

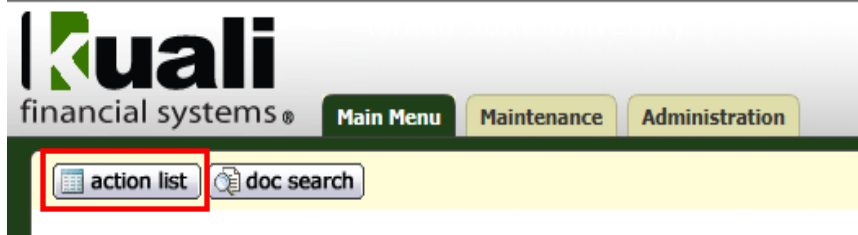


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Action List:

That Action List Button is always in the left corner. In all tabs and on all pages the action list button will remain in the left corner.



The Action List is where all documents that are waiting your approval, acknowledgement or FYI are located. It also has any documents that you have created and only saved. Once you submit a document it is out of your action list.

When you click on the Action List button it will take you to your Action List. Below is an example of the action list.

Action List												
										preferences	refresh	filter
Action List Outbox												
20 items retrieved, displaying all items.												
<u>Id</u>	<u>Type</u>	<u>Title</u>	<u>Route Status</u>	<u>Action Requested</u>	<u>Initiator</u>	<u>Delegator</u>	<u>Date Created</u>	<u>Last Approved Date</u>	<u>Group Request</u>	<u>Log</u>		
2340772	Account	Edit Account - Close 7737650 VTH Water Heater Repl	ENROUTE	APPROVE	Wright, Virginia S		09:12 AM 04/02/2013	10:20 AM 04/04/2013	CampusServices			
2405898	Account	Edit Account - Close 7718010 Clark Bldg Renovation	ENROUTE	APPROVE	Wright, Virginia S		10:32 AM 05/14/2013	04:24 PM 05/14/2013	CampusServices			
2655811	Distribution Of Income And Expense	Distribution Of Income And Expense - PaperCut RamCash Aug through Sept 2013	ENROUTE	APPROVE	Perrotin, Martha Cecilia		03:09 PM 10/14/2013	08:48 AM 10/18/2013	CampusServices			
2657607	Adjustment/Accrual Voucher	Adjustment/Accrual Voucher - CDPS Billing	ENROUTE	APPROVE	Heady, Valerie A		01:56 PM 10/15/2013	09:00 AM 10/18/2013	CampusServices			
2660221	Transfer Of Funds	Transfer Of Funds - GIS Day support	ENROUTE	APPROVE	Peregoy, Cheryl L		02:35 PM 10/16/2013	08:50 AM 10/18/2013	CampusServices			
2660681	Requisition	Requisition - Attn:Kathi LaFollette	ENROUTE	APPROVE	Biela, Laurie M		03:27 PM 10/16/2013		CampusServices			
2661591	Account	Edit Account - Change name on account	ENROUTE	APPROVE	Mandis, Renee R		10:38 AM 10/17/2013	09:12 AM 10/18/2013	CampusServices			
2661690	Account	Edit Account - Change name on account	ENROUTE	APPROVE	Mandis, Renee R		11:11 AM 10/17/2013	09:14 AM 10/18/2013	CampusServices			
2661697	Account	Edit Account - Change name on account	ENROUTE	APPROVE	Mandis, Renee R		11:13 AM 10/17/2013	09:15 AM 10/18/2013	CampusServices			
2661702	Account	Edit Account - Change name on account	ENROUTE	APPROVE	Mandis, Renee R		11:14 AM 10/17/2013	09:16 AM 10/18/2013	CampusServices			
2661710	Account	Edit Account - Change name on account	ENROUTE	APPROVE	Mandis, Renee R		11:14 AM 10/17/2013	04:34 PM 10/17/2013	CampusServices			
2661721	Account	Edit Account - Change name on account	ENROUTE	APPROVE	Mandis, Renee R		11:17 AM 10/17/2013	04:34 PM 10/17/2013	CampusServices			
2661726	Account	Edit Account - Change name on account	ENROUTE	APPROVE	Mandis, Renee R		11:18 AM 10/17/2013	04:34 PM 10/17/2013	CampusServices			
2661729	Account	Edit Account - Change name on account	ENROUTE	APPROVE	Mandis, Renee R		11:18 AM 10/17/2013	04:35 PM 10/17/2013	CampusServices			
2661734	Account	Edit Account - Change name on account	ENROUTE	APPROVE	Mandis, Renee R		11:20 AM 10/17/2013	04:35 PM 10/17/2013	CampusServices			
2663398	Disbursement Voucher	Disbursement Voucher - test	SAVED	COMPLETE	Mercurio, Erin Pillsbury		01:14 PM 10/24/2013					
2663434	Internal Order	Internal Order - test	SAVED	COMPLETE	Mercurio, Erin Pillsbury		03:42 PM 10/29/2013					
2663490	Vendor	Edit VendorDetail - test address	SAVED	COMPLETE	Mercurio, Erin Pillsbury		01:22 PM 11/07/2013					
2663589	Disbursement Voucher	Disbursement Voucher - test BG	SAVED	COMPLETE	Mercurio, Erin Pillsbury		08:11 AM 11/26/2013					
2663591	Distribution Of Income And Expense	Distribution Of Income And Expense - test bg	SAVED	COMPLETE	Mercurio, Erin Pillsbury		11:57 AM 11/26/2013					

