



CENTRALIZED ACCOUNTING & PAYROLL/PERSONNEL SYSTEM

CAPPS Desk Aid

Workflow Administrator Purchasing Approval

Note: This Desk Aid was written to the specifications of CAPPS Central agency modules and may not reflect the unique process variations implemented by individual or non-Central agencies.

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Workflow Administrator Purchasing Approval

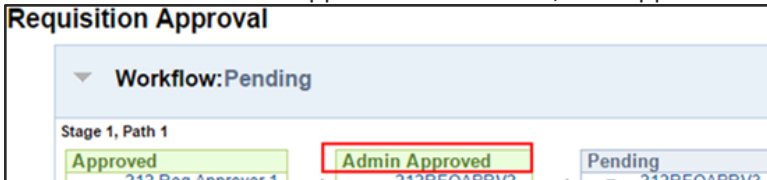
Overview

Each agency will establish one (or more) workflow administrators.

For documents (such as requests, vouchers, purchase orders, etc.) a workflow administrator can:

- Approve a document
- Reassign a document to another approver (the new approver must have the appropriate security for the related document)
- Enter a COMMENT to explain the necessary administrative action (for example: *the department manager is currently out of the office unexpectedly*).
- Restart the approval process

When a workflow administrator approves a document, that approval displays in the workflow path.



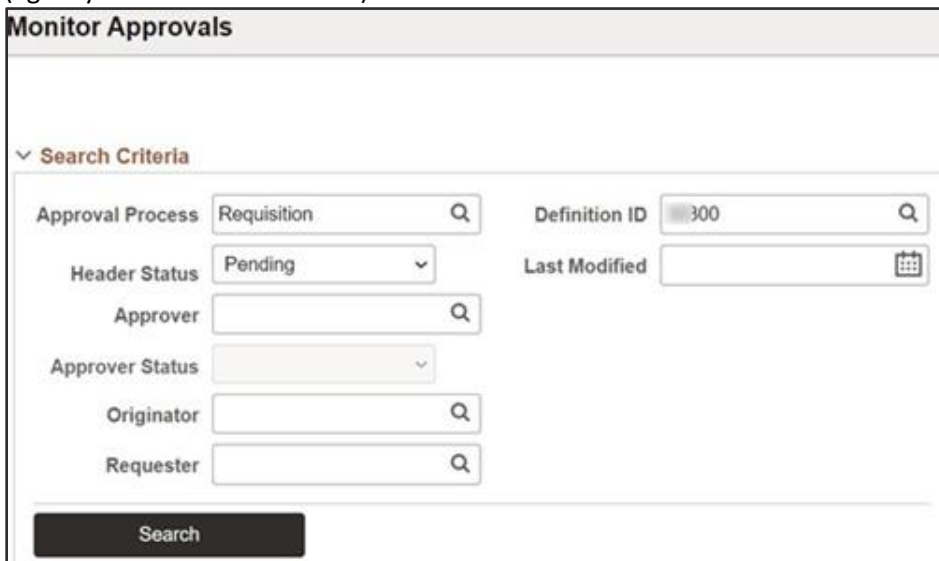
Approving a Workflow

Navigation
NavBar: Financials; Enterprise Components; Approvals; Approvals; Monitor Approvals

Reminder: The *Monitor Approvals* page can be set as a *Favorite*.

From the *Monitor Approvals* page:

1. Enter the *Search Criteria* for the APPROVAL PROCESS, HEADER STATUS, and DEFINITION ID (agency business unit number) fields.



2. Select **Search**.

3. Select the intended document for approval from the resulting search list.

| | | Modified | Status | Business Unit | Requisition ID | Requisition Date | Requester |
|---|--|------------|---------|---------------|----------------|------------------|-----------|
| 1 | | 2018-10-17 | Pending | 40500 | 19R0003126 | 2018-10-17 | 000100! |

4. Choose an **Approver** from the drop-down menu.

Note: The applicable approvers automatically display in the drop-down menu.

Approved By

Approver

Comment

- Charlotte
- Christiana
- Michael
- Ricardo

Line Details

| Business Unit | Requisition ID | Line Number |
|---------------|----------------|-------------|
| 1 40500 | 19R0003126 | 2 |
| 2 40500 | 19R0003126 | 3 |
| 3 40500 | 19R0003126 | 4 |
| 4 40500 | 19R0003126 | 5 |
| 5 40500 | 19R0003126 | 1 |

Reassign Pending Tasks

The selected approver does not currently have an alternate approver selected in their user profile. You must manually select an alternate approver to reassign pending tasks.

Reassign To:

Allow Self-Approval

Allow Auto Approval

Administrative Approve/Deny

Act on behalf of the approver selected above by selecting the Approve/Deny buttons below. This action will be performed on behalf of the approver selected within the context of this transaction.

Requisition Approval

2019 Calendars RSD CES Reg 2 19R0003126:Pending

5. Select **Approve**.

Revision History

| Date | Description of Change | Changed By |
|--------------|-----------------------|------------|
| Dec. 9, 2024 | Initial release. | J. Goodman |
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