Miami-Dade County

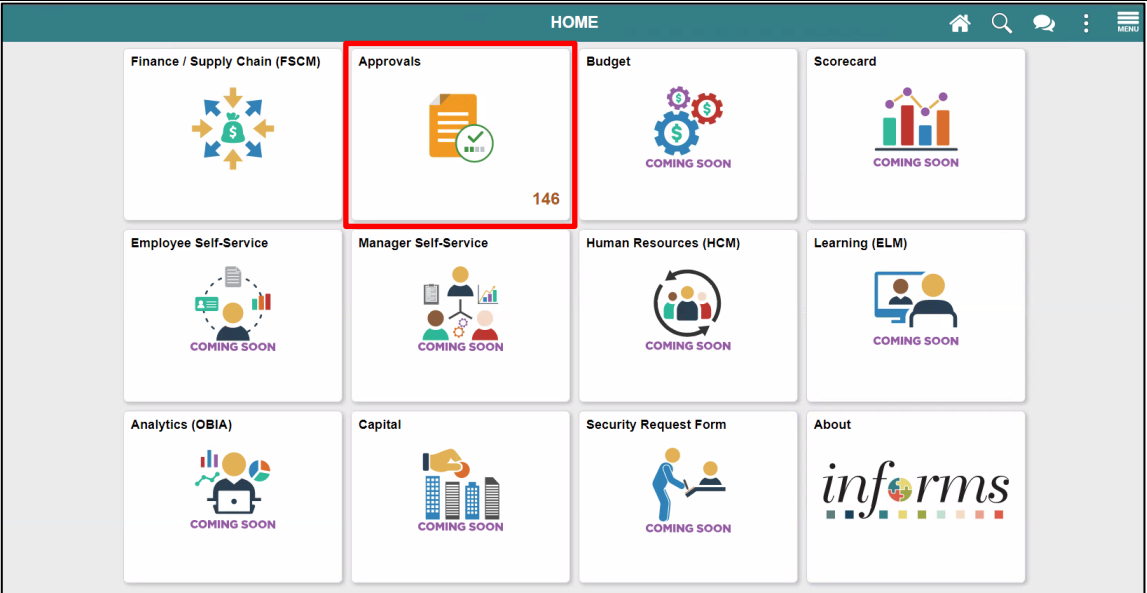# Approvals Job Aid

PURPOSE AND DESCRIPTION

Purpose

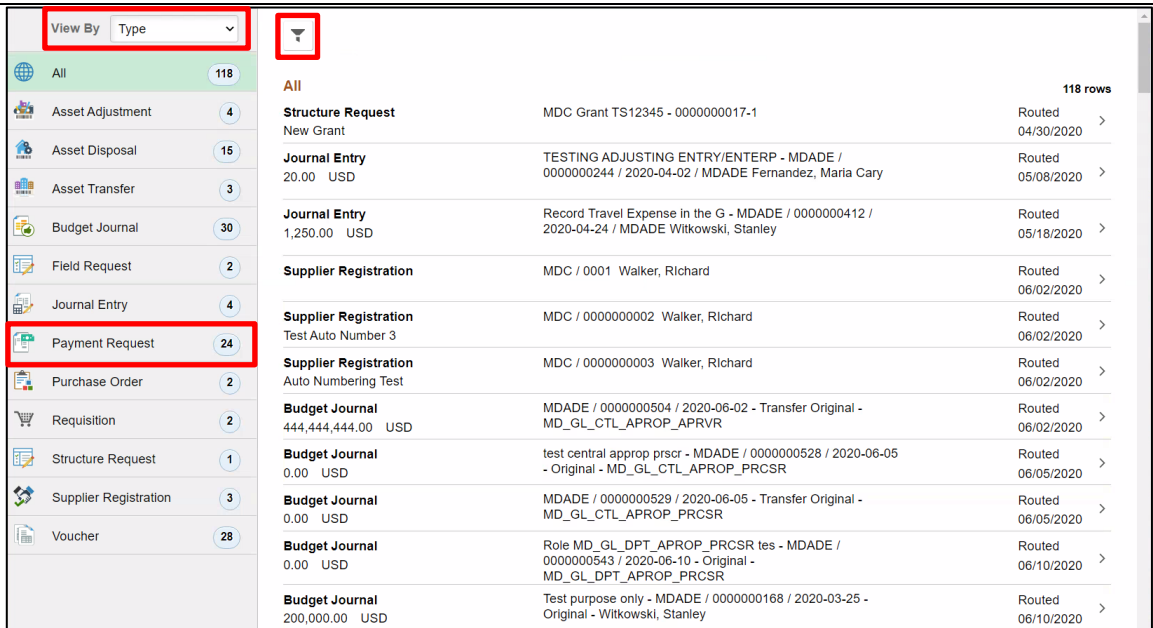This document explains the steps to review and approve pending transactions.

