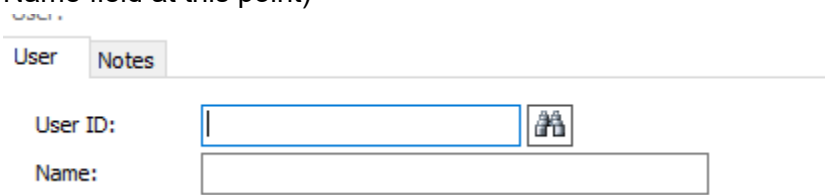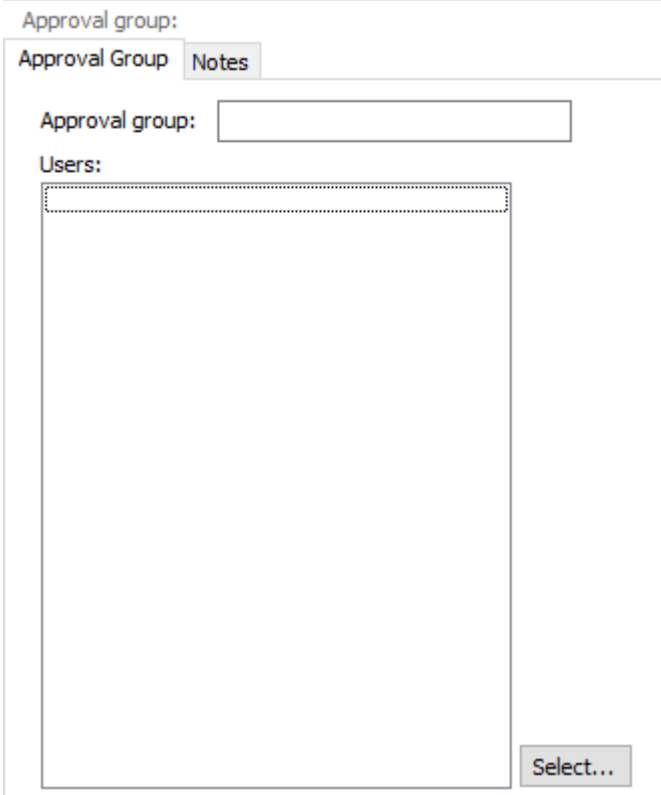# Journal Approvals

Setup

1. Set up Users that will record or approve Journal Entries.
   a. Login to Connect, go to General Ledger – Organization – Users.
   b. Click on the search icon to select a user (we are only concerned with the User ID and Name field at this point)

   c. Click Save and repeat until all appropriate users have been added.
   d. Be sure to add the Admin user (Civic) as a user

2. Set up Approval Groups (this is not users that will be entering, just approving).
   a. Go to General Ledger – Organization – Approval Groups
   b. Enter a title to the Approval Group and the add the users that belong to the group

   c. Common groups are department administrator titles or Finance staff levels

    d. Please include the Admin user in groups (this is Civic) in the event of support calls
    e. Click Save and repeat as needed.

3. Set up the Approval Steps
    a. Go to General Ledger- Organization – Approval Steps
    b. Name the Step (this will often tend to match the names of the groups but not always)
    c. Assign the appropriate group to the step
    d. We do not need to populate the Assigned to or Departments fields at this time.

    e. Click Save and repeat as needed.
4. Set up the Approval Process
    a. Go to General Ledger- Organization – Approval Process
    b. Name the Approval Process
    c. The name may be as simple as Journal Approval or their may be multiple processes that are set up with different names.
    d. Select the type of entry this process applies to (Journal or Budget entries).

    e. Click on the Approval Steps tab,
    f. Click the New button on the Approval Steps tab.

    g. Add the appropriate step(s) for this process.
    h. If appropriate, check the box to allow the approver to modify the request
    i. If there are multiple steps, verify the sequence and determine whether the current step can override the prior steps.
    j. At least one step must have "Required before the next approval step" checked
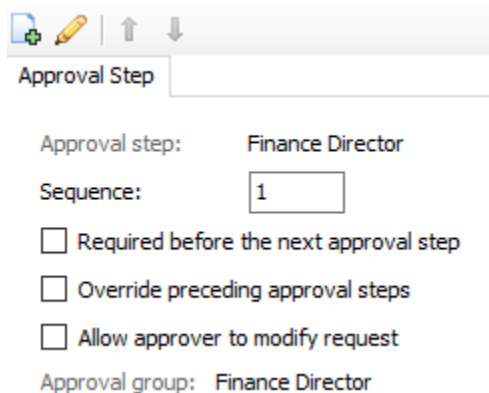
Approval Step

Approval step:	Finance Director
Sequence:	1

☐ Required before the next approval step
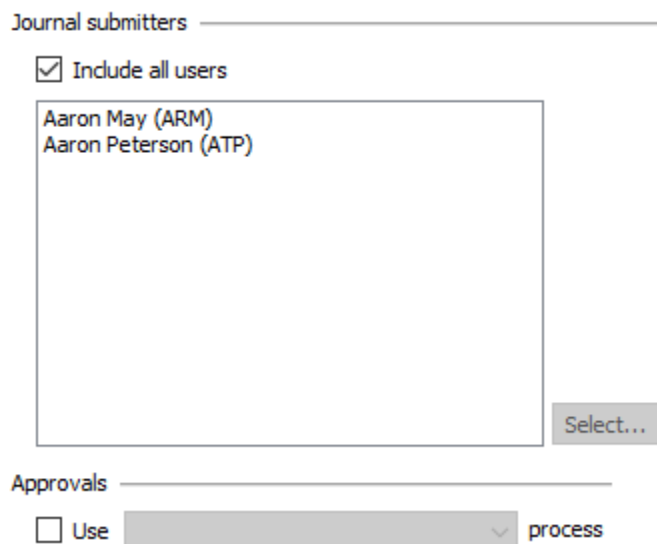
☐ Override preceding approval steps

☐ Allow approver to modify request

Approval group: Finance Director

    k.   Click Save and repeat as needed.

5.   Tie approval process to Journal Codes
    a.   Go to General Ledger – Organization – Journal Codes
    b.   For each journal code, select the users that can record entries (not the approvers) in the Journal submitters field (please include the Admin user in each of these journal codes)
    c.   Check the box next to Use under Approval and select the approval process that will be followed to approve the entries

Journal submitters

☑ Include all users

Aaron May (ARM)
Aaron Peterson (ATP)

Select...

Approvals

☐ Use [   ] process

    d.   Common setup for limited security is to only add the Journal process on the JE, CD or CDJE, CRJE, AUDIT, RE, and RC journal codes.
    e.   For a more secure setup, assign the admin user to each system journal code (AP, AR, CR, etc.) and then only assign other users and approval processes to the manual journal codes. Users will still be able to create allocations and post from sub-systems but they will not be able to delete or modify entries.

6.   Approve Journal Amounts
    a.   Go to General Ledger – Journals – Approve Journal Amounts
    b.   Select transactions (check box).
    c.   Set selected records to either Approved or Denied.
    d.   Press Apply.
    e.   Press GO.

f. Transactions will not reflect in the ledger until approved.