

The **PeopleSoft** Mobile Approvals application provides journal approvers with the added convenience of reviewing and taking action on pending journal transactions from a mobile device. See the [Reviewing and Approving or Denying Journals](#) job aid for specific review tasks required of a Journal Approver and to learn about how to approve a journal using the **PeopleSoft** web application.

The Mobile Approvals application allows users to perform the following tasks using an Apple iOS or Android device:

- Review journals
- Approve or deny journals at the header level
- View attachments
- Add comments for approval/denial actions
- Preview the transaction approval flow
- See any comments that previous approvers have entered

Access to the application is limited to PeopleSoft users assigned the Journal Approver role who are connecting from a properly configured mobile device. To access the application, see the [Connecting to the PeopleSoft Mobile Approvals Application](#) job aid.

Note: links to additional job aids referenced above will be activated upon the release of PeopleSoft 9.2

General Navigation Conventions

- The Mobile Approvals application will adjust the display automatically based on the screen size of your device. The examples used in the document illustrate the fields and controls using a mobile tablet in landscape mode. Your application may appear differently depending on your device and viewing direction.
- This document uses the following conventions to describe working in the mobile application. Consult your device owner's manual for additional guidance.



Tap

Press with your finger on a button or icon to activate; this is the equivalent of clicking with a mouse.



Drag

Move your finger vertically along the surface to scroll through a list. Dragging up will load items further down a list or page.



Swipe

Move your finger horizontally along the surface. This can be used to scroll vertically and to advance to the next (or previous) screen.

Using the PeopleSoft Mobile Approvals Application

The Mobile Approvals Home Page on Tablet Devices

The Approvals Home page—available only on tablet devices—provides access to all journals created in PeopleSoft that are pending approval by the user. When accessing the application on a phone, the Mobile Approvals Transaction List page will be displayed by default.

- a Tap the **Journal** transaction button to access the transaction list page and to begin your review.
- b The bubble count indicates the number of transactions pending approval.
- c Pending transactions are also grouped into the following categories based on how long they have been in pending status:
 - Today
 - Yesterday
 - Less than 7 Days
 - Less than 30 Days
 - 30 Days or More
- d Tap the gray arrow to access the Approvals Transaction List page filtered for only the transactions in this category.



Access the following options from the bottom toolbar of the Home page:

- e **Full Site:** Tap to open the full web version of PeopleSoft in a separate browser window or tab. By default, the user's Worklist will be displayed in the full site.
- f **Refresh:** Tap to reload the Home page with any updates to the list of pending journal approvals from the user's Worklist.
- g **Sign Out:** Tap to log off of the Mobile Approvals application; be sure to log off and close your web browser after each session. If you are connecting via the UCSF VPN, you should also log off of the VPN to disconnect your private network session.

Using the PeopleSoft Mobile Approvals Application

The Mobile Approvals Transaction List Page

- a On a tablet in landscape mode, a transaction list of pending **Journal** approvals is displayed on the left side of the page. By default, the first transaction will be highlighted in yellow, and the journal approval details will be displayed on the right side of the page.

Phone/Tablet Display Note: when using a phone, only the transaction list will be displayed on the screen.

Drag up to see additional transactions in the list that may not be displayed in the space provided.

- b Tap an entry in the transaction list to view the details on the right side of the page. The selected entry will become highlighted in yellow.

Phone/Tablet Display Note: on a phone, tapping an entry in the transaction list will display the journal approval details for that transaction in a separate screen.


- c The right side of the page displays the journal header **Summary**, **Lines** detail, and **Pending Actions** for the selected pending journal. Line details include all chartstring fields and UCOP derived fields.

Drag up to see additional journal lines (if applicable) and the pending actions section.

- d Action buttons to **Approve** or **Deny** a transaction are available at the bottom of this section.

Note: Mass approvals are unavailable in the mobile application.

