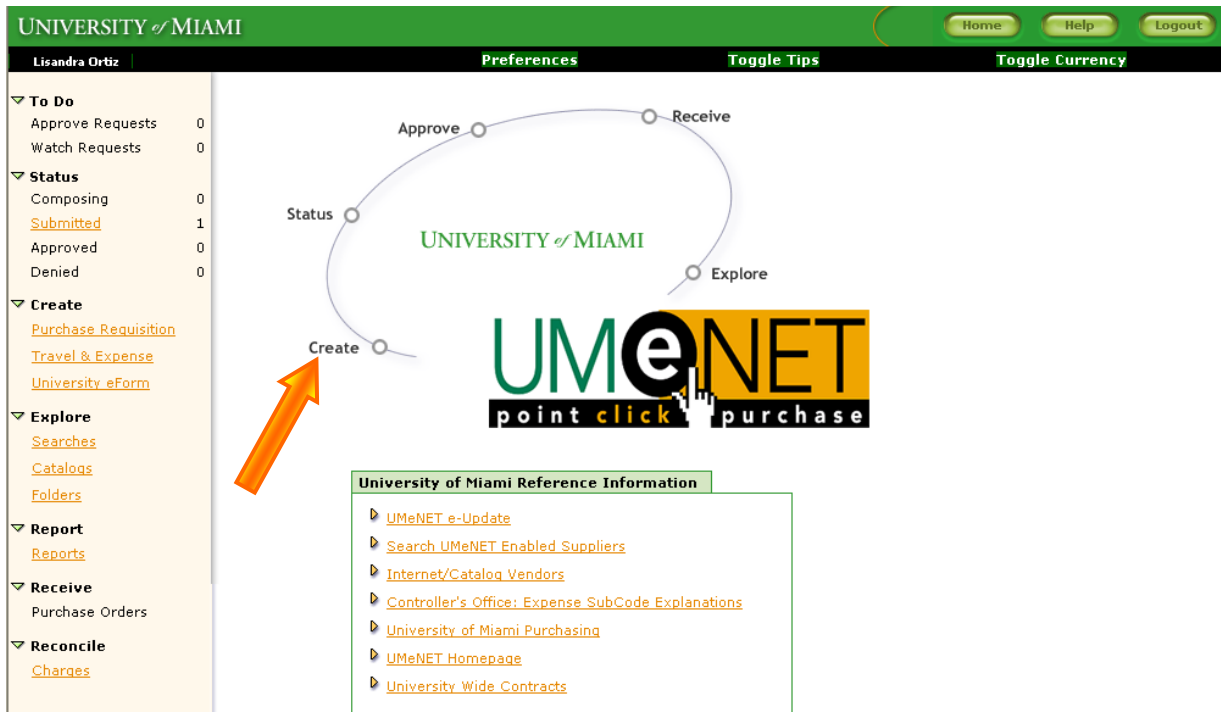


Instructions to Complete the DHRs Approval Loop Form in ARIBA (UMeNet)

1. Login to [UMeNet](#) using your CaneID and Password



2. Click on **Create**



3. Click on **University eForms**



Create a New Request

Select the type of request you want to create; for example, a purchase requisition to order items.

[How To](#)

What would you like to create?

- [Purchase Requisition](#)
- [Travel & Expense](#)
- [University eForms](#)



4. Click on the arrow next to **Security & Control Administration**



Create Request Using Company eForm



















eForms are provided by your company. Select or search for a form to use to create your request.

[How To](#)

Name	Description
eCheck	eForm for creating a Check Requisition
▼ FRS Request	FRS Account Request eForms
Cancelled Check/Stop Payments	Cancelled Checks/Stop Payments Request eForm
FRS Account Freeze eForm	FRS Account Freeze eForm
▼ Human Resources	Human Resource related eForms
Create New Position	Create New Position
Fill Vacant Position	eForm for updating and posting an existing job position
Reclassify a Position	eForm for updating and reclassifying an existing job position
TERF Request	Temporary Employee eForm (TERF)
▼ Risk Management	Risk Management related eForms
Insurance Request	eForm for requesting Risk Management approval of a vendor
▶ Security & Control Administration	System access related eForms
▶ In Development	eForms not quite ready for prime time



