approvaldashboard

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This page allows you (the signed-on approver) to view a list of all member 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 details for an individual request prior to approving or returning the request.

Retrieve a record:

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 ⌄ 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**:

❏ 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 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, 🗋 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 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.


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