

OFFICE OF THE CONTROLLER

Grant Administration

Approving Transactions

February 2024





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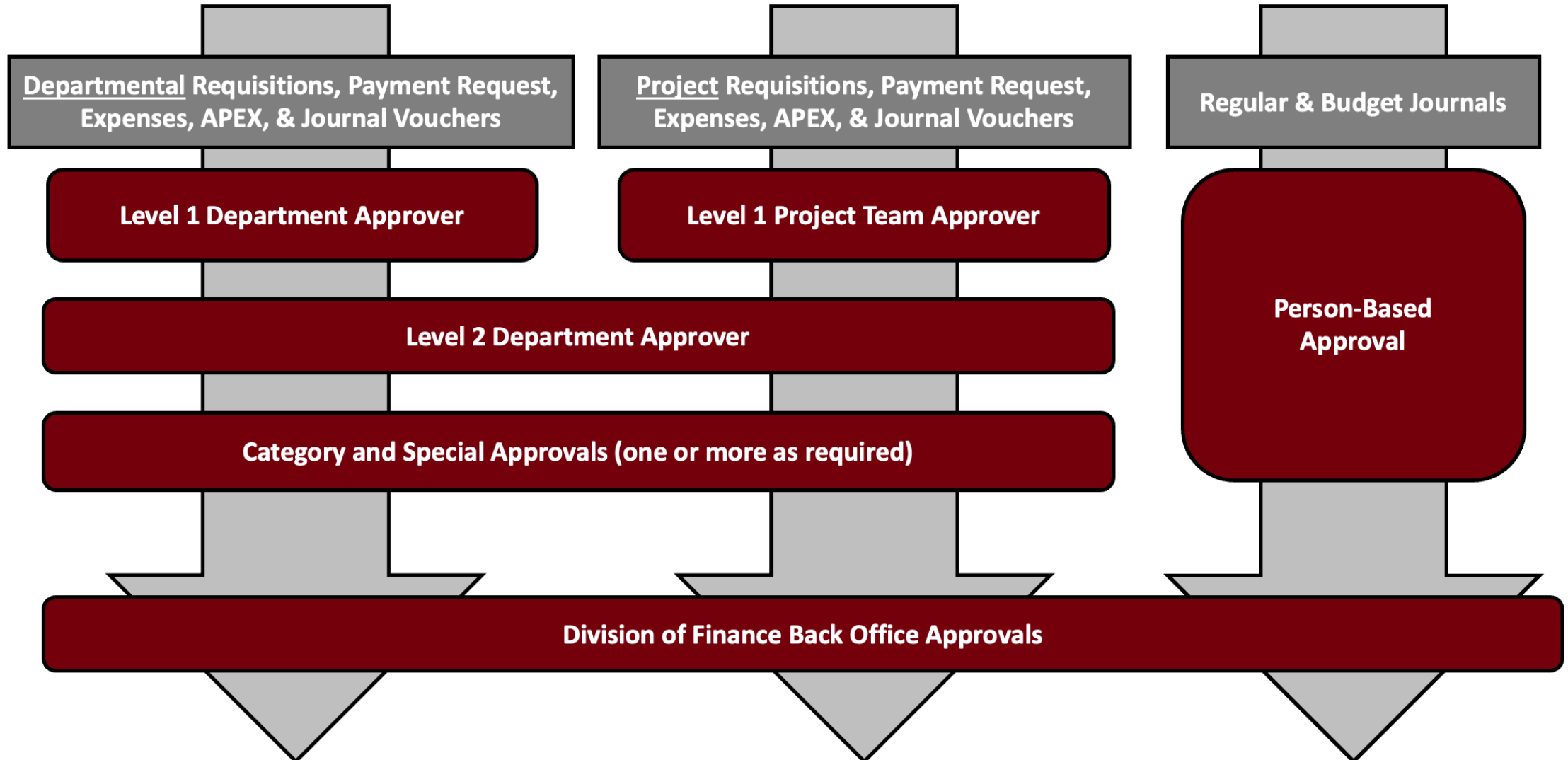
Understanding Approval Workflow Levels in PeopleSoft Finance



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PeopleSoft Finance Approval Workflow Levels

***Note:** Employee expense reimbursements require employee approval prior to the levels shown below



Ways to Receive Approval Notification



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Approve Transactions from Worklist

Use the Worklist to approve transactions in PeopleSoft Finance. The Worklist is where you will find a prioritized list of transactions waiting for your approval. To approve on an item, click the link for a transaction on the worklist and the system will take you to the appropriate approval page.

Many approver levels are pooled so that more than one person receives the notification. Once one person in the pool approves the item, it drops from everyone else's worklist.