5. Click on **DHRS Approval Loop**

▼  Security & Control Administration	System access related eForms
 AP/DMAS	Administrative Access Request for Accounts Payable / DMAS
 Accounts Receivable	Administrative Access Request for Accounts Receivable
 Alumni Donor	Administrative Access Request for Alumni Donor
 Disability Services Management	Administrative Access Request for Disability Services
 Employee Benefits Management	Administrative Access Request for Employee Benefits
 Enrollment Management Financial	Administrative Access Request for Enrollment Management Financial
 Facilities Directory Management	Administrative Access Request for Facilities Directory
 Financial Aid	Administrative Access Request for Financial Aid
 DHRS Approval Loop	DHRS Approval Loop (DHRS)
 DHRS Access	Administrative Access Request for Human Resources (DHRS)
 Lockbox	Administrative Access Request for Lockbox
 Housing/Residence Halls	Administrative Access Request for Housing/Residence Halls
 Parking and Transportation	Administrative Access Request for Parking and Transportation
 Property Accounting Management	Administrative Access Request for Property Accounting
 Purchasing/DMAS (Vendorizing)	Administrative Access Request for Purchasing/DMAS
 Student Admissions	Administrative Access Request for Student Admissions
 Student Government (Law)	Administrative Access Request for Student Government Law




6. Complete the **Department Information** section

- Complete the **Save Request as** field. Example: *DHRS Approval Loop for 11111* (dept. #)
- Select **Add Approver** or **Change Approver**
- Explain specifically what is happening in the **Explain Request** field
- Select **Other** in the drop-down menu for **Approval Loop Organization**


Organization

Select target Organization to set Loop approvers for

* Approval Loop Organization: 

Other...

- You can either:

- select a value from the given list by clicking on the arrow  to expand the department listing or
- search by “Organization Code” or “Description”


Choose Value for Approval Loop Organization Cancel

Select a value from the list or enter a value and search for it. You can also select a specific page from the pull-down list or click an arrow to display the previous or next page.

[How To](#)

Field: 

OrgCode ↓	Description	
▼ All	All ORG Codes	<input type="button" value="Select"/>
▶ 10	10: PRESIDENT	<input type="button" value="Select"/>
▶ 20	20: EXECUTIVE VP & PROVOST	<input type="button" value="Select"/>
▶ 30	30: MEDICAL AFFAIRS	<input type="button" value="Select"/>
▶ 40	40: BUSINESS AND FINANCE	<input type="button" value="Select"/>
▶ 50	50: UNIVERSITY ADVANCEMENT	<input type="button" value="Select"/>
▶ 60	60: INTERCOLLEGIATE ATHLETICS	<input type="button" value="Select"/>




Cancel

- e. Select the correct HR Liaison (employee at the Organization above responsible for HR approvers selection). *Note: the HR Liaison field will default to your name and information.*
 - i. Use the [HR Liaisons Reference List](#) to find who the HR Liaison is for a Department.
 - ii. Then, select **Other** from the **HR Liaison** drop-down menu.

Organization Administration

Select the HR Liaison (employee at the Organization above responsible for HR approvers selection.) You may use the HR Liaisons Reference List to find who the HR Liaison is for a Department. Then enter that person in the HR Liaison drop down. If the person you are selecting is not in the HR Liaisons Reference List, you may pick a new one from the drop-down. Please explain your new selection in the Explain Request text box above. Note the HR Liaison will have to approve this request. Your entry will be verified by the HR Data Custodians.

*HR Liaison: 

Email:

Phone Number: (305) 284-3087

Title: FEDERAL WORK STUDY

Campus: 30

Department Name: HUMAN RESOURCES - GABLES/MARINE

* indicates required field


- iii. Search for the HR Liaison by: Name, Title, UM Employee ID, Home Department, or Department Name. When you find the right person, click on **Select**.