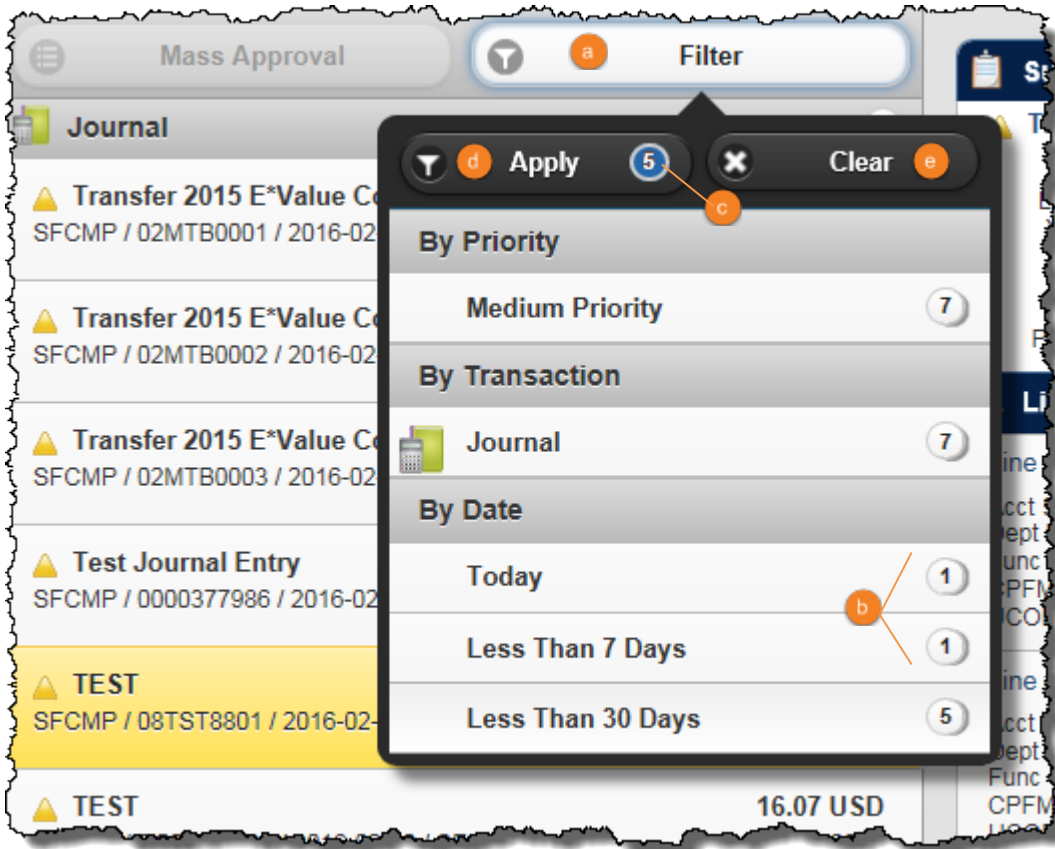
- e Use the **Home** button to return to the Journal Approval Home page.

Phone/Tablet Display Note: on a phone, use the  button to return to the transaction list page.

Using the PeopleSoft Mobile Approvals Application

Filtering the Approvals Transaction List

- a Tap the **Filter** button to limit the transaction list to a subset of pending journals. Filter options include **By Priority** (PeopleSoft determines the priority based on the age of the pending transactions) and **By Date**.



- b A bubble count indicates the number of pending transactions included in each filter value. Tap one or more filter values to add the corresponding pending transactions to your filter list.
- c A bubble count in the **Apply** button indicates how many transactions are included in the filter.
- d Tap **Apply** to filter the Approvals Transaction List.
- e Use the **Clear** button to remove all filter values and to return to the full list of pending transactions.

Note: when navigating to the Approvals Transaction List from a Pending by Date value on the Home page, the corresponding filter will be automatically applied in the Approvals Transaction List page.

