

AP.080.021 - MONITOR APPROVALS - DENYING VOUCHERS

Purpose	To Deny a Voucher using the Modify Approvals page.
Description	<p>The Monitor Approvals page gives Accounts Payable Administrators a view into all approvals to which they have access, as well as take necessary actions on pending approvals, such as searching approval processes, performing mass reassignments, and/or add additional Approvers to workflow.</p> <p>This topic demonstrates how the Accounts Payable Administrator can view approval routings and use this page to Deny a voucher using the Monitors Approval page to expedite workflow.</p> <p>Due to the complex rules used by PeopleSoft Expenses, the Monitor Approvals page should not be used to approve or deny expense transactions. To approve and deny expense transactions use the PeopleSoft Expenses approval pages.</p>
Security Role	BOR_AP_ADMINXX (Accounts Payable 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, vouchers could be 'stuck' in approval workflow, requiring the intervention by the Accounts Payable Administrator.

Procedure

Below are step by step instructions on how to use monitor approvals page to deny vouchers.

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 " VoucherApproval " 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 " Pending " from the Header Status drop-down menu to search for Voucher pending approval. <i>Note: Searching can be done by Header Status or Approver, but not both. Select Header Status to view or take action on Vouchers 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 process 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.	Select Search . This produces a list of vouchers pending approval.
11.	Scroll down to view Approval Process: Voucher Approvals results box.
12.	Filter the results based on criteria entered or scroll through list to locate the Voucher to be viewed.

Step	Action
13.	<p>Users can either take action on an individual voucher or on multiple vouchers by following one of the options below.</p> <ul style="list-style-type: none"> • For individual voucher process: Proceed to Step 14. • For multiple vouchers: Proceed to Step 19.
14.	Click on Voucher ID to view the voucher. The system navigates to the Monitor Approvals page for that voucher.
15.	Confirm 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 you are denying this voucher.
17.	Select Deny button in the Administrative Approve/Deny box. The voucher is denied and is routed back to the submitter. As well, workflow is updated.
18.	<p>Click the Return link to return to the Monitor Approvals page.</p> <p>End of Procedure. All remaining steps pertain to other options.</p>
19.	To deny multiple vouchers, select the checkbox by one or more vouchers that require denial.
20.	Navigate to the Administrative Actions box and enter the current Approver's Oper ID in the Administrative Actions box.
21.	Enter a comment in the Comment field to explain why the vouchers are being denied.
22.	Select Deny Selected button in the Administrative Actions box
23.	Click OK when successful.