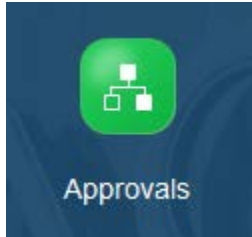


## Approvals: How to Filter on your school or center orgs and promote them

10/26/16

Planning Cloud allows you to filter your individual school and center orgs and parents to help manage your approval process. In general, you shouldn't ever have to scroll to find what you want: there should be a way to search or filter, but it is tricky with Approvals. Click on the Approvals icon on the Planning Cloud home page to start.




The Approvals page will appear. To filter for your school or center orgs, click **Working** or **Budget**. (You can change Budget to **Forecast** after clicking the link and selecting it from the Scenario dropdown.)


### Approvals

Filter: **Budget** Working



---

 **0000-General University Org 0000**  
No Owner  
1st Pass

---

 **0001-General University**  
No Owner  
1st Pass



The window to filter will appear. Click the member selection icon next to Approval Unit.


**Filter**  |  | Clear All Apply Cancel

Scenario

Version

Approvals Status

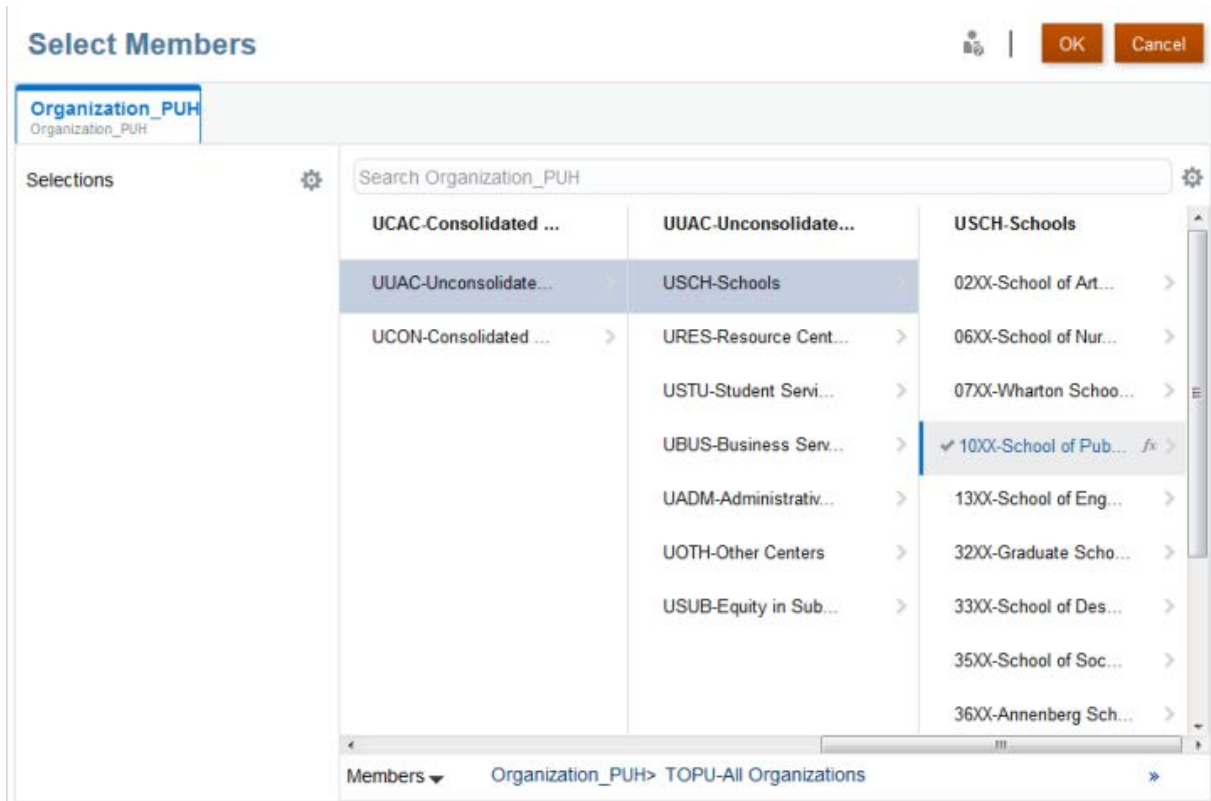
Approval Unit   

 More

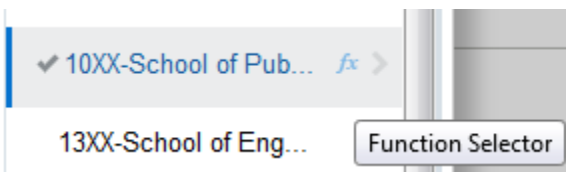
## Approvals: How to Filter on your school or center orgs and promote them

10/26/16

You will now see the Select Members screen. Click or tap to the org or org parent you are interested in promoting. For this example, we'll choose 10XX.



Before clicking the check next to 10XX, click the Function Selector (fx) symbol to the right of the org parent.



There are a variety of filter settings you can choose, but for your purposes these will prove useful:

### If you are a Senior BA promoting an entire school or center to your budget analyst (ex. Org-79XX):

- Click or tap the gray diamond next to **Parents**. This is called **IParents**. It will give you the parent to promote and its immediate ancestor.

Parents

Level 0 Descendants



## Approvals: How to Filter on your school or center orgs and promote them

10/26/16

If you are a Department BA with access to an individual org or several orgs in a parent:

- Select **Level 0 Descendants**.

Parents

Level 0 Descendants ←

Left Siblings

(Note: If you are a Department BA with access to an entire org parent, then you can use the IParents option to promote your budget or forecast).

