Smartsheet: FSS PRF Process
APPROVERS

1) When a new PRF is submitted, you will receive an automatic **email notification** with a summary of the request.

2) Click on the blue **Open request** button to open the request in your browser.

3) If the request is approved, click the green **Approve** button. This will either route the request to the next approver, or directly to the FSSC task queue for processing, depending on how your department's approval queue is setup.
   a. If the request is denied, click the red **Decline** button. This will remove the request from the workflow. The requestor will receive a notification saying that their request has been denied.
   b. If you need to change/add/remove information from the request, you can add a comment and click Approve. When this is received by FSSC, we will make the necessary modifications to the request before processing.

Summary

1. **Email notification** sent when PRF is submitted.

2. Click **Open Request**.

3. **Review request** and **Approve** or **Deny**.

4. **Reminder email** sent weekly for old pending requests.

5. Review/approve multiple requests at once using the appropriate **Approver Dynamic View**:
   - Approver Group 1
   - Approver Group 2
   - Conditional Approvers

4) ADHOC approval functionality also exists within your Smartsheet setup. This flexibility allows any approver(s) the ability to forward the approval notification email to another individual for action. This is especially helpful when you would like a supervisor's review/approval or receive an approval request that may not belong to you.
   a. Open the approval email and forward the original message as you normally would.
   b. The new recipient can now follow steps 2 and 3 as detailed above.

5) Every Wednesday at 4:00pm, the pending requests sheet is automatically reviewed for any old requests that are still pending approval. If any pending requests were submitted more than 5 days ago, you will receive an **automatic reminder** to approve or deny the request.

6) If you have multiple requests pending your approval that you would like to review all in one place, you can open the **dynamic view** for your approval group (Primary, Secondary, or Conditional):

a. **Approver Group 1:** https://app.smartsheet.com/dynamicview/views/f6a25fe9-ed7a-4991-b718-48800921e054

b. **Approver Group 2:** https://app.smartsheet.com/dynamicview/views/769b342f-38ab-4c72-af44-6ff082e60b66

c. **Conditional Approvers:** https://app.smartsheet.com/dynamicview/views/b07582d3-33c5-44ce-890c-6d0e1f24e0ab

FAQ / Glossary

- Approval Queue Types
  - **No Approvals**
    - Approvals are not (necessarily*) needed for every request. When submitted, PRFs route directly to FSS for processing.
    - *A **Conditional Approval** may be combined with the **'No Approvals'** type, where an approval is only required if the request amount is higher than a designated threshold (see **Conditional Approval** below)
  - **One Approval Level**
    - A single approval level is needed for every request. When submitted, PRFs route to the individual/s in the **Primary Approver** group. Once approved, the request is routed to FSS for processing.
  - **Two Approval Levels**
    - Two approval levels are needed for every request. When submitted, PRFs route to the individual/s in the **Primary Approver** group. Once approved, the request is routed to the individual/s in the **Secondary Approver** group. Then, once approved, the request is routed to FSS for processing.
  - **Conditional Approval**
    - Approvals are routed to the individual/s in the **Conditional Approver** group <u>only if</u> the amount of the request is higher than the threshold designated by the department. This approval type can be combined with any of the above approval group types.
    - When submitted, PRFs route to the **Primary Approver** group and the **Conditional Approver** group simultaneously (or just the **Conditional Approver** group if this is combined with the **No Approvals** type).
- Routing to FSS
  - Requests are routed to FSS only once all required groups have approved.
- Denied Requests
  - If any approver denies a request, the request is immediately removed from the workflow. The requestor will receive a notification saying that their request has been denied. No further action is taken by FSS.
  - If a request is <u>accidentally</u> denied, please inform FSS. We can recover the denied request and put it back in the queue.