Phone/Tablet Display Note: on a phone, the filter count, **Apply** and **Clear** buttons will appear at the bottom of the screen.

Using the PeopleSoft Mobile Approvals Application


Reviewing Pending Journals

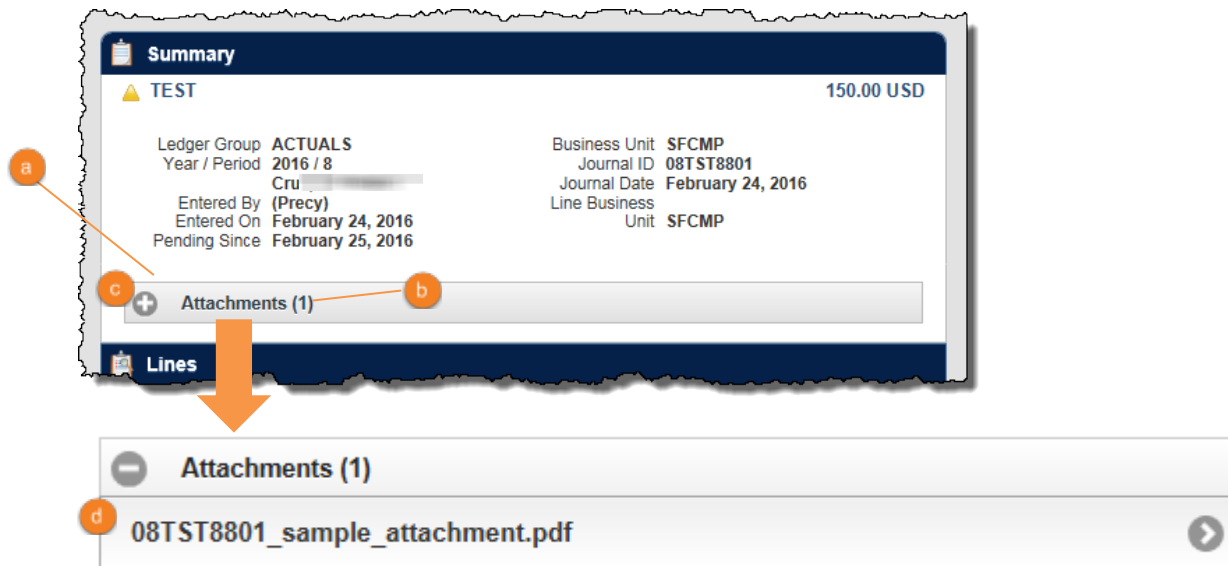
Approvers are responsible for ensuring that all journal transactions submitted to them are reasonable and accurate based on the journal documentation, knowledge of the activity, and conformity to UCSF's Policies and outside agencies such as the National Institutes of Health (NIH).


-UCSF Accounting & Reporting Department

Some journal attributes, including Source Code and Journal Header Long Description, are not available in the Mobile Approvals application. When additional attributes from the Journal Entry Page are required for journal review, access the full [PeopleSoft](#) web application.

Viewing Journal Attachments

- a When files are attached to a pending journal, an **Attachments** sub-section will appear in the **Summary** section. If no files are attached, this section will not be displayed.
- b The number of attachments for the journal will be displayed in parentheses.
- c From the **Summary** section, tap the  button in the **Attachments** sub-section to display a list of attachments for the journal.





