Approvals for Admins - Purchase Request, Warehouse, Timecard Online

Your Tasks ▾   ☰ SI: Stores Inventory Approval ▾   Expand Records ▾   Select and process all tasks ⬤   👤 In Office

Search 🔍

Show: ☑ Pending ☑ Holds
Sort By: Order ID ⇅ Cust ⇅ Stat ⇅

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Order ID: 00097453   **Cust: 008**   **Stat: NW**

Select to process task   ⬤
Approver: Primary

Details | Attachments | History

2

⎘ Link To Record

```
Order ID      = 00097453
Order Total   =    $12.94
Requested By  = Kelly L Case
Request Date  = 6/22/2021
Description   = testing KC

Item# Quantity   Units    Item Price  Item Total  Gr Ledger Key  Ledger Obj Amount/Percent
===== ========== ======== =========== =========== == ========== ========== ================
    1     1.000 EA            $5.93       $5.93 NL 52005141FB 66100          100.00000%
                ProdId: 271/1520 - BRUSH:BENCH OR FOXTAIL

    2     2.000 EA            $3.50       $7.01 NL 52005141FB 66100          100.00000%
                ProdId: 271/1220 - BUCKET:WATER, PLASTIC
```

Clicking the line will open/expand the item so you can view it

Click on the toggle to bring up the workflow options

Order ID: 00097456   **Cust: 008**   **Stat: NW**   Select to process task   ⬤
                                                                              Approver: Primary

Order ID: 00097459   **Cust: 008**   **Stat: NW**   Select to process task   ⬤
                                                                              Approver: Primary

Order ID: 00097472   **Cust: 008**   **Stat: NW**   Select to process task   ⬤
                                                                              Approver: Primary

Order ID: 00097492   **Cust: 008**   **Stat: NW**   Select to process task   ⬤
                                                                              Approver: Primary

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Your Tasks ▾   ☰ SI: Stores Inventory Approval ▾   Select and process all tasks ⬤   👤 In Office

Sort By: Order ID ⇅ Cust ⇅ Stat ⇅

The toggle will turn blue, the record will "close" or collapse, and you can see the workflow/approval options at the bottom of the screen

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Order ID: 00097453   **Cust: 008**   **Stat: NW**   Select to process task   ⬤
                                                                              Approver: Primary

Order ID: 00097456   **Cust: 008**   **Stat: NW**   Select to process task   ⬤
                                                                              Approver: Primary

Order ID: 00097459   **Cust: 008**   **Stat: NW**   Select to process task   ⬤
                                                                              Approver: Primary

Order ID: 00097472   **Cust: 008**   **Stat: NW**   Select to process task   ⬤
                                                                              Approver: Primary

5

Order ID: 00097492   **Cust: 008**   **Stat: NW**   Select to process task   ⬤
                                                                              Approver: Primary

Click Approve

Select to process task   ⬤

👍 Approve   👎 Reject   ⧗ Hold   → Forward

Approve Task (1)

Add Comment

Click Submit

6

Cancel   **Submit**

Order ID: 00097456	Cust: 008	Stat: NW	Select to process task Approver: Primary	⬤
Order ID: 00097459	Cust: 008	Stat: NW	Select to process task Approver: Primary	⬤
Order ID: 00097472	Cust: 008		Select to process task Approver: Primary	⬤
Order ID: 00097492	Cust: 008		Select to process task Approver: Primary	⬤
Order ID: 00097506	Cust: 008		Select to process task Approver: Primary	⬤
Order ID: 00097516	Cust: 008	Stat: NW	Select to process task Approver: Primary	⬤

Repeat steps 1-6 with other records as necessary

P BusinessPlus   **Workflow Tasks**   ? 🔍

🏷 Your Tasks ▾   ☰ SI: Stores Inventory Approval ▾   Expand Records ▼   Select and process all tasks ⬤   👤 In Office

Sort By: Order ID ⬍ Cust ⬍ Stat ⬍

Order ID: 00097453	Cust: 008		Select to process task Approver: Prim...
Order ID: 00097456	Cust: 008		Select to pro... Approver: P...
Order ID: 00097459	Cust: 008	Stat: NW	Select to process t... Approver: Primary
Order ID: 00097472	Cust: 008	Stat: NW	Select to process task Approver: Primary ⬤
Order ID: 00097492	Cust: 008	Stat: NW	Select to process task Approver: Primary ⬤
			Select to process task ⬤

Remember you can expand all records to easily review

Remember you can select and process all tasks, using the toggle, to approve all at once

👍 Approve   👎 Reject   ⧗ Hold   ➜ Forward

OR

Return to the Finance tab to continue with other categories needing approval

FINANCE

Personal Dashboard | **FINANCE**

Workflow Tasks
Go to Workflow Tasklist
PR: Purchase Request Approval (1)
SI: Stores Inventory Approval (11)
Timecard Online Approval (1)
Refreshed at Sunday, August 1, 2021 4:48:58   In Office

CDD Reports
Go to CDD Archive
CDD Folders
📁 Accounts Payable
📁 Bank Reconciliation
📁 Development
📁 Fin...
📁 Grants
📁 IFAS IQ Reports

Job Monitor/Documents Online
Go to Jobs Archive
Desc   Job #   Status   Start   End   Type
No items to display
Refreshed at Sunday, August 1, 2021 4:48:58   Your Jobs

Click into the approval category you want to work with

Tips for working in the Workflow Tasks screen:

Workflow Tasks

Your Tasks | PR: Purchase Request Approval | Expand Records | Select and process all tasks | In Office

Show: ☑ Pending ☑ Holds

You can see any attachments by clicking on the Attachments tab

PR: R542772
Stat: PR

Vend: 114059

Select to process task
Approver: Primary

Details | Attachments | History

...check out the next slide

🔗 Link To Record

When the record is expanded, you can navigate into the actual order screen, if need be, by clicking on the Link to Record button.

```
Purchase Request# = R542772
PR Total$       =      $5.00
Requested By    = Kelly L Case
Request Date    = 5/21/2021
Entry Date      = 5/21/2021
Bid #           =
Vendor          = 114059-CDWG

                      ACCOUNT INFORMATION
                    === =======================

Item#  Quantity    Price         Item  otal  Lg Account
=====  ==========  ================  == =========================
0001    1.000         $5.00        $5.00 NL 10-000-2510-66100-008-0000

       Item Description
       ---------------------------------------
```

Your Tasks ▾   PR: Purchase Request Approval ▾   Expand Records ▾   Select and process all tasks   In Office

Show: ☑ Pending   ☑ Holds

PR: R542772
Stat: PR

PO:

Vend: 114059

Select to process task
Approver: Primary

Details | Attachments | History

Link To Record

Doc Id	Attach Id	Created	Documents	Description
3957825	PRCH_REQ	8/1/2021 5:23:02 PM	1	Test Attachment

Click anywhere on this row to open the attachment

DocId: 3957825   Test Attachment   Zip and download originals

PDF

c0f888af-a94b-41b7-902b-6bb7af96bd0b

Open

Click open