

# Approval WorkFlow

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

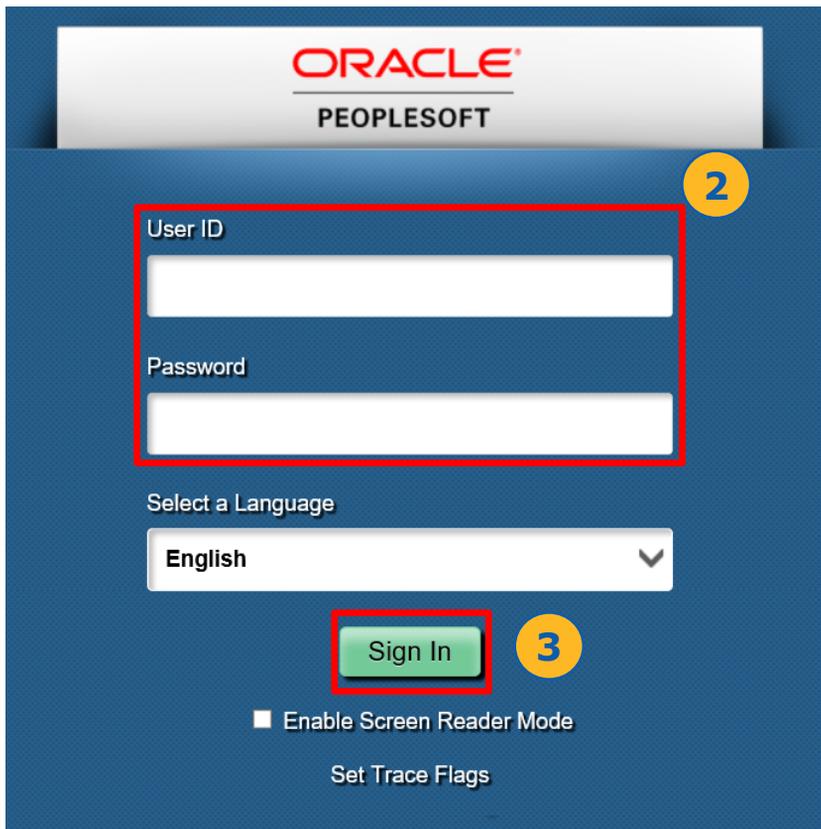
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# Log on to ONEPeralta

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**



The screenshot shows the Oracle PeopleSoft login interface. At the top, the Oracle and PeopleSoft logos are displayed. Below the logos, there are two input fields: 'User ID' and 'Password'. A red box highlights these two fields, with a yellow circle containing the number '2' next to it. Below the input fields is a 'Select a Language' dropdown menu with 'English' selected. A green 'Sign In' button is highlighted with a red box, with a yellow circle containing the number '3' next to it. Below the button, there is a checkbox for 'Enable Screen Reader Mode' and a link for 'Set Trace Flags'.



**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)

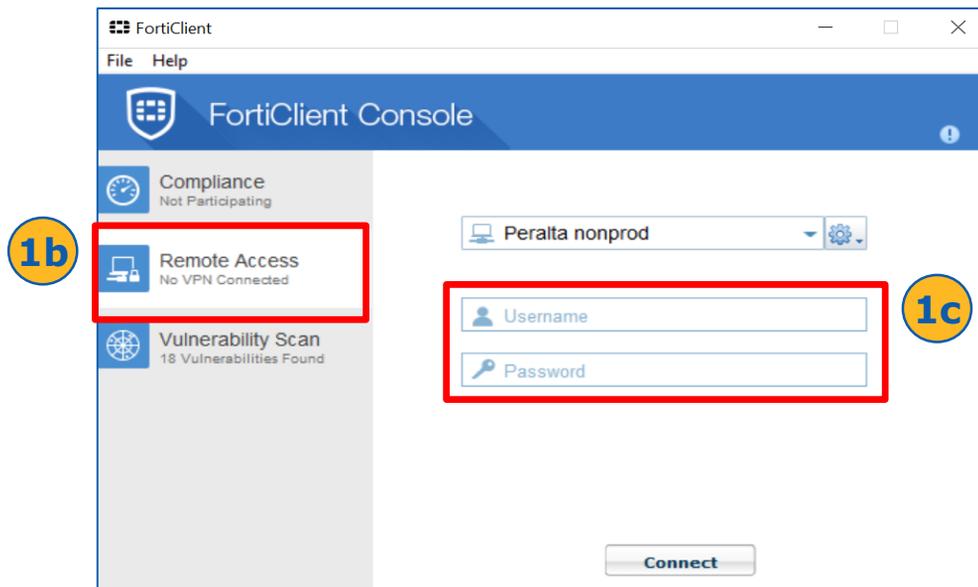
## Turn on VPN

### All ONEPeralta Users

If you are having trouble logging into 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**



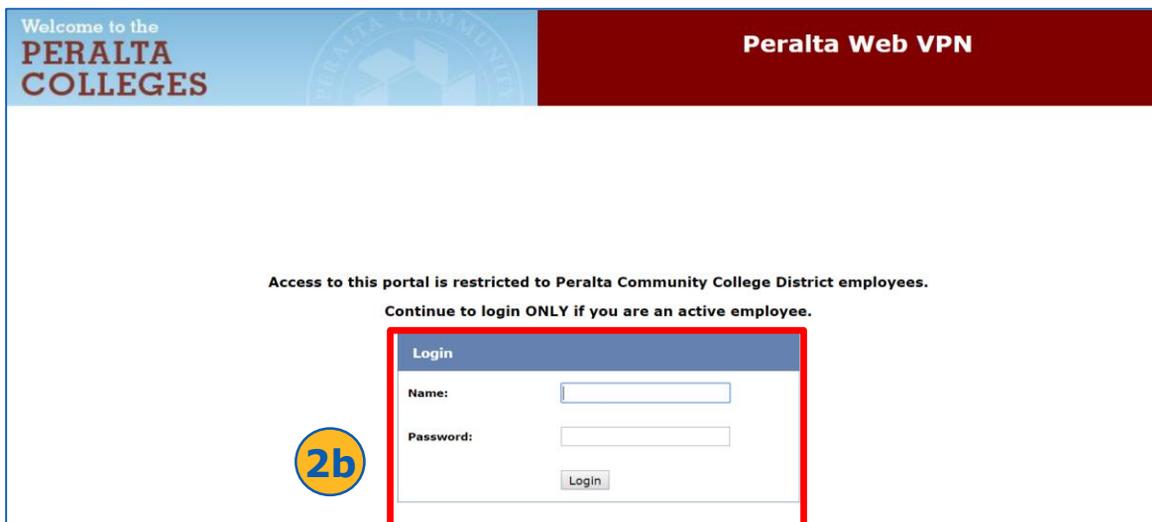
# Log on to ONEPeralta (cont'd)

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**



Welcome to the  
**PERALTA  
COLLEGES**

**Peralta Web VPN**

Access to this portal is restricted to Peralta Community College District employees.  
Continue to login **ONLY** if you are an active employee.

