



How to Review, Endorse Approve using the Dashboard

Handling Procedure #03

Integrated Financial Management Information System (IFMIS)

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1 Document Purpose

1.1 Purpose

The purpose of this document is to detail the step-by-step guide on how to use the IFMIS Dashboard in the review, endorsement, authorization, and approval of transactions.

This is applied to all of the transactions in IFMIS as follows.

- Accountable Advance for Imprest request
- Commitment
- Purchase Requisition
- Purchase Order
- Payment Voucher
- Revenue Voucher
- Journal Voucher

Using the Dashboard will let the reviewers, and approvers to do their task without going out of the Dashboard screen. This will also enable them to filter out the task that is assigned to them.

In using this, it is also ok to delete the numerous internal message notifications.

1.2 Intended Audience

This document is intended for reference by all Reviewers, Endorser, Line Ministry SROs, Approvers.

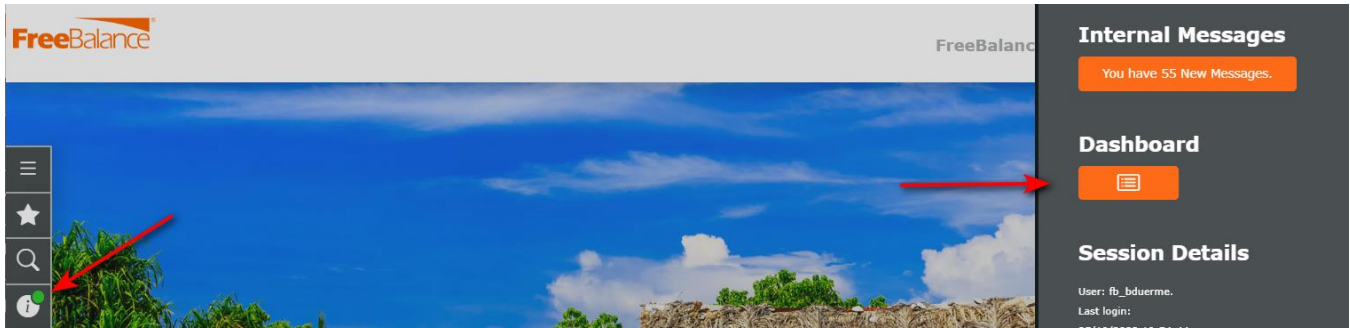
2 How to use the dashboard for review, endorsement approval.

The dashboard is a screen where all pending transactions of the logged in user are listed.

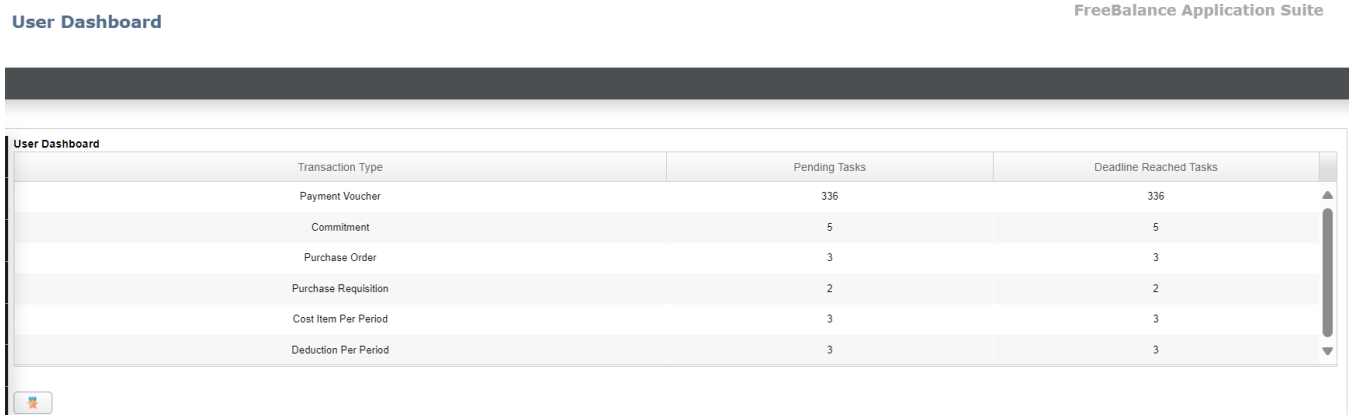
When one User has completed the review and endorsement of the transaction, the count of transactions available for the logged in user will be decreased.

