AM	Hoffman,Roxanne
2	2113260	Step 1	A	S	08/22/12 11:15:29AM	
3	2113260	Step 2	A	A	08/22/12 11:15:29AM	Hoffman,Roxanne
4	2113260	Step 3	A	A	08/22/12 11:52:37AM	Edwards,Julie A
5	2113260	Step 4	A	A	08/22/12 12:08:50PM	Green,Susan Marie

Awaiting Approval From: **Approved**