Approval WorkFlow

Table of Contents

This Job Aid covers the Approval WorkFlow for Budget Journals and Transfers in the upgraded ONEPeralta system.

Log on to ONEPeralta

Sign in

All ONEPeralta Users

1. Enter into your browser > one.peralta.edu
2. Enter > Peralta email **User ID** and **Password**
3. Click > **Sign In**

> **Note**
> Due to periodic system improvements and your evolving role within the system, the screenshots in this training may be different from what you will see when you log in to ONEPeralta.
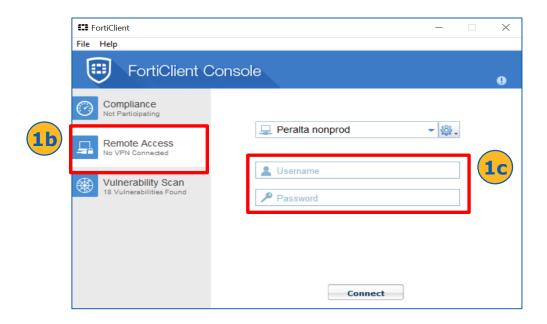
Log on to ONEPeralta (cont'd)

Turn on VPN

All ONEPeralta Users

If you are having trouble logging into to ONEPeralta, you may need to connect to Peralta's **Virtual Private Network** (VPN) before you are able to log in to ONEPeralta. Follow the steps below to connect to VPN, then try logging in again.

Turn on VPN using **one of two methods**:

1. Desktop (recommended method)
   a. Open > **FortiClient**
   b. Select > **Remote Access**
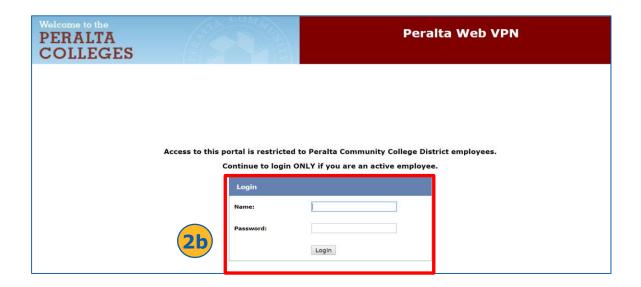   c. Enter > Peralta email **Username** and **Password**

Log on to ONEPeralta (cont'd)

Turn on VPN

All ONEPeralta Users

2. Web / Browser
   a. Enter into your browser > https://access.peralta.edu/
   b. Enter > Peralta email **Username** and **Password**

Approval WorkFlow

Approve a Budget Journal or Transfer

Approvals will follow the following WorkFlow:

Budget Journals	**Budget Transfers**
Level 1: **Department Manager**	Level 1: **Department Manager**
Level 2: **Campus Business Manager**	Level 2: **Campus Business Manager**
Level 3: **District Finance**	

1. Click > **NavBar** icon > **Approvals**
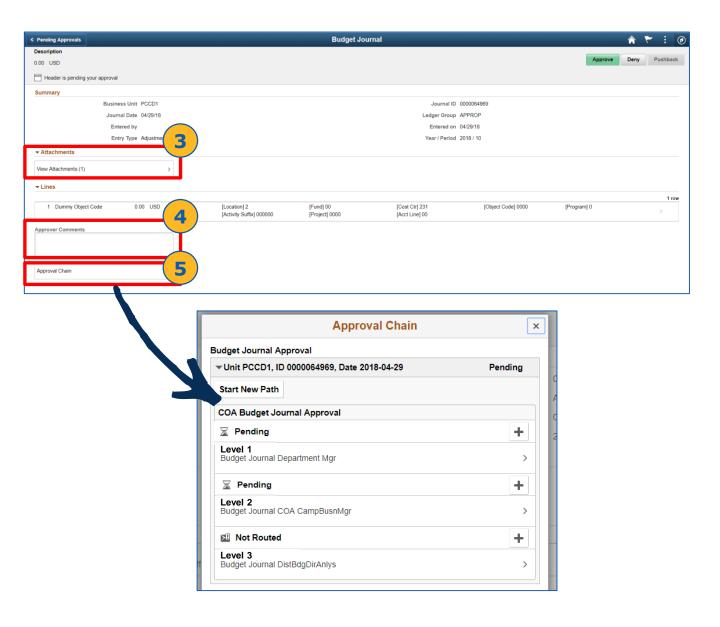2. Select > **Budget Journal** or **Transfer** to review

