

Interim Guidance for Approving an Activity Log before FSO's are active in the system

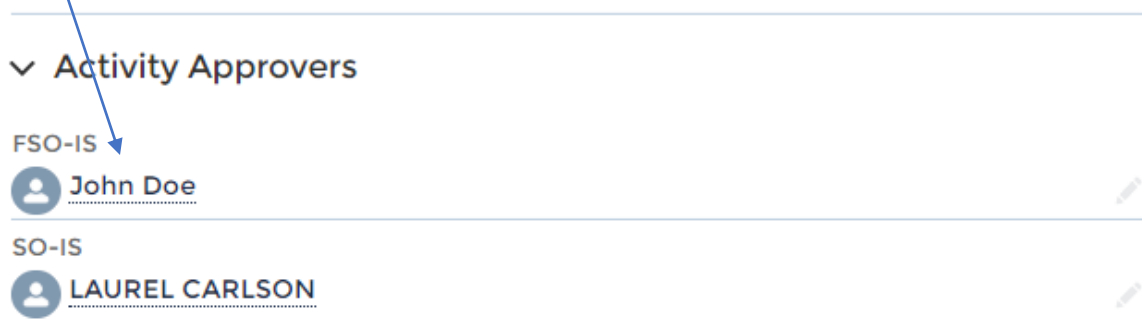
You MUST have entered the info yourself to do this and it must be Submitted (if its is not submitted you can still edit the FSO-IS)

When do you need to do this?

1. When the system has prepopulated the FSO-IS name and that person does not yet have an account
2. When the SO-IS has entered the data from a paper form and wants to by-pass FSO-IS review
3. When there is no FSO-IS or the person in the system is no longer the FSO-IS

Open a submitted Activity Log and go to the DETAIL screen

The Activity Approvers should be listed. In this example, the system populated the name "John Doe" as the FSO-IS. You want to by-pass John and approve the record.



Activity Approvers

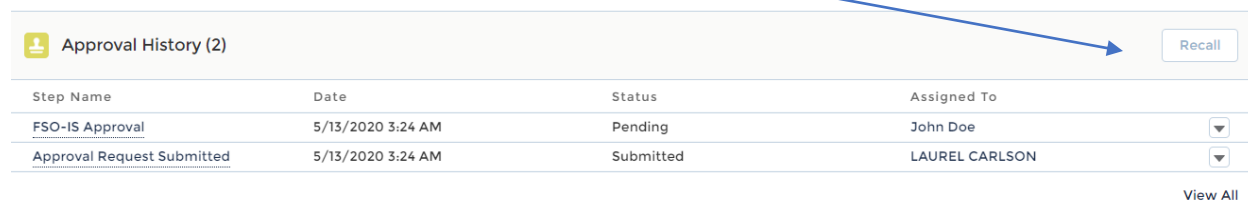
FSO-IS

John Doe

SO-IS

LAUREL CARLSON

Click on the RELATED tab and scroll down to Approval History. You need to RECALL the record (it has been approved). Click the RECALL button. (Note- if you did not enter this you can not recall this.)



Step Name	Date	Status	Assigned To
FSO-IS Approval	5/13/2020 3:24 AM	Pending	John Doe
Approval Request Submitted	5/13/2020 3:24 AM	Submitted	LAUREL CARLSON

View All

You will get a popup box for comment. It is recommended that you put in a short comment explaining what you are doing then click RECALL at the bottom of the box

cc

Recall Approval Request

Comments

Recall to reassign FSO

Cancel

Recall

Go Back to the DETAIL page and Scroll down to the Activity Approvers section. Click the “X” to the right of the FSO-IS (John Doe)

Activity Approvers

FSO-IS

John Doe

X

SO-IS

LAUREL CARLSON

X

Search and enter the name you want in the FSO-IS – your name preferred (you can not leave it blank)

▼ Activity Approvers

FSO-IS

LAUREL CARLSON

John Doe

Scroll to the Bottom of the page and click “SAVE” then to the top and Click “SUBMIT ACTIVITY LOG”

Proceed back to the RELATED Tab and scroll down to Approval History

You will now see the steps you have taken to correct the FSO-IS designation and you will see that you are now assigned to do the FSO-IS approval

Click “View All” at the bottom of the table

Approval History (4)			
Step Name	Date	Status	Assigned To
FSO-IS Approval	5/13/2020 3:34 AM	Pending	LAUREL CARLSON
Approval Request Submitted	5/13/2020 3:34 AM	Submitted	LAUREL CARLSON
FSO-IS Approval	5/13/2020 3:32 AM	Recalled	John Doe
Approval Request Submitted	5/13/2020 3:24 AM	Submitted	LAUREL CARLSON
			View All

The table will redisplay with action buttons along the top. You can now Approve the record (Click Approve)

Approve

Reject

Reassign

Recall