**2b**

**Login**

Name:

Password:

Login

# Approval WorkFlow

## Approve a Budget Journal or Transfer

Approvals will follow the following WorkFlow:

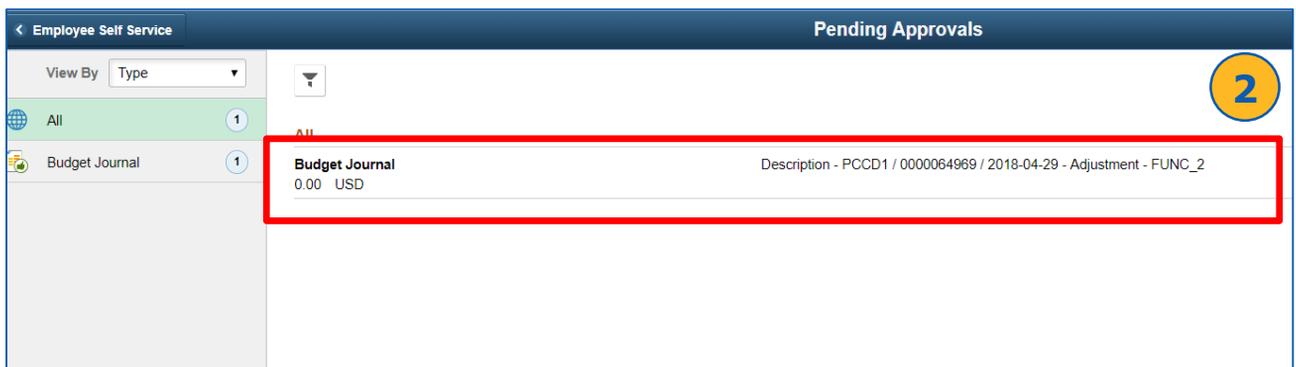
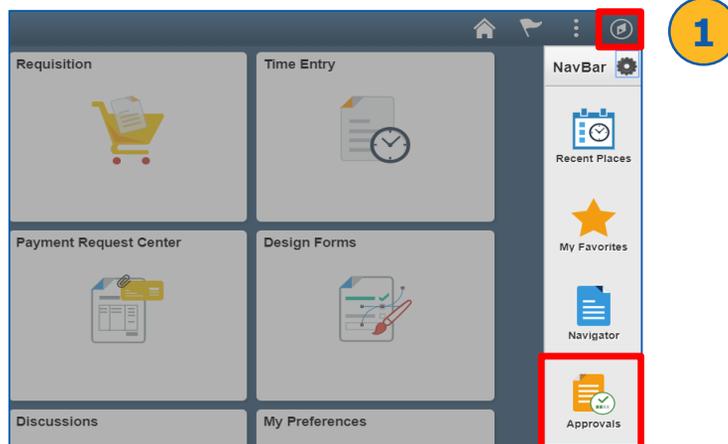
### Budget Journals

- Level 1: **Department Manager**
- Level 2: **Campus Business Manager**
- Level 3: **District Finance**

### Budget Transfers

- Level 1: **Department Manager**
- Level 2: **Campus Business Manager**

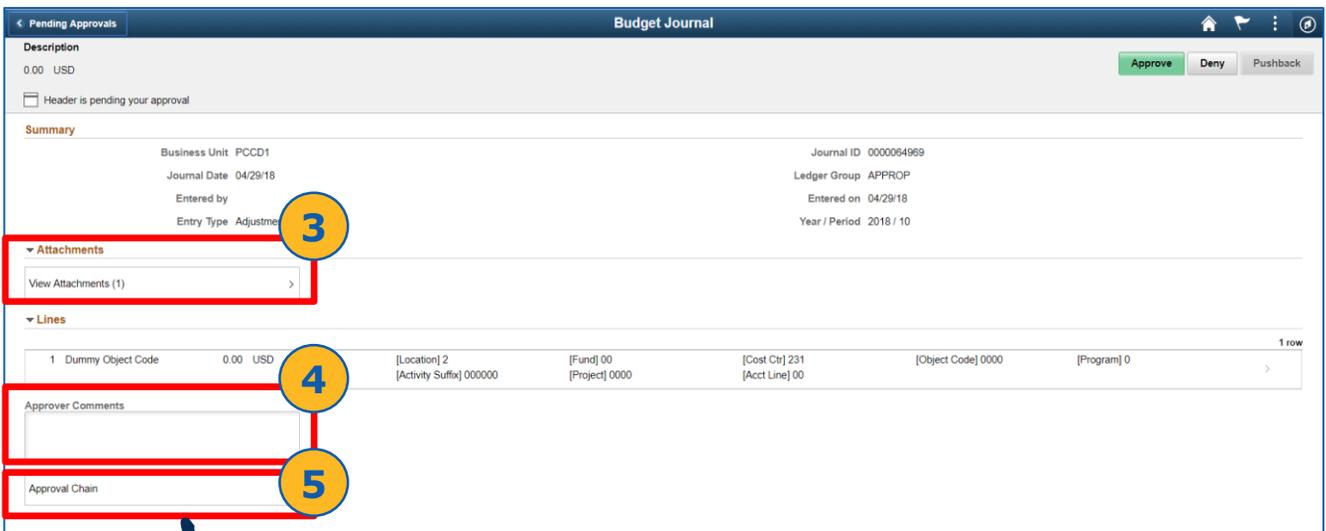
1. Click > **NavBar** icon > **Approvals**
2. Select > **Budget Journal** or **Transfer** to review



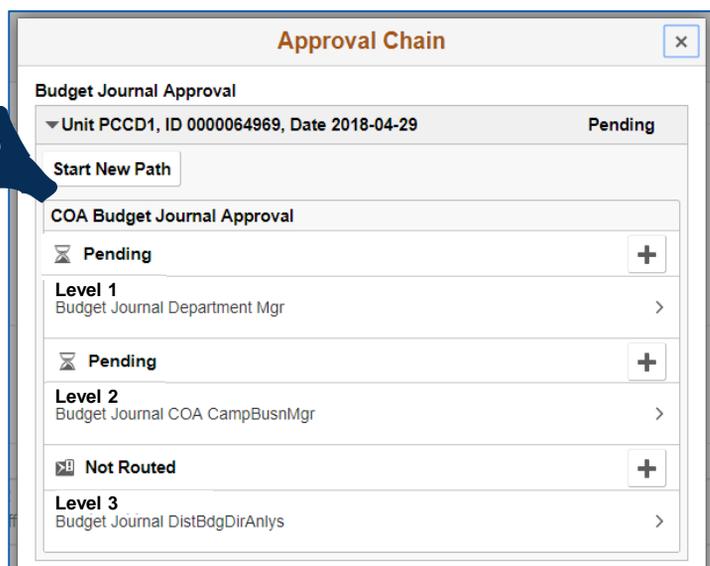
# Approval WorkFlow

## 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



The screenshot shows the 'Budget Journal' interface. At the top right, there are buttons for 'Approve', 'Deny', and 'Pushback'. Below the header, there is a 'Summary' section with fields for Business Unit (PCCD1), Journal Date (04/29/18), Journal ID (0000064969), Ledger Group (APPROP), Entered on (04/29/18), and Year / Period (2018 / 10). A red box highlights the 'Attachments' section, which contains a 'View Attachments (1)' link, with a blue circle containing the number '3' next to it. Below this is the 'Lines' section, which contains a table with columns for Object Code, Amount, Location, Fund, Cost Ctr, Object Code, and Program. A red box highlights the 'Approver Comments' field, with a blue circle containing the number '4' next to it. Below that is the 'Approval Chain' section, with a blue circle containing the number '5' next to it. A blue arrow points from the 'Approval Chain' section to the 'Approval Chain' dialog box shown in the next image.