Description

The key actions to manage INFORMS transactions as an Approver are reviewing, approving, denying, and pushing back pending approvals. The example being used for the screenshots in this job aid is Payment Request. The steps outlined apply to all transactions in INFORMS.

APPROVALS

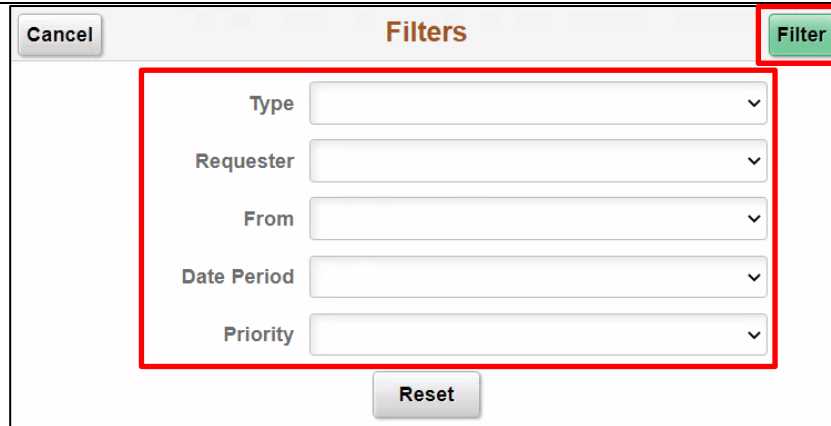| Step	Action
1.	Log into INFORMS.
2.	 Select the **Approvals** Tile.

3.	**Optional:** Select the **Filter** Icon or **View By** dropdown to display selected transactions based on filter criteria. **Optional:** Select the **Transaction Type** Pane to display all transactions by one type.
4.	Select the dropdown option from the desired filter criteria, then select the **Filter** button. **If you see transactions from other departments or divisions use the Requester filter to search for the names of the requestor from your division**.

5.	 Select the transaction from **Pending Approvals**. **NOTE:** Transaction types listed for pending approval are based on users roles and security access.
6.	 a. Review the transaction **Summary** section. b. Select **View Attachments** (if applicable) c. Select **Line Description** to view additional details.

7.	Review all **Chartfields** for accuracy. Select "**X**".
8.	Non Accounts Payable workflow approvers skip to step 17. **Note:** Steps 9 through 16 apply to Accounts Payable workflow approvers only. Select **Approval Chain** to insert an Ad-Hoc Approver / Reviewer
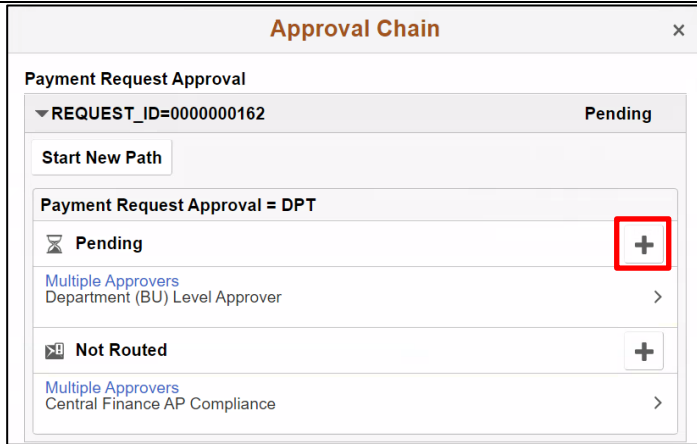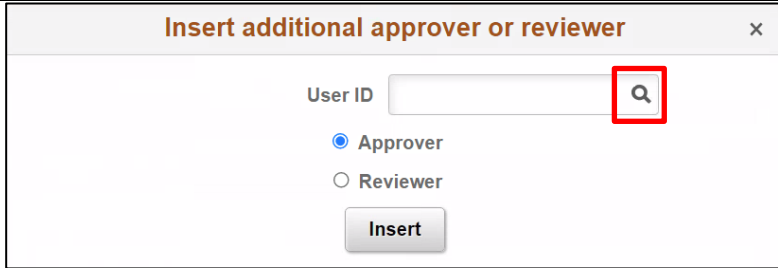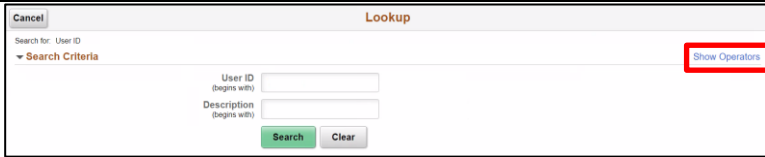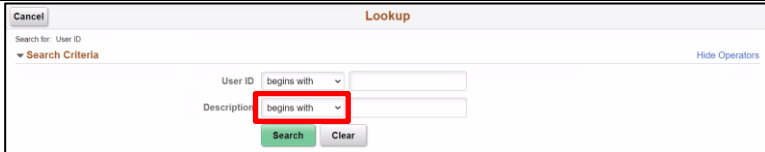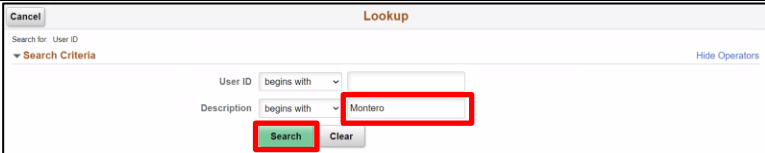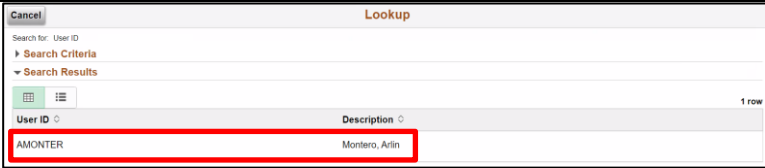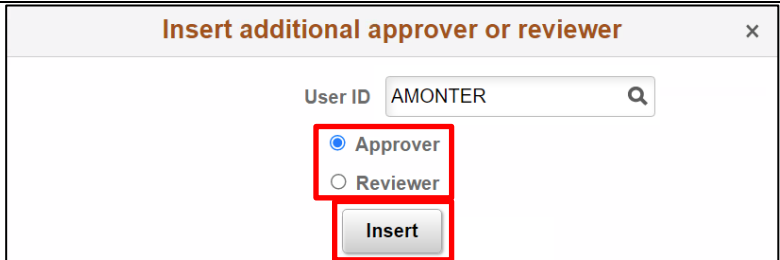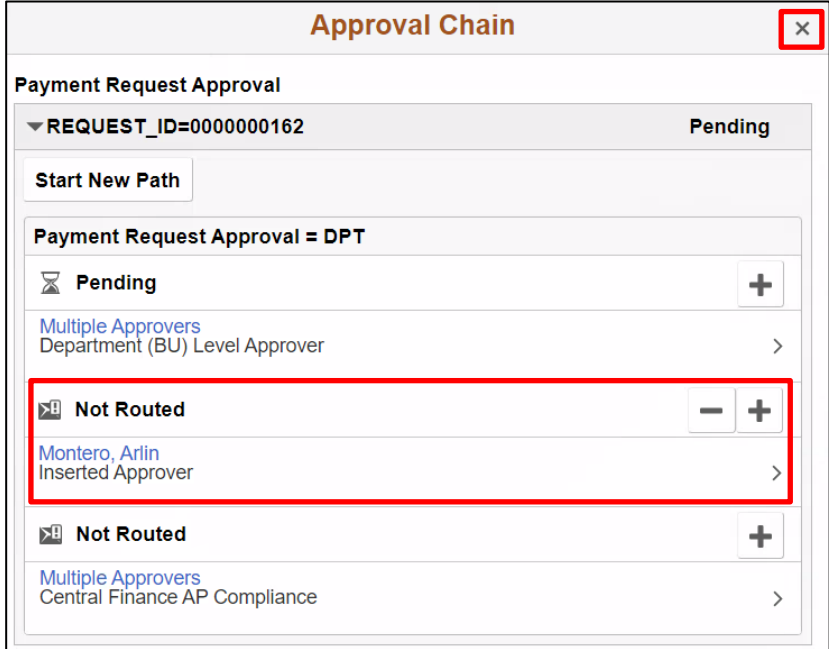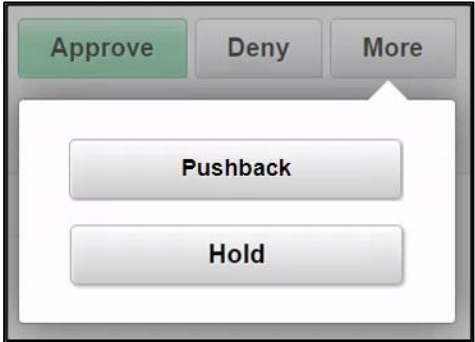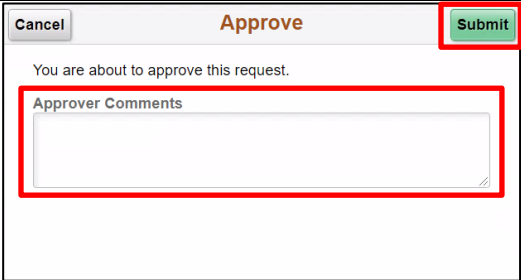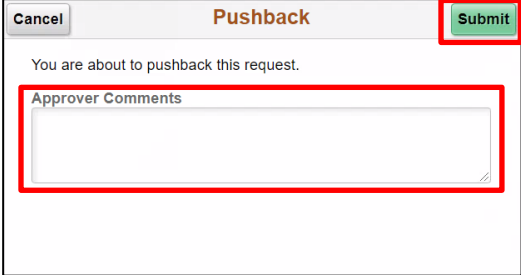
9.	**Approval Chain** × Payment Request Approval ▼ REQUEST_ID=0000000162 Pending Start New Path Payment Request Approval = DPT ⏳ Pending **+** Multiple Approvers Department (BU) Level Approver › 📭 Not Routed **+** Multiple Approvers Central Finance AP Compliance › Select the **Plus Sign (+)**
10.	**Insert additional approver or reviewer** × User ID [＿＿＿＿＿] 🔍 ⦿ Approver ◯ Reviewer Insert Select the **Lookup** icon.
11.	Cancel Lookup Search for: User ID ▼ Search Criteria Show Operators User ID (begins with) [＿＿＿] Description (begins with) [＿＿＿] Search Clear Select the **Show Operators** hyperlink.
12.	Cancel Lookup Search for: User ID ▼ Search Criteria Hide Operators User ID [begins with ▾] [＿＿＿] Description [begins with ▾] [＿＿＿] Search Clear Select **Description** and change "**begins with**" to "**contains**".
13.	Cancel Lookup Search for: User ID ▼ Search Criteria Hide Operators User ID [begins with ▾] [＿＿＿] Description [begins with ▾] [Montero] Search Clear Type the name of the person you wish to add as an Approver, then select **Search**.
14.	Cancel Lookup Search for: User ID ▶ Search Criteria ▼ Search Results ▦ ☰ 1 row User ID ◇ Description ◇ AMONTER Montero, Arlin Select the name of the person.