The org and/or org parent you've selected are now the only ones visible. Your list should be much shorter, making it easier to promote your budget or forecast. In our example there's just Org 1000 and Org Parent 10XX listed.

## Approvals

Filter: [Budget](#) [Working](#) [Name](#) x



**1000-School of Public and Urban Policy**

Ernest A. Wright

Under Review



**10XX-School of Public and Urban Policy**

Ernest A. Wright

Under Review

## Approvals: How to Filter on your school or center orgs and promote them

10/26/16

To promote a budget or forecast: Click the org or org parent you would like to send.

### Approvals

Filter: Budget Working Name

	<b>1000-School of Public and Urban Policy</b> Ernest A. Wright Under Review
	<b>10XX-School of Public and Urban Policy</b> Ernest A. Wright Under Review

A Change Status screen will appear. Make sure the Action drop down says Promote. Next, select the individual in the Owner drop down list (the list is in alphabetical order by first name). Select the name you want (Francesca Seidita, or type F instead of scrolling); write an annotation about the file, if needed; click or tap **Change Status**; and, then, click or tap **Done**. (Note: If you select the wrong Org or Org parent, just hit or tap **Done** without hitting the Change Status button and it will bring you back to the previous screen.)

**Change Status: 10XX-School of Public and Urban Policy** Refresh Done

Action: Promote Owner: Abby DiPietro

Annotation:

**Change Status**

Add Annotation

No data to display

- Abby DiPietro
- Feedback PennPlan
- Fiachra Malone
- Frances Maxwell
- Francesca Seidita**
- Francis Maleno
- Frank DeFrancis
- Frank LaRosa
- Frank Savarese
- Frederick Bloesch
- G. David Lee
- Gary Delson
- Gearline Robinson-Hall
- Geoffrey Filinuk
- George Musonge
- Glenn Lafferty
- Gloria Pedersen
- Gregory Pellicano
- Gregory Tausz
- Gus Hartman
- Helen Kreider

The new file owner will appear.

## Approvals: How to Filter on your school or center orgs and promote them

10/26/16

### Approvals

Filter: Budget Working Name

	<b>1000-School of Public and Urban Policy</b> Francesca Seidita Under Review
	<b>10XX-School of Public and Urban Policy</b> Francesca Seidita Under Review

Finally, if you want to remove a filter, click or tap **Name**.

ng Name

ool of Remove Filter U  
Seidita

Or go back to the Filter screen and click **Clear All**.

Clear All Ap  
Clear All  
▼