The 'Approval Chain' dialog box shows the approval flow for the Budget Journal. It is titled 'Approval Chain' and has a close button (X). The main content is 'Budget Journal Approval' for 'Unit PCCD1, ID 0000064969, Date 2018-04-29', which is currently 'Pending'. There is a 'Start New Path' button. The approval chain consists of three levels:

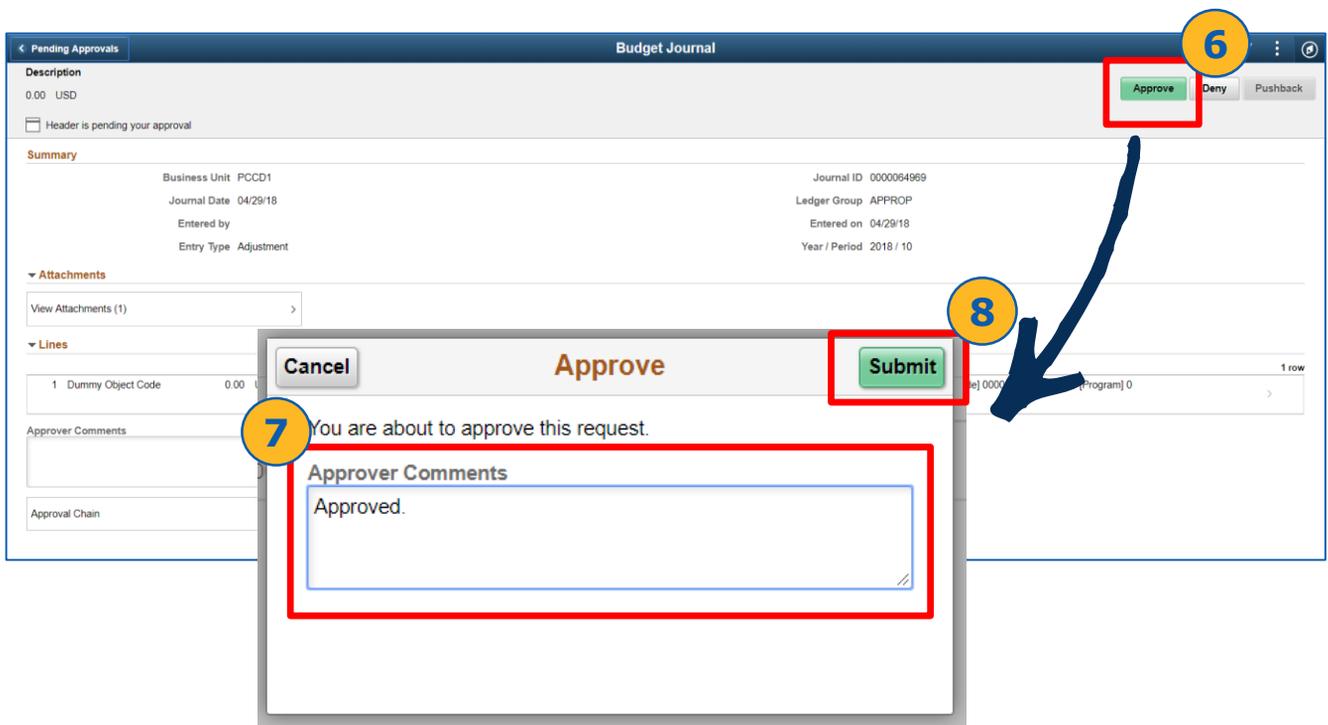
- COA Budget Journal Approval**: Pending (+)
- Level 1**: Budget Journal Department Mgr (>)
- Level 2**: Budget Journal COA CampBusnMgr (>)
- Level 3**: Budget Journal DistBdgDirAnlys (>)

The 'Level 3' status is 'Not Routed' (+).

# 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



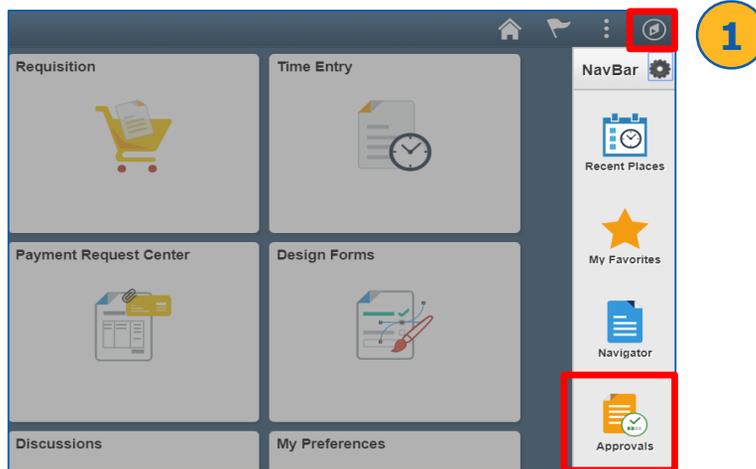
The screenshot displays the 'Budget Journal' approval interface. At the top right, a green 'Approve' button is highlighted with a red box and a yellow circle containing the number 6. A blue arrow points from this button to a modal dialog box. The dialog box has a title bar 'Approve' and buttons for 'Cancel' and 'Submit'. The 'Submit' button is highlighted with a red box and a yellow circle containing the number 8. Inside the dialog, a text area for 'Approver Comments' contains the text 'Approved.' and is highlighted with a red box and a yellow circle containing the number 7. The background interface shows a 'Pending Approvals' tab, a 'Description' section with '0.00 USD', and a 'Summary' section with fields for Business Unit, Journal Date, Journal ID, Ledger Group, Entered on, and Year / Period. There is also an 'Attachments' section and a 'Lines' table with one row.

