

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.

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Useful Links

- e-Journal Entry Help
- Buying and Payment Guide
- FBS Organizational Chart
- General Accounting Organizational Chart
- U Regulations Library
- EthicsPoint
- FBS Blogs

Contact General Accounting

call: 801.581.5810
201 S Presidents Cir, RM 403
SLC UT 84112
[Contact Information](#)

What is e-Journal Entry?

The e-Journal Entry system is an alternative to the General Journal Entry PDF form and Campus Order, as a means for submitting journal entries. e-Journal Entry is a web-based system that provides for all-electronic submission, approval, review, and storage of journal entries – as well as supporting backup documentation. It is also referred to as **e-Journal**.

- If you are a new user and need to set up access to process e-Journals, please click on the **New Preparers** link below.
- The e-Journal system homepage can be accessed through the **e-Journal Entry** link below.

New Preparers **e-Journal Entry**

Common Questions

- 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?
- How can I upload entries via Excel?

Additional Learning Information

- Preparers Reference Guide – Quick look at preparing a journal entry
- Preparers User Guide – For those initiating a journal entry
- Approvers User Guide – For those that approve journal entries
- Viewers User Guide – For those that look at journal entries that will not create or approve
- 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. A green arrow points to the 'Approvals' tab. The interface displays various fields for a journal entry, including JOURNAL ID, ACCTG DATE, JOURNAL STATE, CREATED ON, OWNER Org, SOURCE, SUB SOURCE, REQUESTED BY, EXPLANATION, and PREPARED BY. Below these fields, there are tabs for 'Lines', 'Backup Documentation', 'Approvals', and 'Tracking'. The 'Approvals' tab is active, showing a table of approvers.

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

Below the table, there is a button labeled 'Add Dept. Approver'.

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

This screenshot is a closer view of the 'Approvals' tab. It shows the same table of default approvers as the previous screenshot. A green arrow points to the 'SEL' column header, indicating where to click to select an approver for deletion.

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

Below the table, there is a button labeled 'Add Dept. Approver'.

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

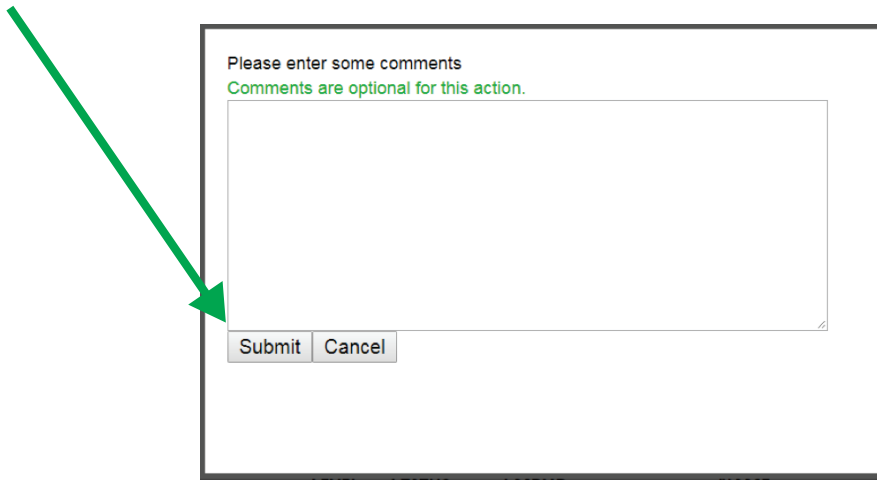
Click the **Approvals** menu, and then click on “Delete Selected”.

This screenshot shows the 'Approvals' menu. A green arrow points to the 'Approvals' menu item. Below the menu, there is a button labeled 'Delete Selected' which is highlighted with a green box.