Anything underlined can be clicked on. So if I click on Mandis, Renee the below window appears giving me the information regarding the Initiator.

Person

expand all collapse all

Overview

<u>Entity Id:</u> 8072	<u>Principal Id:</u> 6087
<u>Principal Name:</u> rmandis	<u>Active:</u> Yes
<u>Principal Password:</u>	

Affiliations

Affiliation Type	Campus Code	Default
Staff	MC - CSU Main Campus	Yes

1

Employment Information

Employee Id	Primary	Employee Status	Employee Type	Primary Department Code	
1	821115898	Yes	Active	Professional	CO-1019

Contact

Privacy Preferences

Membership

Approving a Document:

To view a document in your action list click on the underlined document number (located in the ID column). After clicking on document 2655811, it takes you to the document where you can review and approve if all the information is correct. To approve it, you click the button at the bottom that says "approved."

Document Overview hide

Document Overview

* Description: PaperCut RamCash Aug through Sept 2013
 Organization Document Number: Explanation: Distribute Ramcash and management fee for transactions from 8/1/13 to 9/30/13 for PaperCut Library Print

Financial Document Detail

* Accounting Period: Total Amount: 13,760.00

Accounting Lines hide

Accounting Lines hide detail

From	* Chart	* Account Number	Sub-Account	* Object	Sub-Object	Project	Org Ref Id	* Amount	Actions
1	CO Colorado State University	2607800 Convenience And Vending Funds Clearing		2591 Convenience Card				13,760.00	
Total: 13,760.00									
To	* Chart	* Account Number	Sub-Account	* Object	Sub-Object	Project	Org Ref Id	* Amount	Actions
1	CO Colorado State University	2605350 Ramcard - Id/Vending		4800 Interdepartment Credits	MGT Management Fee Revenue			316.48	
2	CO Colorado State University	2596000 Pay for Print		4380 Other Sales+Services-Auxiliary/Self-Fund				13,443.52	
Total: 13,760.00									

Capital Edit show

General Ledger Pending Entries show

Notes and Attachments (4) hide

Notes and Attachments

	Posted Timestamp	Author	* Note Text	Attached File	Actions
add:			<input type="text"/>	<input type="text"/> Browse... <input type="button" value="CANCEL"/>	<input type="button" value="add"/>
1	10/14/2013 03:09 PM	Perrotin, Martha Cecilia	copied from document 2567539		
2	10/14/2013 03:15 PM	Perrotin, Martha Cecilia	Papercut RamCash Invoice Summary	<input type="button" value="download"/> 8.13-9.13 Papercut Ramcash.pdf (94 KB, application/pdf)	
3	10/14/2013 03:30 PM	Mandis, Renee R	PaperCut Tally - August 2013	<input type="button" value="download"/> PayforPrint Tally as of 8-1-13 thru 8-31-13.xlsx (127 KB, application/vnd.openxmlformats-officedocument.spreadsheetml.sheet)	
4	10/14/2013 03:30 PM	Mandis, Renee R	PaperCut Tally - September 2013	<input type="button" value="download"/> PayforPrint Tally as of 9-1-13 thru 9-30-13.xlsx (176 KB, application/vnd.openxmlformats-officedocument.spreadsheetml.sheet)	

Ad Hoc Recipients show

Route Log show

After clicking approve it will then route to the next approver, or if you are the final approval the document will become final and post to the accounts.