To use the dashboard, follow these steps.

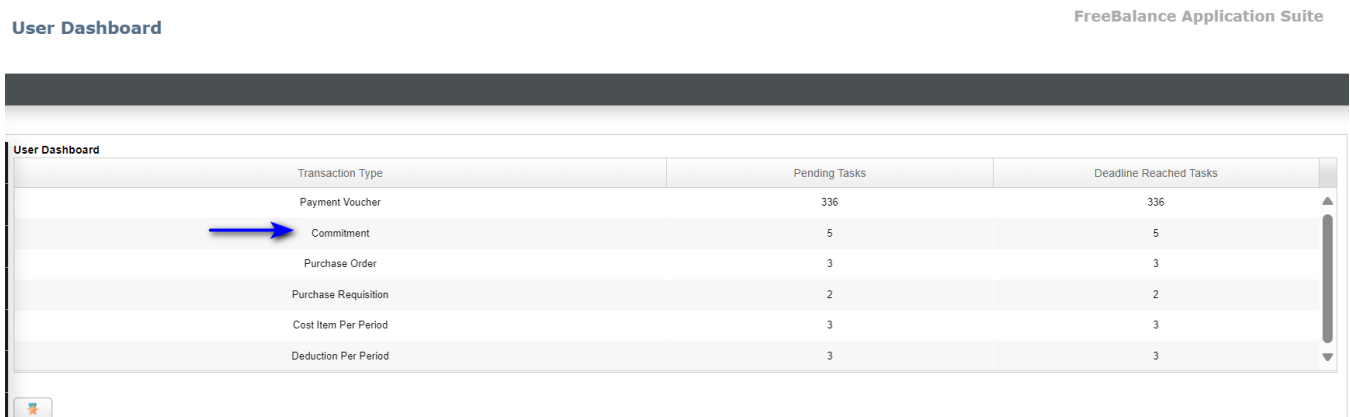
Step 1. Click the (i) to and then click the Dashboard.



Step 2. The dashboard with the list of transactions assigned to the user is displayed.



Step 3. Click the Transaction to process.



Step 4. This will open the list of all commitments pending. Click the Check button of the Commitment to process.

Commitment Workflow Execution

Stage:

Application ID:

<input type="checkbox"/>	Update	Application ID	From Stage	Task Deadline Date	To Stage
<input type="checkbox"/>	<input checked="" type="checkbox"/>	COMM-23-17-0238	For Endorsement	8/9/2023	<input type="text"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	COMM-23-17-0258	For Endorsement	12/9/2023	<input type="text"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	COMM-23-17-0263	For Endorsement	13/9/2023	<input type="text"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	COMM-23-17-0291	For Endorsement	20/9/2023	<input type="text"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	COMM-23-17-0324	For Endorsement	13/10/2023	<input type="text"/>

Update Cancel

Step 5. This will open a popup screen to view, review, authorize. Review and check as necessary. Once done, go to the transition field select the appropriate transition from the dropdown list.

Workflow Process Transition

Commitment FreeBalance Application Suite

[Update/Delete Mode]

Fiscal Year:

Fiscal Period:

Issue Date:

Budget Office:

Workflow Status:

