

HOW TO RUN A PENDING APPROVAL WORKFLOW IN RPT

The purpose of this process is to obtain a report of pending workflow approvals. This report will provide the asset workflow type (transfer to surplus, asset transfer, asset removal or asset return) as well the name of requestor and pending approver.

Pending approvals will remain in the queue and do not time out.

This data is updated nightly and approvals will reflect the following business day.

PeopleSoft Menu Icons:



1. Log into the RPT Environment. <https://zbfirpt.utshare.utsystem.edu/psp/ZBFIRPT/?cmd=start>
2. From the NavBar icon on the top right of the page, select the Navigator icon.
3. Select **Reporting Tools**
4. Select **Query**
5. Select **Query Viewer**
6. Enter the report name: **UTR_AM_WF_PENDING_APPR_SUMMARY** in the *begins with* field and click on **Search**.

Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

A screenshot of the Query Viewer search interface. It shows a search bar with a dropdown menu set to 'Query Name'. To the right of the dropdown is the text 'begins with' followed by a text input field containing 'UTR_AM_WF_PENDING_APPR_SUMMAR'. Below the search bar is a 'Search' button with a red arrow pointing to it, and an 'Advanced Search' link.

7. At this time, this report can be marked as **Favorite** for future quick access. Select the **Excel** option to run the report.

Query				Personalize	Find	View All	First	1 of 1	Last
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
UTR_AM_WF_PENDING_APPR_SUMMARY		Public		HTML	Excel	XML	Schedule	Lookup References	Favorite

The Excel report contains the following fields:

- Business Unit
- Status
- Asset Workflow
- Date of Transfer/Surplus
- Transaction ID
- Asset Identification
- Tag Number
- Pending Approver Name
- Requestor Name
- Current Custodian Name

Notes:

- Assets tied to a Pending Approval workflow are not available for other workflows.
- Transaction ID's may appear twice, this is due to the number of approvers still pending.