The screenshot displays the 'Worklist' page in PeopleSoft Finance. The breadcrumb trail is 'Favorites > Main Menu > Worklist > My Worklist - Summary View'. The page title is 'Worklist' and it is for user 'ALEWIN: Alicia Lewin'. There is a search bar and a 'Worklist Filters' dropdown. The 'Worklist Items' section contains a table with the following data:

From	Date From	Work Item	Worked By Activity	Priority	Link		
Alicia Stoll Williams	11/21/2023	Notification Worklist		<input type="text"/>	JrnI Vchr eForm - Form ID:12280	Mark Worked	Reassign
Vernon G. Dorrell	12/13/2023	Notification Worklist		<input type="text"/>	TRA eForm - Form ID:13766	Mark Worked	Reassign
Vernon G. Dorrell	12/13/2023	Notification Worklist		<input type="text"/>	TRA eForm - Form ID:13768	Mark Worked	Reassign
Vernon G. Dorrell	01/08/2024	Notification Worklist		<input type="text"/>	TRVoucher eForm - Form ID:14379	Mark Worked	Reassign
Vernon G. Dorrell	02/07/2024	Notification Worklist		<input type="text"/>	TRA eForm - Form ID:16363	Mark Worked	Reassign
Vernon G. Dorrell	02/07/2024	Notification Worklist		<input type="text"/>	TRA eForm - Form ID:16365	Mark Worked	Reassign

Approve Transactions from Email

Use email to approve transactions in PeopleSoft Finance. To approve from an email, click the link provided in the body of the email to navigate directly to the page where the transaction can be reviewed and approved. Many approver levels are pooled so that more than one person receives the notification. Once one person in the pool approves the transaction, it drops from everyone else's worklist.

From: CHENYUC@mailbox.sc.edu <CHENYUC@mailbox.sc.edu>
Sent: Wednesday, February 14, 2024 9:23 AM
To: Bell, Melissa <MB175@mailbox.sc.edu>
Subject: Program Card Expense report 3000172943 for Chen,Yuche requires your attention

An expense report has been submitted that requires your action:

Employee ID: K25432761
Employee Name: Chen,Yuche
Submission Date: 2024-01-26
Report Description: CHEN Y Dec 2023 PE card report
Report ID: 3000172943
Business Purpose: Program Card
From Date
To Date
Trip Location
Total Amount: 540.00 USD
Reimbursement Amount: 0.00 USD

You can navigate directly to the approval page by clicking the link below:

https://fms-prd.ps.sc.edu/psp/FPRD/EMPLOYEE/ERP/c/APPROVE_EXPENSE_TRANSACTIONS.EX_SHEET_A

Favorites ▾ Main Menu ▾ > My System Profile

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All ▾ Search [] >> Advanced Search

Password

[Change password](#)

Personalizations

My preferred language for PIA web pages is: English

My preferred language for reports and email is: English ▾

Currency Code: USD []

Default Mobile Page: []

Alternate User

If you will be temporarily unavailable, you can select an alternate user to receive your routings.

Alternate User ID: []

From Date: [] (example:12/31/2000)

To Date: [] (example:12/31/2000)

Workflow Attributes

Email User Worklist User

[Miscellaneous User Links](#)

Email

[] [] < > 1-1 of 1 >

Primary Email Account	Email Type	Email Address		
<input checked="" type="checkbox"/>	Business ▾	JOANNEC@mailbox.sc.edu	+	-

[Save](#)

Updating My System Profile

Use the Workflow Attributes section on the My System Profile page to select how you would like to receive approval notifications.

PeopleSoft Finance Navigation:
Main Menu > My System Profile



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**Approving Transactions in
Workflow PeopleSoft
Finance**



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Reviewing Approval Workflow – Payment Request









Navigation: Main Menu > Accounts Payable > Payments > Payment Request > Payment Request Center

Request Summary From 10/12/2022 to 01/10/2023

Display	Status	Number of Requests
<input checked="" type="checkbox"/>	Pending	449
<input type="checkbox"/>	Approved	83
<input type="checkbox"/>	Vouchered	9323

Recent Messages
No Recent Messages

Requests

Request ID	Entered Datetime	Invoice Number	Supplier ID	Supplier	Description	Total Amount	Currency	Request Status	Business Unit	Voucher ID	Scheduled to Pay				
0000324640	01/10/2023 4:37PM	82622	0000004688	TROPICAL SMOOTHIE CAFE	Food: Football Team Meal	1,103.02	USD	Pending	USC01						
0000324639	01/10/2023 4:39PM	1102023-Snyder	0000043325	LESLEY MARIE SNYDER	Development of micro-credential for CrED-WIN	750.00	USD	Pending	USC01						

Click the **View Approval Workflow** icon.

Reviewing Approval Workflow – Payment Request

Approval Flow [Close]

Payment Request Approval 1

REQUEST_ID=0000324640:Pending [View/Hide Comments] [Start New Path]

Payment Request Approval

Skipped

Leann DeLoach
Payment Request Approval 1
01/10/23 - 4:46 PM

Pending

Multiple Approvers ← [Start New Path]
Payment Request Approval 1

Comments

Payment Request Approval 2

REQUEST_ID=0000324640:Awaiting Further Approvals [Start New Path]

Payment Request Approval 2

Not Routed

Multiple Approvers [Start New Path]
Payment Request Approval 2

Payables Approval

REQUEST_ID=0000324640:Awaiting Further Approvals [Start New Path]

Payables Approval

Not Routed

Multiple Approvers [Start New Path]
Accounts Payable Approval

Return

- **Pooled Approach** – meaning there are multiple approvers assigned to levels 1 and 2.
- Only 1 person from the pool is required to approve before it moves to Level 2.
- To view, click the **Multiple Approvers** hyperlink. This will open a separate page listing all the eligible approvers assigned at that level.
- In this example, one of the approvers is skipped. This is because the approver created the payment request and therefore cannot approve their own request.



