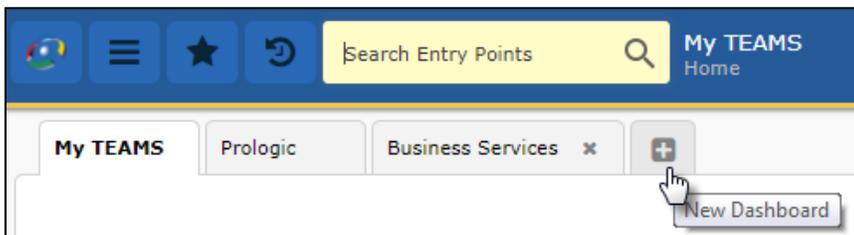


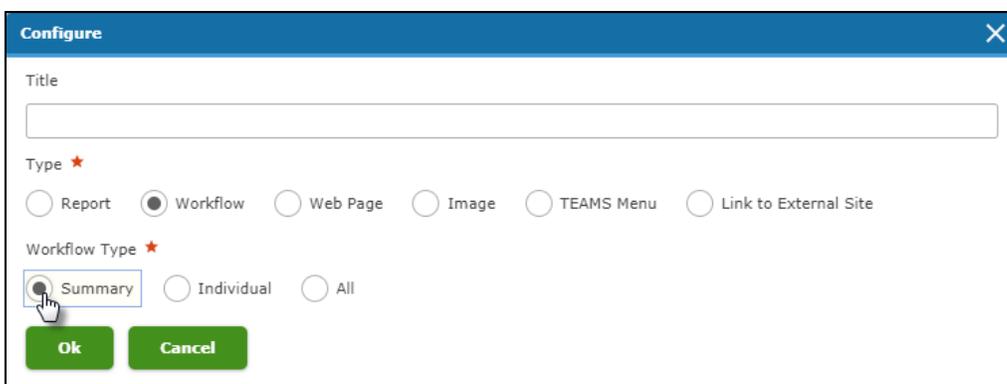
TEAMS: Approval Dashboard

The following guide will demonstrate how to create a custom approval dashboard in TEAMS.

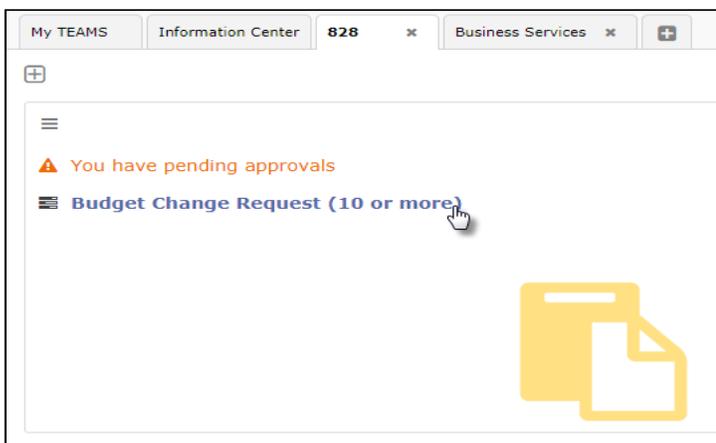
1. On the Main TEAMS page, click the + to add a new Dashboard tab.



2. (a) In the Configure box, enter a title (not required), select **Workflow**, then choose **Summary**. Click **Ok**.

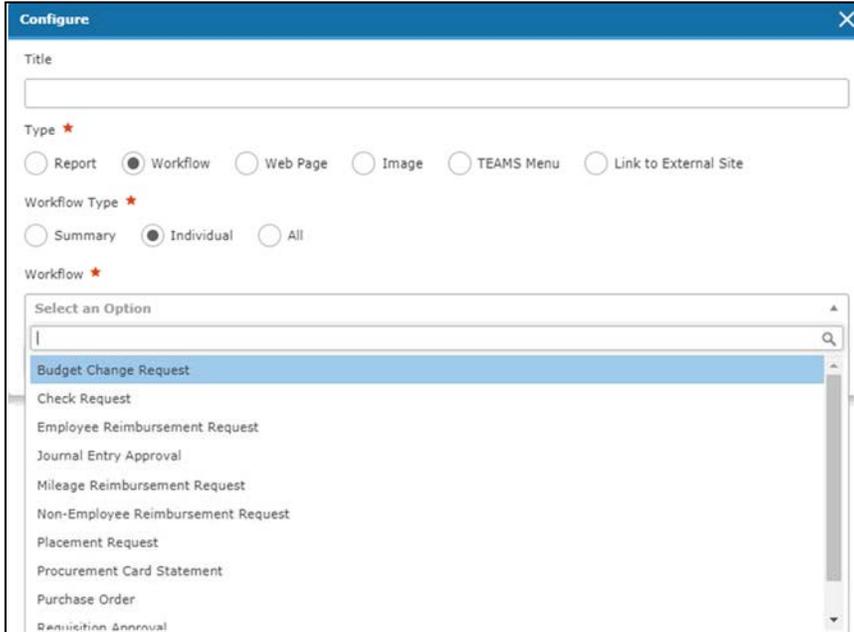


A "container" will appear that lists all pending approvals. Click the entry point to view all of the items pending approval



TEAMS: Approval Dashboard

2. (b) Another option is to choose an **Individual** workflow type, rather than Summary.



Configure

Title

Type *

Report Workflow Web Page Image TEAMS Menu Link to External Site

Workflow Type *

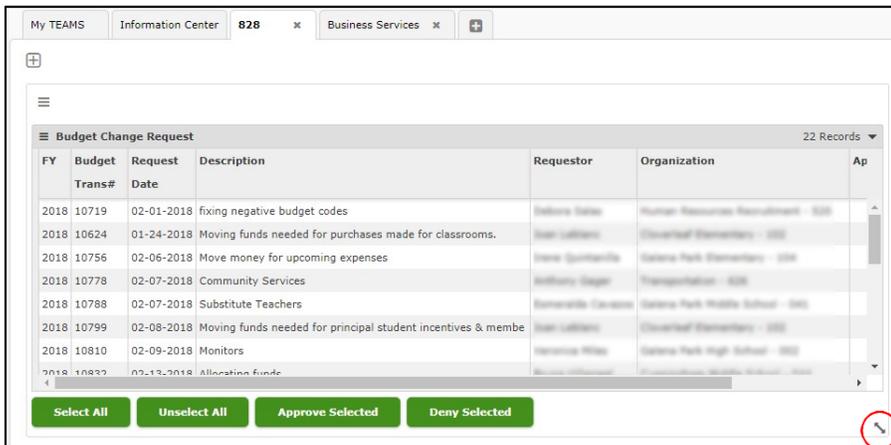
Summary Individual All

Workflow *

Select an Option

- Budget Change Request**
- Check Request
- Employee Reimbursement Request
- Journal Entry Approval
- Mileage Reimbursement Request
- Non-Employee Reimbursement Request
- Placement Request
- Procurement Card Statement
- Purchase Order
- Requisition Approval

Select the desired workflow, then select **OK**. This action will need to be repeated for each workflow where approvals are needed.



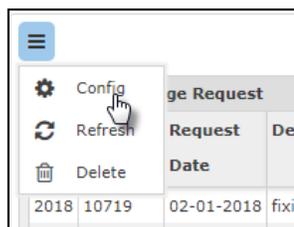
My TEAMS | Information Center | 828 | Business Services

Budget Change Request 22 Records

FY	Budget Trans#	Request Date	Description	Requestor	Organization	Ap
2018	10719	02-01-2018	fixing negative budget codes	Delores Davis	Human Resources Recruitment - 028	
2018	10624	01-24-2018	Moving funds needed for purchases made for classrooms.	Don Latham	Elementary Elementary - 028	
2018	10756	02-06-2018	Move money for upcoming expenses	Steve Spantofe	Galena Park Elementary - 028	
2018	10778	02-07-2018	Community Services	William Sager	Transportation - 028	
2018	10788	02-07-2018	Substitute Teachers	Genevieve Carasco	Galena Park Middle School - 028	
2018	10799	02-08-2018	Moving funds needed for principal student incentives & membe	Don Latham	Elementary Elementary - 028	
2018	10810	02-09-2018	Monitors	Aracelis Wiles	Galena Park High School - 028	
2018	10822	02-13-2018	Allocation funds	Steve Spantofe	Elementary Elementary - 028	

Select All | Unselect All | Approve Selected | Deny Selected

Container size can be adjusted by selecting the arrow in the lower left corner (red circle above). Additional modifications to the container can be made by selecting the three lines in the top right corner.

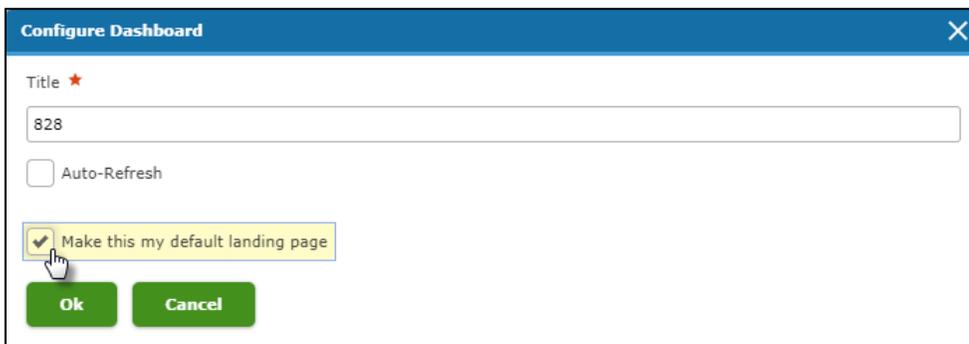


TEAMS: Approval Dashboard

A Dashboard can be renamed by double-clicking the title.



If it is preferable to have this custom dashboard become the default TEAMS page, this can be done by selecting the **Configure Dashboard** icon in the top left corner of the dashboard.



Additional options are available to build various custom Dashboards.