Choose Value for HR Liaison Cancel

Select a value from the list or enter a value and search for it. You can also select a specific page from the pull-down list or click an arrow to display the previous or next page. [How To](#)

Field: Name Search

Name	Title	UM Employee ID	Home Department	Department Name	
Lilian Eymann	Assoc. Director, Compliance			OFFICE OF PATIENT BILLING COMPLIANCE	Select
Maryesther Eymann	Manager, HRIS			HUMAN RESOURCES - GABLES/MARINE	Select
					Select

 Cancel

- f. Click Next > at the bottom of the page

7. Complete the **Loop Approvers** section

The screenshot shows the 'Loop Approvers' configuration page in the University of Miami DHRIS system. The page title is 'DHRIS Approval Loop'. The main content area is divided into several sections:

- Cross Over:** A section for setting approvers for Departmental Crossover. It includes a table with columns: Approver, Admin, Faculty, Research, Staff, Approver Type, and Request Access?. The table is currently empty, showing 'No items'. Below the table are 'Copy', 'Delete', and 'Add' buttons. A red warning icon indicates 'Crossover approvers are required for this organization'.
- Level 1 Authorization:** A section for setting approvers for Level 1. It includes a similar table and buttons. A red warning icon indicates 'Level 1 approvers are required for this organization'.
- Level 2 Authorization:** A section for setting approvers for Level 2. It includes a table and buttons. A red warning icon indicates 'Level 2 approvers are required for this organization'.
- Level 3 Authorization:** A section for setting approvers for Level 3. It includes a table and buttons. A red warning icon indicates 'Level 3 approvers are required for this organization'.

a. Click on **Add**

This close-up view shows the 'Cross Over' section. The table below the instructions is empty. An orange arrow points to the 'Add' button in the toolbar. The 'Request Access?' column header is highlighted in red, and a red warning icon is visible below the table.

- b. A drop-down menu appears under **Approver**. If the cross over approver does not show in the drop-down menu, select **Other**.

Cross Over

Set here approvers for Departmental Crossover. Follow same instructions for Level 1 above. Each department should also identify a cross over approver. The following link contains table of the approvers that have been identified for each department that is participating in the online Crossover Process.

[CrossOver table](#)

<input type="checkbox"/> Approver	Admin	Faculty	Research	Staff	Approver Type	Request Access?
<input type="checkbox"/> (no value) <input type="checkbox"/> (no value) <input type="checkbox"/> Maryesther Eymann <input type="checkbox"/> Lisandra Ortiz <input type="checkbox"/> Other...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Primary	<input type="checkbox"/>

Must select one checkbox for Admin, Faculty, Research or Staff

Crossover approvers are required for this organization

- i. Search for the approver by: Name, UM Employee ID, IDMS User ID, Title, Home Department, or Department Name and click on **Select**.

Choose Value for Approver

Select a value from the list or enter a value and search for it. You can also select a specific page from the pull-down list or click an arrow to display the previous or next page.

Cancel

[How To](#)

There are too many matches to display the entire list. Refine your search criteria and try again.

Field: **Search**

- Name
- UM Employee ID
- IDMS User ID
- Title
- Home Department
- Department Name

Name	ID	IDMS User ID	Title	Home Department	Department Name
No items					

Cancel

- c. Select the correct authorization classification (Admin, Faculty, Research, or Staff) and the approver type (Primary, Backup, or Parallel).

Cross Over

Set here approvers for Departmental Crossover. Follow same instructions for Level 1 above. Each department should also identify a cross over approver. The following link contains table of the approvers that have been identified for each department that is participating in the online Crossover Process.

[CrossOver table](#)

<input checked="" type="checkbox"/> Approver	Admin	Faculty	Research	Staff	Approver Type	Request Access?
<input checked="" type="checkbox"/> Maryesther Eymann	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Primary	<input type="checkbox"/>

Must select one checkbox for Admin, Faculty, Research or Staff

Copy | Delete | Add


- d. Identify a Backup Approver (for Gables/RSMAS campuses) by following the same instructions.

8. If you are an approver for Level 1, follow the same instructions as when adding a cross over approver.

Level 1 Authorization

Set here approvers for Level 1. Select Approver from the Approver field dropdown. If the approver is not listed, select Other... to search for one. For each approver the Authorization Classification (Admin, Faculty, Staff) and the role type of the approval (Primary, Backup, etc). If the approver requires new DHRS Access, mark the Request Access? checkbox.

<input type="checkbox"/>	Approver	Admin	Faculty	Research	Staff	Approver Type	Request Access?
No items							
L <input type="button" value="Copy"/> <input type="button" value="Delete"/> <input type="button" value="Add"/>							

9. If there is an approver for Levels 2 or 3, click the button at the right  to add an approver and follow the same instructions as when adding a cross over approver.

