

# Approving Transactions

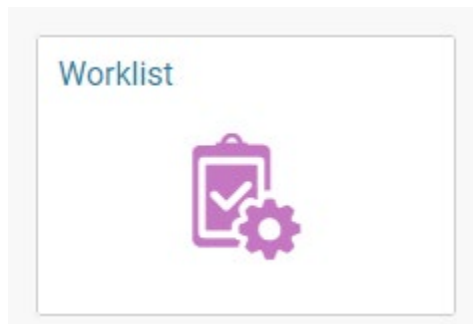
When a transaction is submitted successfully and to Pending phase, the transaction is routed through worklists to be approved. Transactions that go straight to Final phase will need to further approvals. Depending on your level of security, you may or may not be authorized to approve transactions.

The home page has 2 options for the user worklist.

The worklist on the home page shows only the Transactions that are assigned directly to you, or ones that your have “Taken Task” on.

Worklist				
0 Total	0 Others			
Transaction Code	Department	Transaction ID	Assigned Date	Priority
No Records Found				

To access all worklists that are assigned to you, click the Worklist icon on the home page



The Financial Worklist page allows you to filter by many fields to locate the transaction(s) to approve. The default setting for this page is to show you transactions in *all* worklists you are assigned to.

▼ Filters

Worklist

All ▼

Financial Worklist ☆

← Back

Filters

Worklist: All

Department:

Escalated Item:

Unit:

Creator ID:

Show Less

Code:

Submitter ID:

MM/DD/YYYY DD/MM

Apply Reset

The worklist will default to All

Use any of the filter options to search for specific transactions

All transactions matching the filter criteria will appear here

Grid Actions

1-20 of 33 Records

View per Page: 20 50 100

Page 1 of 2

Level	Code	Dept	ID	Message
1	DO	500	01072200000000224348	Please review and approve
1	DO	500	01072200000000224350	Please review and approve
3	PD	500	464585	Please review and approve

If you want to find a specific worklist, click the drop-down arrow under worklist and then select the worklist