Approval WorkFlow

Approve a Budget Journal or Transfer

3. Click > **View Attachments**
4. Review > **Approver Comments** from any previous approvers
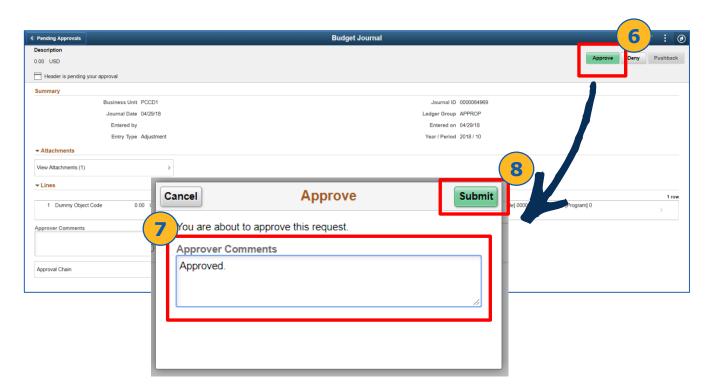5. Click > **Approval Chain** to view Approval Flow and Status

Approval WorkFlow

Approve a Budget Journal or Transfer

6. Click > **Approve**
7. Enter > **Approver Comments** (optional)
8. Click > **Submit** to send the Budget to the next level approver
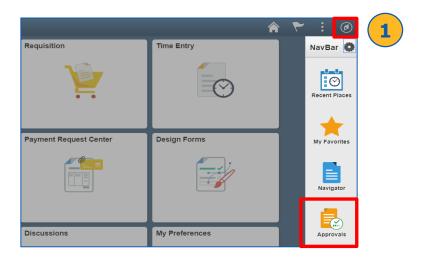
Approval WorkFlow

Deny a Budget Journal or Transfer

When a Budget Journal or Transfer is denied, an email is triggered to the Requestor to correct the Budget and Re-Submit for Approval.

1. Click > **NavBar** icon > **Approvals**
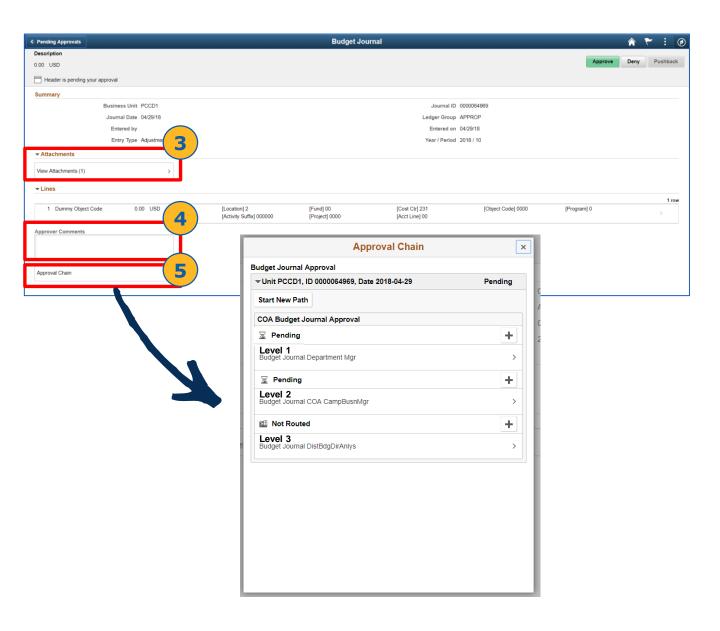2. Select > **Budget Journal** or **Transfer** to review