Disapproving a Document:

If while reviewing the document and the support, you see that some information is incorrect, you can hit the disapprove button.



That will take you to the below screen where you will need to enter the reason you are disapproving this. Once you enter the reason, you will click “yes.” If you realize you do not want to disapprove it, by clicking “no” it will take you back to the document.

Are you sure you want to **disapprove** this document?

* Please enter the reason below:

Disapproving because account number should be 2602700.

Below is how the document will show in the initiator and everyone who approved the document’s action list.

<u>Id</u>	<u>Type</u>	<u>Title</u>	<u>Route Status</u>	<u>Action Requested</u>	<u>Initiator</u>	<u>Delegator</u>	<u>Date Created</u>	<u>Group Request</u>	<u>Log</u>
2630706	Procurement Card	Procurement Card - JAMIE MCCUE	ENROUTE	APPROVE	USER, KR		03:30 PM 09/27/2013		
2630707	Procurement Card	Procurement Card - JAMIE MCCUE	ENROUTE	APPROVE	USER, KR		03:30 PM 09/27/2013		
2631626	Payment Request	Payment Request - PO: 396658 Vendor: OfficeMax Inc Electro	ENROUTE	APPROVE	USER, KR		05:32 AM 09/30/2013		
2638115	Procurement Card	Procurement Card - JAMIE MCCUE	ENROUTE	APPROVE	USER, KR		03:00 PM 10/02/2013		
2646956	Procurement Card	Procurement Card - PATRICK BURNS	ENROUTE	APPROVE	USER, KR		03:00 PM 10/08/2013		
2651303	Requisition	Requisition - Gov Connection - Contex Maintenance	SAVED	COMPLETE	Mandis, Renee R		03:27 PM 10/10/2013		
2651693	Procurement Card	Procurement Card - SCOTT BAILY	ENROUTE	APPROVE	USER, KR		04:40 PM 10/10/2013		
2655811	Distribution Of Income And Expense	Distribution Of Income And Expense - PaperCut RamCash Aug through Sept 2013	DISAPPROVED	ACKNOWLEDGE	Perrotin, Martha Cecilia		03:09 PM 10/14/2013		

When the person opens the document they will scroll down and in the Notes and Attachments section will see the disapproval reason. See below:

Notes and Attachments (5) ▼ hide

Notes and Attachments					
	Posted Timestamp	Author	* Note Text	Attached File	Actions
add:			<input type="text"/>	<input type="text"/> Browse... <input type="button" value="CANCEL"/>	<input type="button" value="add"/>
1	10/14/2013 03:09 PM	Perrotin, Martha Cecilia	copied from document 2567539		
2	10/14/2013 03:15 PM	Perrotin, Martha Cecilia	Papercut RamCash Invoice Summary	8.13-9.13 Papercut Ramcash.pdf (94 KB, application/pdf)	
3	10/14/2013 03:30 PM	Mandis, Renee R	PaperCut Tally - August 2013	PayforPrint Tally as of 8-1-13 thru 8-31-13.xlsx (127 KB, application/vnd.openxmlformats-officedocument.spreadsheetml.sheet)	
4	10/14/2013 03:30 PM	Mandis, Renee R	PaperCut Tally - September 2013	PayforPrint Tally as of 9-1-13 thru 9-30-13.xlsx (176 KB, application/vnd.openxmlformats-officedocument.spreadsheetml.sheet)	
5	12/31/2013 11:24 AM	Mercurio, Erin Pillsbury	Disapproval reason - Disapproving because account number should 2602700.		