Reviewing Approval Workflow – Requisition

Navigation: Main Menu > eProcurement > Manage Requisition

Manage Requisitions

Requisition Search | Keyword Search

▼ Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: USC01 | Requisition Name: | Requisition ID: | Request State: All but Complete | Budget Status: | Date From: 01/03/2023 | Date To: 01/10/2023 | Requester: | Entered By: | PO ID: |

Search | Clear | Show Advanced Search

Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon.
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Request State	Budget	Total	
1000070493	FM00681784	USC01	01/10/2023	Pending	Valid	3,335.00 USD	Go
1000070492	FEDERATION OF FILM ARCH...	USC01	01/10/2023	Pending	Valid	2,300.00 USD	Go
1000070491	Lunch with Authors	USC01	01/10/2023	Canceled	Valid	0.00 USD	Go
1000070490	Deep Clean - Housing	USC01	01/10/2023	Pending	Valid	7,579.00 USD	Go

Approvals
Cancel
Copy
Edit
View Cycle
View Print
✓ [Select Action]
[Select Action]

Click the **Approval** action from the list and then the **Go** button.

Reviewing Approval Workflow – Requisition

▼ **Review/Edit Approvers**

Department & Project Approval

▼ **Line 1: Awaiting Further Approvals** [View/Hide Comments](#)
Labor to Repair Broken Water Lines at Housing

Level 1 Approval

Approved
Kevin Kerr
Department Level 1 Approver
01/10/23 - 3:44 PM

▶ **Comments**

▼ **Line 2: Awaiting Further Approvals** [View/Hide Comments](#)
Material to Repair Broken Water Lines at Housing

Level 1 Approval

Approved
Kevin Kerr
Department Level 1 Approver
01/10/23 - 3:44 PM

▶ **Comments**

Department Level 2 Approval

▼ **Line 1: Awaiting Further Approvals**
Labor to Repair Broken Water Lines at Housing

Level 2 Approval

Approved
Brian Enter
Department Level 2 Approver
01/10/23 - 3:51 PM

▼ **Line 2: Awaiting Further Approvals**
Material to Repair Broken Water Lines at Housing

Level 2 Approval

Approved
Brian Enter
Department Level 2 Approver
01/10/23 - 3:51 PM

Final Purchasing Approval

▼ **Deep Clean - Housing: Pending**

Purchase Order Sourcing

Approved → **Pending**
Lana Widener → Heidi A. Difrancio
PO Sourcing Clerk → Inserted Approver
01/10/23 - 4:16 PM

- **Pooled Approach** – meaning there are multiple approvers assigned to levels 1 and 2.
- Only 1 person from the pool is required to approve before it moves to Level 2.
- To view, click the **Multiple Approvers** hyperlink. This will open a separate page listing all the eligible approvers assigned at that level. The person that completes the approval at that level will be displayed.
- In this example, the final approval is sitting with the Purchasing department.
- Inserted approver indicates an additional approver has been added Ad Hoc.

Reviewing Approval Workflow – Expense Report

Navigation: Main Menu > Travel and Expense > Expense Report > View

View Expense Report

Lili Ju

Business Purpose: Employee Reimburse(Non-Travel)
Description: Supplies/ZOOM reimbursement
Reference:

Totals [View Printable Version](#) [View Analytics](#) [Notes](#)

Employee Expenses (3 Lines)	464.37 USD	Non-Reimbursable Expenses	0.00 USD	Employee Credits	0.00 USD
Cash Advances Applied	0.00 USD	Prepaid Expenses	0.00 USD	Supplier Credits	0.00 USD

Amount Due to Employee: 464.37 USD Amount Due to Supplier: 0.00 USD

By checking this box, I certify that the expenses were incurred for official business of the University, and they will not be reimbursed from any other source. The University reserves the right not to reimburse expenditures without receipts or proof of payment.

Submit Expense Report Withdraw Expense Report Submitted On: 01/10/2023 Submitted By: Joanne James

[Save Changes](#)

Approval History ←

[Return to Search](#) [Previous in List](#) [Next in List](#) [Notify](#)

Click the Expand Section Approval History arrow to review workflow.

Reviewing Approval Workflow – Expense Report

▼ **Approval History**

Expense Report Employee

▼ SHEET_ID=3000133871:Approved

Employee Approval Required

Approved

Lili Ju
Employee
01/10/23 - 5:46 PM

Expense Report Approval 1

▼ SHEET_ID=3000133871:Pending

Level 1 Approval

Pending

Multiple Approvers
Department Approvers

Expense Report Approval 2

▼ SHEET_ID=3000133871:Awaiting Further Approvals

Level 2 Approval

Not Routed

Multiple Approvers
Level 2 Approvers

Budget Checking Process

▼ SHEET_ID=3000133871:Awaiting Further Approvals

Budget Checking Process

Not Routed

Multiple Approvers
Valid status is auto-approved

Controller's Office Approval

▼ SHEET_ID=3000133871:Awaiting Further Approvals

Accounts Payable Approval

Not Routed

Multiple Approvers
Accounts Payable Approval

- **Pooled Approach** – meaning there are multiple approvers assigned to levels 1 and 2.
- Only 1 person from the pool is required to approve before it moves to Level 2.
- To view, click the **Multiple Approvers** hyperlink. This will open a separate page listing all the eligible approvers assigned at that level.
- In this example, the expense report has only been approved by the employee. This is required when the report is created by a Proxy on behalf of the employee.