Approvals

Delete Selected

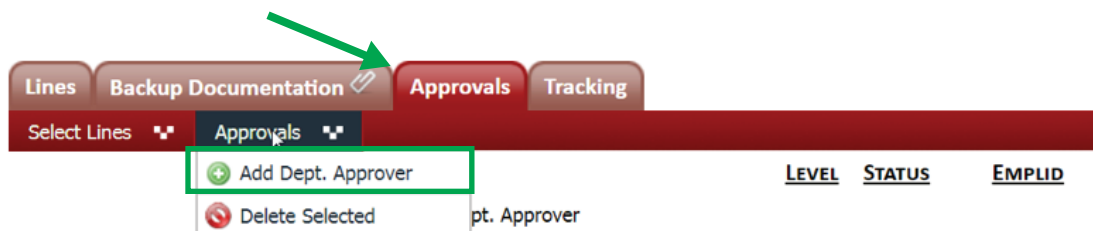
When the “Delete Selected” option has been selected, a pop up box will appear. In the box the preparer should add a comment(s) to why they are deleting an approver on the specific journal entry. Click the **Submit** button when you are finished adding comments.



A screenshot of a pop-up window titled "Please enter some comments". It contains a text area with the placeholder text "Comments are optional for this action." and two buttons at the bottom: "Submit" and "Cancel". A green arrow points from the "Delete Selected" button in the previous screenshot to the "Submit" button in this pop-up.

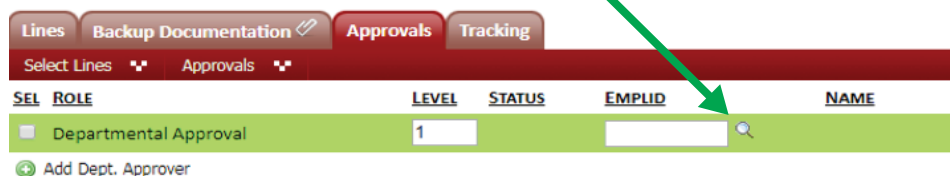
Note: At this point an alternative approver(s) can be added to the e-Journal if desired.

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



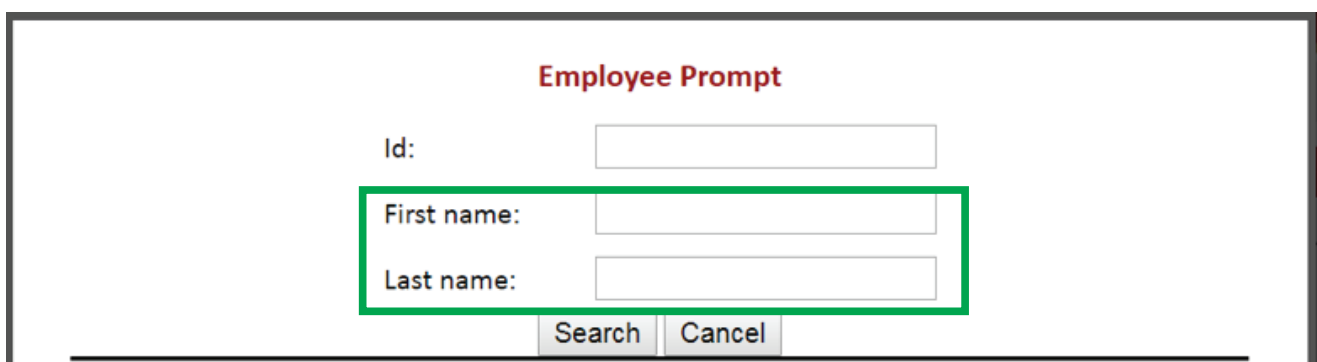
A screenshot of the "Approvals" menu. The menu is open, showing options: "Add Dept. Approver" (highlighted with a green box and a green arrow) and "Delete Selected". The "Approvals" button is also highlighted with a green arrow.

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



A screenshot of the "Departmental Approval" table. The table has columns: SEL, ROLE, LEVEL, STATUS, EEMPLID, and NAME. The first row is highlighted in green and contains the text "Departmental Approval", "1", and a search icon. A green arrow points from the "Emplid" column header to the search icon.

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



A screenshot of the "Employee Prompt" form. It contains fields for "Id:", "First name:", and "Last name:". The "First name:" and "Last name:" fields are highlighted with a green box. At the bottom are "Search" and "Cancel" buttons.

