Using the Pending Approvals List

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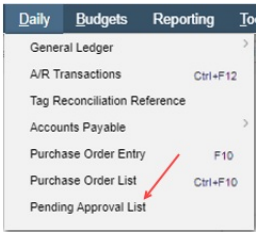
How to review the Pending Approvals List for entries requiring user action

- Access the list:
  - From an approval notification email click on “To review all your Entries Pending Approval, click Here”:

    SGA has submitted a invoice for approval.
    Invoice Invoice 1 from 3 GEORGE'S has been received and requires approval.
    Vendor: GEORGE'S
    PO #:
    Invoice Date: 11/17/2021
    Total Amount: $1,500.00

    Details (Account#, Acct Description, Amount, Comments):
    1-01-01-0810-00000, UNITED WAY INCOME, $1,500.00, Invoice for donation
    How to approve or disapprove:
    To approve this Invoice click Here
    To disapprove this Invoice click Here
    -To view a PDF with more information about this Invoice click Here
    -To edit this Invoice click Here
    -To review all your Entries Pending Approval, click Here
  - Click the icon in the upper right of the screen
  - Select “Pending Approval List” from the Daily menu:

- The list will initially display the following types of entries that require action by the user:
  - Entries that require the user’s approval
  - Entries that have been assigned to the user for review (if reviewer feature is being used)
  - Entries the user has created, but not yet submitted
- Menu options for the screen will adapt based on the status of the entry line highlighted:
  - If an entry’s status is “waiting on approval” approval icons will be visible:

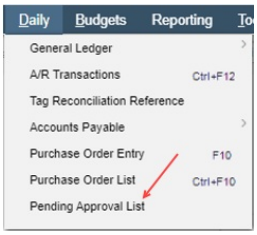
    Approve Disapprove
  - If an entry has been assigned to the user for review the “Submit” icon will be visible:

    Submit
  - If an entry the user created has not been submitted the “Submit” icon will be visible:

    Submit
- At any time a highlighted entry may be:
  - Edited (if not yet submitted) by clicking Edit
  - Submitted for approval by clicking Submit
  - Approved/disapproved by clicking Approve Disapprove

How to review the Pending Approvals List for all other entries when no entries require the user’s approval

- Select “Pending Approval List” from the Daily menu:



- By default the list is limited to entries requiring action on the part of the accessing user (entries the user has created but not yet submitted, entries requiring the user's review, and entries requiring the user's approval)
- Entries displayed can be modified by adjusting the display filters:
  - Group: Will display all entries created using approval tables associated with the selected Approval Group
    - Table: Will display all entries created using a specific approval table for the selected Approval Group
  - Search:
    - By Description
    - By Batch #
    - By PO# (only for PO entries)
    - By Vendor Name (only for PO and Invoice entries)
    - Task Name (used with Task Management which will be included in a subsequent software release)
  - Status (Multi-Select):
    - Not Submitted: Entries not yet submitted
    - Waiting for approval: Entries currently being reviewed for approval
    - Waiting on me: All entries associated with the user
      - Entries created by the user
      - Entries where the user is assigned as a reviewer
      - Entries awaiting approval by the user
      - Entries that include the user in their approval table
    - Approved: Entries that have received final approval
    - Disapproved: Entries that have been disapproved
  - Show records due for approval before: Will display entries with due dates prior to the stated date and entries without due dates
  - Timeframe: Will display entries that have dates within the stated timeframe:
    - Custom date range
    - All dates
    - Last 30 days
    - Last 60 days
    - Last 90 days
    - This year (the current system accounting year)
    - Last year (the accounting year preceding the current system accounting year)
- Highlighting an entry and clicking Edit will open a new browser window displaying the entry detail screen.
  - If the entry has been submitted for approval, has been fully approved, or has been posted modifications may only be made to select fields.

    - If the entry has not been submitted or has been assigned to a reviewer it may be edited by any user with sufficient permissions or the assigned reviewer
- Highlighting an entry and clicking Log will display the log of all activity for the entry.
- Highlighting an entry and clicking Approval Table allows the user to:
    - Review the entry's assigned approval table, or
    - If the entry has not been fully approved:
        - Send email to current approver: the system will send a follow-up notification email to the current "waiting on" user
        - Approve for current approver and move to the next approver: If the accessing user has sufficient permissions they may approve for the current user and move the entry to the next step in the approval process
- Highlighting an entry and clicking Attachments will display a window containing all attachments currently applied to the entry.
- Highlighting an entry and clicking Links will display all links currently in existence for the entry. Viewing a link from the menu will open a new browser window displaying the linked item.