FINPROD

adv-prod.cobbcounty.org/finprod/Advantage4

Cobb County GOVERNMENT

Financial Worklist ☆

Filters

Worklist

All

All

Nancy McGregor

Water 5753 Approval

Department 501 Approval

RQS Final Approval

Water 5140 Approval

Water 5150 Approval

Water 5190 Approval

Water 5201 Approval

Water 5205 Approval

Water 5220 Approval

Water 5230 Approval

Water 5240 Approval

Water 5250 Approval

Water 5400 Approval

Water 5600 Approval

Water 5758 5759 Approval

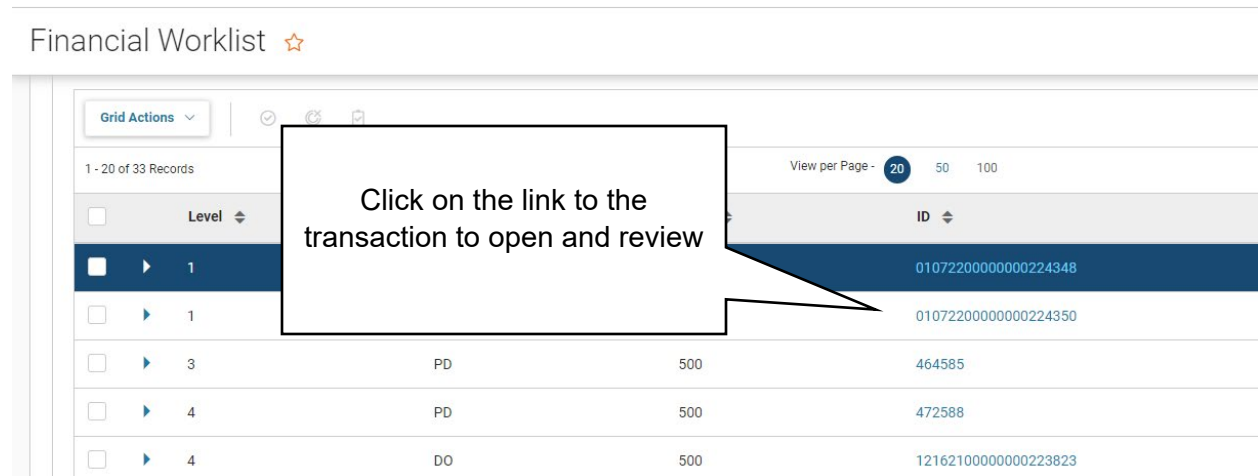
Water Approval

Water FL09 Approval

Grid Actions

To open and review a transaction, click on the ID link to open it

Financial Worklist ☆



Grid Actions

1 - 20 of 33 Records

View per Page - 20 50 100

Level	ID
1	01072200000000224348
1	01072200000000224350
3	PD 500 464585
4	PD 500 472588
4	DO 500 12162100000000223823

When the Transaction is open, you have several options

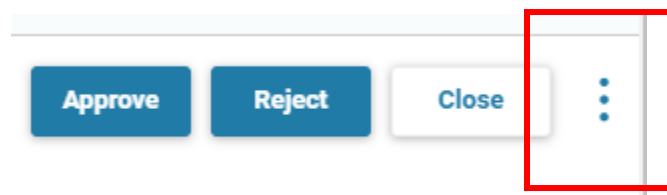
- Click Approve-This will take the transaction to Final status or place it in the next level of approvals.

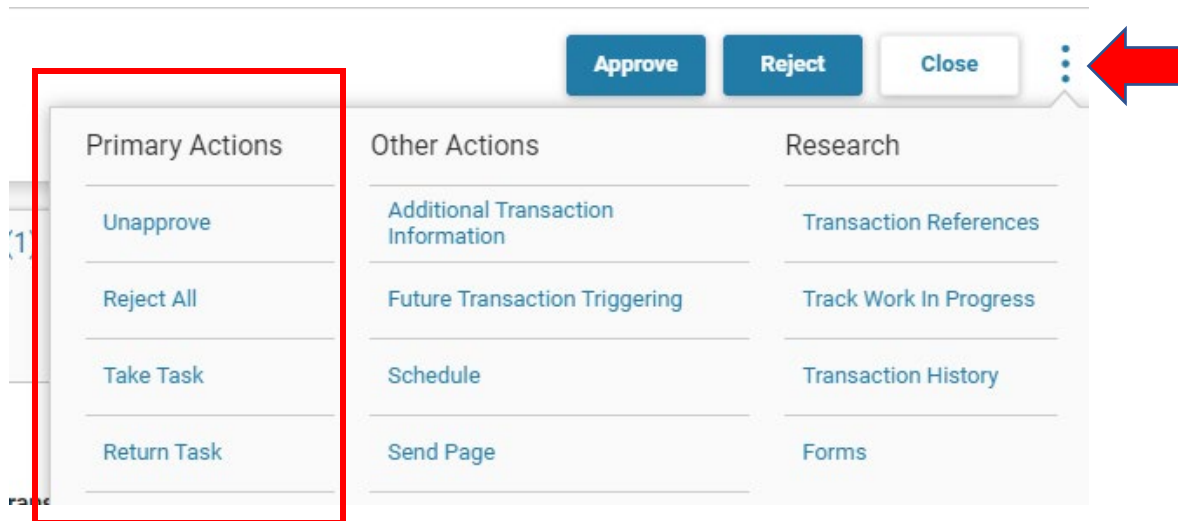


- Click Reject-Rejecting a transaction will remove it out of the worklist and place the transaction back in draft status. If after rejecting, the transaction remains in pending phase, the last approver will need to Unapprove it to return the draft status.

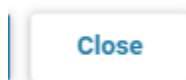


- Click the 3 dots for more approval actions





- **Unapprove**-If you have previously approved a transaction and it gets rejected from a higher level of approval, you will need to Unapprove the transaction.
- **Reject All**-Clicking the Reject All will reject all levels of approvals on a transaction and force it back to draft status.
- **Take Task**-This will remove the transaction from the current worklist and place it in your personal worklist
- **Return Task**-Returns a previously “taken” transaction into the worklist.
- Click Close to close the current transaction and return to the Financial Worklist