Reviewing Approval Workflow – Apex

Navigation: Main Menu > USC Finance eForms > APEX eForm

The screenshot displays the APEX application interface. At the top, there is a navigation bar with 'Worklist', 'Home', and 'Sign Out' links. Below this is a search bar with 'All' and 'Advanced Search' options. The left sidebar contains a 'Main Menu' dropdown with a 'Search Menu' input field. The 'USC Finance eForms' folder is highlighted in yellow, and its sub-menu is open, showing 'Approvals', 'APEX eForm' (highlighted in red), 'Student/Non-Employee Travel', and 'Journal Voucher eForm'. The main content area shows three Oracle application windows.

Reviewing Approval Workflow – Apex

On the APEX Landing page, select Approval APEX from the left navigation and click the **Search** button. This will return all the APEX transactions waiting for your approval.

The screenshot displays the APEX application interface. On the left, a navigation menu includes 'Landing Page', 'Add APEX', 'Update APEX', 'Approve APEX' (highlighted with a red box), and 'View APEX'. The main area features search filters for 'Form ID', 'Form Type', 'Form Status', 'Empl ID', 'Report ID', and 'Accounting Date', each with a dropdown menu and an input field. Below the filters are 'Search', 'Clear', and 'Save Search' buttons. The 'Search' button is highlighted with a red box. The search results are displayed in a table with 11 columns: Form ID, Form Type, Form Status, Empl ID, Report ID, Accounting Date, Journal Report ID, Original Operator, Original Date, Last Operator, and Last Date. The table contains 7 rows of data, all with a 'Pending' status. The table is outlined with a red border.

	Form ID ↑↓	Form Type ↑↓	Form Status ↑↓	Empl ID ↑↓	Report ID ↑↓	Accounting Date ↑↓	Journal Report ID ↑↓	Original Operator ↑↓	Original Date ↑↓	Last Operator ↑↓	Last Date ↑↓
1	13510	APEX	Pending		NEXT	2023-12-07	3000160156	QPAUL	2023-12-07	AGACK	2024-01-17
2	14790	APEX	Pending		NEXT	2024-01-17	3000170626	MOORERT	2024-01-17	JAMISOND	2024-01-19
3	14799	APEX	Pending		NEXT	2024-01-17	3000163581	PEAKM	2024-01-17	GIBSONLG	2024-01-17
4	15003	APEX	Pending		NEXT	2024-01-19	3000155246	KWHITE2	2024-01-19	CALONG	2024-01-19
5	15010	APEX	Pending		NEXT	2024-01-19	3000167279	KWHITE2	2024-01-19	CALONG	2024-01-19
6	15012	APEX	Pending		NEXT	2024-01-19	3000163977	KWHITE2	2024-01-19	CALONG	2024-01-19
7	15016	APEX	Pending		NEXT	2024-01-19	3000163758	KWHITE2	2024-01-19	CALONG	2024-01-19

Reviewing Approval Workflow – Apex

Review the APEX details on the Approve APEX: Expense Module Correction Request page.

APEX
Search in Menu

Approve APEX : Expense Module Correction Request
Form ID 13510 (Pending)

Transaction Information

Empl ID <input type="text"/>	Business Purpose REIMB Employee Reimburse(Non-Travel)
Entered By <input type="text"/>	Journal Report ID 3000160156 QIAN Sept 2023 Amazon lab supp
*Accounting Date <input type="text" value="12/07/2023"/>	Original Accounting Date 10/03/2023

Current Distribution

2 rows														
Expense Type	Transaction Date	Transaction Amount	Operating Unit	Department	Fund Code	Account	Class Field	PC Business Unit	Project	Activity	Product	Cost Share	Select	Distribution Line
1 Miscellaneous Supplies	09/21/2023	\$42.78	CL040	155212	N1100	53009	202	USCIP	80005261	1			Yes	0
2 Miscellaneous Supplies	09/22/2023	\$117.55	CL040	155212	N1100	53009	202	USCIP	80005261	1			Yes	0

Deselect All

New Distribution

4 rows													
Copy Down	Transaction Amount	Operating Unit	Department	Fund Code	Account	Class Field	PC Business Unit	Project	Activity	Product	Cost Share	Line Number	Distribution Line
1 Yes	\$-42.78	CL040	155212	N1100	53009	202	USCIP	80005261	1			0	0
2	\$42.78	CL040	155200	F1000	53009	202	USCSP	10011055	1			0	0
3 Yes	\$-117.55	CL040	155212	N1100	53009	202	USCIP	80005261	1			0	0
4	\$117.55	CL040	155200	F1000	53009	202	USCSP	10011055	1			0	0

Reviewing Approval Workflow – Apex

Review the APEX details on the Approve APEX: Expense Module Correction Request page.

