Training Workbook

Module 3: Approval
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Learning Objectives:
Module 3: The Approval Process

Upon completion of this module the staff will be able to:

- Demonstrate changing the approval flow by adding an approver that is not in the chain
- Demonstrate how to review the submitted request list
The Approval Flow Tab

In any request the approval flow tab allows you to view the approval flow.

Click the approval flow tab to view the flow.

You can check the status of the approval or add an approver in this tab.
Approve Request List

To display the Approve Requests screen, on the Home page, click **Approve Requests** in the Navigation Panel or **Approve** in the central "swoosh" or image.
1. Review the list of requests for which your approval is required.
   o You must act on requests whose status is Submitted. The list can include requests with other statuses; for example, requests that have already been approved or denied by an approver parallel to you in the approval flow, denied by an approver who precedes you in the approval flow, or that have been withdrawn by the requester. In these cases, the request status appears as Denied, Approved, or Withdrawn, and you are no longer required to act on the request. However, it can be useful to review the request and add comments, as appropriate.

   o To display an approval summary of the request, from which you can also approve or deny the request or drill down to request details, click any link in a request.
To review other pending requests, click an arrow to display the previous or next page or select a page from the pull-down menu.

If available, click the Table Options icon, located in the row above the column headers, to display commands that control the display of data in the table. For example, you can hide or show columns of data; group data; or export data to Excel.
2. To approve or deny one or more requests, click the check box for each request and then click **Approve** or **Deny**. You are then asked to provide a comment and indicate a folder to archive or move the request.

3. You may also approve from the details link, click one of the links to review, click approve or deny, enter a comment and indicate to archive or move the request.