

AP.080.023 - MONITOR APPROVALS - MODIFYING VOUCHER WORKFLOW

Purpose	To modify voucher workflow using the Monitor Approvals page
Description	<p>The Monitor Approvals page allows Accounts Payable Administrators to view 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 modify workflow using the Monitors Approval page.</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 Accounts Payable Administrator to intervene.

Procedure

Below are step by step instructions on how to use monitor approvals page to modify workflow.

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.</i> <i>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 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.	Select the Search button.
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 that needs to be viewed.
13.	Click on a Voucher ID to view the voucher. The system navigates to the Monitor Approvals page for that voucher.

Step	Action
14.	To add an additional Approver to workflow, scroll down to the Workflow to modify (Budget Approver, Department Approver, AP Approver, etc.).
15.	Select on the green plus (+) icon next to the approval workflow. <i>Note: DO NOT click on the plus (+) sign to “Start New Path.”</i>
16.	Enter the User ID of the user to add as an Approver or Reviewer or use the magnifying glass to search for the User ID.
17.	Select the Approver or Reviewer radio button.
18.	Select Insert . This inserts the Approver or Reviewer into the workflow.
19.	Click Save Changes to complete modifying workflow.
20.	Click the Return link to return to the Monitor Approvals page.