Approval Dashboard - GRT3020

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Approval Dashboard

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This page allows you (the signed-on approver) to view a list of all the budget amendment and reimbursement requests pending your approval or denial for the year and grant type. You can elect to approve all requests, individual requests, or return all requests or individual requests. Additionally, you can update individual requests prior to approving or returning the request.

Retrieve a record:

Year	Type a four-digit grant year.
Grant Type	Begin typing the grant type or description. As you type the data, a drop-down list of corresponding data is displayed. Select a grant. If the grant type or description is not known, click ⋮ to select a grant from the Grant Types lookup or press the Spacebar to view a list of grant types.

☐ Click **Retrieve**. The selected **Year** and **Grant Type** are displayed with a list of pending approvals.

☐ Under **Transaction Pending Approval**:

Select All	Select the top-level check box to select/unselect all transactions. Or, select individual check boxes to only select specific transactions.
Detail	Click 🔍 to view additional details for the transaction and any documents attached to the transaction.
Doc	If documents exist for the transaction, 🗋 is displayed. Click 🗋 to open the Document Attachments pop-up and view the existing uploaded documents. The Document Attachments feature in this view is read-only.
Member	Displays the member number and name for the transaction.
Year	Displays the grant year for the transaction.
Grant ID	Displays the grant ID for the transaction.
Transaction Date	Displays the transaction date.
Type	Displays the transaction type.
Amount	Displays the transaction amount. This amount includes the sum of all object class amounts for the grant year and ID.
Final Rpt	If selected, the originator has indicated that the transaction is the last request for the grant year and ID.

☐ Click **Approve** to approve the request and forward it to the next approver in the approval path.

☐ Click **Return** the return the request to the originator who submitted it.

Other functions and features: