

There are two ways to change the departmental approver on e-Journals:

- 1) Change the default approver on all e-Journals
- 2) Change the approver on a single journal entry

1. How to Change Default Approver on all e-Journals

A preparer can have up to three default approvers added to his/her **preparer security access form**. This form is submitted to gain access to the e-Journal system. If you need to change the approvers on all the journal entries that you create after submitting the Preparer security access form, you should use the "Change Approver/ Change Access Form" located on the **EJ home page**. See the green box below.

The screenshot shows the e-Journal system homepage. At the top is a navigation bar with links: HOME, BLOGS, CALENDARS, DEPARTMENTS, FORMS, NEWS, RESOURCES, TRAINING. Below this is a 'TUITION' section. On the left sidebar, there are sections for 'General Accounting' (with links like Ask Us, Contact Us, e-Journal Entry, e-Journal Entry Excel Option, New Preparers, Mission Statement, Resources and Forms), 'Useful Links' (with links like e-Journal Entry Help, Buying and Payment Guide, FBS Organizational Chart, General Accounting Organizational Chart, U Regulations Library, EthicsPoint, FBS Blogs), and 'Contact General Accounting' (with phone number 801.581.5810 and address 201 S Presidents Cir, RM 403, SLC UT 84112). The main content area has a heading 'What is e-Journal Entry?' followed by a paragraph explaining the system. Below this are two red buttons: 'New Preparers' and 'e-Journal Entry'. Further down is a 'Common Questions' section with six red buttons: 'How do I add backup info to my e-Journal?', 'How do I change the Departmental Approver?', 'How do I find out the status of my e-Journal entry?', 'How do I share an e-Journal with others?', 'How do I use the Search feature?', and 'How can I upload entries via Excel?'. At the bottom is an 'Additional Learning Information' section with a list of links. A green arrow points from the left to a green-bordered box around the link 'e-Journal Change Approver/Change Access Form - Change or delete approvers'.

e-Journal Entry - Change Approver / Change Access Form

This form may only be used to change approvers and/or change one's access.

1

Action: *

Preparer Name: *

Preparer Emplid: *

Preparer Phone: *

Preparer Email: *

2

Owner Org

List the highest level/highest rollup Organization for which you are requesting preparer access. We want to capture the Organization that is ultimately responsible for the journal entries you prepare. The Organization you list here in no way restricts the chartfields used in your journal entries. If you create journal entries for multiple, unrelated Organizations, submit this form multiple times, once for each Owner Org.

Orgid: *

Org Name: *

3

Default Approvers (optional):

You may elect to have up to three departmental approvers automatically added to every e-Journal you create. If it is more convenient for you to remove approvers when they are not required/available, rather than adding them each time they are needed, this option may work best for you. Provide the Name and Emplid of each default approver. If you leave the Level blank, each approver will be auto-assigned level 1 and the approvals can occur concurrently. If you have more than one default approver, and want the approvals to happen in a particular order, number the order in which they should occur in the Level field.

Name	Emplid	Level
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

There are three sections on the e-Journal Change Approver/ Change Access Form that will need to be filled out before submitting the form. All the fields with an * next to them are required information.

- 1) Preparer's information
- 2) Owner Org information
- 3) Default Approvers Information

1. Preparer's Information

The first part of the form that needs to be filled out is information on the preparer. First you will need to select "Update Access" on the Action drop down menu. Continue the first section by filling out all the required preparers' information.

2. Owner Org Information

List the highest level/highest rollup Organization for which you are requesting preparer access. If you create journal entries for multiple, unrelated Organization, submit this form multiple times, once for each Owner Org.

3. Default Approvers information

Next complete the Default Approvers section of the form. In this section you will specify who you want to approve your journal entries. You will be required to input their name, employee ID # and level. This process can be repeated if multiple approvers are desired.

If you leave the Level blank, each approver will be auto-assigned level 1 and the approvals can occur concurrently. If you have more than one default approver, and want the approvals to happen in a particular order, number the order in which they should occur in the "Level" field.

Submitting the Form

After completing the form, click on the submit function at the bottom of the page. This will send the form to General Accounting for processing and set up.

Each default approver will be auto assigned to journal entries created by the preparer, and must open and approve each entry the preparer submits (unless manually removed from entries)

2. How to change the approver on a single entry

Departmental approvers can also be removed or added to a single entry by the preparer at any time before the approver has approved the entry. Removing an approver could be initiated if the approver is on vacation or otherwise unavailable to approve a journal entry.