Approval WorkFlow

Deny a Budget Journal or Transfer

3. Click > **View Attachments**
4. Review > **Approver Comments** from any previous approvers
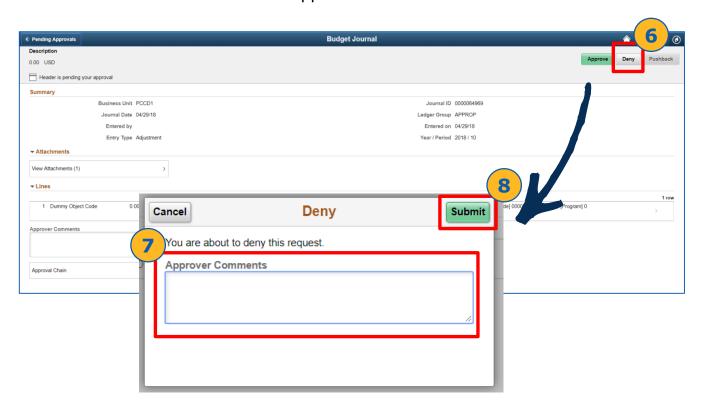5. Click > **Approval Chain** to view Approval Flow and Status

Approval WorkFlow

Deny a Budget Journal or Transfer

6. Click > **Deny**
7. Enter > **Approver Comments** (required)
8. Click > **Submit** to trigger an email to the requester with Budget Journal Details and access link to the Budget Journal. The requester will correct errors and re-submit to the Approval WorkFlow
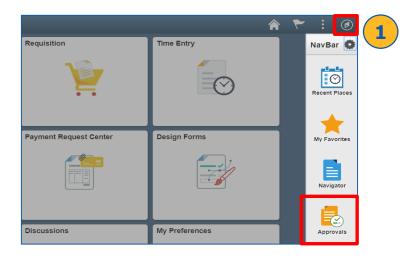
Approval WorkFlow

Pushback a Budget Journal or Transfer

Only Level 2 and 3 Approvers are able to Pushback a Budget Journal or Transfer. This will send the budget back for edits, and can be resubmitted to the Level 2 or 3 Approver.

1. Click > **NavBar** icon > **Approvals**
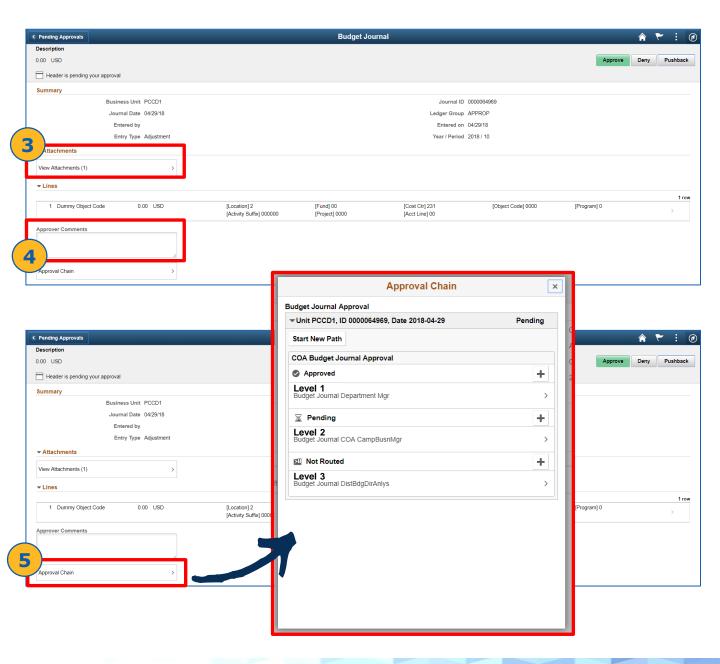2. Select > **Budget Journal** or **Transfer** to review

Approval WorkFlow

Pushback a Budget Journal or Transfer

3. Click > **View Attachments** to review supplemental materials
4. Review > **Approver Comments** from Level 2 or 3 Approvers
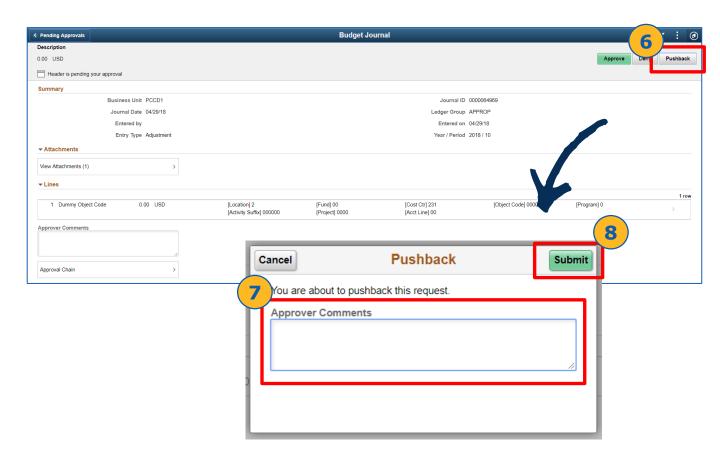5. Click > **Approval Chain**

Approval WorkFlow

Pushback a Budget Journal or Transfer

6. Click > **Pushback**
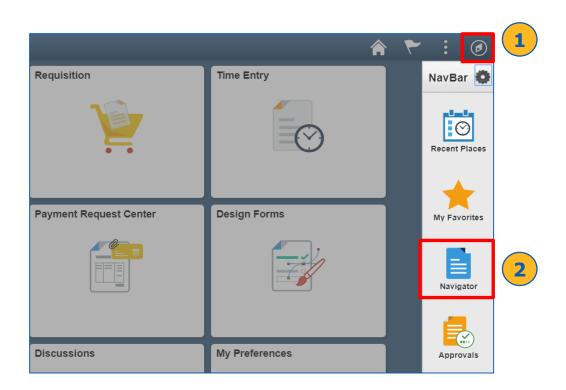7. Enter > **Approver Comments**
8. Click > **Submit**

Approval WorkFlow

Correct Budget Journal after Pushback

Follow the steps below to correct a budget journal or transfer that has been pushed back by a Level 2 or 3 Approver.

1. Click > **NavBar** icon
2. Click > **Navigator**

Approval WorkFlow

Correct Budget Journal after Pushback

3. Click > > **Commitment Control** > **Budget Journals** > **Enter Budget Journals**
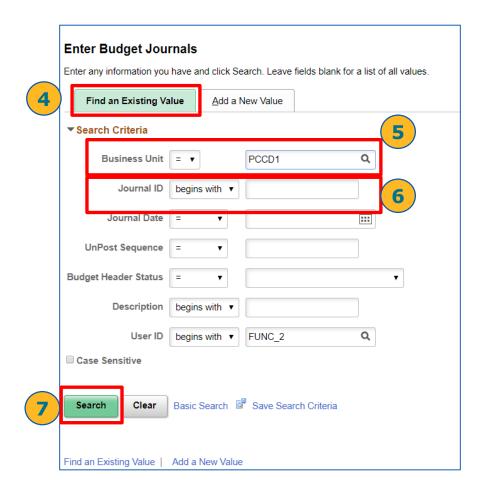
Approval WorkFlow
Correct Budget Journal after Pushback

4. Click > **Find an Existing Value**
5. Enter > **Business Unit**: **PCCD1**
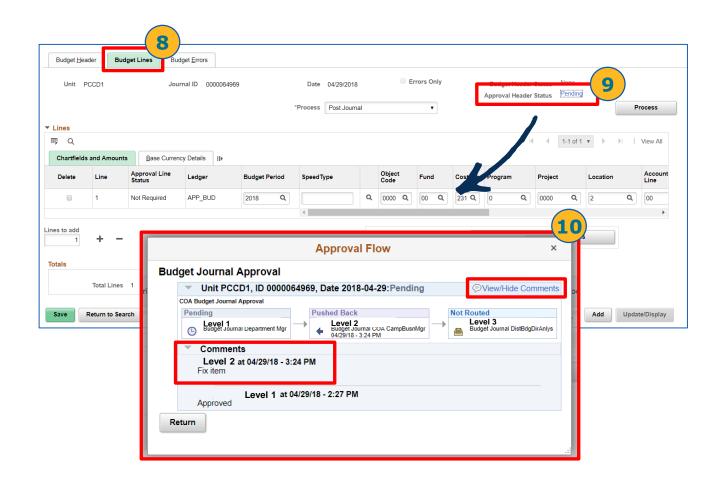6. Enter > **Budget Journal ID**
7. Click > **Search**

