Overview

Major Campus Unit (MCU) Finance leads manage and maintain the approval workflow for their school or division. For each department in their organization, they choose:

- how many levels of approval are required within the department for each type of transaction
- who in the department approves transactions

Leads can also choose to delegate the tasks of maintaining approvals workflow.

Making Changes to Approval Workflow

To manage workflow, follow these steps:

1. Go to **Finance Menu > UNC Campus > Department Workflow Config**
   
   **Note:** Anyone who has access to the finance part of ConnectCarolina can use this option to view how approvals are set up for their department, but only MCU leads and their delegates have access to make changes.

2. Do one of the following:
   - Enter in the Business Unit
   - Type all of or part of the department number in the Department field.
   - If you want to search by description, change “begins with” to “contains” beside the Description field and type all or part of the description.

3. Click the **Search** button.

**Result:** ConnectCarolina does one of the following:

- Displays a list of departments that match what you typed, or
- If there is only one that matches, it opens the department’s workflow configuration page. Skip to step 6.

4. Click the link of the department you need to work with.

   **Result:** ConnectCarolina displays the first tab of the screen that lets you configure your approval workflow.

5. Refer to the following pages for instructions on making changes to your approvals workflow.

6. Click **Save** to save your changes.

7. When you are finished you can do one of the following:
   - Click **Next in List** or **Previous in List** to move to the next department in your search results.
   - Click **Return to Search** to search again.
Use these steps to specify how many levels of approval they need.

Add Levels of Approval

If a transaction has a check next to it, it has at least one level of approval. The approvers listed at the bottom of the page are the approvers for this level. (These are also the approvers for the department if it is listed as a second or third level approver for another department.)

To add a second or third level of approval, type the department number in the Level 2 or Level 3 column beside the transaction you want to add another level to.

You can’t change the boxes that are grayed out.

To add another level of approval for this transaction, choose the department here.
Adding and Removing Approvers

Use these steps to add and remove approvers for a department.

At the bottom of the Dept. Approval Cfg tab, in the Departmental Approvers section, you can add or remove approvers.

Note: The University recommends that you always have at least two approvers for each type of transaction that requires approval.

Remove an Approver

Click the minus sign that is on the same row that the approver’s Onyen.

Add an Approver

Click one of the plus signs on the right side of the Departmental Approvers box (scroll all the way to the right to see it). The system adds a new row. In the Approver Oprid field, choose the approver’s Onyen. Check the box for each transaction you want the person to be an approver for.
Specifying Who Can Make Changes to Approvals Workflow

To delegate authority to make changes to approvals workflow and approvers, go to the **Approval Security** tab.

Leads can choose to have others:

- change how many levels of approval. You do this by adding or deleting names in the Authority to Assign Parental Hierarchy box.
- add or delete approvers. You do this by adding or deleting the names in the Authority to Assign Departmental Approvers box.

The Office of Sponsored Programs maintains the names in the Authority to Assign OSP Approval Group box.

**Adding and Removing Names**

- **To add a name**, click one of the plus signs in the box you need to work with. The system adds a new row. Search for the person you need to add.
- **To remove a name**, click the minus sign on the same row as the Onyen of the person you need to remove.