

University of Puget Sound Training Guides

Approve or Deny Transfer Request

Steps to Approve or Deny a Transfer Request when money has or has not been spent:

1. Find the transaction to approve or deny by one of three methods:
 - a. Click the **hyperlink** in the approval email, or
 - b. Click within the “**My Worklist**” page in the Financials & Annual Budget tile in myPugetSound, or
 - c. Click the **Approve** button in the Transfer Request page
 - d. If one does not seem to work, please try all three before contacting Office of Finance
2. Click the **Journal Lines** expand arrow on the GL Journal Approval page
3. Review the Journal Line **Chartfields**
4. Click the **Currency Details** Tab and review the Journal Line **Amounts**
5. Click the **Approve** button or **Add a Comment** and click the **Deny** button

Note: Approvals for Transfer Requests when money was spent via an Accounts Payable voucher will be handled manually.

Read further for more detailed information about each step.

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Prerequisite

A Transfer Request must be Submitted to invoke the Approval Process for Self-Service Journals, i.e. the Transfer Request status is Pending Approval.

The screenshot shows the 'Financials & Annual Budget' interface. On the left is a navigation menu with options like 'Charfield Value Lookup', 'Annual Budget', 'Carryover Projects', 'Grants and Projects', 'Transfer Request' (highlighted), 'Purchasing & Payables Inquiry', and 'My Worklist'. The main area is titled 'Transfer Requests - Search Criteria' and includes search filters for Fiscal Year (2025), Accounting Date, SpeedChart, Account, and ChartField 1. Below the search criteria is a 'Create New Request' button. The 'Search Results' table shows three entries:

View Request	Request ID	Accounting Date	Request Status	Created By	Date Submitted	Journal ID	Transfer From	Transfer Amount	Transfer To	Approver	Approve
<input type="checkbox"/>	SSR000011	09/17/2024	Approved	konto	09/20/2024 4:08:58PM	0000071388	184405	\$500.00	104011	dkerkhoff	
<input type="checkbox"/>	SSR000012	09/17/2024	Approved	konto	09/20/2024 4:14:08PM	0000071389	184405	\$500.00	104011	dkerkhoff	
<input type="checkbox"/>	SSR000014	09/17/2024	Pending Approval	konto	09/20/2024 5:18:43PM	0000071391	184405	\$500.00	104011	dkerkhoff	<input type="button" value="Approve"/>

Find Transaction to Approve or Deny

If one of these three methods does not seem to work, please try all of them before contacting Office of Finance for assistance.

Method 1 - The Approver will receive an email with Subject line: *Approval is Requested for Journal ID "00000xxxxx"*

Open the email and click the link provided to navigate directly to the journal entry page to review and approve or deny the Self-Service Journal for the Transfer Request.

From: <kspiese@pugetsound.edu>
 Date: Thu, Jul 11, 2024 at 2:42 PM
 Subject: Approval is Requested for Journal ID "0000070531"
 To: <fachavez@pugetsound.edu>

A journal has been entered that requires your attention.

Journal ID: 0000070531
 Journal Date: 2024-06-30

You can navigate directly to the journal entry page by clicking the link below.

https://campus.pugetsound.edu/psp/CS92PRD/EMPLOYEE/ERP/c/PROCESS_JOURNALS.JOURNAL_APPROVAL_GBL?Page=JOURNAL_APPROVAL&Action=U&BUSINESS_UNIT=PUGET&JOURNAL_ID=0000070531&JOURNAL_DATE=2024-06-30&BUSINESS_UNIT_LN=PUGET

Method 2 - The Approver monitors the worklist for Self-Service Journals

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Navigate to the My Worklist page via the Financials & Annual Budget tile in myPugetSound

Worklist
Worklist for mchtliga: Miriam Chitiga
Detail View
Worklist Filters: Approval Routing

From	Date From	Work Item	Worked By Activity	Priority	Link
Margo D Palmer	06/29/2024	Approval Routing	Approval Workflow	1-High	GL JournalApproval_91_UP-SelfServiceJournals_1901-01-03_N_0_BUSINESS_UNIT_PUGET JOURNAL_ID0000069375 JOURNAL_DATE20240625 BUSINESS_UNIT_INPUGET RDCRA.0.A
Margo D Palmer	07/07/2024	Approval Routing	Approval Workflow	1-High	GL JournalApproval_99_UP-SelfServiceJournals_1901-01-03_N_0_BUSINESS_UNIT_PUGET JOURNAL_ID0000069384 JOURNAL_DATE20240611 BUSINESS_UNIT_INPUGET RDCRA.0.A
Margo D Palmer	07/07/2024	Approval Routing	Approval Workflow	1-High	GL JournalApproval_100_UP-SelfServiceJournals_1901-01-03_N_0_BUSINESS_UNIT_PUGET JOURNAL_ID0000069385 JOURNAL_DATE20240630 BUSINESS_UNIT_INPUGET RDCRA.0.A

1. Click the **Financials & Annual Budget Tile** then click on **My Worklist**
2. Click the **Link** to open, review, and Approve or Deny the Self-Service Journal

Method 3 - The Approver can search the Transfer Request page for lines Pending Approval

Search the Transfer Request page via the Financials & Annual Budget tile in myPugetSound

Financials & Annual Budget

Transfer Requests - Search Criteria

Fiscal Year: 2025 Include Completed Requests? SpeedChart:
Accounting Date: Account:
ChartField 1:

Search Results

View Request	Request ID	Accounting Date	Request Status	Created By	Date Submitted	Journal ID	Transfer From	Transfer Amount	Transfer To	Approver	Approve
<input type="checkbox"/>	SSR0000011	09/17/2024	Approved	konto	09/20/2024 4:08:58PM	0000071388	184405	\$500.00	104011	dkerkhoff	<input type="button" value="Approve"/>
<input type="checkbox"/>	SSR0000012	09/17/2024	Approved	konto	09/20/2024 4:14:08PM	0000071389	184405	\$500.00	104011	dkerkhoff	<input type="button" value="Approve"/>
<input type="checkbox"/>	SSR0000014	09/17/2024	Pending Approval	konto	09/20/2024 5:18:43PM	0000071391	184405	\$500.00	104011	dkerkhoff	<input type="button" value="Approve"/>

1. Click the **Approve** button to open, review, and Approve or Deny the Self-Service Journal

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Approve the Self-Service Journal

Any of the above three methods will open the Journal Approval page:

GL Journal Approval

Business Unit: PUGET [Return to Worklist](#)
Journal ID: 0000069385 [Attachments \(0\)](#)
Journal Date: 06/30/2024 [Go to Journal Entry Page](#)

Line Unit: PUGET Status: Pending
Ledger Group: ACTUALS Debits: \$3.00
Adjusting Entry: N Credits: \$3.00
Fiscal Year: 2024 Description: Transfer Request SSR0000100
Period: 12 Requester: mdpalmer

Self-Service Journals

Unit PUGET, ID 0000069385, Date 2024-06-30, Line Unit PUGET:Pending [Start](#)
[New](#)
[Path](#)

Budget Manager Approval

Pending
Miriam Chitiga
SelfService Journals Budget Mg

To add comments to the journal's approval process, enter and select any one of the four approval action buttons. Then the comments can be viewed from the Approval Flow Graphic Display.

254 characters remaining

[Approve](#) [Deny](#) [Hold](#) [Pushback](#) [Add Comments](#)

Journal Lines

[Chartfields](#) [More Chartfields](#) [Currency Details](#)

Line	Unit	Ledger	Fund	Dept	Project	ChartField 1	Account	Oper Unit	Fund Affil	Oper Unit Affil	Affiliate
1	PUGET	ACTUALS	10	6013			91228				
2	PUGET	ACTUALS	10	7101			91228				

1. Click the **Journal Lines** expand arrow
2. Review the Journal Line **Chartfields**
3. Click the **Currency Details** Tab and review the Journal Line **Amounts**
4. Click the **Approve** button

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GL Journal Approval

Business Unit	PUGET	Return to Worklist
Journal ID	0000069385	Attachments (0)
Journal Date	06/30/2024	Go to Journal Entry Page
Line Unit	PUGET	Status: Approved
Ledger Group	ACTUALS	Debits \$3.00
Adjusting Entry	N	Credits \$3.00
Fiscal Year	2024	Description Transfer Request SSR0000100
Period	12	Requester mdpalmer

Self-Service Journals

Unit PUGET, ID 0000069385, Date 2024-06-30, Line Unit PUGET:Approved

To add comments to the journal's approval process, enter and select any one of the four approval action buttons. Then the comments can be viewed from the Approval Flow Graphic Display.