# 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.

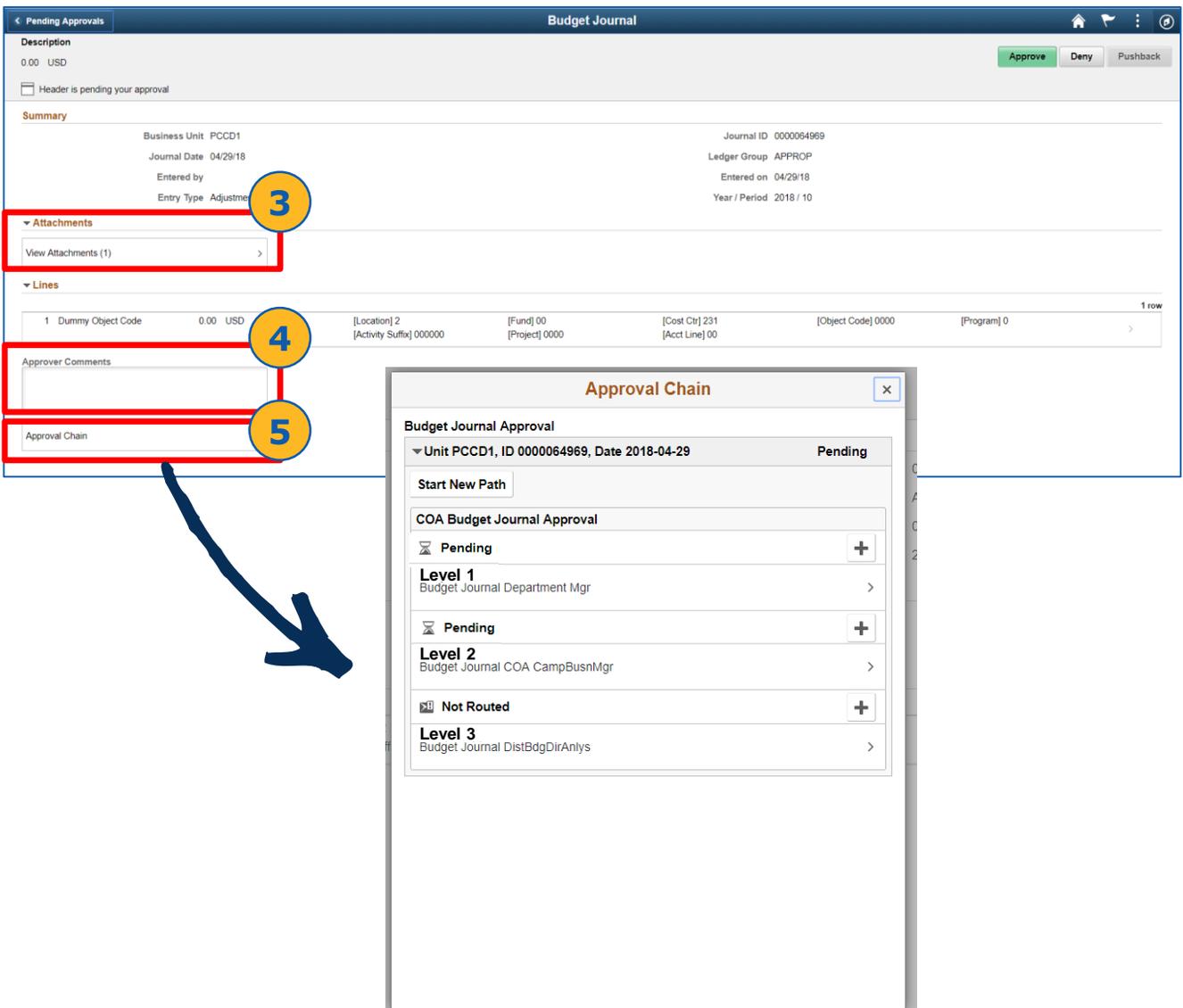
1. Click > **NavBar** icon > **Approvals**
2. Select > **Budget Journal** or **Transfer** to review



# 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

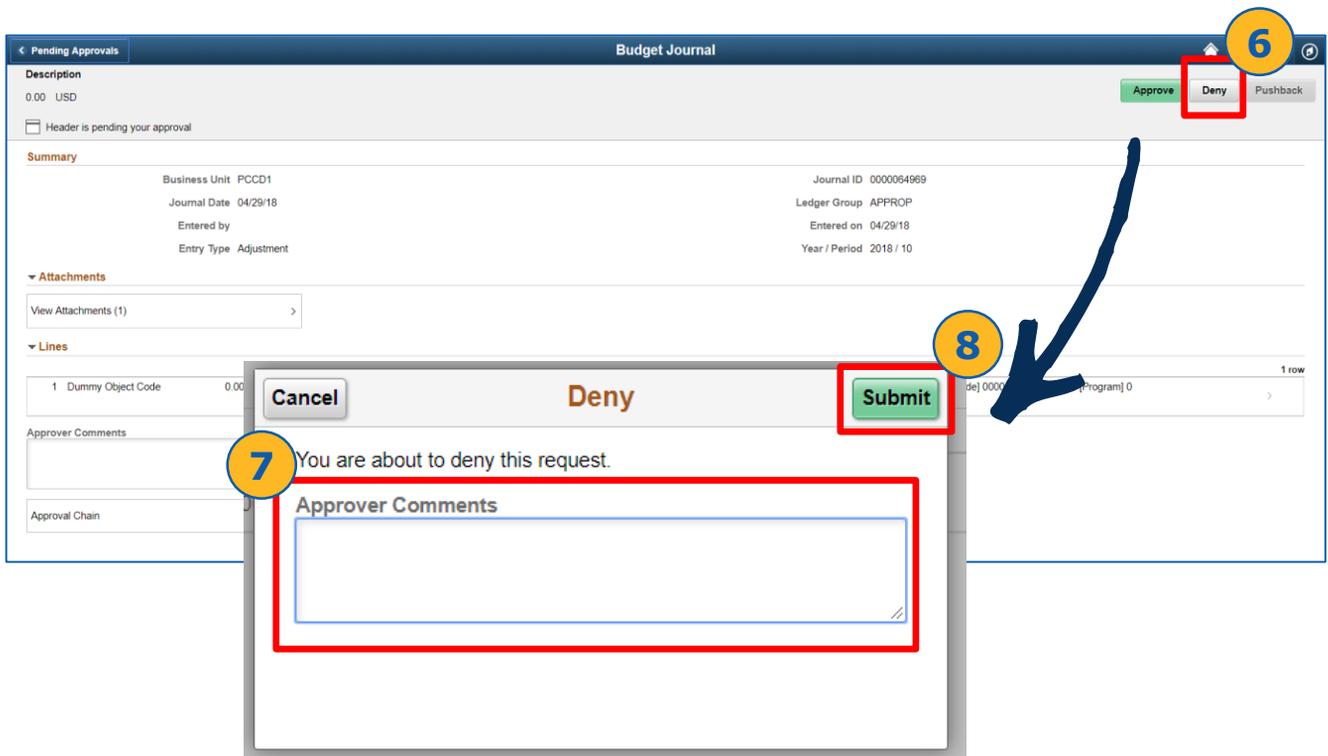


The screenshot displays the 'Budget Journal' interface. At the top, there are buttons for 'Approve', 'Deny', and 'Pushback'. The 'Summary' section shows details like Business Unit (PCCD1), Journal Date (04/29/18), and Journal ID (0000064969). A red box highlights the 'Attachments' section with a callout '3' pointing to the 'View Attachments (1)' link. Below that, the 'Lines' section is visible, with a red box and callout '4' pointing to the 'Approver Comments' field. Another red box and callout '5' point to the 'Approval Chain' link. A large blue arrow points from the 'Approval Chain' link to an expanded 'Approval Chain' window. This window shows the approval path for 'Unit PCCD1, ID 0000064969, Date 2018-04-29', which is currently 'Pending'. The path includes: 'COA Budget Journal Approval' (Pending), 'Level 1: Budget Journal Department Mgr' (Pending), 'Level 2: Budget Journal COA CampBusnMgr' (Pending), and 'Level 3: Budget Journal DistBdgDirAnlys' (Not Routed).

# 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



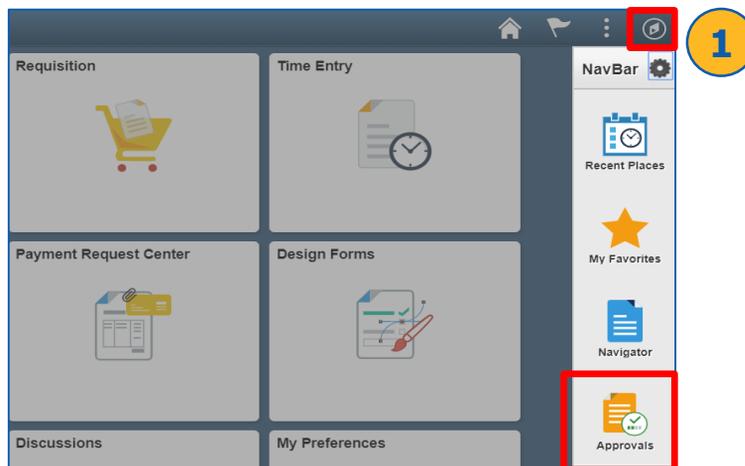
The screenshot displays the 'Budget Journal' approval workflow interface. At the top right, the 'Deny' button is highlighted with a red box and a yellow circle containing the number 6. A blue arrow points from this button to a modal dialog box. The modal dialog has a title bar with 'Deny' and buttons for 'Cancel' and 'Submit'. The 'Submit' button is highlighted with a red box and a yellow circle containing the number 8. Inside the dialog, the text 'You are about to deny this request.' is followed by a large text input field labeled 'Approver Comments', which is highlighted with a red box and a yellow circle containing the number 7. The background interface shows a 'Pending Approvals' section with a 'Budget Journal' entry, including fields for 'Description', 'Summary', 'Attachments', and 'Lines'. The 'Deny' button in the background is also highlighted with a red box.

