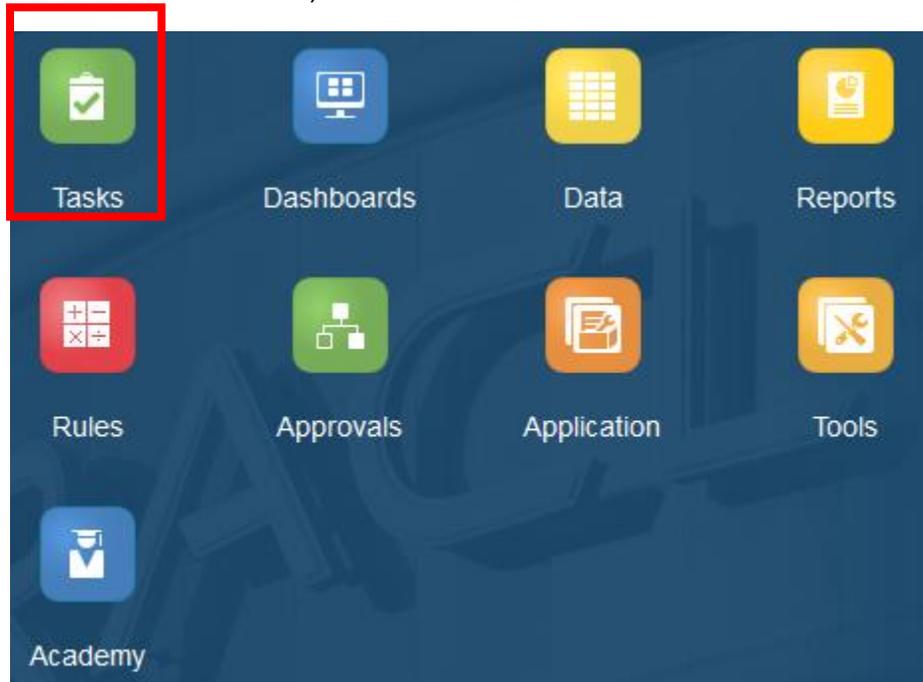
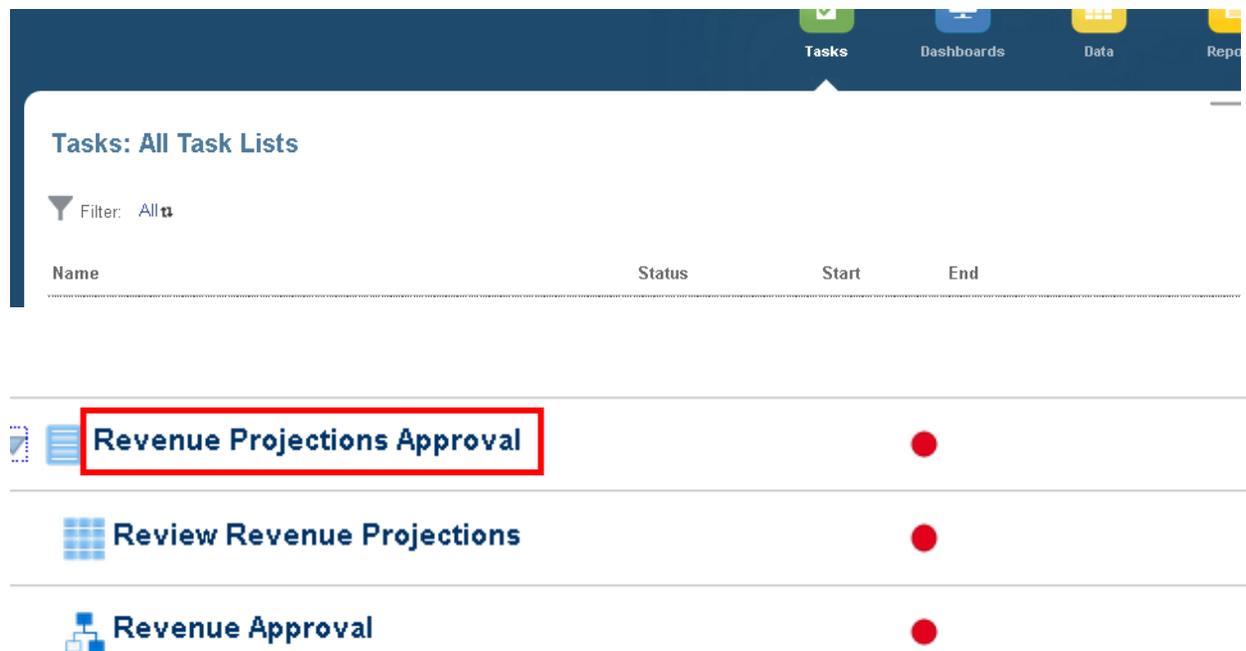


Workflow Process – Revenue Projections Approval

On the home next screen, click on the **Tasks** icon:

