Chart of Accounts Maintenance: Approve a Request

Both the requester (initiator) and the RRC and alternate approvers who were selected on the form will receive an e-mail notification that the request has been successfully prepared and submitted for review and approval.

1. To access BPEL go to: https://prd.oas.oit.umn.edu/umnworklist. The login is the same M-Key login used for PeopleSoft. Or go to One Stop > Staff > PeopleSoft Enterprise Financial System > EFS Data Change Forms.

2. The initial page that displays is the Task List. Any requests that are awaiting your approval display on the My Tasks tab of this page.
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To approve a request item, it first must be “claimed” by one of the approvers. Since requests are submitted to the primary and alternate approvers at the same time, this claiming action ensures that only one of the users will review and approve or deny the request.

3. To claim an item, select “Claim” from the drop-down menu under Actions.

4. Click <Go> to display the completed request form.

5. Review the form to ensure that the request is consistent with the ChartField definition and that the information provided in the form is complete and appropriate.

6. Click <Validate & Save The Request>, even if no changes are made to the form prior to approving or denying it.

7. To approve or deny the request, select the appropriate action from the Task Action drop-down menu at the top of the page.

8. Click <Go>.

9. A reminder message displays indicating again that the page must be saved before further processing can occur, or all information will be lost. If the page has been appropriately saved, click <OK> to continue.

The request stays on the RRC task list until all approvals have been completed. When approval is complete, the item will be removed from the approver’s worklist.
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APPROVAL ROUTING

No e-mail notification is sent to the initiator when the first approver (RRC manager or designee) approves a request. After RRC approval, the DeptID Request Form is routed to the Office of Budget and Finance. After RRC approval, the Program and User Defined Request forms are routed to Accounting Services for approval or denial.

E-mail notifications on approval or denial actions will be sent to the initiator only after the final central approver approves or denies a request.

Once a ChartField is approved, Accounting Services will assign the ChartField value, if new, and perform the appropriate tree, combo edit, and budget definition updates.