

EP.080.020 – MONITOR/REASSIGN APPROVALS

Purpose	To monitor/reassign existing requisitions.
Description	<p>The Monitor Approvals page gives eProcurement 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.</p> <p>This business process shows how the eProcurement Administrator can view approval routings and use this page to reassign worklist entries using the Monitors Approval page to expedite workflow.</p>
Security Role	BOR_EP_ADMINXX (ePro Administrator Role)
Assumptions	None
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, transactions could be 'stuck' in approval workflow, requiring the intervention by the eProcurement Administrator.

Procedure

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

Step	Action
1.	Click the NavBar icon.
2.	Click the Navigator 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 "Requisition" in the Approval Process field by clicking on the magnifying glass. <i>Note: A list of approval processes available is determined by the administrator role associated with the approval process definition.</i>
8.	Enter the Business Unit in the Definition ID field.
9.	Select a value from the Header Status drop-down menu to add or take action on a transaction. <i>Note: Searching can be done by Header Status or Approver, but not both.</i> <i>Select Header Status to view or take action on transactions in a specific approval process state, such as Approved, Complete, Pending, etc.</i> <i>Select an approver to view or take action on an approval processes for a specific approver this field is required.</i> <i>Enter additional search criteria, as needed, in the remaining fields to narrow search results, such as Originator or Requester User ID.</i>
10.	Click the Search button.
11.	Scroll down at right to view Approval Process: ePro Requisition results box.
12.	If needed, enter information in one or more of the search criteria fields and click the filter button or scroll through the list to locate a transaction.

Step	Action
13.	<p>Users can either take action on an individual transaction or on multiple by following one of the options below.</p> <ul style="list-style-type: none"> • For individual transaction process: Proceed to Step 14. • For multiple transactions: Proceed to Step 19.
14.	Click on Transaction ID to view the transaction. The system navigates to the Monitor Approvals page for that transaction.
15.	Select the current Approver's name from the Approver dropdown menu at the top of the page.
16.	<p>Select one of the following options:</p> <ul style="list-style-type: none"> • To Approve the transaction, proceed to Steps 17 – 18. • To Deny the transaction, proceed to Steps • To Reassign the transaction, proceed to Steps
17.	To approve the transaction, navigate to the Administrative Approve/Deny Section.
18.	<p>Click the Approve button.</p> <p>End of Procedure. All remaining steps pertain to other options.</p>
19.	To deny the transaction, enter a comment in the Comment field to explain why this transaction is being denied.
20.	Navigate to the Administrative Approve/Deny Section.
21.	<p>Click the Deny button.</p> <p>End of Procedure. All remaining steps pertain to other options.</p>
22.	Navigate to the Reassign Pending Tasks box and click in the Reassign To field.
23.	Enter the UserID of the Approver that the requisition should be reassigned to in the Reassign To field.
24.	Select the Reassign button.
25.	Click OK when successful.
26.	<p>The Approver that the requisition was reassigned to can now sign in and approve the requisition following the standard business process.</p> <p>End of Procedure. All remaining steps pertain to other options.</p>

Step	Action
27.	To take action on multiple transactions, navigate to the search results and select the checkbox next to the transactions to change them.
28.	Scroll up to the Administrative Actions box and enter the current Approver's Oper ID in the Administrative Actions box.
29.	Select one of the following options: <ul style="list-style-type: none"> • To Approve multiple transactions, proceed to Steps 30 - • To Deny multiple transactions, proceed to Steps • To Reassign multiple transactions, proceed to Steps
30.	Click the Approve button. End of Procedure. All remaining steps pertain to other options.
31.	To deny the transaction, enter a comment in the Comment field to explain why this transaction is being denied.
32.	Click the Deny button. End of Procedure. All remaining steps pertain to other options.
33.	Click in the Reassign To field.
34.	Enter the UserID of the Approver that the requisition should be reassigned to in the Reassign To field.
35.	Select the Reassign Selected button.
36.	Click OK when successful.
37.	The Approver that the requisition was reassigned to can now sign in and approve the requisition following the standard business process.