Approval WorkFlow

Correct Budget Journal after Pushback

8. Click > **Budget Lines**
9. Click > **Approval Status (Pending)**
10. Review > **Approval Flow** and **Comments** to understand changes required
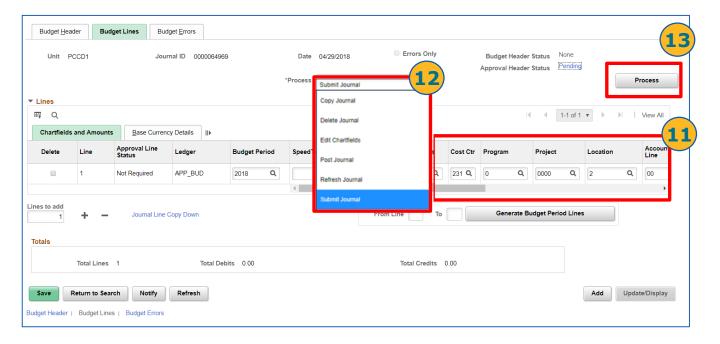
Approval WorkFlow

Correct Budget Journal after Pushback

11. Enter > **Corrected information in Budget Lines**
12. Click > **Submit Journal**
13. Click > **Process** to continue the approval process with the updated Budget Journal

Approval WorkFlow
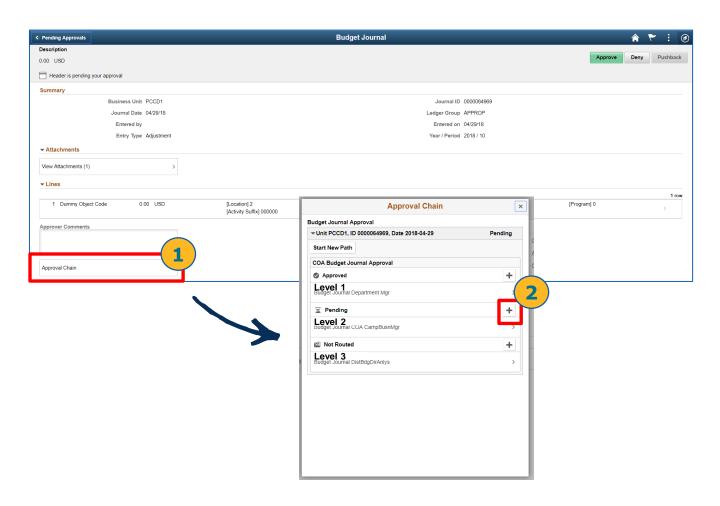
Add an Ad Hoc Approver

If another approver (other than those included in the WorkFlow) is required, you can add an ad hoc approver to the WorkFlow.

From the Budget Journal Page
1. Click > **Approval Chain**
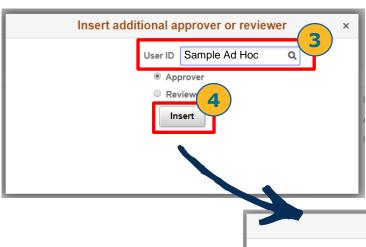2. Click > **(+)**
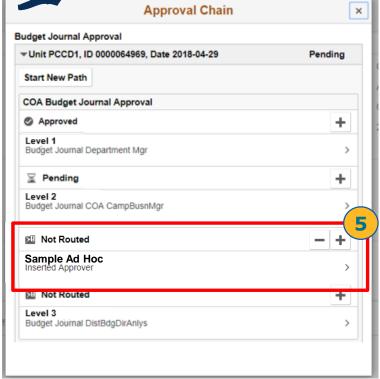
Approval WorkFlow

