Multiple departments on a transaction

If more than one department is sharing the cost of a transaction, ConnectCarolina considers which departments have the most money committed to the transaction. The system makes the three departments with the most money on the transaction approvers, and any others become reviewers.

Approvals required, self-approvals

<table>
<thead>
<tr>
<th>Transaction</th>
<th>Departmental Approval Required?</th>
<th>Self-approval Allowed?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vouchers (Check Request/SOP)</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Independent Contractors</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Budget Journals &amp; Transfers</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Software Acquisition Orders</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Fund Source Requests</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Vendor Catalog Orders</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Purchase Requisitions</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Journal Entries (Basic &amp; Complex)</td>
<td>No</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Who can approve financial transactions?

School and division leadership, department heads, and business owners grant the authority to individuals to approve transactions.

For each type of transaction that requires approval, the University recommends that at least two people in the department be available to review and approve. In larger organizations, several approvers are recommended.

Different by transaction

The approval process is not identical for all transactions. Some transactions support options that others do not. For example, journal entries don’t allow you to add approvers on the fly.

Each school and division chooses options for whether to use approvals (for transactions where it is optional) and how many levels of department approval each department in their organization has.

Which transactions go through approval?

- Campus journal entries
- Campus vouchers
- Purchase requisitions
- Budget journals and budget transfers
- Chartfield value requests
- Independent contractors

Changing a transaction

If you make significant changes to the transaction, such as changing a fund source, the approval process restarts and the transaction is returned to the originator.

How do I know there is a transaction pending approval?

Each approver is automatically notified when new transactions require his or her approval.

Transactions that require approval are listed in your My Worklist, and you’ll get an email, notifying you that a transaction is waiting for your approval.

Opening transactions

In your My Worklist, click the link for the transaction you want to review. Or, click the link in the email. After you’ve logged in to ConnectCarolina, access your My Worklist.
### Approving or denying

The Approve and Deny buttons are located near the bottom of the transaction page.

- Click the **Approve** button to approve the transaction.
- Click the **Deny** button to deny the transaction. If you deny the transaction, you are required to enter a reason in the Comments box, which is shared with the transaction’s originator.
- Click the **Add Comments** button to add comments to a transaction.

When a transaction is approved, it is automatically routed to the next step in the approval process. Some types of transactions require multiple approvals. The transaction’s originator and others can track the progress of the transaction as it moves through the approval steps.

If your department has more than one level of approval, you can click the **Pushback** button to send the transaction back one level in the approval workflow. This only works within a department.

Some transactions have a **Hold** button, which lets you prevent others from approving the transaction (for example, while you research a question). Be careful with this button—no one can access the transaction except you if you’ve put the transaction on hold.

### Adding reviewers and approvers

Sometimes, you need someone else to also review a transaction. A **reviewer** can review the details of a transaction and make comments, but they cannot approve or deny it. You can also add approvers. This does not permanently change the workflow for that type of transaction, but it adds an extra approver for this specific transaction.

To add a reviewer or another approver, click the Plus button in the workflow diagram of the transaction where you want to add a reviewer or approver. Choose reviewer or approver. Search for and choose the name of the person that you want to add.

### Steps for approving a transaction

1. Log in to ConnectCarolina and click on My Worklist.
2. Click the link for the transaction you want to work with.
3. Review the details of the transaction.
4. Click the **Approve**, **Deny**, or **Add Comments** button, as appropriate.