EP.080.020 – MONITOR/REASSIGN APPROVALS

Purpose	To monitor/reassign existing requisitions.
Description	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. 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.
Security Role	**BOR_EP_ADMINXX** (ePro 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, 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 **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 “Requisition” 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 a value from the **Header Status** drop-down menu to add or take action on a transaction. ***Note:*** *Searching can be done by Header Status or Approver, but not both.* *Select Header Status to view or take action on transactions 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.	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.	Users can either take action on an individual transaction or on multiple by following one of the options below. • **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.	Select one of the following options: • 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.	Click the Approve button. End of Procedure. All remaining steps pertain to other options.
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.	Click the **Deny** button. End of Procedure. All remaining steps pertain to other options.
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.	The Approver that the requisition was reassigned to can now sign in and approve the requisition following the standard business process. End of Procedure. All remaining steps pertain to other options.

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: • 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.