Level 2 Authorization

Click button at the right to show fields for this level -->



Level 3 Authorization

Click button at the right to show fields for this level -->



10. Click at the bottom of the page

- Complete the **Approval Flow** section. The approval flow lists users who must approve the request and the reason they are included in the approval process.

UNIVERSITY of MIAMI

Lisandra Ortiz Preferences Toggle Tips Toggle Currency

SC100538: DHRIS Approval Loop for 4001: SENIOR VICE PRESIDENT

3 Approval Flow DHRIS Approval Loop

The required approvers are displayed below. You may add approvers as necessary. Administrative users may also delete required approvers. [How To](#)

Approval Flow - DHRIS Approval Loop

Legend: Pending Active Approved Denied Watcher

SC100538 Maryesther Eymann dHRS Data Custodian (Gables) DHRIS Loop Ap

[Add Approver](#)

- Click on **Add Approver** to add a new user or role (set of permissions) to the approval flow. You are authorized to add approvers if you are the preparer, requester, or an approver.
- To add an approver, select **Other** under the **Approver** drop-down menu

Approval Flow - DHRIS Approval Loop

Approver: | [Select Approval List](#)

Add this approver as: cher

Other...

Provide a reason:

- Enter the approver's name (you can enter first name, last name, or both) and click on **Search**. Once you find the appropriate person, click on **Select**.

Choose Value for Approver [Cancel](#)

Select a value from the list or enter a value and search for it. You can also select a specific page from the pull-down list or click an arrow to display the previous or next page. [How To](#)

There are too many matches to display the entire list. Refine your search criteria and try again.

Field: Name [Search](#)

Name
(no value)

[Select](#)

[Cancel](#)

- d. Select the appropriate option next to **Add this approver as** (Approver or Watcher)
- e. Provide a detailed reason for adding the approver in the **Provide a reason** field
- f. Select the appropriate option between “Add approver to the approval flow, as the first or subsequent approver” and “Add approver in parallel to the entire approval flow”
- g. Click on **OK**

Approval Flow - DHRS Approval Loop

Approver: | [Select Approval List](#)

Add this approver as: Approver Watcher

Provide a reason:

Legend: Pending Active Approved Denied Watcher

SC100540 — Lisandra Ortiz — dHRS Data Custodian (Gables) — DHRS Loop Approval

- Add approver to the approval flow, as the **first** or **subsequent** approver
- Add approver in **parallel** to the entire approval flow

- h. Click at the bottom of the page

12. Review the **Summary** screen which displays the complete form. Click on the **Approval Flow** tab to review the approval flow. Make changes if necessary and click on **Update**.

UNIVERSITY of MIAMI

Lisandra Ortiz | Preferences | Toggle Tips | Toggle Currency

SC100540: DHRIS Approval Loop for 4001: SENIOR VICE PRESIDENT

< Prev | Submit | Exit

4 Summary

DHRIS Approval Loop

The complete form is displayed below. You may make changes if necessary. Any changes may result in additional edits and/or changes to the approval workflow. You may also make comments or add attachments using the appropriate fields below. Click Submit when all data is correct.

Summary | **Approval Flow** ←

Save Request as:

Complete Form - DHRIS Approval Loop

Request Number: [SC100540](#)

*Request: Add Approver Change Approver

Preparer: [Lisandra Ortiz](#)

*Explain Request:

*Approval Loop Organization:

HR Liaison:
 lortiz@umiami.edu
 (305) 284-3087

Level 1 Approvers :

Approver	Admin	Faculty	Research	Staff	Approver Type	Request Access?
No Items						

Cross Over Approvers :

Approver	Admin	Faculty	Research	Staff	Approver Type	Request Access?
Maryesther Eymann	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Primary	<input type="checkbox"/>
Lisandra Ortiz	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	BackUp	<input type="checkbox"/>

Comments - Entire DHRIS Approval Loop

Comments:

* indicates required field

< Prev | Submit | Exit

13. You can also add an attachment by clicking on **Add Attachment**
- a. Click on Browse
 - b. Search for the document you need to attach
 - c. Click on OK

Add Attachment

Browse to and select a file to include with your comments.

[How To](#)

File:

- d. You can delete the attachment by clicking on **Delete**

14. Add **Comments**, if necessary, in the given field

Comments - Entire DHRS Approval Loop

Comments:

15. Click on **Submit**