Note: as long as the approver on the journal entry hasn't approved the entry, the preparer can recycle the entry back to themselves to change the approver(s) on the entry.

To change an approver on a single entry, click the **Approvals** tab within the Journal Entry

The screenshot shows the 'e-JOURNAL ENTRY' interface for 'FINANCIAL & BUSINESS SERVICES THE UNIVERSITY OF UTAH'. The 'Approvals' tab is selected. The interface displays journal entry details such as JOURNAL ID (EJ00219312), ACCTG DATE (06/01/2017), and JOURNAL STATE (Preparing). Below the details, there are tabs for 'Lines', 'Backup Documentation', 'Approvals', and 'Tracking'. The 'Approvals' tab is active, showing a table of approvers. A green arrow points to the 'Approvals' tab.

SEL	ROLE	LEVEL	STATUS	EMPLID	NAME
<input type="checkbox"/>	Departmental Approval	1		00342646	BAGGETT,REBECCA
<input type="checkbox"/>	Departmental Approval	2		00103917	CHURCH,DEAN BRUCE

After clicking on the Approval tab the default approvers will be displayed. An example is shown below.

The screenshot shows the 'Approvals' tab with a table of default approvers. A green arrow points to the 'SEL' column.

SEL	ROLE	LEVEL	STATUS	EMPLID	NAME
<input type="checkbox"/>	Departmental Approval	1		00342646	BAGGETT,REBECCA
<input type="checkbox"/>	Departmental Approval	2		00103917	CHURCH,DEAN BRUCE

To delete approvers - check the box(es) under "SEL" of the approvers you want to delete.

Click the **Approvals** menu, and then click on "Delete Selected".

The screenshot shows the 'Approvals' menu with the 'Delete Selected' option highlighted. A green arrow points to the 'Delete Selected' option.

LEVEL	STATUS	EMPLID

When the "Delete Selected" option has been selected, a pop up box will appear. In the box the preparer should add a comment(s) to why they are deleting an approver on the specific journal entry. Click the **Submit** button when you are finished adding comments.

Please enter some comments
Comments are optional for this action.

Submit Cancel

Note: At this point an alternative approver(s) can be added to the e-Journal if desired.

To add Approvers - Click the Approvals menu and then click on the "Add Dept. Approver" on the drop down menu

Lines Backup Documentation Approvals Tracking

Select Lines Approvals

+ Add Dept. Approver

Delete Selected

LEVEL STATUS EEMPLID

Specify the approver's Emplid (can be found using the spyglass – must be a current employee with an email address on employment record).

Lines Backup Documentation Approvals Tracking

Select Lines Approvals

SEL	ROLE	LEVEL	STATUS	EEMPLID	NAME
	Departmental Approval	1			

+ Add Dept. Approver

Enter the first and last name of the individual that you would like to add as an approver

Employee Prompt

Id:

First name:

Last name:

Search Cancel

Note: that the full name does not need to be entered in to search if the full name is not known. See screen shot below:

Employee Prompt

Id:

First name:

Last name:

<u>EMPLID</u>	<u>NAME</u>	<u>HOME DEPT ID</u>	<u>HOME DEPT</u>
00047288	BARKER,MARCI JANE	00348	GENERAL ACCOUNTING - CAMPUS

Once the individual ID information has been found, click on the EMPLID # to select the individual that you want to approve the e-Journal. See the green box below.

Employee Prompt

Id:

First name:

Last name:

<u>EMPLID</u>	<u>NAME</u>	<u>HOME DEPT ID</u>	<u>HOME DEPT</u>
00047288	BARKER,MARCI JANE	00348	GENERAL ACCOUNTING - CAMPUS

After you have selected their Emplid number, their information will automatically populate under the **Approvals** tab.

e-JOURNAL ENTRY
FINANCIAL & BUSINESS SERVICES
THE UNIVERSITY OF UTAH

Home Downloads Journal Search Journal ID: Search New Journal

Journal Entry Sharing

JOURNAL ID: EJ00219312 ACCTG DATE: 06/01/2017 JOURNAL STATE: Preparing Dept Approv