# 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**

**Budget Journal**

Description  
0.00 USD

Header is pending your approval

Summary

Business Unit	PCCD1	Journal ID	0000064969
Journal Date	04/29/18	Ledger Group	APPROP
Entered by		Entered on	04/29/18
Entry Type	Adjustment	Year / Period	2018 / 10

Attachments

View Attachments (1) >

Lines

1	Dummy Object Code	0.00 USD	[Location] 2 [Activity Suffix] 000000	[Fund] 00 [Project] 0000	[Cost Ctr] 231 [Acct Line] 00	[Object Code] 0000	[Program] 0	1 row
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Approver Comments

Approval Chain >

**Approval Chain**

Budget Journal Approval

Unit PCCD1, ID 0000064969, Date 2018-04-29 Pending

Start New Path

COA Budget Journal Approval

- Approved** +
- Level 1** Budget Journal Department Mgr >
- Pending** +
- Level 2** Budget Journal COA CampBusnMgr >
- Not Routed** +
- Level 3** Budget Journal DistBdgDirAnlys >

**Budget Journal**

Description  
0.00 USD

Header is pending your approval

Summary

Business Unit	PCCD1	Journal ID	0000064969
Journal Date	04/29/18	Ledger Group	APPROP
Entered by		Entered on	04/29/18
Entry Type	Adjustment	Year / Period	2018 / 10

Attachments

View Attachments (1) >

Lines

1	Dummy Object Code	0.00 USD	[Location] 2 [Activity Suffix] 000000	[Fund] 00 [Project] 0000	[Cost Ctr] 231 [Acct Line] 00	[Object Code] 0000	[Program] 0	1 row
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Approver Comments

Approval Chain >

# Approval WorkFlow

## Pushback a Budget Journal or Transfer

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

The screenshot displays the 'Budget Journal' interface with a 'Pushback' dialog box open. The dialog box contains the following elements:

- 6**: A red box highlights the 'Pushback' button in the top right corner of the main interface.
- 7**: A red box highlights the text 'You are about to pushback this request.' in the dialog box.
- 8**: A red box highlights the 'Submit' button in the dialog box.
- A large blue arrow points from the 'Pushback' button in the main interface to the 'Submit' button in the dialog box.

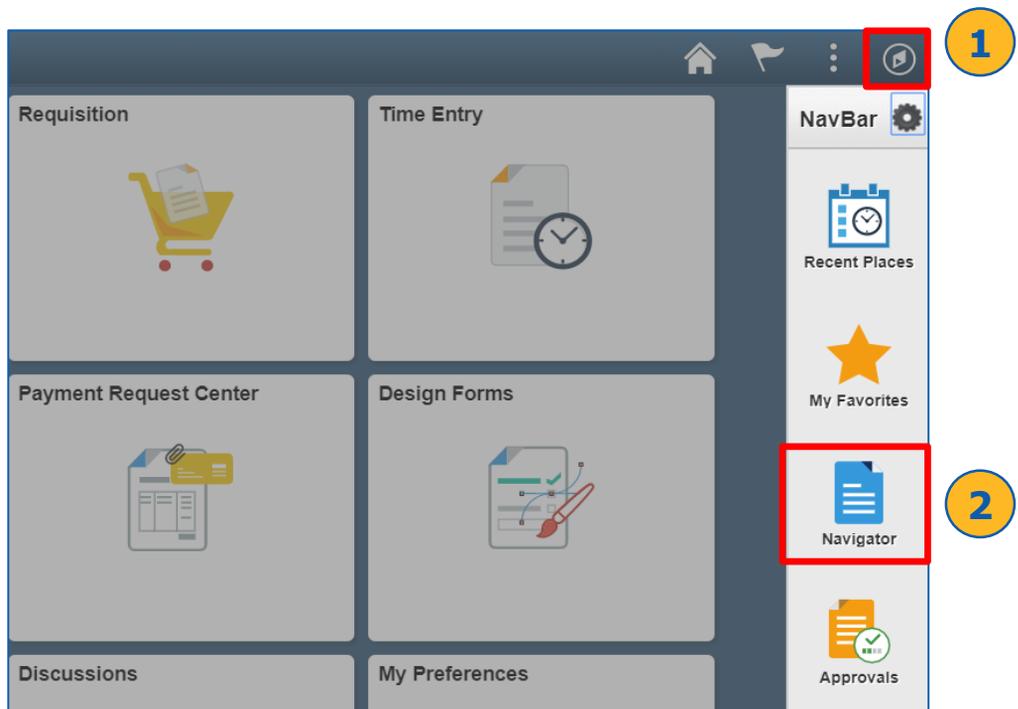
The main interface shows a 'Pending Approvals' header and a 'Budget Journal' title. The 'Description' section includes '0.00 USD' and 'Header is pending your approval'. The 'Summary' section displays details such as Business Unit (PCCD1), Journal Date (04/29/18), Journal ID (0000064969), Ledger Group (APPROP), Entered by, Entered on (04/29/18), Entry Type (Adjustment), and Year / Period (2018 / 10). The 'Attachments' section has a 'View Attachments (1)' link. The 'Lines' section shows a table with one row: '1 Dummy Object Code 0.00 USD [Location] 2 [Activity Suffix] 000000 [Fund] 00 [Project] 0000 [Cost Ctr] 231 [Acct Line] 00 [Object Code] 0000 [Program] 0'. The 'Approver Comments' section has a text input field, and the 'Approval Chain' section has a dropdown menu.

