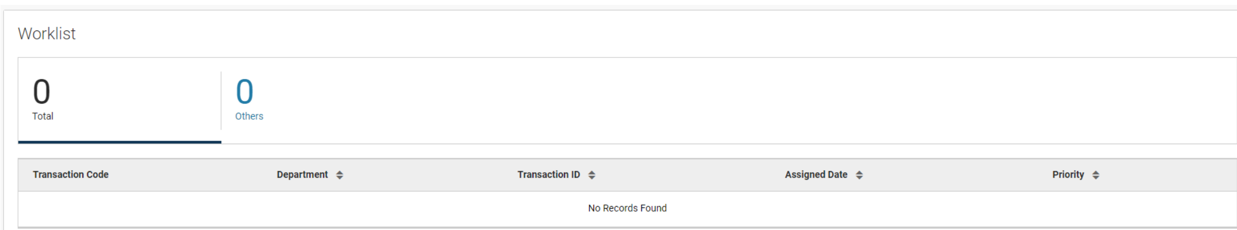
Approving Transactions

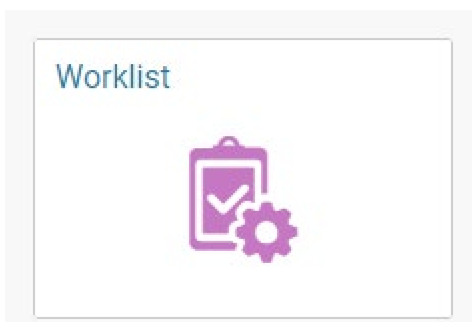
When a transaction is submitted successfully and to Pending phase, the transaction is routed through worklists to be approved. Transactions that go straight to Final phase will need to further approvals. Depending on your level of security, you may or may not be authorized to approve transactions.

The home page has 2 options for the user worklist.

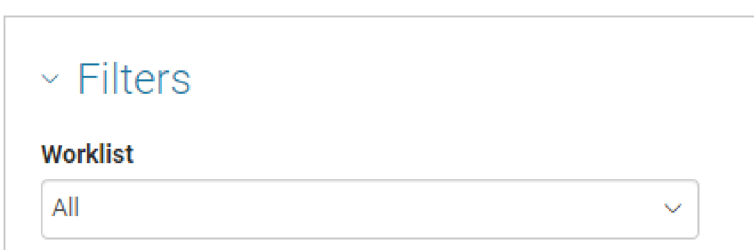
The worklist on the home page shows <u>only</u> the Transactions that are assigned directly to you, or ones that your have “Taken Task” on.

