APT Approval / Monitoring Application

Default Views for All Users and Steps to Search and Monitor Requests

1. For All Users, the Approval / Monitoring Application displays two tabs. ‘My Tasks’ displays the open items in your work queue. For example, if you are a departmental approver or APL you may have requests to review and approve/deny. These requests would be displayed on your ‘My Tasks’ dashboard. ‘Initiated Tasks’ displays requests you have initiated. For example, if you submitted a request for an Employee, this request would be displayed on your ‘Initiated Tasks’ dashboard.

2. The Search function allows you to refine the information displayed on the dashboards. Each Tab uses the same selection criteria. If you do not immediately see the records you expect on your dashboard, modify the search criteria.
   - **Keyword:** The most common uses of this field are to search by either Name (First, Last, or Full Name) or NetID. For NetID searches, the search results will include records where the NetID searched matches the Requestor, Subject, or Department Approver.
   - **Category:** For My Tasks, this field defaults to My & Group; however, you may want to review a task you have previously approved. In this case you would change the Category to ‘Previous’ and the Status to ‘Any.’
   - **Status:** Defaults to Assigned. If you are unsure of the current status of the request you are searching for, you may wish to change the Status to ‘Any.’

3. To open a specific request, double click the Task Number or Title link of the desired record. Within the request a complete history is available at the bottom of the page. Comments, if added to the record throughout its life, will also display.

4. The Assigned Users column represents the ‘current’ assignee of the request. This allows you to see who currently needs to take action on the request.

5. The State, Created and Expiration dates are useful in monitoring your requests. You may use the ‘Preferences’ option at the top most right corner of the user interface, to modify the columns of information displayed on the dashboard.
**Administrative View for APLs and Data Stewards**

6. APLs, Data Stewards and other technical support staff may have ‘view’ access to the Administration Tasks tab. This allows searches for all requests, even those for which you have not been involved as a Requestor, APL, or Data Steward. This additional functionality is intended to provide increased visibility into the requests being submitted for employees in your area. The same tips described above for searching and reviewing tasks can be leveraged on the Administration Tasks tab.

7. If you experience slow search times while in the Administrative Tasks tab, disable the Chart widget as shown below, by clicking the X in the top right corner.