Approve New Foundation Account

Location(s):

    myNKU

Purpose: The process for approving a new NKU Foundation account can be found in myNKU. Account requests will need to be approved by the departments(s) responsible for the new account. All requests can be approved, sent back to requestor, or rejected via the Universal Worklist tab of myNKU.

1. Log into myNKU.

2. Select the Universal Worklist tab.
   - Items that need to be reviewed are reflected in the grid.
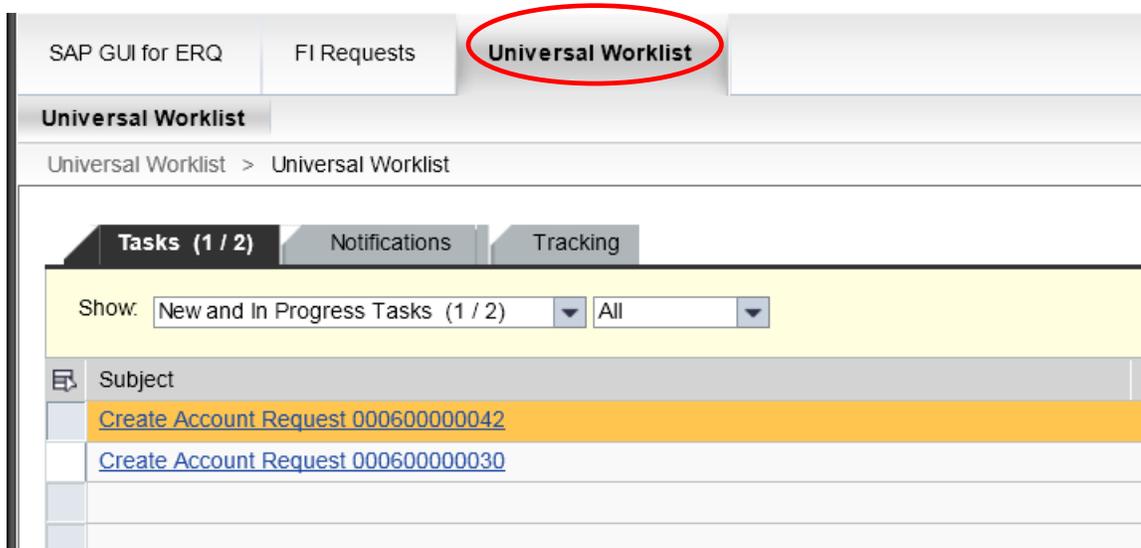
3. Click on the hyperlink (the underlined portion) to open the request.
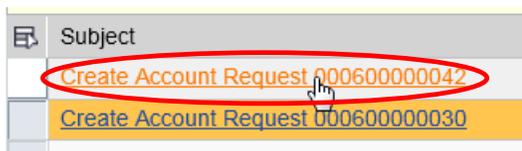
4. Review the information at the top of the screen to ensure accuracy and review the attachments

Create Account

Department Section	Foundation Accounting Section

Expenditure Purpose: New Foundation Scholarship Account
Account Name: Fnd Scholarship
Account Description: Foundation Scholarship
Responsible User Name: DAVISL
Responsible Name (Last, First): Davis,Linda
Hierarchy: 020501-NKU Foundation Administration
Classification: Permanently Restricted
Functional Area: 0800-Student Financial Assistance

Attachments

[Browse...] [Upload File]

☐ Doc1.doc ⬅
☐ exceltest.xlsx ⬅
Delete Attachment(s)

Note: Click the hyperlink (the underlined portion) for that attachment to open in a new window (pdf or documents with a 3 character extension; i.e. doc or xls) or save the file to your computer to view (documents with a 4 character extension; i.e. docx or xlsx.)

- You may enter necessary comments in the Comments text box

Comments

01/09/2013 14:54:31 Genelle Antoine (ANTOINEG1)
This is a training simulation for a foundation scholarship account.

5. If changes are needed before approving, click Back to Requestor. You can use the comment box to explain why the request is being sent back.

[Back to Requestor]

- A confirmation message that the request was returned will appear.

✅ Request 600000030 has been returned

6. If the new account is not needed, click Reject.

    Reject

    - A confirmation message that the request was rejected will appear.

      Request 600000042 has been rejected

7. If all information entered is satisfactory, click Approve.

    Approve

    - A confirmation message that the request was approved will appear.

      Request 600000043 has been approved

8. Once the workflow has been completely approved or rejected, the notification can be viewed under the Notifications tab.

9. Highlight the row and the details will be reflected under the grid.

	Tasks (1 / 2)	**Notifications (8 / 10)**	Tracking

Show: All

	Subject	From
	Fundcenter 241040511 and Fund 0700003659 created	Northern Kentucky University
	Fundcenter 241040510 and Fund 0700003658 created	Northern Kentucky University
	Fundcenter 241040509 and Fund 0700003657 created	Northern Kentucky University

Fundcenter 241040511 and Fund 0700003659 created

Sent Date:	Jan 22, 2013 11:17 AM By Northern Kentucky University	Priority:	Medium
Status:	Read
Description:	A new NKU Foundation account has been established as follows:Responsible: ANTOINEG1 - Antoine,GenelleFund: 0700003659 - Fnd Scholarship 2Fund Center/Cost Center: 241040511 - Fnd Scholarship 2Hierarchy node: 060804 - Landon, WilliamFunctional Area: 0800 - Student Financial AidPurpose:New Foundation Scholarship Account 2Comments: 01/22/2013 11:15:35 TEST BAILEY JO (TESTBAILEYJO) testbaileyjo has completed the foundation accounting section and approved.Please contact NKU Foundation Accounting at extension 5126 or foundation@nku.edu with questions regarding this new account.