The screenshot shows a web browser window with a dark top bar containing navigation icons (back, refresh, heart) and a search bar labeled 'Search in Menu'. The page title is 'APEX'. Below the title is a section header 'Justification'. The form contains four text input fields, each with a label on the left and a question on the right. The first field is labeled 'More Information' and contains the text 'Expense was to be charged to project 10011055.'. The second field is labeled 'CTJ1' and contains 'Correctly moving expense from 80005261 to 10011055'. The third field is labeled 'CTJ2' and contains 'Discovered by an overage in project 80005261'. The fourth field is labeled 'CTJ3' and contains 'Review expense report'. Each text input field has a small icon in the bottom right corner, likely for text formatting or undo/redo actions.

APEX

Justification

More Information Expense was to be charged to project 10011055.

Please specify the transactions(s) being moved and how it directly benefits the sponsored project it is being moved to/from.

CTJ1 Correctly moving expense from 80005261 to 10011055

How was this error or situation discovered? Please include the reason this was originally charged to the incorrect sponsored project or account.

CTJ2 Discovered by an overage in project 80005261

How will this type of error or situation be prevented from happening in the future?

CTJ3 Review expense report

Reviewing Approval Workflow – Apex

Click the **View** button to review the attachments. Once review is complete, click the **Approve** button.

File Attachments

Please attach supporting documentation. Allowed file types include .DOC, .DOCX, .JPG, .PDF, .TIF, .MSG, .TXT, .XLS, .XLSX, .CSV

2 rows

Attachment Uploaded	View	Description ↑↓	File Name ↑↓	Replace
1	View	Document	RE_VPR_Funded_Project_-_December_Expiration.msg	Replace
2	View	Document <input type="text" value="Document"/>	cost_transfer_justification_form_10011055s.pdf	Delete

[Add](#)

> **Comments**

[Search](#) [Deny](#) [Recycle](#) [Approve](#)

Reviewing Approval Workflow – Apex

Click the **View Approval Route** link to see where the transaction is in the approval process.

The screenshot displays the Apex system interface. At the top, there is a navigation bar with a search box labeled "Search in Menu" and several icons. Below the navigation bar, the page title "APEX" is visible. The main content area shows a confirmation message: "Approve APEX : Results" with a checkmark icon and "Form ID 13510 (Authorized)". A light blue banner below the message states, "You have successfully approved your eForm." Below this banner, a button labeled "View Approval Route" is highlighted with a red box. Underneath the button, the section "Transaction / Signature Log" is displayed, followed by a table with 6 rows. The table columns are: Current Date Time, Step Title, User ID, Description, Form Action, and Time Elapsed. A "Refresh Log" button is located at the bottom left of the table area.

	Current Date Time	Step Title	User ID	Description	Form Action	Time Elapsed
1	12/07/2023 2:44:20PM	Initiated	QPAUL	Quintella Paul	Submit	
2	12/12/2023 8:01:16AM	APEX Sponsored Programs	SKLIE	Susan Klie	Approve	4 days 17 hours 16 minutes
3	01/11/2024 4:42:14PM	APEX Sponsored Programs	QIAN4	YU QIAN	Approve	30 days 8 hours 40 minutes
4	01/17/2024 9:43:29AM	APEX Dept Approver	JSWANNER	Jennifer Swanner	Approve	5 days 17 hours 1 minute
5	01/17/2024 10:19:03AM	APEX GFM Accting Approver	AGACK	Andrea Gack	Approve	35 minutes
6	02/14/2024 10:41:40AM	APEX Accting Approver	BLACKBU4	Katherine Blackburn	Authorize	28 days 22 minutes

Reviewing Approval Workflow – Apex

This transaction has been fully approved. To see who can approve at each level, click the **Multiple Approver** link.

Approve APEX : Results Form ID 13510 (Authorized)

You have successfully approved your eForm.

[View Approval Route](#)

Transaction / Signature Log

Current Date Time	Step Title	Action	Time Elapsed
1 12/07/2023 2:44:20PM	Initiated		
2 12/12/2023 8:01:16AM	APEX Sponsored Pro		4 days 17 hours 16 minutes
3 01/11/2024 4:42:14PM	APEX Sponsored Pro		30 days 8 hours 40 minutes
4 01/17/2024 9:43:29AM	APEX Dept Approver		5 days 17 hours 1 minute
5 01/17/2024 10:19:03AM	APEX GFM Accting A		35 minutes
6 02/14/2024 10:41:40AM	APEX Accting Approv		28 days 22 minutes

[Refresh Log](#)

View Approval Route

Review/Edit Approvers

Basic Stage

✓ G3FORM_ID=13510 **Approved** 6 rows

Basic Path

- ✓ **Approved**
Multiple Approvers
APEX Sponsored Programs
01/11/24 4:42 PM
- ✓ **Approved**
Jennifer Swanner
APEX Dept Approver
01/17/24 9:43 AM
- ✓ **Approved**
Andrea Gack
APEX GFM Accting Approver
01/17/24 10:19 AM
- ✓ **Approved**
Katherine Blackburn
APEX Accting Approver
02/14/24 10:41 AM

Reviewing Approval Workflow – Journal Entry (JE)

Navigation: Main Menu > General Ledger > Journals > Journal Entry > Create/Update Journal Entries

Enter the applicable search criteria, click the Search button. On the Create/Update Journal Entries page click the Approve tab.

