approvaldashboard

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Approval Dashboard - GRT3020

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This page allows you (the signed-on approver) to view a list of all the budget amendments and reimbursement requests pending your approval or denial for a year/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	For reimbursement requests only: If selected, the originator has indicated that the request is the final transaction for the grant year and ID. This field is read-only.

❑ Click **Approve** to approve the request and forward it to the next approver in the approval path. The approved transactions are removed from the list.

❑ Click **Return** the return the request to the originator. The returned transactions are removed from the list.

Other functions and features:

Retrieve	The **Retrieve** button is also used to retrieve information from the last save. If you click **Retrieve**, any unsaved changes are lost.