Ad Hoc Recipients ▶ show

Route Log ▶ show

They will also see the “acknowledge” button. To have this item leave your action list you will need to click the “acknowledge” button. Quali has it route like this so when it is disapproved everyone knows that the transaction did not get posted due to an error and that the correct document needs to be submitted.

Action List Preferences:

There is a preferences section in the action list. When you are in the action list it is the gray button on the right side that says "preferences."



This will take you to the Workflow Preferences page where you can update General Information, Fields Displayed in Action List, and the Document Route Status Colors for Action List Entries. The General Section allows you to set the following:

- Automatic Refresh: how often you want your page to refresh
- Action List Page Size: how many documents you want to show on each page of your action list
- Email Notification: how many times you want to receive an email when items are in your action list. The options are none, daily, weekly, or immediate. If you anticipate receiving a lot of documents then we recommend you set this to none or weekly. If you have it at immediate, every time a document enters your action list you receive an email. This is helpful if you rarely check your action list.
- Receive Primary Delegate Emails: if you have been set up as a primary delegate (discussed in section E), this will have you receive emails every time a document enters your action list that relates to your primary delegation.
- Receive Secondary Delegate Emails: if you have been set up as a secondary delegate (discussed in section E), this will have you receive emails every time a document enters your action list that relates to your secondary delegation.
- Delegator Filter: Allows you to set how you want to see your delegations either on your main page or via a filter at the top of the screen.
- Primary Delegate Filter: Allows you to set how you want to see your delegations either on your main page or via a filter at the top of the screen.

See below for General Section:

General	
Automatic Refresh Rate:	15 in whole minutes - 0 is no automatic refresh.
Action List Page Size	25
Delegator Filter	Secondary Delegates on Action List Page
Primary Delegate Filter	Primary Delegates on Action List Page

The Fields Displayed in Action List allows you to have control of what columns are shown in your action list. Every item checked in the list below will appear in your action list.

Fields Displayed In Action List	
Document Type	<input checked="" type="checkbox"/>
Title	<input checked="" type="checkbox"/>
ActionRequested	<input checked="" type="checkbox"/>
Initiator	<input checked="" type="checkbox"/>
Delegator	<input checked="" type="checkbox"/>
Date Created	<input checked="" type="checkbox"/>
Date Approved	<input checked="" type="checkbox"/>
Current Route Node(s)	<input type="checkbox"/>
WorkGroup Request	<input checked="" type="checkbox"/>
Document Route Status	<input checked="" type="checkbox"/>
Application Document Status	<input type="checkbox"/>
Clear FYI	<input checked="" type="checkbox"/>
Use Outbox	<input checked="" type="checkbox"/>

The Document Route Status Colors for Action List Entries allows you to color code your action list based on the type of document in there. Below there is no colors selected except blue for saved documents.

Document Route Status Colors for Actionlist Entries											
Saved											
Initiated											
Disapproved											
Enroute											
Approved											
Final											
Processed											
Exception											
Canceled											

Below is the email notification preferences section. In this section, if you are a delegate, you can choose to receive or not receive emails when it hits your action list. The Default Email Notification is where you can select if you want to receive notification emails, none, daily, weekly, or immediate. You can also select which type of documents you want to receive email notifications on. So, if you only want to see Requisition documents you can select only to receive emails for that. You can also select to only receive emails for complete, approve, acknowledge, and/or FYI.

Email Notification Preferences									
Receive Primary Delegate Emails	<input checked="" type="checkbox"/>								
Receive Secondary Delegate Emails	<input type="checkbox"/>								
Default Email Notification	None								
Document Type Notifications	<div style="border: 1px solid black; padding: 2px;"> None Daily Weekly Immediate </div>	<table border="1"> <thead> <tr> <th>Type</th> <th>Notification Preference</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td></td> <td>None</td> <td><input type="button" value="add"/></td> </tr> </tbody> </table>	Type	Notification Preference	Actions		None	<input type="button" value="add"/>	
Type	Notification Preference	Actions							
	None	<input type="button" value="add"/>							
Send Email Notifications For	<input checked="" type="checkbox"/> Complete <input checked="" type="checkbox"/> Approve <input checked="" type="checkbox"/> Acknowledge <input checked="" type="checkbox"/> FYI								

Make sure when changes are made to click the “save” button to implement the changes. Below shows the action list with the saved items color coded blue.


