# 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.

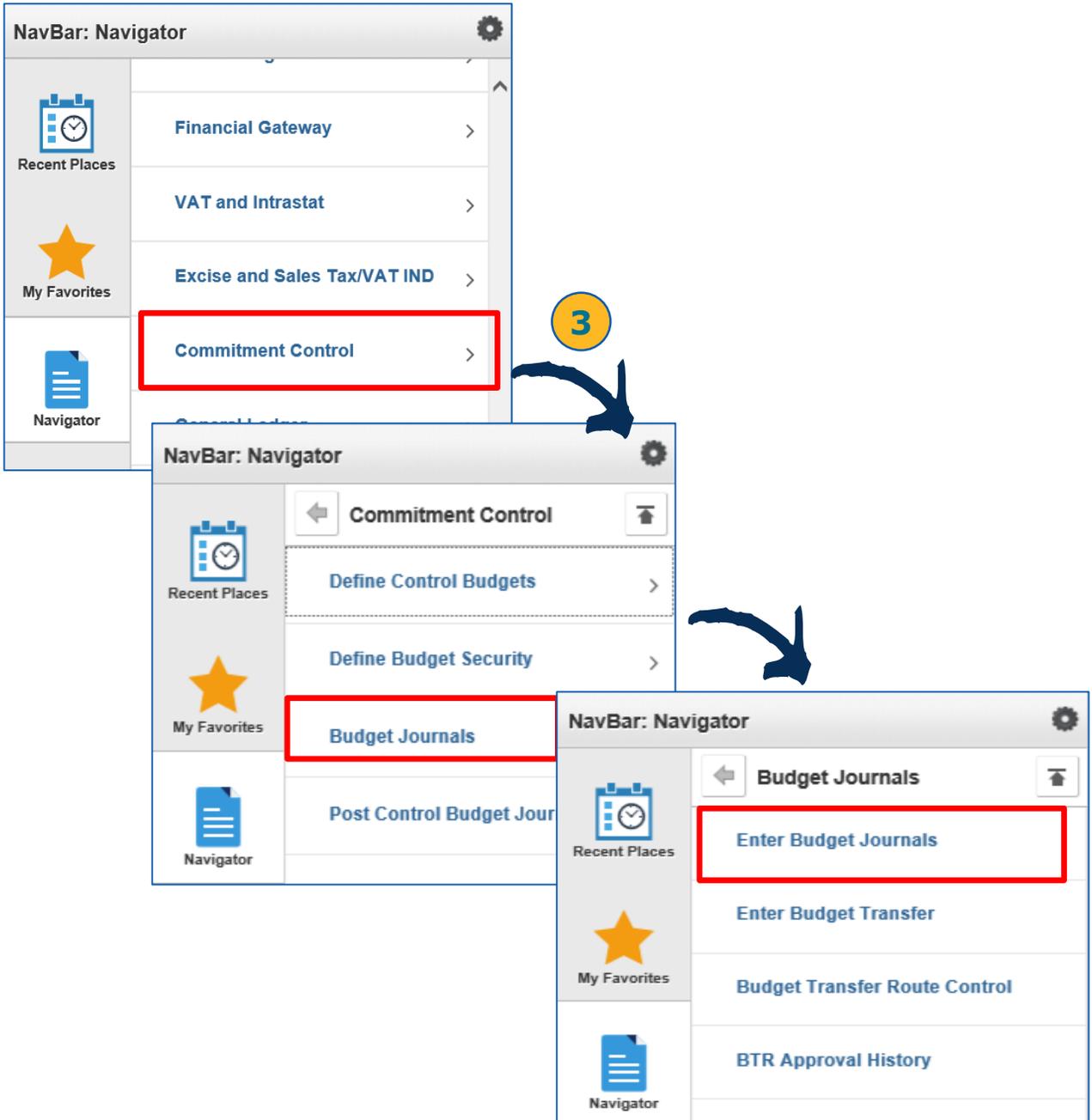
1. Click > **NavBar** icon
2. Click > **Navigator**



# Approval WorkFlow

## Correct Budget Journal after Pushback

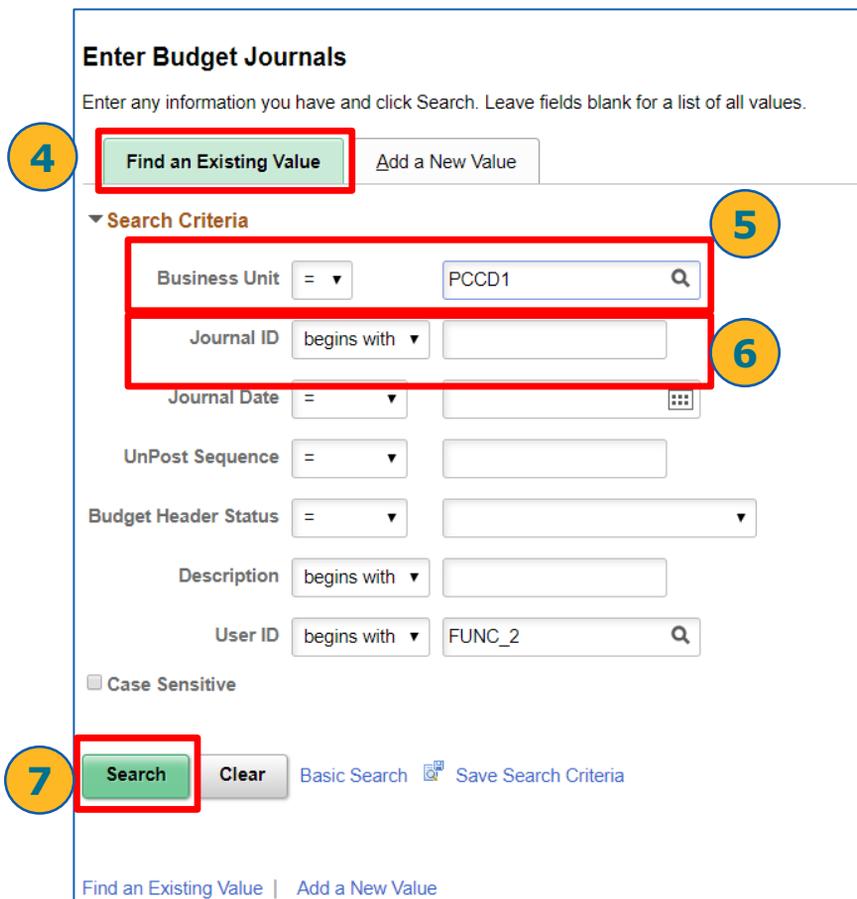
3. Click >> **Commitment Control** > **Budget Journals** > **Enter Budget Journals**



# 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**



**Enter Budget Journals**

Enter any information you have and click Search. Leave fields blank for a list of all values.

4 **Find an Existing Value** Add a New Value

▼ Search Criteria

5 Business Unit = ▾ PCCD1 🔍

6 Journal ID begins with ▾

Journal Date = ▾

UnPost Sequence = ▾

Budget Header Status = ▾

Description begins with ▾

User ID begins with ▾ FUNC\_2 🔍

Case Sensitive

7 **Search** Clear Basic Search 🔍 Save Search Criteria

Find an Existing Value | Add a New Value

# 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

The screenshot displays the budget system interface. At the top, the 'Budget Lines' tab is selected, indicated by a red box and a blue circle with the number 8. The 'Approval Header Status' is shown as 'Pending', also highlighted with a red box and a blue circle with the number 9. A blue arrow points from the 'Pending' status to the 'Approval Flow' pop-up window. The 'Approval Flow' window shows a flow from 'Level 1' (Budget Journal Department Mgr) to 'Level 2' (Budget Journal COA CampBusnMgr) which is 'Pushed Back', and then to 'Level 3' (Budget Journal DistBdgDirAnlys) which is 'Not Routed'. A 'Comments' section is highlighted with a red box and a blue circle with the number 10, containing a comment from Level 2 at 04/29/18 - 3:24 PM: 'Fix item'. Below the comments, it shows 'Level 1 at 04/29/18 - 2:27 PM' with the status 'Approved'. A 'Return' button is visible at the bottom of the pop-up.