CREATED ON: 04/21/2017 OWNER ORGID: 00348 - GENERAL ACCOUNTING - CAMPUS

GL POSTED DATE: SOURCE: EJG - eJournal - General Accounting PREPARED BY: 00047288 - BARKER,MARCI JAN

FROM EXCEL: No SUB SOURCE: 000 - NO SUB SOURCE DEFINED PREPARER EMAIL: marci.barker@admin.utah.edu

RECYCLED: Yes - REQUESTED BY: Marci Barker PREPARER PHONE: 801-581-7296

EXPLANATION: Demo Entry

Backup Documentation

Retained in Department

Backup Being Mailed

Lines Backup Documentation **Approvals** Tracking

Select Lines Approvals

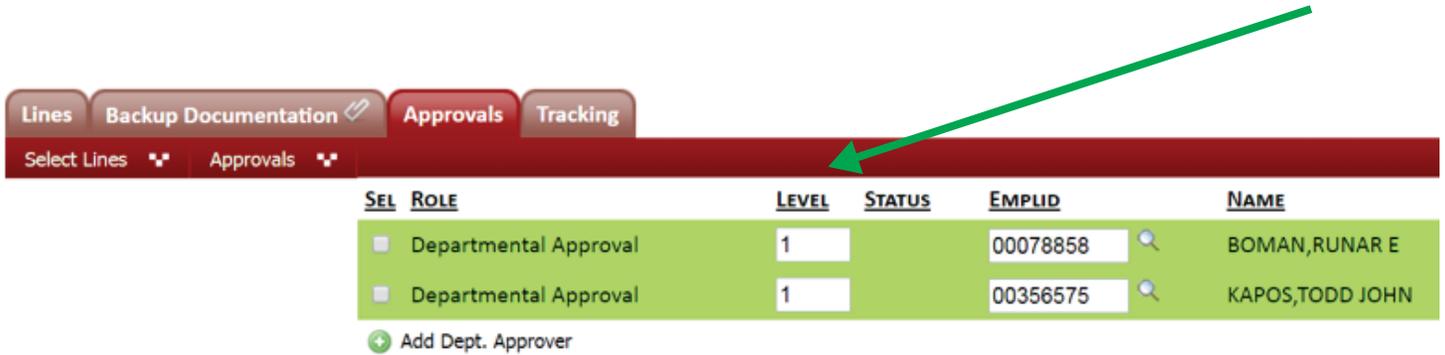
<u>SEL</u>	<u>ROLE</u>	<u>LEVEL</u>	<u>STATUS</u>	<u>EMPLID</u>	<u>NAME</u>
<input type="checkbox"/>	Departmental Approval	1		00047288	BARKER,MARCI JANE

To add a Single Approver

If only one approver is selected, the "Level" field has a default of 1 and no further action is necessary.

To add Multiple Approvers

If multiple approvers are added, the approvers can all be assigned to a "Level" 1. All the approvers have the default level 1 assigned. By leaving the default "Level" equal to 1 on each approval row, they will all receive the journal entry concurrently. However all approvers must still approve the entry for it to be complete. See example below.



The screenshot shows the 'Approvals' tab with two rows of approvers. Both rows have 'LEVEL' set to 1. A green arrow points to the 'LEVEL' field of the first row.

SEL	ROLE	LEVEL	STATUS	EMPLID	NAME
<input type="checkbox"/>	Departmental Approval	1		00078858	BOMAN,RUNAR E
<input type="checkbox"/>	Departmental Approval	1		00356575	KAPOS,TODD JOHN

[Add Dept. Approver](#)

Or they can be assigned multiple levels (see green box below) which means that the e-Journal must be approved in a specific order of approvers beginning with level 1 and progressing through the assigned levels. Level 1 Approvers will receive the entry first and be required to approve the entry before it is sent to Level 2 and any subsequent level approvers. Please note that multiple level approvers are not required.



The screenshot shows the 'Approvals' tab with two rows of approvers. The first row has 'LEVEL' set to 1, and the second row has 'LEVEL' set to 2. A green box highlights the 'LEVEL' field of the second row.

SEL	ROLE	LEVEL	STATUS	EMPLID	NAME
<input type="checkbox"/>	Departmental Approval	1		00078858	BOMAN,RUNAR E
<input type="checkbox"/>	Departmental Approval	2		00356575	KAPOS,TODD JOHN

[Add Dept. Approver](#)

After the e-Journal is submitted, the entire approval path will be visible on the **Approvals** tab.