GEORGIA*FIRST*
FINANCIAL, INFORMATION & REPORTING SYSTEMS FOR TOMORROW
University System of Georgia • Information Technology Services

PeopleSoft 9.2

AP.080.032 - MONITOR APPROVALS - REASSIGNING PAYMENT REQUESTS

Purpose	To Reassign a Payment Request using the Monitor Approvals page.
Description	The Monitor Approvals page gives Payment Request Administrators a view into all approvals to which they have access, as well as the ability to take necessary actions on pending approvals, such as searching approval processes, performing mass reassignments, and/or add additional Approvers to workflow. This topic demonstrates how the Payment Request Administrator can view approval routings and use this page to Reassign a Payment Request using the Monitors Approval page to expedite workflow.
Security Role	**BOR_PR_ADMINXX** (Payment Request Administrator Role)
Dependencies/ Constraints	None
Additional Information	As Approvers retire, leave the institution or change departments/positions within the institution, Approver Assignments must be updated to reflect a new approver for the department and/or project. Otherwise, Payment Requests could be 'stuck' in approval workflow, requiring the intervention by the Payment Request Administrator.

Procedure

Below are step by step instructions on how to use monitor approvals to reassign Payment Request.

Step	Action
1.	Click the **NavBar** icon.
2.	Click the **Menu** icon.
3.	Click the **Enterprise Components** link.
4.	Click the **Approvals** link.
5.	Click the **Approvals** link.
6.	Click the **Monitor Approvals** link. The system navigates to the Monitor Approvals page.
7.	Select "PaymentRequestApproval" in the **Approval Process** field by clicking on the magnifying glass. *Note: A list of approval processes available is determined by the administrator role associated with the approval process definition.*
8.	Enter the Business Unit in the **Definition ID** field.
9.	Select "Pending" from the **Header Status** drop-down menu to search for Payment Request pending approval. *Note: Searching can be done by Header Status or Approver, but not both.* *Select Header Status to view or take action on Payment Requests in a specific approval process state, such as Approved, Complete, Pending, etc.* *Select an approver to view or take action on an approval processes for a specific approver this field is required* *Enter additional search criteria, as needed, in the remaining fields to narrow search results, such as Originator or Requester User ID.*
10.	Select **Search**. This produces a list of Payment Requests pending approval.
11.	Scroll down to view **Approval Process: Payment Request** results box.
12.	Filter the results based on criteria entered or scroll through list to locate a Payment Request to view.

Step	Action
13.	Users can either take action on an individual Payment Request or on multiple Payment Requests by following one of the options below. • **For individual Payment Request process:** Proceed to Step 14. • **For multiple Payment Requests:** Proceed to Step 21.
14.	Click on Payment Request ID to view the Payment Request. The system navigates to the Monitor Approvals page for that Payment Request.
15.	Verify the current Approver's name is entered in the Approver dropdown menu at the top of the page.
16.	Enter a comment in the **Comment** field to explain why the Payment Request is being reassigned.
17.	Navigate to the Reassign Pending Tasks box and click in the **Reassign To** field.
18.	Enter the UserID of an approver to reassign all pending steps within the approval process. (Optional): • Allow Self-Approval - Select to enable self-approval. When it is enabled, the approval is assumed and the process continues. • Allow Auto Approval - Select to enable auto-approval. When it is enabled, the system remembers an approver's action for that process at the header or line level and applies the same action automatically for any subsequent appearance in the Approval Framework routing.
19.	Select the **Reassign** button.
20.	Click **OK** when successful. End of Procedure. All remaining steps pertain to other options.
21.	To reassign multiple Payment Requests, select the checkbox by one or more Payment Requests that require to be reassigned.
22.	Navigate to the Administrative Actions box and enter the current **Approver's Oper ID** in the Administrative Actions box.
23.	Click in the **Reassign To** field.

Step	Action
24.	Enter the UserID of an approver to reassign the pending step within the approval process. (Optional): • Allow Self-Approval - Select to enable self-approval. When it is enabled, the approval is assumed and the process continues. • Allow Auto Approval - Select to enable auto-approval. When it is enabled, the system remembers an approver's action for that process at the header or line level and applies the same action automatically for any subsequent appearance in the Approval Framework routing.
25.	Enter a comment in the **Comment** field to explain why the Payment Requests are being reassigned.
26.	Select **Reassign Selected** button in the Administrative Actions box
27.	Click **OK** when successful.