Create/Update Journal Entries

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

Search Criteria

Business Unit = USC01

Journal ID begins with 0000155418

Journal Date =

Document Sequence Number begins with

Line Business Unit =

Journal Header Status = Valid Journal - Edits Complete

Budget Checking Header Status =

Source =

Entered By begins with

Attachment Exist =

Journal Class begins with

Long Description begins with

Case Sensitive

[Basic Search](#) [Save Search Criteria](#)

Approval

Unit USC01 Journal ID 0000155418 Date 01/04/2023

Long Description Purchasing 5 waivers (\$50 each) for Philosophy's Ph.D. program. CollegeNet fees for Philosophy in the College of Arts and Sciences.
123 characters remaining

*Ledger Group ACTUALS Adjusting Entry Non-Adjusting Entry

Ledger

*Source ONL Fiscal Year 2023 Period 7

Reference Number ADB Date 01/04/2023

Journal Class

Transaction Code GENERAL

SJE Type

Currency Defaults: USD / CRRNT / 1

Attachments (3)

Reversal: Do Not Generate Reversal

Entered By HIBSHMAJ

Entered On 01/04/2023 8:00:52AM

Last Updated On 01/06/2023 3:30:54PM

Header | Lines | Totals | Errors | **Approval**

Reviewing Approval Workflow – Journal Entry (JE)

Journal Entry approvals are **person-based**.

Unit USC01 Journal ID 0000155418 Date 01/04/2023 **Submit**

Approval Status

Unit USC01
 Approval Check Active Y
 Approval Status Pending Approval
 Approval Action Approve
 Deny Comments (254 characters remaining)

GL JE Journal Approval

Unit USC01, ID 0000155418, Date 2023-01-04, Line Unit USC01:Pending

GL Journal Entry Approval

Approved: Susan Klie (JE: Journal Entry Approval 1, 01/06/23 - 3:38 PM) → Pending: Multiple Approvers (Controller Office Journal Appr)

Approval History

Thread ID	Definition ID	Effective Date	Requester	Stage	Path	Step Number	Step Status	Approver	Approval Status	Datetime
162797	GLJOURNALAPPROVAL	01/01/1901	HIBSHMAJ	10	1	1.00	Approved	BRABHAMP	Bypassed	01/06/2023 3:36:40.000000PM
162797	GLJOURNALAPPROVAL	01/01/1901	HIBSHMAJ	10	1	1.00	Approved	OSWALDE	Bypassed	01/06/2023 3:36:40.000000PM
162797	GLJOURNALAPPROVAL	01/01/1901	HIBSHMAJ	10	1	1.00	Approved	SKLIE	Approved	01/06/2023 3:36:40.000000PM

Launch Question 1.

Reviewing Approval Workflow – Journal Voucher (JV)

Navigation: Main Menu > USC Finance eForms > Journal Voucher eForm

The screenshot displays the main navigation interface of the University of South Carolina system. At the top, there is a dark red header with navigation links for 'Worklist', 'Home', and 'Sign Out'. Below the header, a search bar is visible with the text 'All Search' and 'Advanced Search'. The main navigation menu is open, showing a list of folders and sub-items. The 'USC Finance eForms' folder is highlighted with a red box. A sub-menu is displayed for 'USC Finance eForms', with the 'Journal Voucher eForm' item highlighted by a red box. Other items in the sub-menu include 'Student/Non-Employee Travel', 'Approvals', and 'APEX eForm'. The background shows a partial view of the system's main content area with various Oracle application windows.

Reviewing Approval Workflow – Journal Voucher (JV)

On the Journal Voucher landing page, select Approve Journal Voucher from the left navigation and click the **Search** button. This will return all the Journal Vouchers waiting for your approval.

Journal Voucher

Approve Journal Voucher

View Journal Voucher

Search by:

Form ID: Begins With []

Form Type: Begins With []

Form Status: is Equal To []

Voucher ID: Begins With []

From Voucher ID: Begins With []

Supplier ID: Begins With []

Invoice Number: Begins With []

Effective Date: is Equal To []

Requested By: Begins With []

Search Clear Save Search

2 rows

	Form ID	Form Type	Form Status	Voucher ID	From Voucher ID	Supplier ID	Invoice Number	Effective Date	Requested By	Original Operator	Original Date	Last Operator	Last Date
1	15431	JRNLVCHR	Pending	NEXT	02270601	0000054769	02270601 JV	2024-01-25	ALSTOLL	ALSTOLL	2024-01-25	ALSTOLL	2024-01-29
2	15435	JRNLVCHR	Pending	NEXT	02313811	0000054769	02313811 JV	2024-01-25	ALSTOLL	ALSTOLL	2024-01-25	ALSTOLL	2024-01-29

Reviewing Approval Workflow – Journal Voucher (JV)

Review the Journal Voucher details on the Journal Voucher: Distribution Details page.

