

Monitoring Approvals

Purpose: Use this document as a reference for monitoring approvals in ctclink.

Audience: Approval Process Administrators.

The approval monitor gives administrators a view into all approvals to which they have access, as well as the ability to take necessary actions on pending approvals.

 You must have at least one of these local college managed security roles:

- CTC_AWE_ADMIN_220
- ZZ_AWE_ADMIN_000
- ZZ_AWE_ADMIN_010
- ZZ_AWE_ADMIN_020
- ZZ_AWE_ADMIN_030
- ZZ_AWE_ADMIN_040
- ZZ_AWE_ADMIN_050
- ZZ_AWE_ADMIN_060
- ZZ_AWE_ADMIN_070
- ZZ_AWE_ADMIN_080
- ZZ_AWE_ADMIN_090
- ZZ_AWE_ADMIN_100
- ZZ_AWE_ADMIN_110
- ZZ_AWE_ADMIN_120
- ZZ_AWE_ADMIN_130
- ZZ_AWE_ADMIN_140
- ZZ_AWE_ADMIN_150
- ZZ_AWE_ADMIN_160
- ZZ_AWE_ADMIN_170
- ZZ_AWE_ADMIN_180
- ZZ_AWE_ADMIN_190
- ZZ_AWE_ADMIN_200
- ZZ_AWE_ADMIN_210
- ZZ_AWE_ADMIN_220
- ZZ_AWE_ADMIN_230
- ZZ_AWE_ADMIN_240

- ZZ_AWE_ADMIN_250
- ZZ_AWE_ADMIN_260
- ZZ_AWE_ADMIN_270
- ZZ_AWE_ADMIN_280
- ZZ_AWE_ADMIN_290
- ZZ_AWE_ADMIN_300

You must also set these User Preference Definitions:

- [User Preferences: Purchase Order Processing](#)

If you need assistance with the above security roles or User Preference Definitions, please contact your local college supervisor or IT Admin to request role access.

Monitoring Approvals

Monitor Approvals Search Criteria

Navigation: Enterprise Components > Approvals > Approvals > Monitor Approvals

1. The **Monitor Approvals** search page displays.
2. Enter search criteria to identify your transaction such as;
 - a. **Approval Process:** Select an approval process. The list of approval processes available is determined by the administrator role associated with the approval process definition. If a user is associated with the role specified in the Admin Role field on the Setup Process Definitions page, they can view or act on that process ID within the Approval Monitor.
 - b. **Definition ID:** Business Unit.
 - c. **Header Status:** For example, Pending.
 - d. **Last Modified:** Select the last modified date.
 - e. **Approver:** Select an Approver. ***NOTE: Search by Approver will not be available until AFTER the image 41 update ***
 - f. **Approver Status:** Select from the available Status. This is specific to the Approver selected. ***NOTE: Search by Approver Status will not be available until AFTER the image 41 update ***
 - g. **Originator:** Select the user who entered the transaction.
 - h. **Requester:** Select the user who requested the transaction.
3. Select **Search**. Results will display at the bottom of the Monitor Approvals page.



NOTE: Searching with values in the **Approval Process**, **Definition ID**, and **Header Status** fields, at a minimum, will help to narrow your search and provide quicker results; the other search fields are optional.

Monitor Approvals

Search Criteria

Approval Process:

Definition ID:

Header Status:

Approvers:

Approver Status:

Originator:

Requester:

Administrative Actions

The selected approver does not currently have an alternate approver selected in their user profile. You must manually select an alternate approver to reassign pending tasks.

Approver's Oper ID: ☐ Allow Auto Approval

Reassign To: ☐ Allow Self-Approval

Comment:

Search Results

Approval Process: Purchase Order

Business Unit: PO Number:

Purchase Order Date: Supplier ID:

Origin:

	Modified	Status	Business Unit	PO Number	Purchase Order Date	Supplier ID	Origin
1	2023-10-05	Pending	VA000	0000003461	2023-10-04	0000046216	ONL
2	2023-10-05	Pending	VA000	0000003298	2023-07-01	0000053231	ONL
3	2023-10-05	Pending	VA000	0000003286	2023-08-07	V000041645	ONL
4	2023-10-05	Pending	VA000	0000003329	2023-07-24	0000000394	ONL
5	2023-10-05	Pending	VA000	0000003463	2023-09-20	0000059869	ONL
6	2023-10-05	Pending	VA000	0000003443	2023-09-20	V000020965	ONL
7	2023-10-05	Pending	VA000	0000003494	2023-10-04	V000026451	ONL
8	2023-10-05	Pending	VA000	0000003289	2023-07-01	0000052988	ONL
9	2023-10-05	Pending	VA000	0000003478	2023-10-03	V000041989	ONL

Administrative Actions

i The Administrative Actions section is used to reassign pending tasks (of selected transactions below) to another user. This section is only available if the process allows reassignment.

- Approver's Oper ID:** Input the Empl ID of the original approver.
- Reassign To:** Select an approver to whom to reassign all pending steps within the approval process.
 - The **Allow Auto Approval** option enables the system to remember an approver's action and applies the same action automatically for any subsequent appearances in the approval routing.
 - The **Allow Self Approval** option enables self-approval if the user is both the initiator and approver at the approval stage.
- Select an action; **Reassign Selected**, **Approve Selected** or **Deny Selected**.

Administrative Actions

The selected approver does not currently have an alternate approver selected in their user profile. You must manually select an alternate approver to reassign pending tasks.

Approver's Oper ID: ☐ Allow Auto Approval

Reassign To: ☐ Allow Self-Approval

Comment:

Search Results

Approval Process: Purchase Order

Business Unit: PO Number:


Purchase Order Date: Supplier ID:

Origin:

		Modified	Status	Business Unit	PO Number	Purchase Order Date	Supplier ID	Origin
1	<input checked="" type="checkbox"/>	2023-10-05	Pending	WA000	0000003491	2023-10-04	0000046216	ONL
2	<input checked="" type="checkbox"/>	2023-10-05	Pending	WA000	0000003298	2023-07-01	0000053231	ONL
3	<input type="checkbox"/>	2023-10-05	Pending	WA000	0000003286	2023-08-07	V000041645	ONL
4	<input type="checkbox"/>	2023-10-05	Pending	WA000	0000003329	2023-07-24	0000060394	ONL

Refine by Search Results

- The results can be filtered using the available fields. Enter the values such as;
 - Business Unit.
 - Purchase Order Date.
 - Origin.
 - PO Number.
 - Supplier ID.
- Select **Filter**.

 If the approval process contains header and line approvals, then the 'Toggle Header and Line' button can be used to toggle the display to view the details. To open up a selected transaction, select the blue hyperlink.

▼ **Approval Process: Purchase Order**

Business Unit
Purchase Order Date
Origin

PO Number
Supplier ID

		Modified	Status	Business Unit	PO Number	Purchase Order Date	Supplier ID	Origin
1	<input type="checkbox"/>	2023-10-05	Pending	WA000	0000003491	2023-10-04	0000046216	ONL
2	<input type="checkbox"/>	2023-10-05	Pending	WA000	0000003298	2023-07-01	0000053231	ONL
3	<input type="checkbox"/>	2023-10-05	Pending	WA000	0000003286	2023-08-07	V000041645	ONL
4	<input type="checkbox"/>	2023-10-05	Pending	WA000	0000003329	2023-07-24	0000060394	ONL

Monitor Approvals - Selected Transaction Details

- From the main Monitor Approvals page, select the [blue](#) transactions details link, i.e. PO Number. A new **Monitor Approvals** screen will display details of the selected transaction.

		Modified	Status	Business Unit	PO Number	Purchase Order Date	Supplier ID	Origin
1	<input type="checkbox"/>	2023-10-05	Pending	WA000	0000003491	2023-10-04	0000046216	ONL
	<input type="checkbox"/>	2023-10-05	Pending	WA000	0000003298	2023-07-01	0000053231	ONL

- Select an **Approver** from the drop-down list. All approvers associated with the pending step within the approval process will be listed.
- Optional to enter text to appear under the approval graphic in the Approval Comment History section.
- In the **Line Details** section, the Business Unit, PO Number, and Line Number(s) for the selected transaction will display.

Monitor Approvals

Approval Process: PurchaseOrder Definition ID: WA000
 Business Unit: WA000 PO Number: 0000003491
 Purchase Order Date: 2023-10-04 Supplier ID: 0000046216

Origin: ONL
 Approver:
 Comment:

Line Details

Business Unit	PO Number	Line Number
1 WA000	0000003491	1

Reassign Pending Tasks

The selected approver does not currently have an alternate approver selected in their user profile. You must manually select an alternate approver to reassign pending tasks.

Reassign To: ☐ Allow Self-Approval
☐ Allow Auto Approval

Administrative Approve/Deny

Act on behalf of the approver selected above by selecting the Approve/Deny buttons below. This action will apply to all tasks pending for the approver selected within the context of this transaction.

Grants Contracts Approver

Purchase Order 0000003491: Awaiting Further Approvals

Grants Contracts Approver

Approved
 Sydney Grant Coordinator
 10/04/23 - 3:34 PM

Compliance Approval

Purchase Order 0000003491: Pending

Compliance Approval

On Hold
 PO Purchasing Review
 10/05/23 - 6:57 AM

[Return](#)

Reassign Pending Tasks


- Reassign To:** Enter or lookup an **Approver** to whom to reassign all pending steps within the approval process.
 - The **Allow Self-Approval:** this option enables self-approval and the process continues.
 - The **Allow Auto Approval:** this option enables the system to remember an approver's action and applies the same action automatically for any subsequent appearances in the approval routing.
- Select the **Reassign** button to submit your selected approver.

Reassign Pending Tasks

The selected approver does not currently have an alternate approver selected in their user profile. You must manually select an alternate approver to reassign pending tasks.

Reassign To: ☐ Allow Self-Approval
☐ Allow Auto Approval

Administrative Approve/Deny

 The **Administrative Approve/Deny** section will display as configured on the Approval Monitor Configuration page.

1. After selecting the Approver that is pending for the transaction, select the action to take:
 - **Approve:** Click to act on behalf of the selected approver. This action applies to all tasks pending for the approver selected within the context of the approval process.
 - **Deny:** Click to act on behalf of the selected approver. This action will apply to all tasks pending for the approver selected within the context of the process.
 - **Restart:** Click to restart a pending transaction to all approvers in the approval path. This button is only available when the transaction is pending.

Administrative Approve/Deny

Act on behalf of the approver selected above by selecting the Approve/Deny buttons below. This action will apply to all tasks pending for the approver selected within the context of this transaction.

Approve

Deny

Pushback

Restart

Approval Routing Details

 This section displays the routing path for the transaction.

 Select the **Return** hyperlink to return to the main Monitor Approvals search page.

Grants Contracts Approver

Purchase Order 0000003491:Awaiting Further Approvals

Start New Path

Grants Contracts Approver

Approved

Sydney

Grant Coordinator

10/04/23 - 3:34 PM

Compliance Approval

Purchase Order 0000003491:Pending

View/Hide Comments

Start New Path

Compliance Approval

On Hold

Rory S

PO Purchasing Review

10/05/23 - 6:57 AM

Comments

Return