15.	**Insert additional approver or reviewer** ✕ User ID AMONTER 🔍 🔵 Approver ⚪ Reviewer Insert Select either the **Approver** or **Reviewer** option, then select **Insert**.
16.	**Approval Chain** ✕ **Payment Request Approval** ▼ REQUEST_ID=0000000162 Pending Start New Path **Payment Request Approval = DPT** ⌛ Pending + Multiple Approvers Department (BU) Level Approver > ▣ Not Routed − + Montero, Arlin Inserted Approver > ▣ Not Routed + Multiple Approvers Central Finance AP Compliance > Ensure the additonal Approver has been added, then select "**X**".
17.	Approve Deny More Pushback Hold Select the desired action. **Approve** – Approves the Transaction **Deny** – Denies the Transaction and returns to initiator **Pushback** – Returns transaction to prior approver
18.	Approve

	Cancel **Approve** **Submit** You are about to approve this request. **Approver Comments** Enter approval comments **(Optional).** Select **Submit**.
19.	Deny **Cancel** **Deny** **Submit** You are about to deny this request. **Approver Comments** Enter reason for denial in **Approver Comments** Section **(Required).** Select **Submit**
20.	Pushback **Cancel** **Pushback** **Submit** You are about to pushback this request. **Approver Comments** Enter reason for Pushback in **Approver Comments** Section **(Required).** Select **Submit.**
21.	End of process.