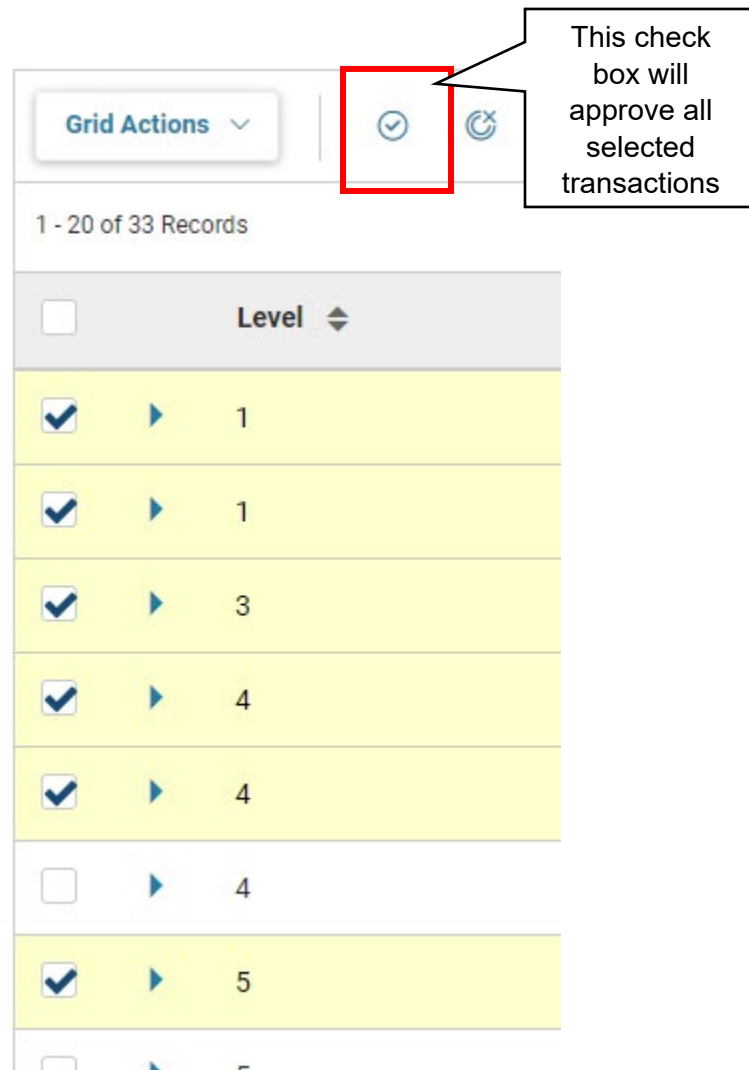


### To Approve more than 1 Transaction at a time:

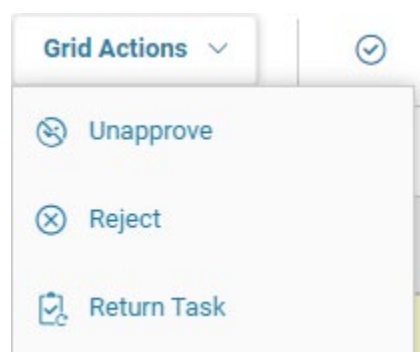
From the Financial Worklist page, select more than 1 transaction by checking the checkbox next to the transaction(s)

<input type="checkbox"/>	Level	Code	Dept	ID
<input checked="" type="checkbox"/>	1	DO	500	01072200000000224348
<input checked="" type="checkbox"/>	1	DO	500	01072200000000224350
<input checked="" type="checkbox"/>	3	PD	500	464585
<input checked="" type="checkbox"/>	4	PD	500	472588
<input checked="" type="checkbox"/>	4	DO	500	12162100000000223823
<input type="checkbox"/>	4	DO	500	01062200000000224303
<input checked="" type="checkbox"/>	5	RQS	500	01072200000000044948

Once transactions are selected, click on the Approve Checkbox



You can also use the Grid Actions drop down to perform other actions to selected transactions.



