

SSA Approval Path - GRT2130

Table of Contents

SSA Approval Path 1

SSA Approval Path

Grants and Projects > Tables > SSA Approval Path

This page is used to create and maintain the sequence or hierarchy of the approvers for the approval of budget amendments and reimbursement requests. The order in which the approvers are listed indicates the approval sequence. You can add to or edit the approval path as needed. If a change is made to the approval path, the change will apply to all budget amendments and reimbursement requests that have yet to reach that specific approver.

Notes: Any changes made to the approval path are immediate and automatically update (move) existing requests. If there are existing requests and you are adding a new approver, first create the new approver's approval rules so that any pending items are properly moved when the approver is added to the workflow.

View a record:

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

❑ Click **Retrieve**. If an approval workflow exists, the list of approvers is displayed and you can make changes as needed.

The drag-and-drop feature is available allowing you to change the order of the approval path.

Reminder Days	Type the number of days after which no action has been taken on an item and a reminder email should be forwarded to the originator and approver. This field has a maximum of three digits. By default, this field is set to zero indicating that no reminders will be sent. If the value is greater than zero, the Approver has that many days to respond to the approval before a reminder email is sent to the Approver. After the initial reminder email message is sent, email messages are sent on a daily basis until action is taken. The number of reminder days also applies to first approvers. If all approvers in the approval path are removed, the field is reset to zero.

❑ Click **+Add** to add an approver. The Approver Directory is displayed. Or, click ⋮ to open the directory and select a different approver.

Approver	The selected approver name is displayed.
Email Opt-Out	Select to indicate that this approver is opted out of receiving approval workflow emails.

❑ Click **Save**. Depending on the change, the appropriate application message is displayed indicating the action.

Other functions and features:

	Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved.


ASCENDER
ELEVATING TECHNOLOGY SOLUTIONS
ASCENDER GUIDES
ASCENDER
ELEVATING TECHNOLOGY SOLUTIONS

Back Cover