ACADEMIC AFFAIRS
FISCAL SHARED SERVICE CENTER

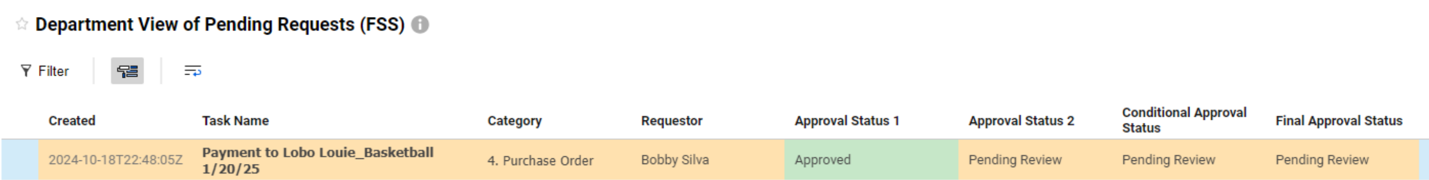
Smartsheet: FSS PRF Tracking

Admins

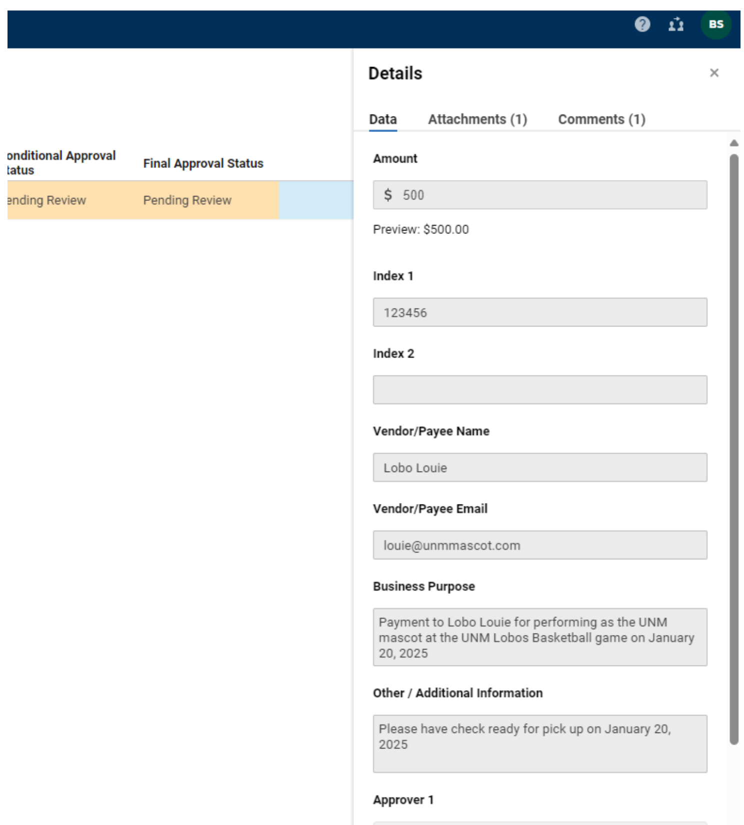
Admin View of Pending Requests

When a new PRF is submitted, it is initially placed into a Smartsheet file specifically for pending requests. To access the Dynamic View of this sheet and view all pending requests for your department, go to the following link: https://app.smartsheet.com/dynamicview/views/3f3943d6-68b4-4258-adad-92113d86d881

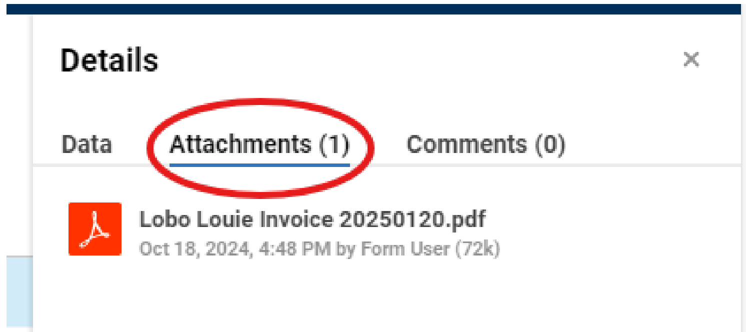
The primary view will display the Created Date, Request Name, Request Category, Requestor Name, and Approval Status for all approval groups (Note that the columns for all three approval groups are shown, even if your department uses some or none of them).



