Sending Input Sheets for Approval in FP&A Transcript

While working with an input sheet, you can mark individual cells or an entire input sheet for approval.

Follow along with this course to be able to do so. .

Objectives

- Sending Input Sheets for Approval - Simulation

Sending Input Sheets for Approval - Simulation

The following steps walk through the process of selecting cells in an input sheet and submitting them for approval.

With the sheet open, select the cells that you want to send for approval.

You can select multiple by clicking and dragging, or hold control while selecting multiple.

For the example, select the highlighted box and we'll select them for you.

Now, select the Workflow tab.

Here you can choose to send a set of cells within the input sheet as highlighted or the entire sheet for approval. For this example, we want the current selection, so leave it as it is.

Select Input/Adjust Budget.

Choose the state to change those fields to. We want to send them to approval, so select For Approval.

Press Apply Workflow Change to complete the process.

A confirmation message appears.

And the cells change color to reflect the change.

Good work selecting input sheet cells and sending them for approval. Select Next to continue.

Recap

You should now be able to select cells or entire input sheets and send them for approval.

Select exit Course when done.

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