

Approval Dashboard - GRT3020

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Grants and Projects > Maintenance > Approval Dashboard

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

Retrieve a record:

Upon retrieving the page, a list of all budget revision requests and reimbursement requests awaiting your approval is displayed regardless of the year and grant type.

Use the following fields to narrow your search of pending approvals:

Year	Type a four-digit grant year.
Grant	Begin typing the grant type or description. As you type the data, a drop-down list of
Туре	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 ✓ to select the request type (*ALL*, *Budget Adj* & *Rev*, *Reimbursement*).

□ Click **Retrieve**. A list of pending requests matching your search criteria is displayed if any.

Under Transactions Pending Approval:

 \Box Select the top-level check box to select/unselect all transactions. Or, select individual check boxes to only select specific transactions.

Detail Click \bigcirc to view the corresponding details for the transaction and any documents attached to the transaction (if applicable). You can edit, save, and submit budget adjustment requests, budget revision requests, and reimbursement requests. Depending on the transaction type and status, either the Budget Adjustment Request, Budget Revision Request, or the Reimbursement Request pop-up window opens.

Note: After the final transaction is submitted for a grant year and ID, no other requests can be submitted.

Doc	If documents exist for the transaction, \Box is displayed. Click \Box to open the Document Attachments pop-up and view the existing uploaded documents. The Document Attachments feature in this view is read-only.
Member	The member county district number and name tied to the transaction are displayed.

Business

Year	The grant year for the transaction is displayed.
Grant ID	The grant ID for the transaction is displayed.
Transaction Date	The transaction date is displayed.
Туре	The transaction type is displayed.
Amount	The transaction amount is displayed. 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 display- only.

□ Click **Approve** to approve the request.

- If there are subsequent approvers in the workflow, the transaction will continue to the next approver.
- If you are the last approver in the approval workflow and you approve the transaction, a final approval message is displayed, click **OK**. The transaction status is updated to *Posted* on the Grant Maintenance tab.
- If Final Report is selected for a reimbursement request, the Final Report Processed Indicator is automatically selected for the Grant Year and Grant ID on the Grant Maintenance tab.
- The approved requests are removed from the list.

□ Click **Return** to return the request to the originator. The returned requests 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.
Documents	View or attach supporting documentation.



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