Workflow Process – Revenue Projections Approval

On the home next screen, click on the Tasks icon:

Approval involves two tasks: Reviewing the work in your unit, and approval.

The Revenue Projections Task will load a single report that summarizes all of the changes to every fund center available for Revenue. Once you have reviewed this with your team, you may mark
“Complete” on this task. Then, click the “NEXT” button. The following screen appears. To approve, the dropdown next to ACTION should state “Promote”. Promote means to promote to the next person in your workflow process – usually this is automatically determined based on the ownership in the planning unit hierarchy definition.

Next, click on **Change Status**. Once this is completed, the status appears below. It shows that the status has been promoted.
Then click [Done].

Everyone under the approved node should only be able to read the data after approval. This likely completes your Approval Task. You may now mark this task as complete.

Further approval:
Next, click on Change Status. Once the user clicks on Change Status, there is the option to APPROVE or REJECT.

Click Reject and Done. Once completed, it is sent back to the previous owner/approver.

Click Approve and Done.

Once completed, the next screen appears, that shows it has been “signed off”.
Workflow

Approvals

Filter: Budget  I  FixCostAdjst

FC_9900
admvicepres@gmail.com
Signed Off