← | 🕒 | ❤️ | 🔍 Search in Menu | 🏠 | 🔔 | ⋮ | 🔄

Form Page

Journal Voucher : Distribution Details Form ID 15431

Transaction Information

Supplier ID 0000054769 Optomec Inc

From Voucher ID 02270601 Invoice Number 02270601 JV

*Effective Date 📅 Requested By ALSTOLL Alicia Stoll Williams

Current Distribution

5 rows

	Merchandise Amount ↑↓	Operating Unit ↑↓	Department ↑↓	Fund Code ↑↓	Account ↑↓	Class Field ↑↓	PC Business Unit ↑↓	Project ↑↓	Activity ↑↓	Product ↑↓	Cost Share ↑↓	Select ↑↓
1	135529.50	CL040	155300	F1000	56203	202	USCSP	10012501	1			No
2	44275.00	CL040	155300	F1000	56203	202	USCSP	10012501	1			No
3	10152.50	CL040	155300	F1000	53024	202	USCSP	10012501	1			Yes
4	14750.00	CL040	155300	F1000	52070	202	USCSP	10012501	1			Yes
5	7625.00	CL040	155300	F1000	52046	202	USCSP	10012501	1			Yes

Select All

Reviewing Approval Workflow – Journal Voucher (JV)

Review the Journal Voucher details on the Journal Voucher: Distribution Details page.

Form Page

New Distribution

Copy Down	Merchandise Amount ↑	Operating Unit ↑	Department ↑	Fund Code ↑	Account ↑	Class Field ↑	PC Business Unit ↑	Project ↑	Activity ↑	Product ↑	Cost Share ↑	Insert A Row	Delete A Row
1	Copy Down	-10152.50	CL040	155300	F1000	53024	202	USCSP	10012501	1		+	-
2	Copy Down	-14750.00	CL040	155300	F1000	52070	202	USCSP	10012501	1		+	-
3	Copy Down	-7625.00	CL040	155300	F1000	52046	202	USCSP	10012501	1		+	-
4	Copy Down	10152.50	CL040	155300	F1000	56213	202	USCSP	10012501	1		+	-
5	Copy Down	14750.00	CL040	155300	F1000	56213	202	USCSP	10012501	1		+	-
6	Copy Down	7625.00	CL040	155300	F1000	56213	202	USCSP	10012501	1		+	-

Justification

More Information: Moving lines that are part of an equipment build to 56213

File Attachments

Please attach supporting documentation. Allowed file types include .DOC, .DOCX, .JPG, .PDF, .TIF, .MSG, .TXT, .XLS, .XLSX, .CSV

Attachment Uploaded	Action	Description ↑	File Name ↑	Delete
1	View	Document	10012501_JV_Back-Up.docx	Replace
2	View	Document	RE__10012501_1.25.2024.pdf	Delete

Add

Comments

Search Deny Recycle Hold Approve

Reviewing Approval Workflow – Journal Voucher (JV)

Click the **View** button to review the attachments. Once review is complete, click the **Approve** button.

Justification

More Information

File Attachments

Please attach supporting documentation. Allowed file types include .DOC, .DOCX, .JPG, .PDF, .TIF, .MSG, .TXT, .XLS, .XLSX, .CSV

Attachment Uploaded	Action	Description ↑↓	File Name ↑↓	Delete
1	View	Document	10012501_JV_Back-Up.docx	Replace
2	View	Document	RE_10012501_1.25.2024.pdf	Delete

[Add](#)

> **Comments**

[Search](#) [Deny](#) [Recycle](#) [Hold](#) [Approve](#)

Reviewing Approval Workflow – Journal Voucher (JV)

Click the **View Approval Route** link to see where the transaction is in the approval process.

Form Result

Journal Voucher : Finalized Form ID 15431

You have successfully approved your eForm.
The eForm has been routed to the next approval step.
[multiple approvers.](#)

[View Approval Route](#)

Transaction / Signature Log 3 rows

	Current Date Time	Step Title	User ID	Description	Form Action	Time Elapsed
1	01/25/2024 4:17:00PM	Initiated	ALSTOLL	Alicia Stoll Williams	Submit	
2	01/29/2024 2:38:13PM	Sponsored Programs	ALSTOLL	Alicia Stoll Williams	Approve	3 days 22 hours 21 minutes
3	02/15/2024 1:27:44PM	Sponsored Programs	GWANG	Guoan Wang	Approve	16 days 22 hours 49 minutes

[Refresh Log](#)

Reviewing Approval Workflow – Journal Voucher (JV)

This transaction is waiting approval at the JC Dept. Approver level. To see who can approve at each level, click the **Multiple Approver** link.

Form Result

Journal Voucher : Finalized Form ID 15431

You have successfully approved your eForm.
The eForm has been routed to the next approval step.
multiple approvers.

[View Approval Route](#)

Transaction / Signature Log

	Current Date Time	Step Title	
1	01/25/2024 4:17:00PM	Initiated	
2	01/29/2024 2:38:13PM	Sponsored Programs	
3	02/15/2024 1:27:44PM	Sponsored Programs	

[Refresh Log](#)

View Approval Route

[Cancel](#) [Done](#)

Review/Edit Approvers

Basic Stage

▼ G3FORM_ID=15431 Pending

Basic Path

✓ **Approved**

Multiple Approvers
Sponsored Programs
02/15/24 1:27 PM

⌵ **Pending**

Multiple Approvers
JV Dept Approver

✗ **Not Routed**

Andrea Gack
GFM Accting Approver

✗ **Not Routed**

Multiple Approvers
JV Accting Approver

	Time Elapsed	
	3 days 22 hours 21 minutes	
	16 days 22 hours 49 minutes	

Demonstration

- View My System Profile
- View a worklist
- Approve an expense report
- Approve a Student/Non-employee TRV
- Review balances in Grant Dashboard



Resources and Contacts



UNIVERSITY OF
South Carolina

Office of the Controller

Office of the Controller

General Accounting

Grants and Funds Management

Compliance and Tax Management

Payroll Department

Operational Management and Reporting

External Financial Reporting and Transparency

Resource and Training Toolbox

Business Manager

➤ Grant Administration

Principal Investigator

Policies & Procedures

Forms

Newsletters

PeopleSoft Finance Training Schedule

Listservs

Social Media

Contact Us

Grant Administration

Grant Administration of Sponsored Awards supports academic and administrative business units to include personnel management, fiscal operations, and coordination with multiple governing areas to ensure compliance with Uniform Guidance and grant awards.

Understands and executes the various stages of the grant lifecycle including pre-award review, grant progress monitoring, and award closure in coordination with the Principal Investigators.

Below is a list of Grant Administration tasks you may be responsible for within your college/department. Sections include links to training resources that support each task.

Note: Each year the Controller's Office provides refresher trainings starting the month of February thru the end of April. Registration links for all scheduled trainings are sent to our BIZMANAGER listserv end of January, provided in our monthly newsletter, and in a prior week reminder email. On demand training can be found in the sections below.

Account Funding Change

Expand all



Close Out Matrix



Cost Share



Cost Transfers



Indirect Cost (IDC)



Introduction to Grants Management



Milestone Notifications



Monitoring Awards



Where to Find Resources

For a list of Grant Administration tasks, you may be responsible for within your college/department, visit our [Grant Administration](#) page.



Office of the Controller

Office of the Controller

General Accounting

Grants and Funds Management

Compliance and Tax Management

Payroll Department

Operational Management and Reporting

External Financial Reporting and Transparency

Resource and Training Toolbox

Business Manager

Grant Administration

Principal Investigator

Policies & Procedures

Forms

Newsletters

PeopleSoft Finance Training Schedule

Listservs

Social Media

Contact Us

Principal Investigator

A *Principal Investigator* or *PI* is the individual responsible for the preparation, conduct, and administration of a research grant.

Below is a list of tasks a Principal Investigator may be responsible for as the administrator of a research grant. Sections include links to training resources that support each task.

Note: Each year the Controller's Office provides refresher trainings starting the month of February thru the end of April. Registration links for all scheduled trainings are sent to our PROJECTPI listserv end of January and in a prior week reminder email. On demand training can be found in the sections below.

	Expand all
Close Out Matrix	+
Cost Share	+
Cost Transfers	+
Introduction to Grant Management	+
Milestone Notifications	+
Monitoring Awards	+
No Cost Extensions	+
Procurement	+
Project Team	+
Retro Funding Change	+
Risk Accounts	+
Salary Allocations	+
Sponsored Award Roles and Responsibilities	+
Subrecipients	+
Time and Effort Reporting	+
Workflow	+

Where to Find Resources

For a list of tasks, a Principal Investigator may be responsible for as the administrator of a research grant, visit our [Principal Investigator](#) page.



Contacts

10012779		CON0006798		07/25/2022-07/24/2024
Next-Generation Ammonia System Integration Utilizi		University at Buffalo, SUNY	R1344198 DE-AR0001479	[23.9 months]
Operating Unit	Department	Fund	Class	
CL040 ENGINEERING - COMPUTING	155100 CHEMICAL ENGINEERING RESEARCH	F1000 FEDERAL GRANT	202 INDIVIDUAL AND PROJECT RSRCH	
PROJECT TEAM				
Role	Name	USCID	Email	
APPRV_1	Wagner,Alicia		alewin@mailbox.sc.edu	
CGA	Gack,Andrea Lynn		agack@mailbox.sc.edu	
PI	Lauterbach,Jochen Anton		lauteraj@mailbox.sc.edu	

If you have any questions regarding expenses or invoicing, please contact your Grant Administrator (**APPRV_1**).



Our Grant Administration Team

Name	Title	Email
Susan Klie	Director of Grant Administration	SKLIE@mailbox.sc.edu
Melissa Bell	Grant Administrator	MB175@mailbox.sc.edu
Alicia Lewin	Grant Administrator	ALEWIN@mailbox.sc.edu
Alicia Stoll	Grant Administrator	ALSTOLL@cec.sc.edu
Jennifer Swanner	Grant Administrator	JSWANNER@cec.sc.edu



Questions



UNIVERSITY OF
South Carolina

THANK YOU!

Office of the Controller



Alone, we can do so little; together,
we can do so much.



Address:

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Columbia, SC 29208



Contact Number:

Phone: 803-777-2602
Fax: 803-777-9586



Email Address:

controller@sc.edu



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