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:

Journal Entry
Sharing

JOURNAL ID: EJ00219312
 CREATED ON: 04/21/2017
 GL POSTED DATE:
 FROM EXCEL: No
 RECYCLED: Yes -

ACCTG DATE: 06/01/2017
 OWNER ORGID: 00348 - GENERAL ACCOUNTING - CAMPUS
 SOURCE: EJG - eJournal - General Accounting
 SUB SOURCE: 000 - NO SUB SOURCE DEFINED
 REQUESTED BY: Marci Barker
 EXPLANATION: Demo Entry

JOURNAL STATE: Preparing Dept Approv
 PREPARED BY: 00047288 - BARKER,MARCI JAN
 PREPARER EMAIL: marci.barker@admin.utah.edu
 PREPARER PHONE: 801-581-7296

Backup Documentation

☐ Retained in Department
☐ Backup Being Mailed

Lines Backup Documentation Approvals Tracking

Select Lines
Approvals

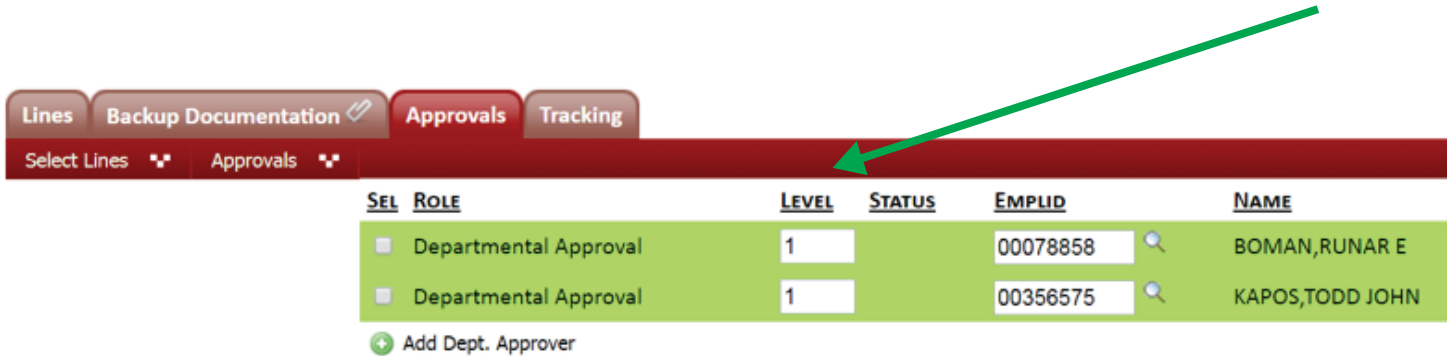
SEL	ROLE	LEVEL	STATUS	EMPLID	NAME
<input type="checkbox"/>	Departmental Approval	1		00047288	BARKER,MARCI JANE
<div style="display: flex; align-items: center;"> Add Dept. Approver </div>					

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 in a software interface. At the top, there are tabs for 'Lines', 'Backup Documentation', 'Approvals', and 'Tracking'. Below these are buttons for 'Select Lines' and 'Approvals'. The main area contains a table with the following columns: 'SEL', 'ROLE', 'LEVEL', 'STATUS', 'EMPLID', and 'NAME'. There are two rows of data, both with 'LEVEL' set to 1. A green arrow points to the 'LEVEL' field in 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

Below the table is a button labeled '+ 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 in a software interface. At the top, there are tabs for 'Lines', 'Backup Documentation', 'Approvals', and 'Tracking'. Below these are buttons for 'Select Lines' and 'Approvals'. The main area contains a table with the following columns: 'SEL', 'ROLE', 'LEVEL', 'STATUS', 'EMPLID', and 'NAME'. There are two rows of data. The first row has 'LEVEL' set to 1. The second row has 'LEVEL' set to 2. A green box highlights the 'LEVEL' field in 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

Below the table is a button labeled '+ Add Dept. Approver'.

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