## Find status of Pending Transaction or to see Approval History of a Final Transaction

To find the status of a pending transaction

1. Open the Transaction
2. Click on the word Pending at the top of the transaction

Standard Requisition (RQS) ☆ Pending

Department: 500 | Unit: 5205 | Transaction ID: 01072200000000044948 | Version: 1

This will bring up the Track Work in Progress page, which details any approvals that have already been completed, and what approvals are still necessary for this transaction

Track Work in Progress

← Back

Transaction Dept: 500 | Transaction Unit: 5205 | Transaction ID: 01072200000000044948 | Version: 1 | Date Submitted: 2022-01-07 | Submitter: Joyce Key

5 Approved  
Approved By  
Water 5205 Appr...

12 Pending  
Assignee  
RQS Final Appr...

15 Pending  
Assignee  
Capital Items f...

1 - 3 of 3 Records View per Page: 20 50 100

Approval Rule ID	Seq No	Approval Level	Assignment Date	Initial Assignee Name	Approval Status	Status After	Status Before	Approval User Name	Current Assignee Name
142	5	5	01/07/2022	Water 5205 Approval	Approved	Approved	-	Nancy McGregor	-
142	12	12	01/28/2022	RQS Final Approval	Pending	Pending	-	-	RQS Final Approval
142	15	15	-	Capital Items for Budget Appr	Pending	Pending	-	-	-

The Log at the bottom of the page displays the date and time of any approvals already applied and the User ID of the approver

Log

Grid Actions

1 - 1 of 1 Records View per Page: 20 50 100

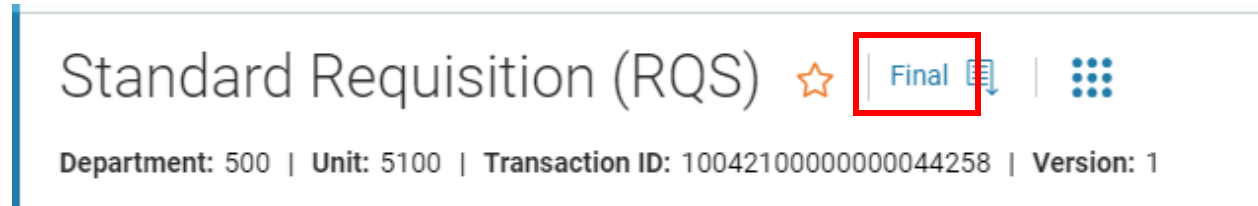
Event Date	User ID	Approval Level	Status Before	Status After
01/28/2022 08:58 AM	nmcgregor	5	Pending	Approved

3. Click the Back button in the upper right corner to return to the Transaction

← Back

## To see the Approval History of a Final transaction

1. Open the Transaction
2. Click on the word Final at the top of the transaction



This will bring up the Track Work in Progress page, which details any approvals that have already been completed.

Track Work in Progress [← Back](#)

Transaction Dept: 500 | Transaction Unit: 5100 | Transaction ID: 10042100000000044258 | Version: 1 | Date Submitted: 2021-10-04 | Submitter: Pathenia Freeman

10 Approved  
Approved By  
Water 5400 Appr...

12 Approved  
Approved By  
RQS Final Appro...

14 Approved  
Approved By  
IS Commodity Ap...

1 - 3 of 3 Records View per Page: 20 50 100 Page 0 of 0

	Approval Rule ID	Seq No	Approval Level	Assignment Date	Initial Assignee Name	Approval Status	Status After	Status Before	Approval User Name
<input type="checkbox"/>	142	10	10	10/04/2021	Water 5400 Approval	Approved	Approved	-	Nancy McGregor
<input type="checkbox"/>	142	12	12	10/04/2021	RQS Final Approval	Approved	Approved	-	Nancy McGregor
<input type="checkbox"/>	142	14	14	10/04/2021	IS Commodity Approvals	Approved	Approved	-	Mary Anna Gunther

The Log at the bottom of the page displays the date and time of each approval and the User ID of the approver

Log

Grid Actions

1 - 3 of 3 Records View per Page: 20 50 100 Page 1 of 1

	Event Date	User ID	Approval Level	Status Before	Status After
<input type="checkbox"/>	10/04/2021 02:14 PM	nmcmgregor	10	Pending	Approved
<input type="checkbox"/>	10/04/2021 02:32 PM	nmcmgregor	12	Pending	Approved
<input checked="" type="checkbox"/>	10/05/2021 10:39 AM	mgunther	14	Pending	Approved

3. Click the Back button in the upper right corner to return to the Transaction