254 characters remaining

Journal Lines

1. Verify the **Status** has updated to **Approved**
2. Click the **Return to Worklist** List

The Requester will receive an email with the Subject: *Journal ID "00000xxxxx" Has Been "Approved"*

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Deny the Self-Service Journal

Note: When a Journal is Denied it is no longer a viable transaction; **a new Transfer Request must be created and submitted to replace it with corrected information.**

GL Journal Approval

Business Unit: PUGET
Journal ID: 0000069385
Journal Date: 06/30/2024
Line Unit: PUGET
Ledger Group: ACTUALS
Adjusting Entry: N
Fiscal Year: 2024
Period: 12

Status: Pending
Debits: \$3.00
Credits: \$3.00
Description: Transfer Request SSR0000100
Requester: mdpalmer

Self-Service Journals

Unit PUGET, ID 0000069385, Date 2024-06-30, Line Unit PUGET:Pending

Budget Manager Approval: Pending (Miriam Chitiga)

Please provide explanation for this request

211 characters remaining

Approve Deny Hold Pushback Add Comments

Journal Lines

Line	Unit	Ledger	Fund	Dept	Project	ChartField 1	Account	Oper Unit	Fund Affil	Oper Unit Affil	Affiliate
1	PUGET	ACTUALS	10	6013			91228				
2	PUGET	ACTUALS	10	7101			91228				

1. Click the **Journal Lines** expand arrow
2. Review the Journal Line **Chartfields**
3. Click the **Currency Details** Tab and review the Journal Line **Amounts**
4. Add a **Comment** to explain why the Journal is denied
5. Click the **Deny** button

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GL Journal Approval

Business Unit	PUGET	Return to Worklist 3
Journal ID	0000069385	Attachments (0)
Journal Date	06/30/2024	Go to Journal Entry Page
Line Unit	PUGET	Status Denied 1
Ledger Group	ACTUALS	Debits \$3.00
Adjusting Entry	N	Credits \$3.00
Fiscal Year	2024	Description Transfer Request SSR0000100
Period	12	Requester mdpalmer

Self-Service Journals

Unit PUGET, ID 0000069385, Date 2024-06-30, Line Unit PUGET:Denied [View/Hide Comments](#)

Budget Manager Approval

Denied

Miriam Chitiga
Self-Service Journals Budget Mg
07/07/24 - 11:22 AM **2**

Comments

Miriam Chitiga at 07/07/24 - 11:22 AM
Please provide explanation for this request

To add comments to the journal's approval process, enter and select any one of the four approval action buttons. Then the comments can be viewed from the Approval Flow Graphic Display.

254 characters remaining

Approve
Deny
Hold
Pushback
Add Comments

Journal Lines

Line	Unit	Ledger	Fund	Dept	Project	ChartField 1	Account	Oper Unit	Fund Affil	Oper Unit Affil	Affiliate
1	PUGET	ACTUALS	10	6013			91228				
2	PUGET	ACTUALS	10	7101			91228				

1. Verify the **Status** has updated to **Denied**
2. Verify the added **Comment**
3. Click the **Return to Worklist** List

The Requester will receive an email with the Subject: *Journal ID "00000xxxxx" Has Been "Denied"*

Again, edits are not allowed to existing requests when going through the approval process. **You will need to make sure the requester knows a new transfer request is required.**

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Tips and Tricks:

Request Statuses:

1. Pending Submission - can only be deleted by the Created By user
2. Submitted
3. Pending Approval
4. Approved
5. Denied
6. Completed
7. Canceled