Action List | [Outbox](#)

20 items retrieved, displaying all items.


















ID	Type	Title	Route Status	Action Requested	Initiator	Delegator	Date Created	Last Approved Date	Group Request	Log
2340772	Account	Edit Account - Close 7737650 VTH Water Heater Repl	ENROUTE	APPROVE	Wright, Virginia S		09:12 AM 04/02/2013	10:20 AM 04/04/2013	CampusServices	
2405898	Account	Edit Account - Close 7718010 Clark Bldg Renovation	ENROUTE	APPROVE	Wright, Virginia S		10:32 AM 05/14/2013	04:24 PM 05/14/2013	CampusServices	
2655811	Distribution Of Income And Expense	Distribution Of Income And Expense - PaperCut RamCash Aug through Sept 2013	ENROUTE	APPROVE	Perrotin, Martha Cecilia		03:09 PM 10/14/2013	08:48 AM 10/18/2013	CampusServices	
2657607	Adjustment/Accrual Voucher	Adjustment/Accrual Voucher - CDPS Billing	ENROUTE	APPROVE	Headv, Valerie A		01:56 PM 10/15/2013	09:00 AM 10/18/2013	CampusServices	
2660221	Transfer Of Funds	Transfer Of Funds - GIS Day support	ENROUTE	APPROVE	Peregov, Cheryl L		02:35 PM 10/16/2013	08:50 AM 10/18/2013	CampusServices	
2660681	Requisition	Requisition - Attn:Kathi LaFollette	ENROUTE	APPROVE	Biela, Laurie M		03:27 PM 10/16/2013		CampusServices	
2661591	Account	Edit Account - Change name on account	ENROUTE	APPROVE	Mandis, Renee R		10:38 AM 10/17/2013	09:12 AM 10/18/2013	CampusServices	
2661690	Account	Edit Account - Change name on account	ENROUTE	APPROVE	Mandis, Renee R		11:11 AM 10/17/2013	09:14 AM 10/18/2013	CampusServices	
2661697	Account	Edit Account - Change name on account	ENROUTE	APPROVE	Mandis, Renee R		11:13 AM 10/17/2013	09:15 AM 10/18/2013	CampusServices	
2661702	Account	Edit Account - Change name on account	ENROUTE	APPROVE	Mandis, Renee R		11:14 AM 10/17/2013	09:16 AM 10/18/2013	CampusServices	
2661710	Account	Edit Account - Change name on account	ENROUTE	APPROVE	Mandis, Renee R		11:14 AM 10/17/2013	04:34 PM 10/17/2013	CampusServices	
2661721	Account	Edit Account - Change name on account	ENROUTE	APPROVE	Mandis, Renee R		11:17 AM 10/17/2013	04:34 PM 10/17/2013	CampusServices	
2661726	Account	Edit Account - Change name on account	ENROUTE	APPROVE	Mandis, Renee R		11:18 AM 10/17/2013	04:34 PM 10/17/2013	CampusServices	
2661729	Account	Edit Account - Change name on account	ENROUTE	APPROVE	Mandis, Renee R		11:18 AM 10/17/2013	04:35 PM 10/17/2013	CampusServices	
2661734	Account	Edit Account - Change name on account	ENROUTE	APPROVE	Mandis, Renee R		11:20 AM 10/17/2013	04:35 PM 10/17/2013	CampusServices	
2663398	Disbursement Voucher	Disbursement Voucher - test	SAVED	COMPLETE	Mercurio, Erin Pillsbury		01:14 PM 10/24/2013			
2663434	Internal Order	Internal Order - test	SAVED	COMPLETE	Mercurio, Erin Pillsbury		03:42 PM 10/29/2013			
2663490	Vendor	Edit VendorDetail - test address	SAVED	COMPLETE	Mercurio, Erin Pillsbury		01:22 PM 11/07/2013			
2663589	Disbursement Voucher	Disbursement Voucher - test BG	SAVED	COMPLETE	Mercurio, Erin Pillsbury		08:11 AM 11/26/2013			
2663591	Distribution Of Income And Expense	Distribution Of Income And Expense - test bg	SAVED	COMPLETE	Mercurio, Erin Pillsbury		11:57 AM 11/26/2013			

Action List Tips

If you click on any of the document headers it will sort that column A-Z/smallest to largest. So, if you have items in your action list that need approve, acknowledge, ad hoc, or complete, you can click on the column header Action Requested it will sort those in alphabetical order. This is an easy way to group the items based on action. Below is how the action list looks prior to sorting.

<u>Id</u>	<u>Type</u>	<u>Title</u>	<u>Route Status</u>	<u>Action Requested</u>	<u>Initiator</u>	<u>Delegator</u>	<u>Date Created</u>	<u>Last Approved Date</u>	<u>Group Request</u>	<u>Log</u>
3847689	General Error Correction	General Error Correction - VB Account Clean	ENROUTE	APPROVE	Bailey, Brandon		11:13 AM 07/03/2014	09:14 AM 07/08/2014	CampusServices	
3848057	General Error Correction	General Error Correction - FB Account Clean	ENROUTE	APPROVE	Bailey, Brandon		11:39 AM 07/03/2014	09:02 AM 07/08/2014	CampusServices	
3851004	Adjustment/Accrual Voucher	Adjustment/Accrual Voucher - Service Agreement Accrual	ENROUTE	APPROVE	Terzyan, Asya		02:29 PM 07/03/2014	09:29 AM 07/08/2014	CampusServices	
3857401	Transfer Of Funds	Transfer Of Funds - SAHE online Spring 2014 cash	ENROUTE	APPROVE	Becker, Susan M		09:17 AM 07/07/2014	09:39 AM 07/21/2014	CampusServices	
3860898	General Error Correction	General Error Correction - Adjust receivable balances to actual	ENROUTE	APPROVE	Grube, Brian E		01:56 PM 07/07/2014	07:57 AM 07/08/2014	CampusServices	
3861385	Account	Edit Account - Edit expiration date on AES extension	ENROUTE	APPROVE	Ellis, Bret M		02:36 PM 07/07/2014	09:41 AM 07/21/2014	CampusServices	
3863644	Adjustment/Accrual Voucher	Adjustment/Accrual Voucher - Revenue Accrual for FY13-14	ENROUTE	APPROVE	Diehl, Vicki Lynn		03:53 PM 07/07/2014	08:49 AM 07/08/2014	CampusServices	
3866142	General Error Correction	General Error Correction - FY 14 allocation of grounds expenses	ENROUTE	APPROVE	Bailey, Brandon		08:21 AM 07/08/2014	08:54 AM 07/08/2014	CampusServices	
3866157	General Error Correction	General Error Correction - Moving partial expenses to 1571222	ENROUTE	APPROVE	Yust, Sharon K		08:24 AM 07/08/2014	08:59 AM 07/08/2014	CampusServices	
3866201	Distribution Of Income And Expense	Distribution Of Income And Expense - FYE Closing Entries	ENROUTE	APPROVE	Cooper, Mark A		08:27 AM 07/08/2014	09:14 AM 07/08/2014	CampusServices	
3866307	General Error Correction	General Error Correction - Moving partial expenses to 1591322	ENROUTE	APPROVE	Yust, Sharon K		08:36 AM 07/08/2014	09:00 AM 07/08/2014	CampusServices	
3866565	Adjustment/Accrual Voucher	Adjustment/Accrual Voucher - Book Rev & Rec - COD SU14	ENROUTE	APPROVE	Biel, Thao Le		08:50 AM 07/08/2014			
3866719	General Error Correction	General Error Correction - Amex Fees Jun 2014	ENROUTE	APPROVE	Hutson, Linda K		09:01 AM 07/08/2014		CampusServices	
3866940	Adjustment/Accrual Voucher	Adjustment/Accrual Voucher - Credit Card Sales Accrual-Housing Deposi	ENROUTE	APPROVE	Irvin, Laura L		09:15 AM 07/08/2014	09:26 AM 07/08/2014	CampusServices	
3867046	Adjustment/Accrual Voucher	Adjustment/Accrual Voucher - Credit Card Sales Accrual-RamCard	ENROUTE	APPROVE	Irvin, Laura L		09:25 AM 07/08/2014		CampusServices	
3867163	Disbursement Voucher	Disbursement Voucher - test [E:N]	SAVED	COMPLETE	Mercurio, Erin Pillsbury		07:03 PM 07/08/2014			
3867505	Adjustment/Accrual Voucher	Adjustment/Accrual Voucher - test	SAVED	COMPLETE	Mercurio, Erin Pillsbury		11:15 AM 07/25/2014			


Below is the same action list, after Initiator was clicked to sort it A-Z.

<u>Id</u>	<u>Type</u>	<u>Title</u>	<u>Route Status</u>	<u>Action Requested</u>	<u>Initiator</u>	<u>Delegator</u>	<u>Date Created</u>	<u>Last Approved Date</u>	<u>Group Request</u>	<u>Log</u>
3847689	General Error Correction	General Error Correction - VB Account Clean	ENROUTE	APPROVE	Bailey, Brandon		11:13 AM 07/03/2014	09:14 AM 07/08/2014	CampusServices	
3848057	General Error Correction	General Error Correction - FB Account Clean	ENROUTE	APPROVE	Bailey, Brandon		11:39 AM 07/03/2014	09:02 AM 07/08/2014	CampusServices	
3866142	General Error Correction	General Error Correction - FY 14 allocation of grounds expenses	ENROUTE	APPROVE	Bailey, Brandon		08:21 AM 07/08/2014	08:54 AM 07/08/2014	CampusServices	
3857401	Transfer Of Funds	Transfer Of Funds - SAHE online Spring 2014 cash	ENROUTE	APPROVE	Becker, Susan M		09:17 AM 07/07/2014	09:39 AM 07/21/2014	CampusServices	
3866565	Adjustment/Accrual Voucher	Adjustment/Accrual Voucher - Book Rev & Rec - COD SU14	ENROUTE	APPROVE	Biel, Thao Le		08:50 AM 07/08/2014			
3866201	Distribution Of Income And Expense	Distribution Of Income And Expense - FYE Closing Entries	ENROUTE	APPROVE	Cooper, Mark A		08:27 AM 07/08/2014	09:14 AM 07/08/2014	CampusServices	
3863644	Adjustment/Accrual Voucher	Adjustment/Accrual Voucher - Revenue Accrual for FY13-14	ENROUTE	APPROVE	Diehl, Vicki Lynn		03:53 PM 07/07/2014	08:49 AM 07/08/2014	CampusServices	
3861385	Account	Edit Account - Edit expiration date on AES extension	ENROUTE	APPROVE	Ellis, Bret M		02:36 PM 07/07/2014	09:41 AM 07/21/2014	CampusServices	
3860898	General Error Correction	General Error Correction - Adjust receivable balances to actual	ENROUTE	APPROVE	Grube, Brian E		01:56 PM 07/07/2014	07:57 AM 07/08/2014	CampusServices	
3866719	General Error Correction	General Error Correction - Amex Fees Jun 2014	ENROUTE	APPROVE	Hutson, Linda K		09:01 AM 07/08/2014		CampusServices	
3866940	Adjustment/Accrual Voucher	Adjustment/Accrual Voucher - Credit Card Sales Accrual-Housing Deposi	ENROUTE	APPROVE	Irvin, Laura L		09:15 AM 07/08/2014	09:26 AM 07/08/2014	CampusServices	
3867046	Adjustment/Accrual Voucher	Adjustment/Accrual Voucher - Credit Card Sales Accrual-RamCard	ENROUTE	APPROVE	Irvin, Laura L		09:25 AM 07/08/2014		CampusServices	
3867163	Disbursement Voucher	Disbursement Voucher - test [E:N]	SAVED	COMPLETE	Mercurio, Erin Pillsbury		07:03 PM 07/08/2014			
3867505	Adjustment/Accrual Voucher	Adjustment/Accrual Voucher - test	SAVED	COMPLETE	Mercurio, Erin Pillsbury		11:15 AM 07/25/2014			
3851004	Adjustment/Accrual Voucher	Adjustment/Accrual Voucher - Service Agreement Accrual	ENROUTE	APPROVE	Terzyan, Asya		02:29 PM 07/03/2014	09:29 AM 07/08/2014	CampusServices	
3866157	General Error Correction	General Error Correction - Moving partial expenses to 1571222	ENROUTE	APPROVE	Yust, Sharon K		08:24 AM 07/08/2014	08:59 AM 07/08/2014	CampusServices	
3866307	General Error Correction	General Error Correction - Moving partial expenses to 1591322	ENROUTE	APPROVE	Yust, Sharon K		08:36 AM 07/08/2014	09:00 AM 07/08/2014	CampusServices	

Try to view items in your action list every day so it doesn't hold up the documents approval. If there are questions on the document the best person to email is the initiator.

Anything underlined can be clicked on. So if you need more information you can click on anything underlined.

If you want to know who approved the document before you, or who needs to approve the document after you can do that by either clicking the magnifying glass that is in your action list on the far right side, or going into the document and looking at the route log. Below is how to look at the route log by clicking the magnifying glass.

<u>Id</u>	<u>Type</u>	<u>Title</u>	<u>Route Status</u>	<u>Action Requested</u>	<u>Initiator</u>	<u>Delegator</u>	<u>Date Created</u>	<u>Last Approved Date</u>	<u>Group Requested</u>	<u>Log</u>
3953313	adjustment/Accrual voucher	Adjustment/Accrual Voucher - Prepays FY 14 - 26(Acct)	ENROUTE	APPROVE	LOWELL, SARAH REBEKAH		10:52 AM 07/21/2014	03:10 PM 07/28/2014	CampusService	

After you click on the route log, the below screen will appear, where you are able to see who completed the document, who approved it, and who else needs to approve it.

Route Log [refresh](#)

ID: 3953313 [hide](#)

Title	Adjustment/Accrual Voucher - Prepays FY 14 - 26(Acct)		
Type	Adjustment/Accrual Voucher	Created	10:52 AM 07/21/2014
Initiator	LOWELL, SARAH REBEKAH	Last Modified	03:10 PM 07/28/2014
Route Status	ENROUTE	Last Approved	
Node(s)	CampusServiceReviewer	Finalized	

Actions Taken [hide](#)

	Action	Taken By	For Delegator	Time/Date	Annotation
show	COMPLETED	LOWELL, SARAH REBEKAH		11:03 AM 07/21/2014	
show	APPROVED	PFINGSTON, VALERIE A.		04:38 PM 07/21/2014	
show	APPROVED	GONZALES, ROBERT G.		08:18 AM 07/25/2014	
show	APPROVED	FOLDA, JOSEPH M.		03:10 PM 07/28/2014	

Pending Action Requests [hide](#)

	Action	Requested Of	Time/Date	Annotation
show	IN ACTION LIST APPROVE	CampusServices	03:10 PM 07/28/2014	KR-WKFLW CampusServiceReviewer

Future Action Requests [show](#)

The other option is to click on the document number 3953313, and it will take you to the document as shown below. Scroll to the bottom of the document and next to Route Log, click "Show."

Route Log [refresh](#)

ID: 3953313 [hide](#)

Title	Adjustment/Accrual Voucher - Prepays FY 14 - 26(Acct)		
Type	Adjustment/Accrual Voucher	Created	10:52 AM 07/21/2014
Initiator	LOWELL, SARAH REBEKAH	Last Modified	03:10 PM 07/28/2014
Route Status	ENROUTE	Last Approved	
Node(s)	CampusServiceReviewer	Finalized	

Actions Taken [hide](#)

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show	COMPLETED	LOWELL, SARAH REBEKAH		11:03 AM 07/21/2014	
show	APPROVED	PFINGSTON, VALERIE A.		04:38 PM 07/21/2014	
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Pending Action Requests [hide](#)

	Action	Requested Of	Time/Date	Annotation
show	IN ACTION LIST APPROVE	CampusServices	03:10 PM 07/28/2014	KR-WKFLW CampusServiceReviewer

Future Action Requests [show](#)