Delete	Line	Approval Line Status	Ledger	Budget Period	Speed Type	Object Code	Fund	Cost	Program	Project	Location	Account Line
	1	Not Required	APP_BUD	2018		0000	00	231	0	0000	2	00

# 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

The screenshot displays the 'Budget Lines' tab in a web application. At the top, there are tabs for 'Budget Header', 'Budget Lines', and 'Budget Errors'. The 'Budget Lines' tab is active, showing details for Unit PCCD1, Journal ID 0000064969, and Date 04/29/2018. The 'Approval Header Status' is 'Pending'. A red box labeled '13' highlights the 'Process' button in the top right corner. A dropdown menu is open, showing options: 'Submit Journal', 'Copy Journal', 'Delete Journal', 'Edit Chartfields', 'Post Journal', 'Refresh Journal', and 'Submit Journal'. A red box labeled '12' highlights the 'Submit Journal' option at the bottom of the dropdown. A red box labeled '11' highlights the 'Generate Budget Period Lines' button at the bottom right of the interface. The main table shows one line item with Cost Ctr 231, Program 0, Project 0000, Location 2, and Account Line 00. The 'Totals' section shows 1 Total Line, 0.00 Total Debits, and 0.00 Total Credits. At the bottom, there are buttons for 'Save', 'Return to Search', 'Notify', 'Refresh', 'Add', and 'Update/Display'.

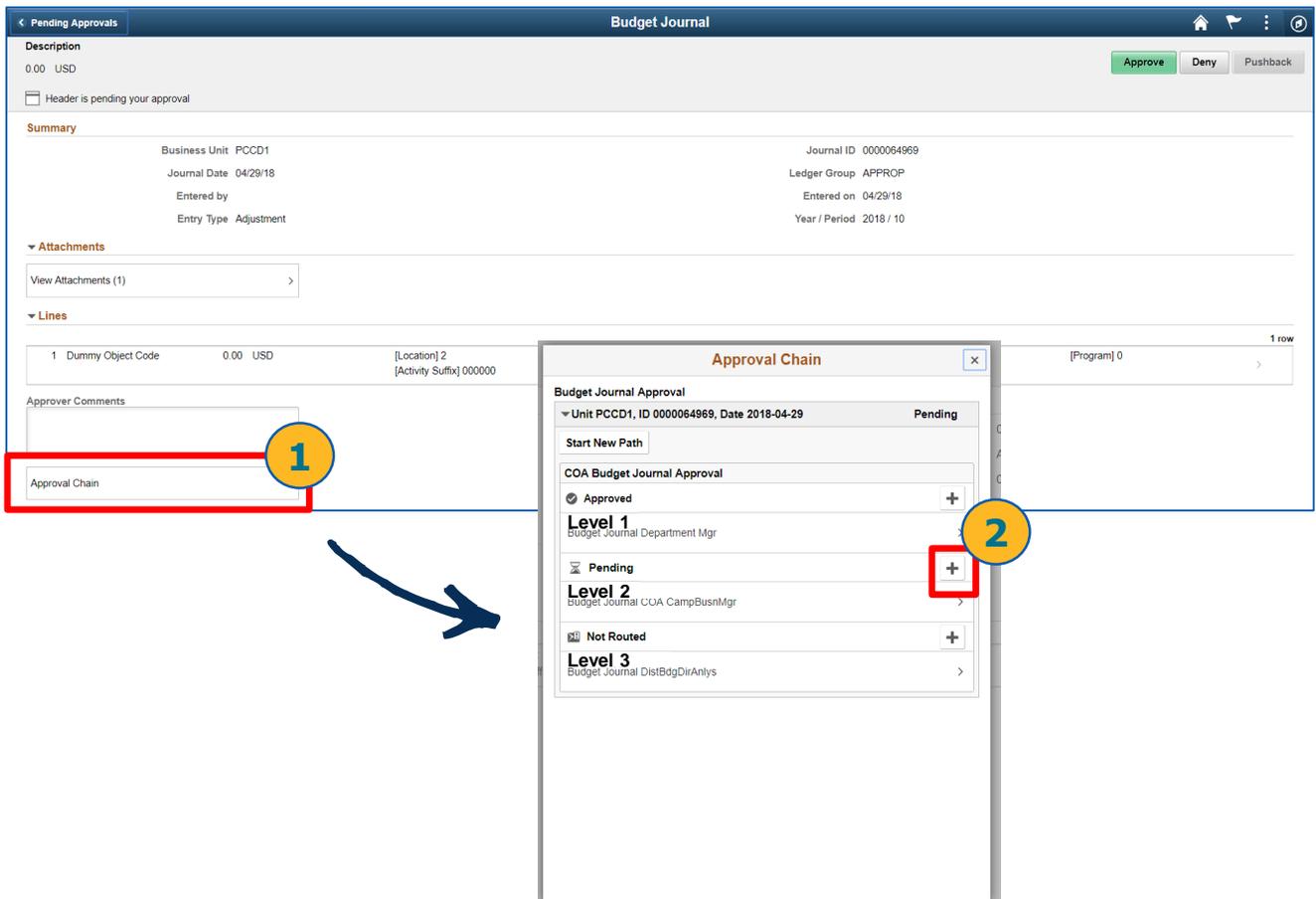
# Approval WorkFlow

## 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 > **(+)**



**Budget Journal**

Description: 0.00 USD

Buttons: Approve, Deny, Pushback

Header is pending your approval

**Summary**

Business Unit: PCCD1 | Journal ID: 0000064969  
Journal Date: 04/29/18 | Ledger Group: APPROP  
Entered by: | Entered on: 04/29/18  
Entry Type: Adjustment | Year / Period: 2018 / 10

**Attachments**

View Attachments (1)

**Lines**

Line	Object Code	Amount	Location	Activity Suffix	Program
1	Dummy Object Code	0.00 USD	[Location] 2	[Activity Suffix] 000000	[Program] 0

Approver Comments

Approval Chain

**Approval Chain**

Budget Journal Approval

Unit: PCCD1, ID 0000064969, Date 2018-04-29 | Pending

Start New Path

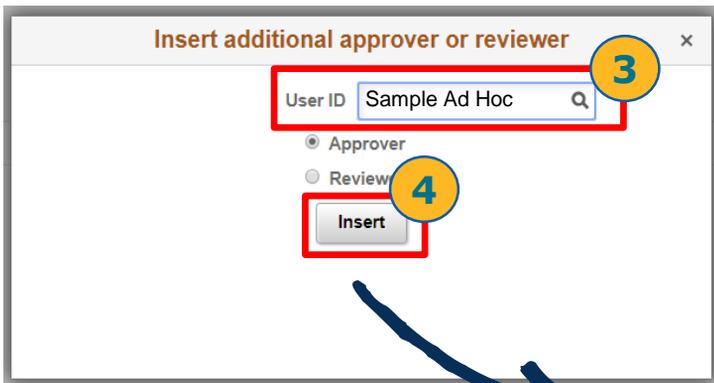
COA Budget Journal Approval

- Approved (+)
- Level 1** Budget Journal Department Mgr (+)
- Pending (+)
- Level 2** Budget Journal COA CampBusnMgr (>)
- Not Routed (+)
- Level 3** Budget Journal DistBdgDirAnlys (>)