Add an Ad Hoc Approver

3. Enter > **User ID** for new approver
4. Click > **Insert**
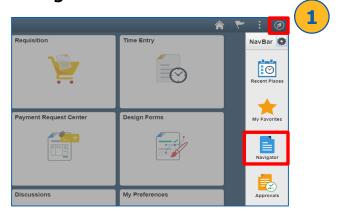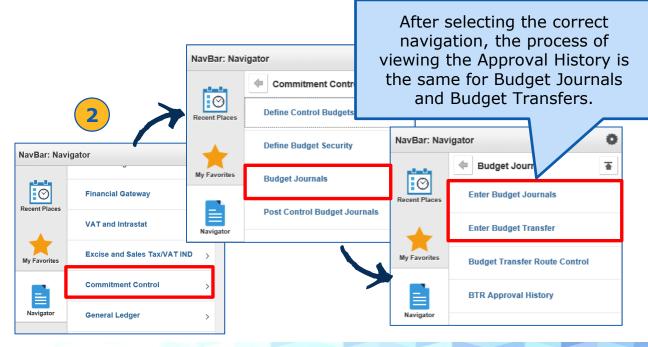5. The new approver will be added next in the **Approval Chain**

Approval WorkFlow

View Approval History

This section reviews the steps to view the Approval History of a Budget Journal or Transfer.

1. Click > **NavBar** icon > **Navigator**
2. Click > **Commitment Control** > **Budget Journals** > **Enter Budget Journals** OR **Enter Budget Transfers**

After selecting the correct navigation, the process of viewing the Approval History is the same for Budget Journals and Budget Transfers.
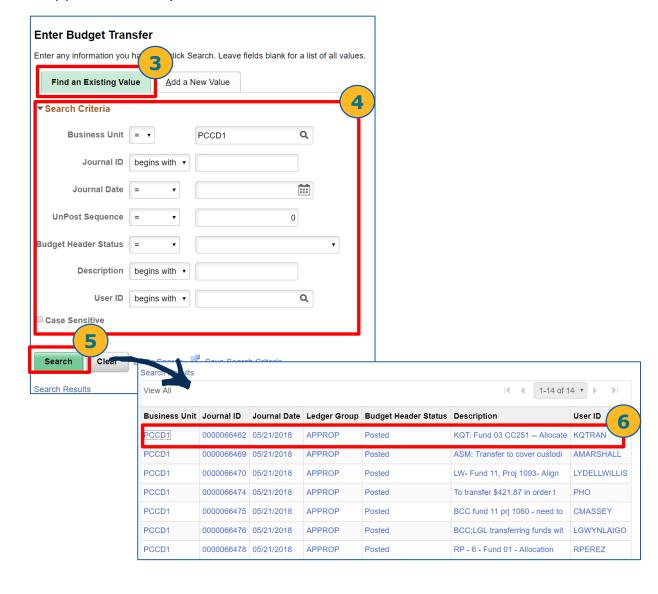
Approval WorkFlow

View Approval History

3. Click > **Find an Existing Value**
4. Enter > **Search Criteria**
5. Click > **Search**
6. Select > the Budget Journal or Transfer for which you would like to view the Approval History
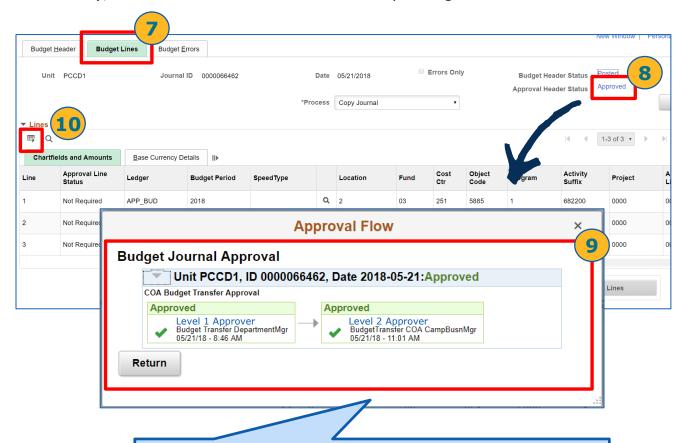
Approval WorkFlow

View Approval History

7. Click > **Budget Lines** tab
8. Click > **Approval Header Status** hyperlink
9. View > **Approval History**
10. Click > **Grid Action Menu** icon to personalize the table (hide columns, zoom), or to download to an Excel file for printing

Note that you can only view the Approval History for transactions created in ONEPeralta. The approval history of transactions from PROMT are not available.