approvaldashboard

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Approval Dashboard - GRT3020

Grants and Projects > Maintenance > Approve Grant Requests > Approval Dashboard

This page allows you (the signed-on approver) to view a list of all 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, you can update individual requests 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 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**. A list of pending approvals matching your search criteria is displayed if any.

❑ 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	The member county district number and name tied to the transaction are displayed.
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.
Type	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 read-only.

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

❏ Click **Return** the 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.

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