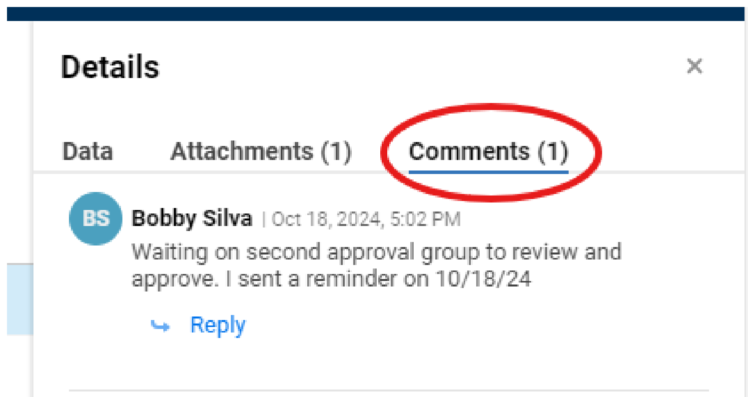
To see more information on the request, you can click on the row, which will open the Details side panel on the right. This will show more detailed information about the request, such as the index, vendor name, business purpose, etc.



In the Details panel, you can view and add attachments by going to the Attachments tab.



You can also view and add comments by going to the Comments tab.



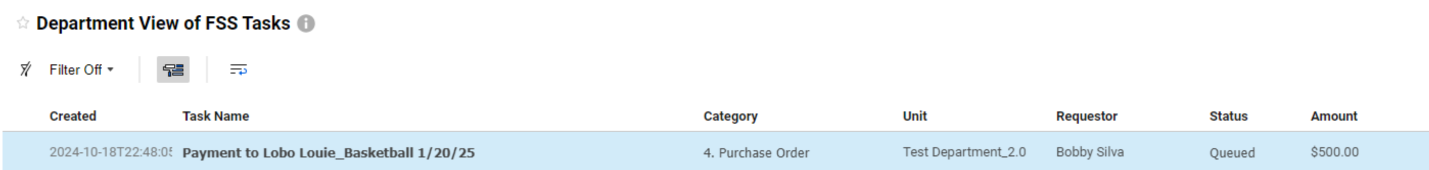
Once a request has received all required approvals, it will automatically be moved from this sheet to the FSS Tasks sheet, where it will be reviewed by your Fiscal Agent, then delegated for processing.

If a request is denied by any approver, it will automatically be removed from this sheet. The requestor will be sent an email notifying them that their request has been denied. If a request is ever accidentally denied, please let FSS know. We can recover denied requests and move them back to the approval queue.