# 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**



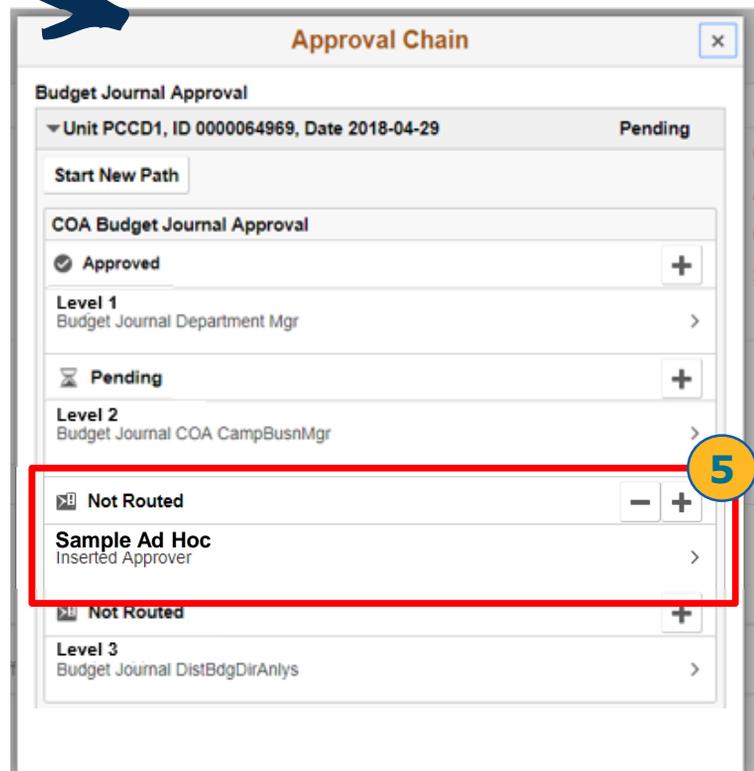
Insert additional approver or reviewer

User ID Sample Ad Hoc

Approver

Reviewer

Insert



Approval Chain

Budget Journal Approval

Unit PCCD1, ID 0000064969, Date 2018-04-29 Pending

Start New Path

COA Budget Journal Approval

Approved +

Level 1  
Budget Journal Department Mgr >

Pending +

Level 2  
Budget Journal COA CampBusnMgr >

Not Routed - +

Sample Ad Hoc  
Inserted Approver >

Not Routed +

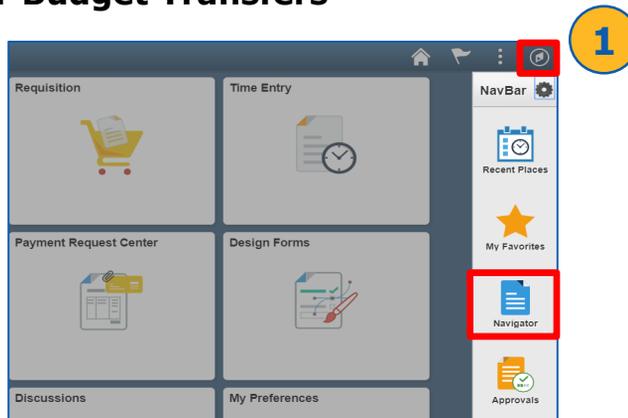
Level 3  
Budget Journal DistBdgDirAnlys >

# Approval WorkFlow

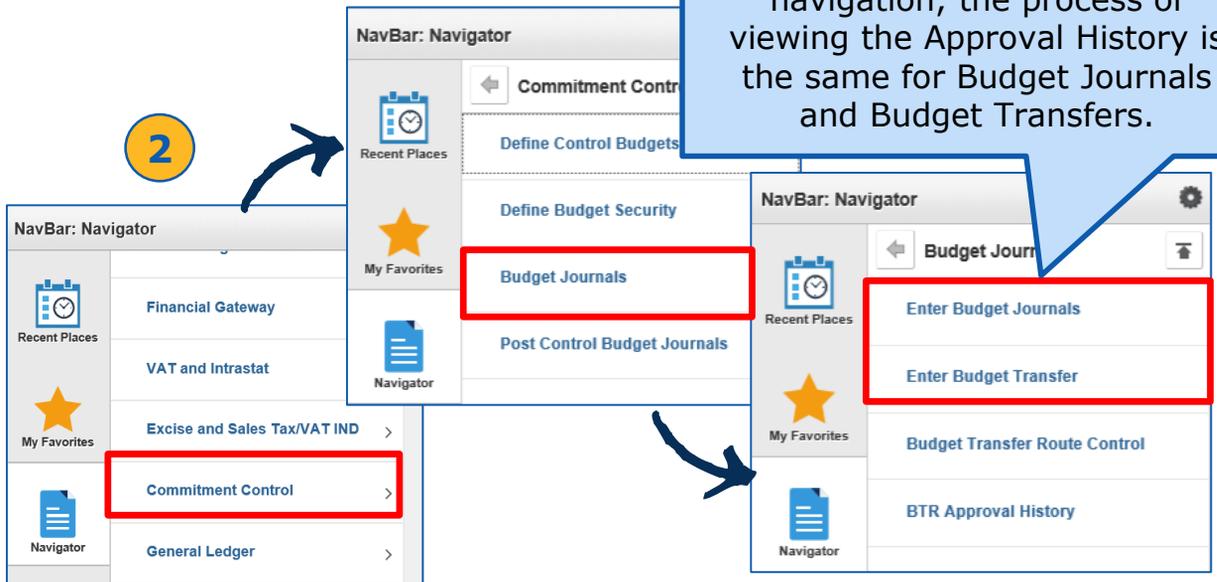
## View Approval History

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

### Enter Budget Transfer

Enter any information you have. Click Search. Leave fields blank for a list of all values.

Find an Existing Value
Add a New Value

**Search Criteria**

Business Unit =

Journal ID begins with

Journal Date =

UnPost Sequence =

Budget Header Status =

Description begins with

User ID begins with

Case Sensitive

Search
Clear

Search Results

View All 1-14 of 14

Business Unit	Journal ID	Journal Date	Ledger Group	Budget Header Status	Description	User ID
PCCD1	0000066462	05/21/2018	APPROP	Posted	KQT: Fund 03 CC251 -- Allocate	KQTRAN
PCCD1	0000066469	05/21/2018	APPROP	Posted	ASM: Transfer to cover custodi	AMARSHALL
PCCD1	0000066470	05/21/2018	APPROP	Posted	LW- Fund 11, Proj 1093- Align	LYDELLWILLIS
PCCD1	0000066474	05/21/2018	APPROP	Posted	To transfer \$421.87 in order t	PHO
PCCD1	0000066475	05/21/2018	APPROP	Posted	BCC fund 11 prj 1060 - need to	CMASSEY
PCCD1	0000066476	05/21/2018	APPROP	Posted	BCC:LGL transferring funds wit	LGWYNLAIGO
PCCD1	0000066478	05/21/2018	APPROP	Posted	RP - 6 - Fund 01 - Allocation	RPEREZ

# 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

The screenshot displays the ONEPeralta interface. At the top, the 'Budget Lines' tab is selected (7). The 'Approval Header Status' is shown as 'Approved' (8). A blue arrow points from the 'Approved' status to a pop-up window titled 'Approval Flow' (9). This window shows the 'Budget Journal Approval' process for Unit PCCD1, ID 000066462, dated 2018-05-21. It details the approval flow from a Level 1 Approver to a Level 2 Approver, both marked as 'Approved'. A 'Return' button is visible at the bottom of the pop-up. In the background, a table of budget lines is visible, with a grid action menu icon highlighted (10).

Line	Approval Line Status	Ledger	Budget Period	SpeedType	Location	Fund	Cost Ctr	Object Code	Program	Activity Suffix	Project	A
1	Not Required	APP_BUD	2018		2	03	251	5885	1	682200	0000	00
2	Not Required										0000	00
3	Not Required										0000	00

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