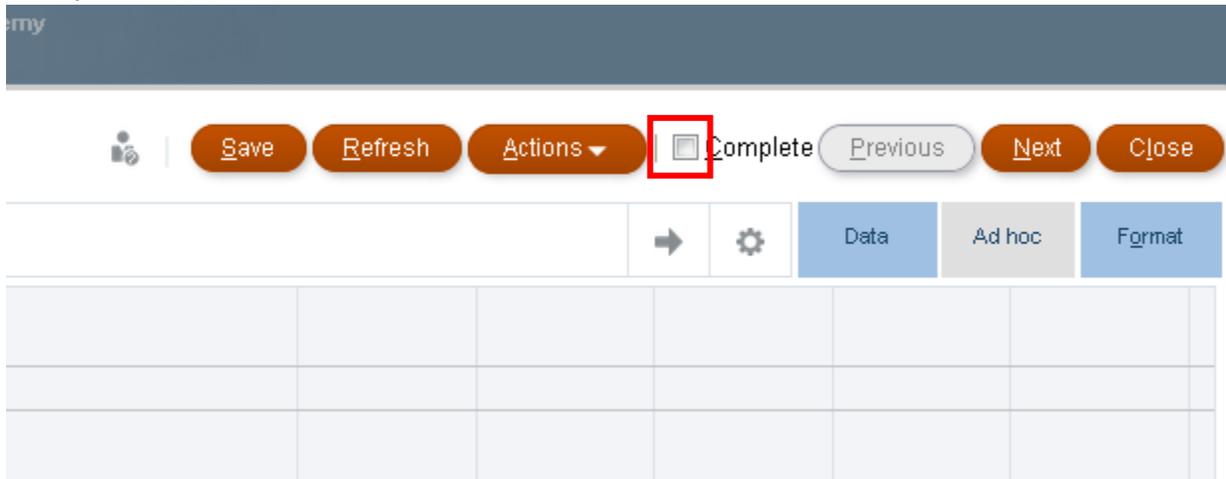


Approval involves two tasks: Reviewing the work in your unit, and approval.



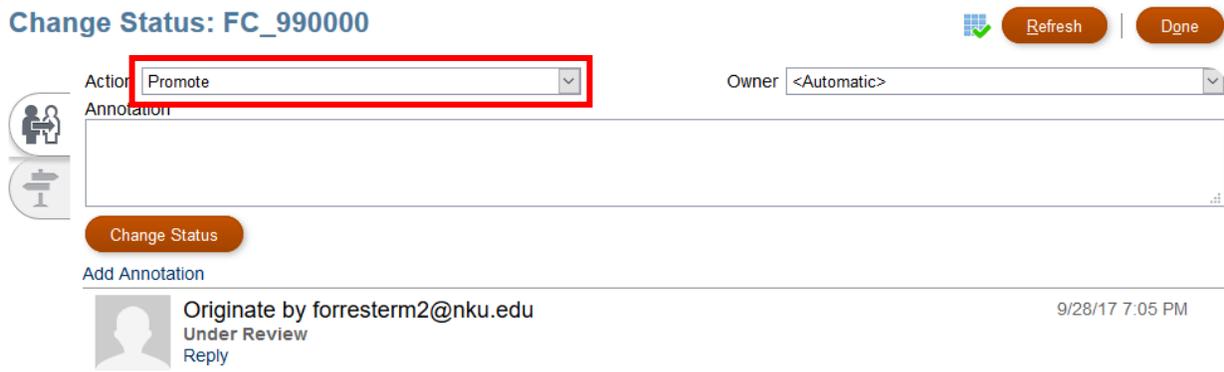
The Revenue Projections Task will load a single report that summarizes all of the changes to every fund center available for Revenue. Once you have reviewed this with your team, you may mark

“Complete” on this task.



Then, click the “NEXT” button.  The following screen appears. To approve, the dropdown next to ACTION should state “Promote”. Promote means to promote to the next person in your workflow process – usually this is automatically determined based on the ownership in the planning unit hierarchy definition.

Change Status: FC_990000



Next, click on . Once this is completed, the status appears below. It shows that the status has been promoted.

Workflow

Change Status: FC_990000



Refresh

Done

Add Annotation



Promote by admtestinput@gmail.com

10/10/17 6:31 PM

Under Review
Reply



Originate by forresterm2@nku.edu

10/4/17 3:36 PM

Under Review
Reply

Done

Then click

Everyone under the approved node should only be able to read the data after approval. This likely completes your Approval Task. You may now mark this task as complete.

my

Save Refresh Actions Complete Previous Next Close

Data Ad hoc Format

Further approval:

Change Status: FC_9900



Refresh

Done

Action Sign Off

Owner <Automatic>

Annotation



Change Status

Add Annotation

No data to display

Workflow

Change Status

Next, click on **Change Status**. Once the user clicks on Change Status, there is the option to **APPROVE** or **REJECT**.

Change Status: FC_9900



Refresh

Done

Action Owner

Annotation

Change Status

Add Annotation

No data to display

Click Reject and Done. Once completed, it is sent back to the previous owner/approver.

Change Status: FC_9900

Action

Annotation

Click Approve and Done.

Change Status: FC_9900

Action

Annotation

Once completed, the next screen appears, that shows it has been "signed off".

Approvals

Filter: Budget  | FixCostAdjst 

	FC_9900 admvicepres@gmail.com Signed Off
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