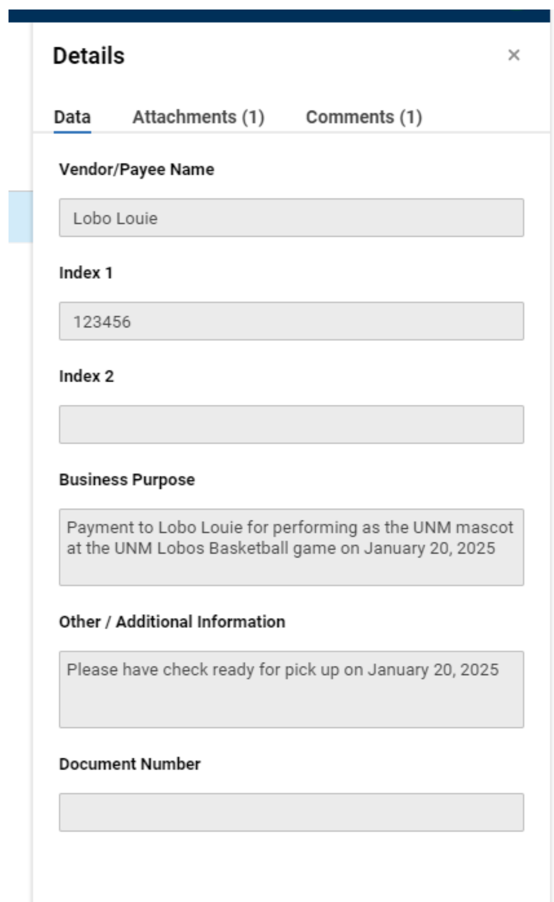
Admin View of FSS Tasks

Once a PRF is fully approved, the request will be moved to the FSS Tasks sheet. In general, new requests are processed in the order they were received. To access the Dynamic View of this sheet and view all current and past tasks for your department, go to the following link: https://app.smartsheet.com/dynamicview/views/809c8834-7946-4b2c-aad3-baf0c42bd852

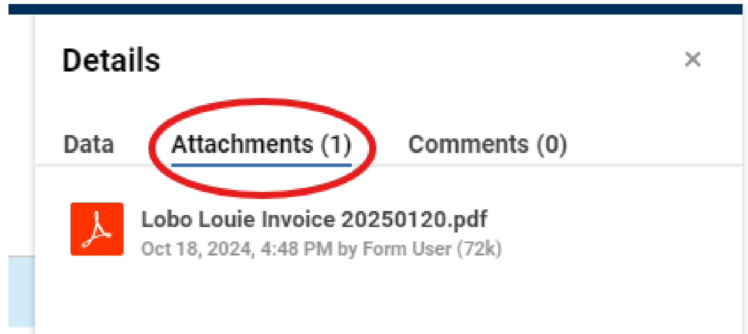
The primary view will display the Created Date, Task Name, Task Category, Unit, Requestor Name, Status, and Amount.



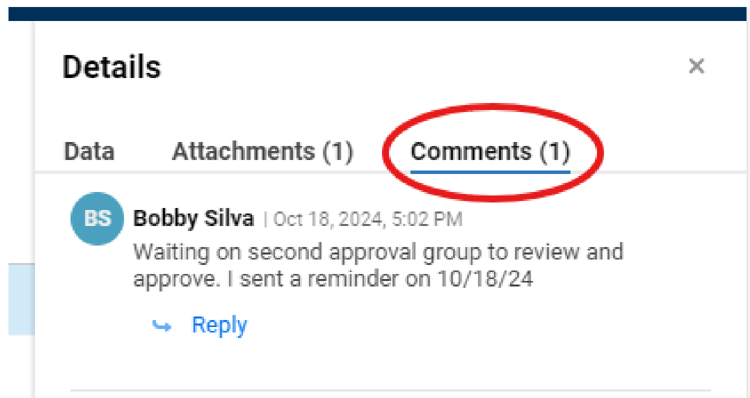
To see more information on the request, you can click on the row, which will open the Details side panel on the right. This will show more detailed information about the request, such as the index, vendor name, business purpose, etc.



In the Details panel, you can view and add attachments by going to the Attachments tab.



You can also view and add comments by going to the Comments tab.



As with the Dynamic View for Pending Tasks, this page is only viewable by those designated by the department. This view is also read-only access. If any changes need to be made, please contact your Fiscal Agent, or leave a comment on the task tagging the appropriate person (use the @ symbol followed by the recipient's email address to tag someone, which will automatically notify them).

By default, this Dynamic View will show all current and completed tasks for your department. Completed tasks are highlighted in gray. To view only the current tasks (i.e. tasks that are queued or in progress), click on the filter button in the top left, just below the title of the page, and select Current Tasks: