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:

<u>User Preferences: Purchase Order Processing</u>

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

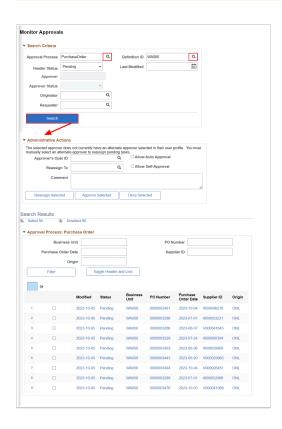
Monitor Approvals Search Criteria

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.

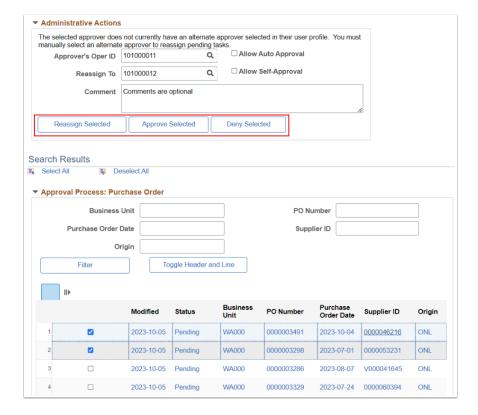


NOTE: Searching with values in the **Approval Process**, **Definition ID**, and **Header Status** fields, at a minimum, will help to narrow your search and provide quicker results; the other search fields are optional.



Administrative Actions

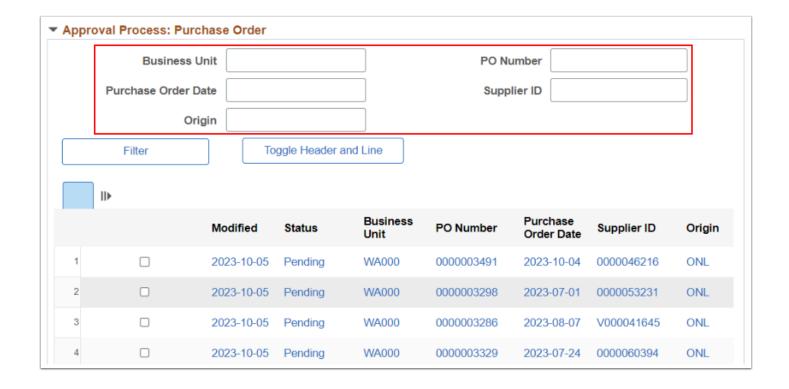
- 1 The Administrative Actions section is used to reassign pending tasks (of selected transactions below) to another user. This section is only available if the process allows reassignment.
- 1. **Approver's Oper ID**: Input the Empl ID of the original approver.
- 2. **Reassign To**: Select an approver 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.
- 3. Select an action; Reassign Selected, Approve Selected or Deny Selected.



Refine by Search Results

- 1. The results can be filtered using the available fields. Enter the values such as;
 - a. Business Unit.
 - b. Purchase Order Date.
 - c. Origin.
 - d. PO Number.
 - e. Supplier ID.
- 2. Select Filter.



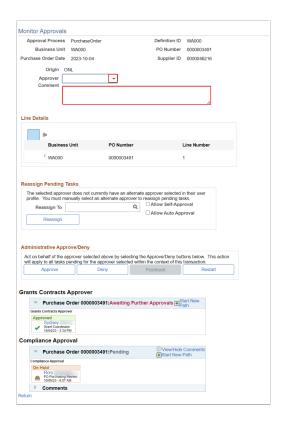


Monitor Approvals - Selected Transaction Details

1. 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.

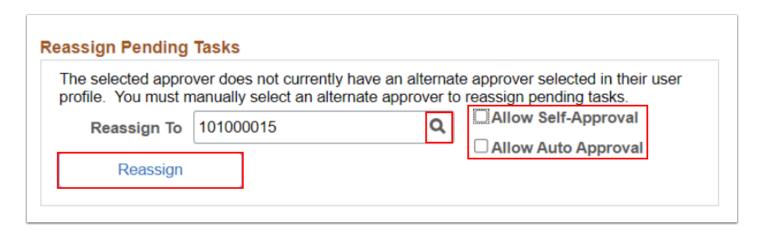


- 2. Select an **Approver** from the drop-down list. All approvers associated with the pending step within the approval process will be listed.
- 3. Optional to enter text to appear under the approval graphic in the Approval Comment History section.
- 4. In the **Line Details** section, the Business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



Reassign Pending Tasks

- 1. **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.
- 2. Select the **Reassign** button to submit your selected approver.



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.

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Approve	Denv	Pushback	Restart

Approval Routing Details

