Budget Office Process

An email will be sent to all users in the School Budget group when an FTF is in the queue to be approved.
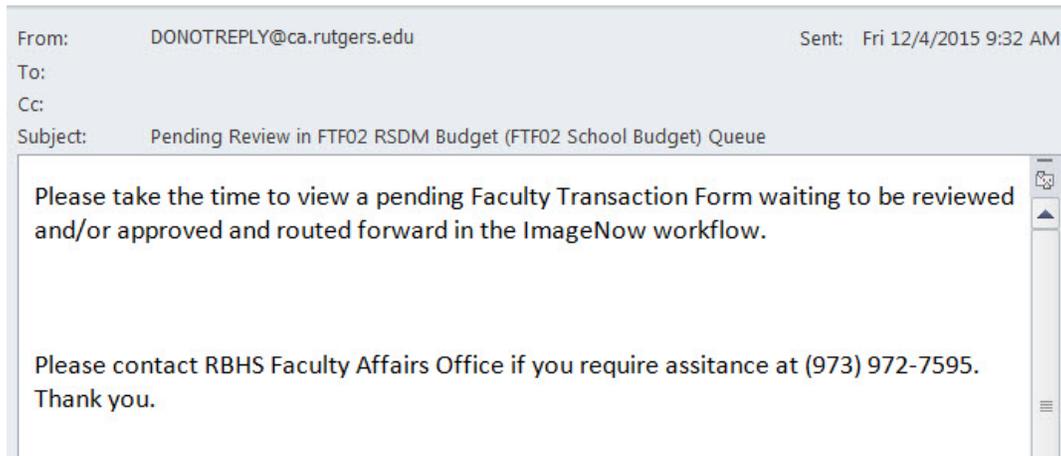
Approval Process:

1. Log into Perceptive Content using CORE ID and password.
2. Select the drop-down for **Workflow** and select *FTF02 {School} Budget.*

3. Double click on the faculty action listed in the workflow.
4. Review the FTF. If any changes/corrections are needed:

    a. Select the Black Pen icon 🖉 to cross out the incorrect item.

    b. Right click on the **T** to verify "Text" is selected. Click in the area, an *Add Text* box will appear. Type in the new information.

    c. Press [OK] button
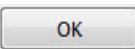
    Note: The user cannot edit once the "OK" button has been pressed. To delete the text, right click on the text and select Delete to remove the text and start over.

    d. Once information is verified, right click on the icon and select **FTF Approval**.

5. In the Salary Component section of the FTF, click to place the stamp in the "Approval and Date" field.

6. Go to the menu toolbar select **Workflow** and select   ➜ Route Forward…
    NOTE: This will automatically move the FTF to the Dean for review and approval.

7. If another FTF needs to be reviewed by budget, it will automatically appear on the user's screen.

If the FTF is Not Approved or other changes need to be made:

1. Select the Sticky Note icon 📄 and place it on the FTF form in the top right-hand corner next to the header and the *Sticky Note* box will appear.

2. Type in the reason that the FTF is not being approved.

    a. Press   [Add]   button; this will move the information to the *History* box. Once the Add is selected the information can't be edited or deleted.

    a. Press   [Close]   button.

3. On the menu toolbar select **Workflow.**

4. Select *Route Up.*

5. Select the {**FTF01 School} Faculty Coordinator (FTF01 – Faculty Coordinators).**
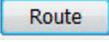
6. Press   [Route].   This will send the FTF back to the School Faculty Coordinator resolution.
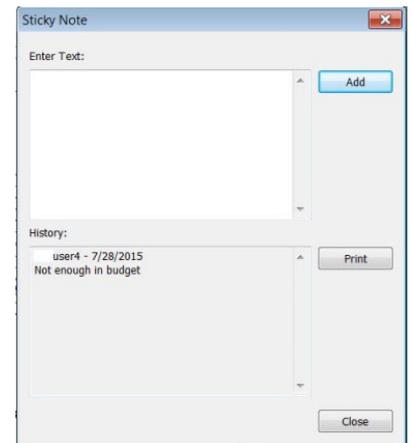
Volunteer/Unpaid Faculty Actions (FTFs):

Budget approval is not required for unpaid faculty actions, therefore the budget user will just need to forward the unpaid FTF to the Dean.

1. Go to the menu toolbar select **Workflow.**

2. Select **Route Forward**. This will automatically move the FTF to the Dean for review and approval.

To Print an Approved Faculty Action:
1. Log into Perceptive Content
2. Select the drop down for *Documents* and select *Faculty Affairs - School View*

3. On the left hand side in the *View* navigation under the **Faculty Affairs – School View** are three filters
   a. *Approved/Complete* – if select the documents (first 500) that have been approved will appear
   b. *Cancelled* – if select the documents (first 500) that have been cancelled will appear
   c. *Last Name – Approve/Complete* – if select you will be prompted to enter a last name
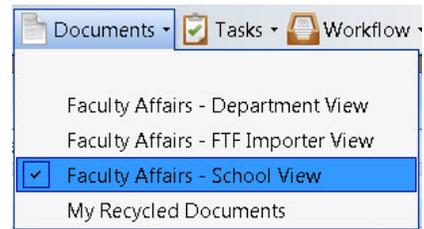
4. Select the **Last Name - Approve/Complete** filter
   a. Type in the last name in the dialog box that appears
   b. Select the **OK** button

5. On the document that appears right click and select **Export...**

6. An *Export* dialog box will appear
   a. Select the drop down for the *Format* and select **Single Page PDF**
   b. Fill in the *Directory:* information
      i. You can select **Browse...** button and go to the locations where you what the document saved
      ii. Type in a *File name:*
      iii. Select the **Save** button
   c. Under *Annotations* select the drop down and Select **Annotations**

d. Select the [OK] button
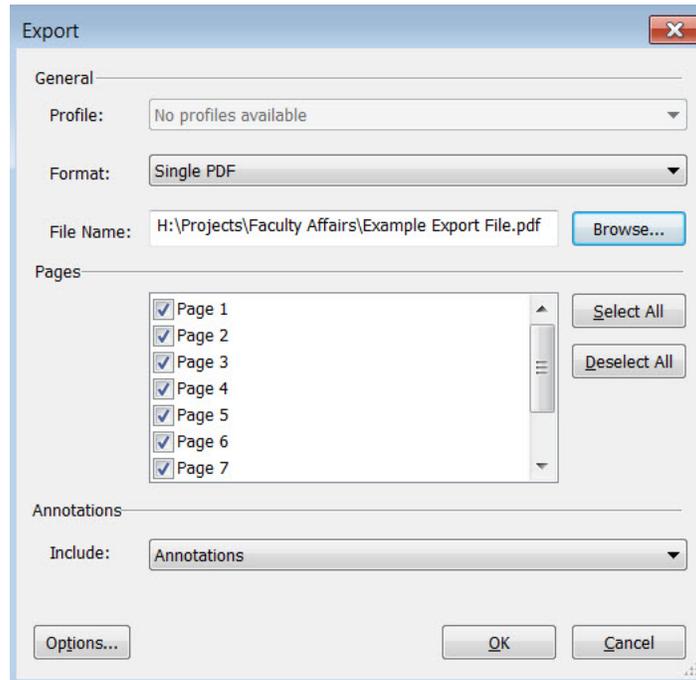
The file will be saved in the location that you have selected. If you have Perceptive Content running on startup you may get message when the system is converting the information to save.