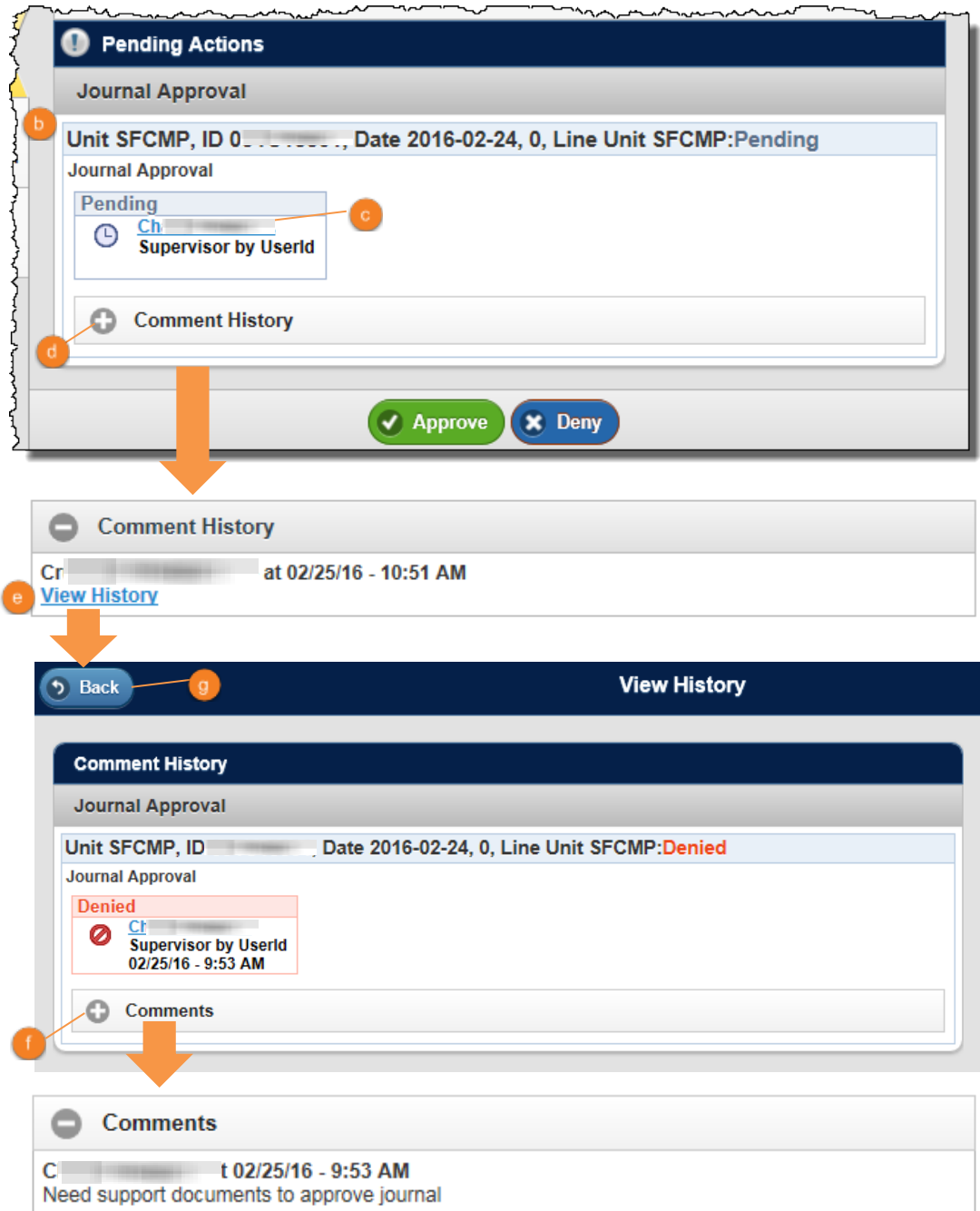
- d Tap the attachment file name, the  button, or anywhere on the row to open the attachment. The attachment will open in a new window (you may need to disable any pop-up blockers to view the attachment).

Using the PeopleSoft Mobile Approvals Application

Viewing Pending Actions and Comment History

- a Drag up with your finger to scroll to the bottom on the journal detail section to view Pending Actions (not shown).
- b This section displays the approval workflow for the journal entry; for each approval step, the status, approver, and routing rule are displayed.

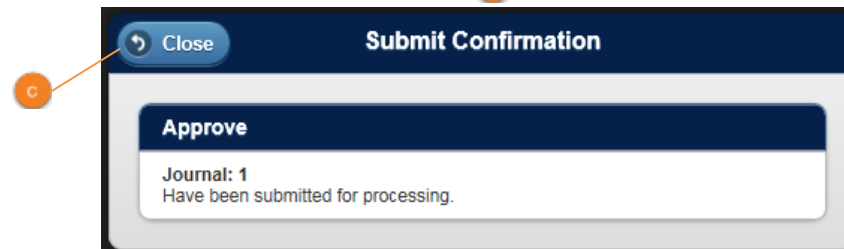
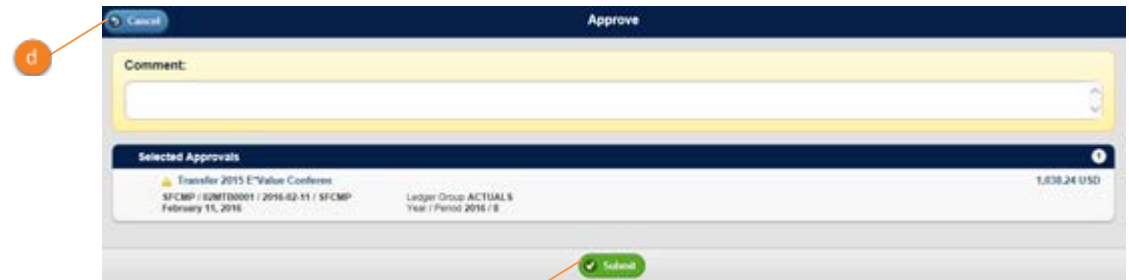
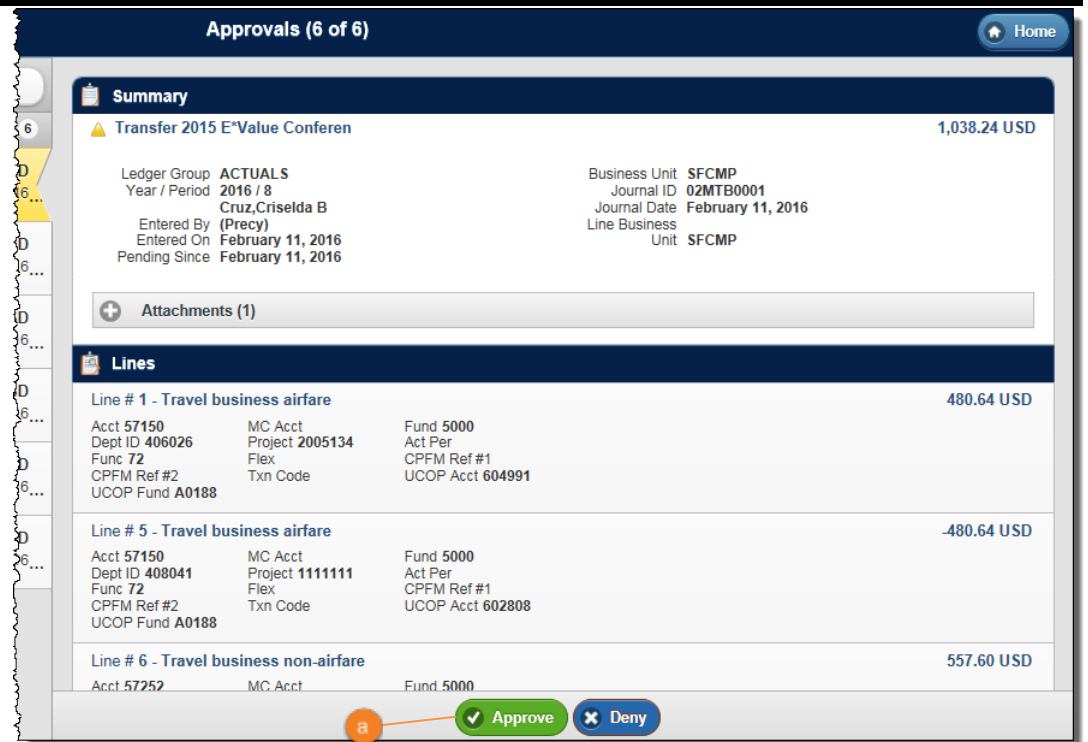
Phone/Tablet Display Note: on a phone, swipe left to view additional approvals that have taken place or will need to take place.
- c Tap the approver name to view additional approver information, including contact information, in a separate page.
- d If comments have been added during previous approval steps, a **Comment History** section will be available. Tap the  button to display a list of all comment entries.
- e Tap **View History** to open a new page to view the comment history details recorded during the approval step.
- f Tap the  button to view the full comments.
- g Tap the **Back** button to return to the previous page.



Using the PeopleSoft Mobile Approvals Application

Approving Pending Journals

- a Once you have completed your review and have determined that the selected journal is ready for approval, tap the **Approve** button at the bottom of the page.
- b If you **have completely reviewed all parts of this journal as described in the sections above** and are ready to approve it, tap **Submit**.
Your approval is immediately updated from Pending to Approved status and will pass automatically to the next Approver (if applicable) in the workflow process. This journal is also immediately removed from the Approver's Worklist.
- c A confirmation screen will appear. Tap **Close** to return to the Approvals Transaction List page.
- d You can also tap **Cancel** to return to the Approvals Transaction List page without approving the journal.



Using the PeopleSoft Mobile Approvals Application

Denying Pending Journals

- a Once you have completed your review and have determined that the selected journal should be denied, tap the **Deny** button at the bottom of the page.
- b You must enter a **Comment** when denying a journal. They are not optional. You need to tell the Preparer how to fix and resubmit the journal so that you may approve it.
- c You will receive an error message if you do not enter a comment.
- d Tap **Submit**.
Your action is immediately updated from Pending to Denied. All other additional workflow is Terminated and the journal is returned to the Preparer's Worklist with an email notification. The journal is immediately removed from the Approver's Worklist.
- e A confirmation screen will appear. Tap **Close** to return to the Approvals Transaction List page.
- e You can also tap **Cancel** to return to the Approvals Transaction List page without approving the journal.

Approvals (7 of 7) Home

Summary

▲ TEST 150.00 USD

Ledger Group	ACTUALS	Business Unit	SFCMP
Year / Period	2016 / 8	Journal ID	08TST8801
Entered By	Cruz,Criselda B (Precy)	Journal Date	February 24, 2016
Entered On	February 24, 2016	Line Business Unit	SFCMP
Pending Since	February 25, 2016		

Lines

Line # 1 - Legal-general ops/advice 150.00 USD

Acct 55601	MC Acct	Fund 5018
Dept ID 412334	Project 1111111	Act Per
Func 72	Flex	CPFM Ref #1
CPFM Ref #2	Txn Code	UCOP Acct 606526
UCOP Fund A0166		

Line # 2 - F/C OP campus below 50K (M) -150.00 USD

Acct 10214	MC Acct	Fund
Dept ID	Project	Act Per
Func	Flex	CPFM Ref #1
CPFM Ref #2	Txn Code	UCOP Acct 119501
UCOP Fund		

Pending Actions

Journal Approval

Unit SFCMP, ID 08TST8801, Date 2016-02-24, 0, Line Unit SFCMP:Pending a

Deny

Comment:

Need support documents to approve journal

Selected Approvals

▲ TEST 150.00 USD

SFCMP / 08TST8801 / 2016-02-24 / SFCMP
February 25, 2016

Ledger Group: ACTUALS
Year / Period: 2016 / 8

Deny

Comment is required.

Submit Confirmation

Deny

Journal: 1
Have been submitted for processing.