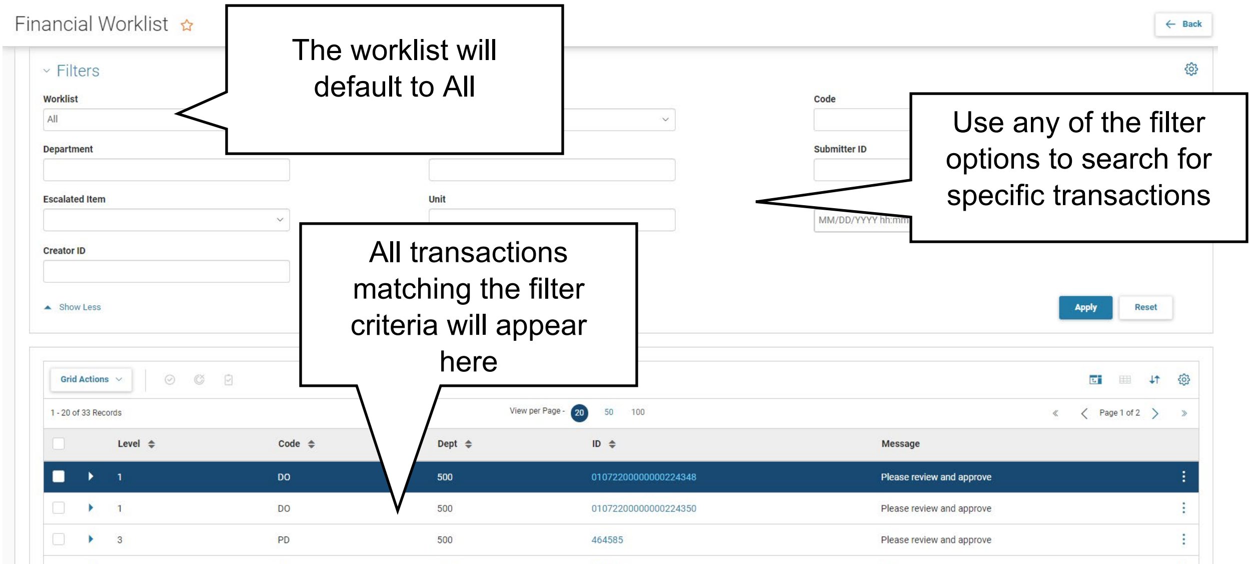


To access all worklists that are assigned to you, click the Worklist icon on the home page

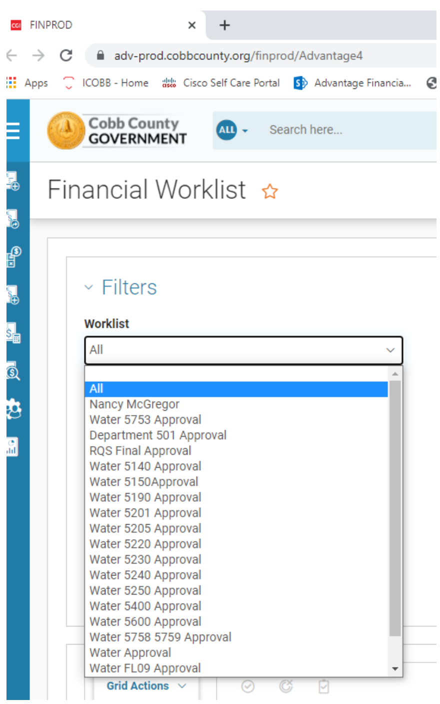


The Financial Worklist page allows you to filter by many fields to locate the transaction(s) to approve. The default setting for this page is to show you transactions in *all* worklists you are assigned to.

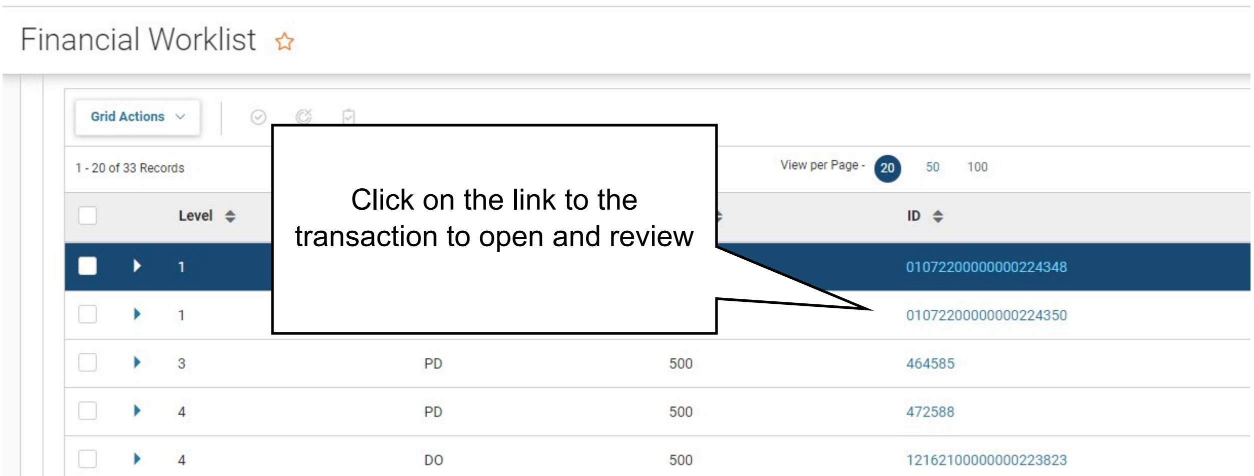




If you want to find a specific worklist, click the drop-down arrow under worklist and then select the worklist

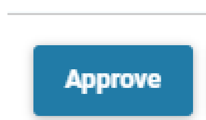


To open and review a transaction, click on the ID link to open it



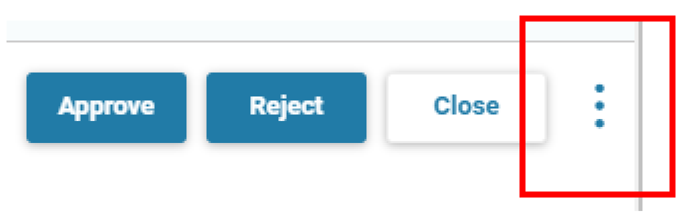
When the Transaction is open, you have several options

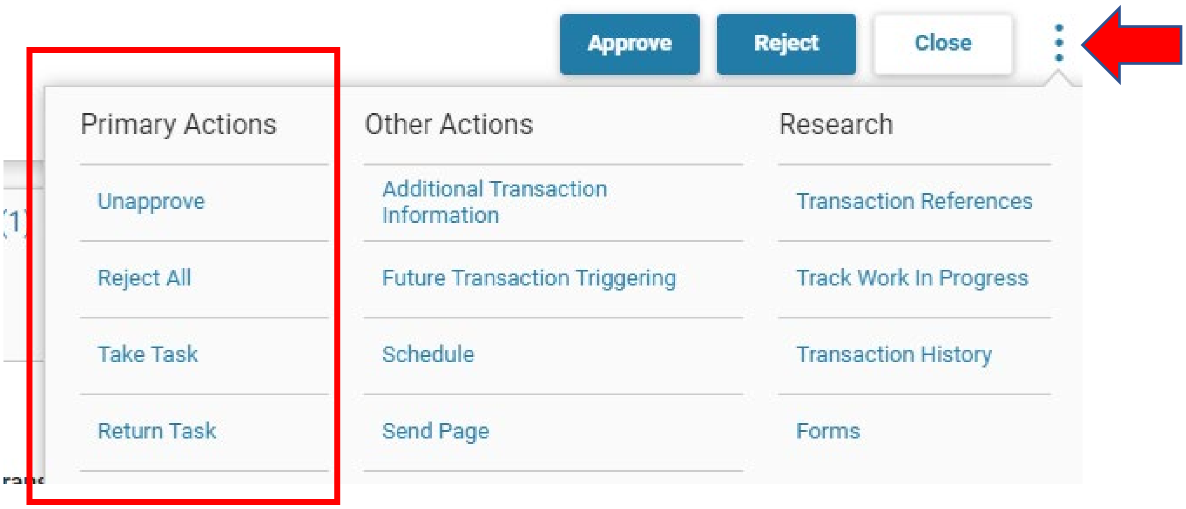
- Click Approve-This will take the transaction to Final status or place it in the next level of approvals.



- 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.

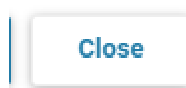
- Click the 3 dots for more approval actions





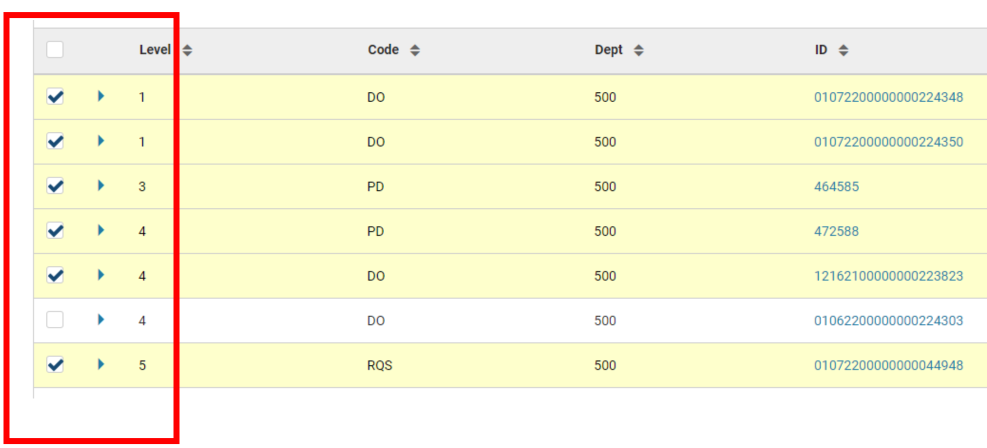
- **Unapprove**-If you have previously approved a transaction and it gets rejected from a higher level of approval, you will need to Unapprove the transaction.
- **Reject All-**Clicking the Reject All will reject all levels of approvals on a transaction and force it back to draft status.
- **Take Task**-This 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



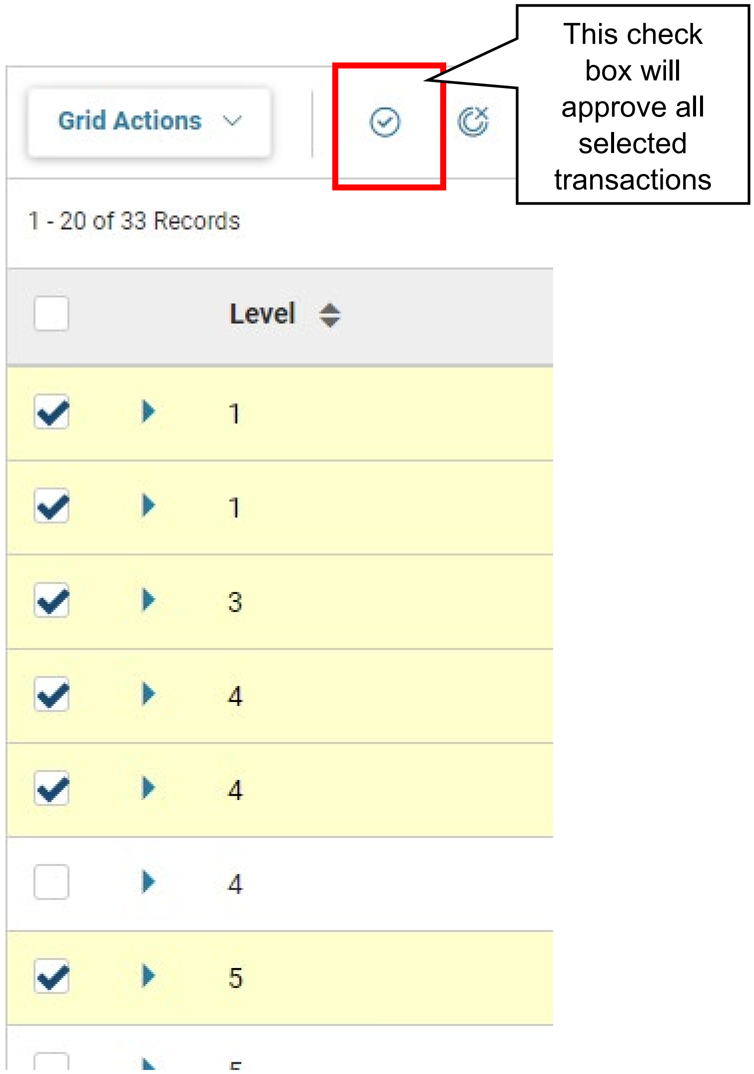
To Approve more than 1 Transaction at a time:

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

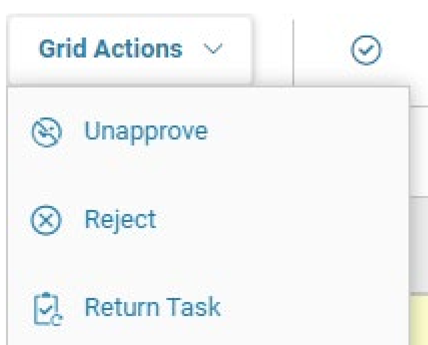


		Level	Code	Dept	ID
✓		1	DO	500	01072200000000224348
✓		1	DO	500	01072200000000224350
✓		3	PD	500	464585
✓		4	PD	500	472588
✓		4	DO	500	12162100000000223823
		4	DO	500	01062200000000224303
✓		5	RQS	500	01072200000000044948

Once transactions are selected, click on the Approve Checkbox



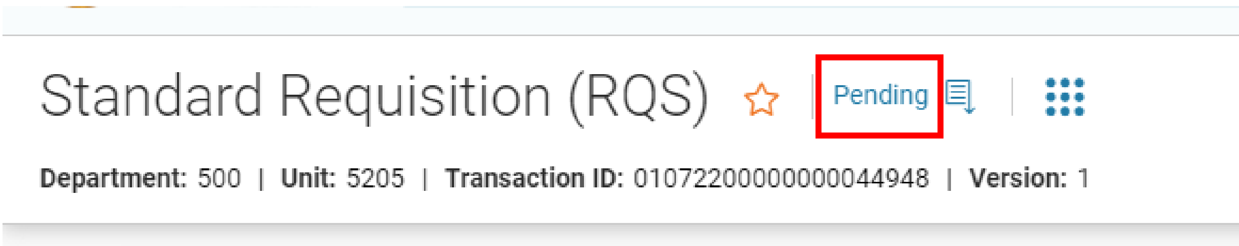
You can also use the Grid Actions drop down to perform other actions to selected transactions.



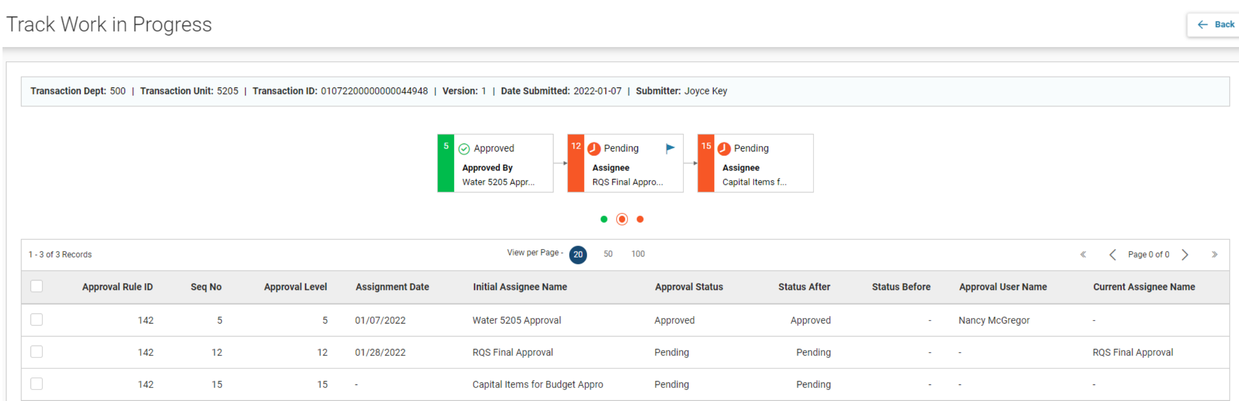
Find status of Pending Transaction or to see Approval History of a Final Transaction

<u>To find the status of a pending transaction</u>

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

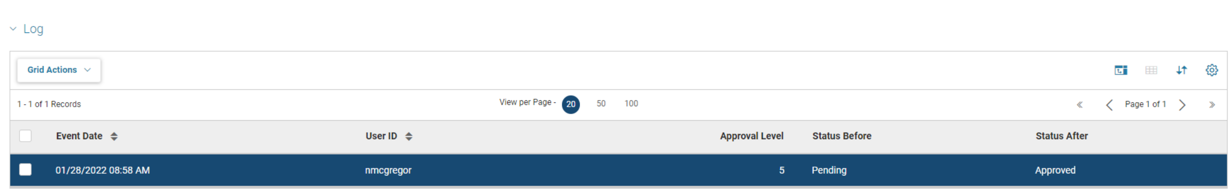


This will bring up the Track Work in Progress page, which details any approvals that have already been completed, and what approvals are still necessary for this transaction



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 Appro	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

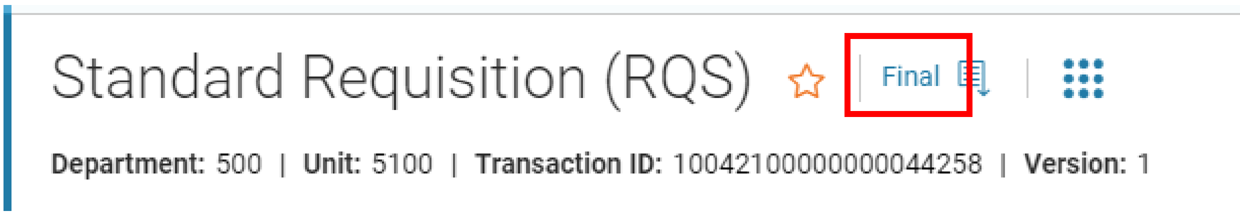


Event Date	User ID	Approval Level	Status Before	Status After
01/28/2022 08:58 AM	nmcgregor	5	Pending	Approved

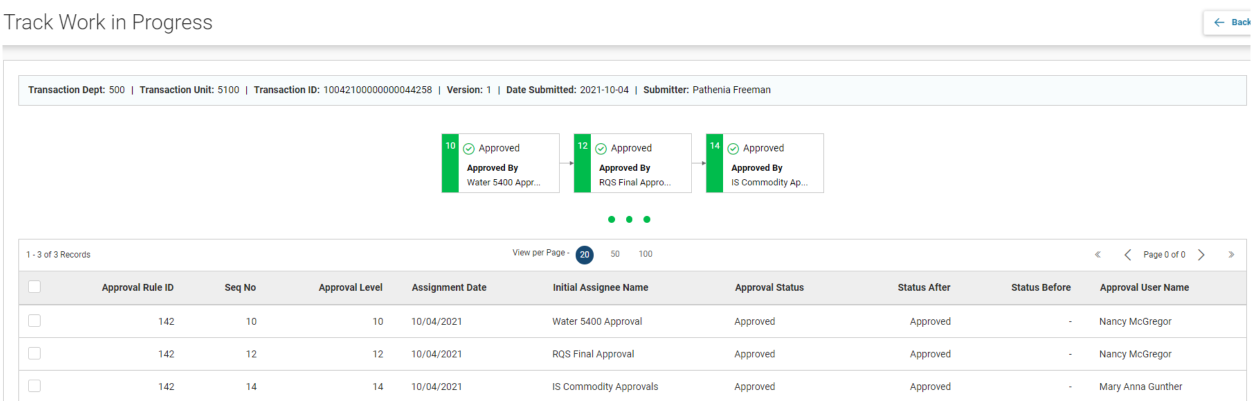
3. Click the Back button in the upper right corner to return to the Transaction

To see the Approval History of a Final transaction

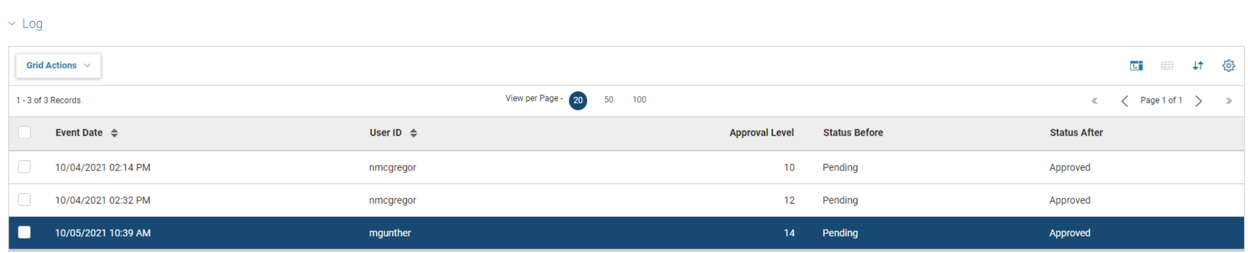
1. Open the Transaction
2. Click on the word Final at the top of the transaction



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



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



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