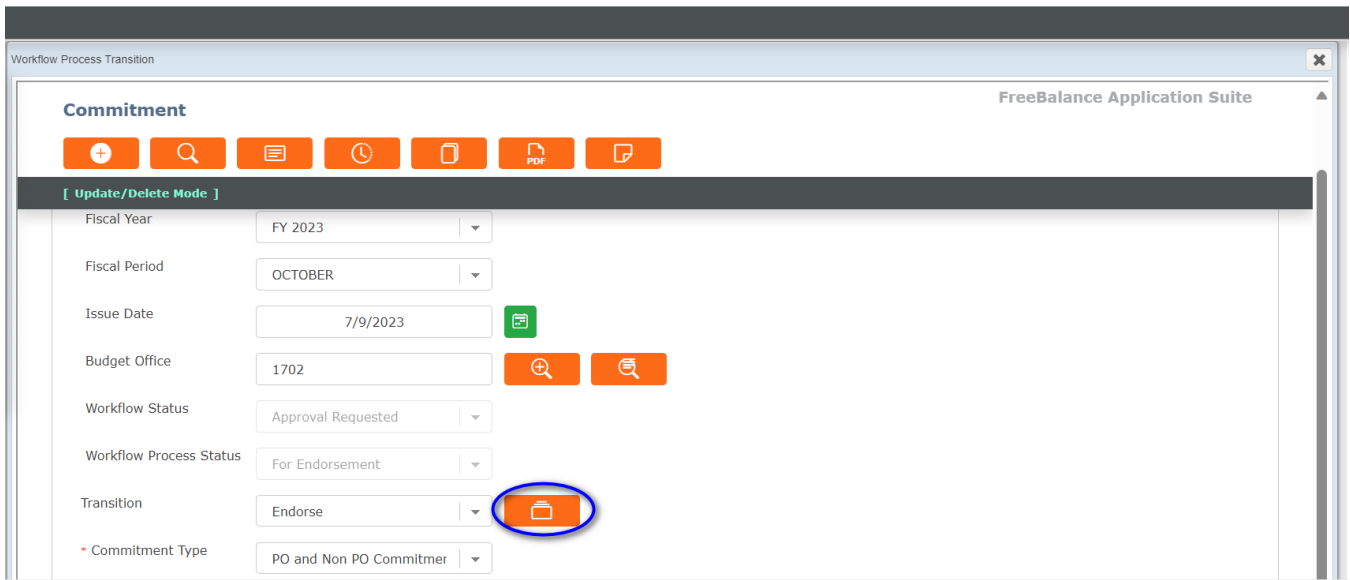
Workflow Process Status:

Transition:

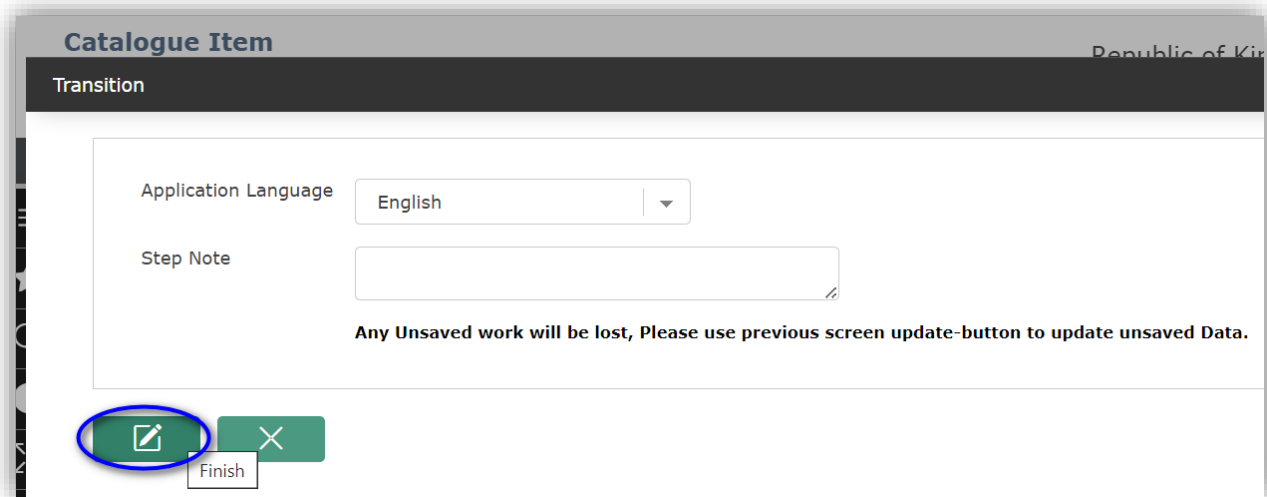
Commitment Type:

Step 6. Click the Transition button.

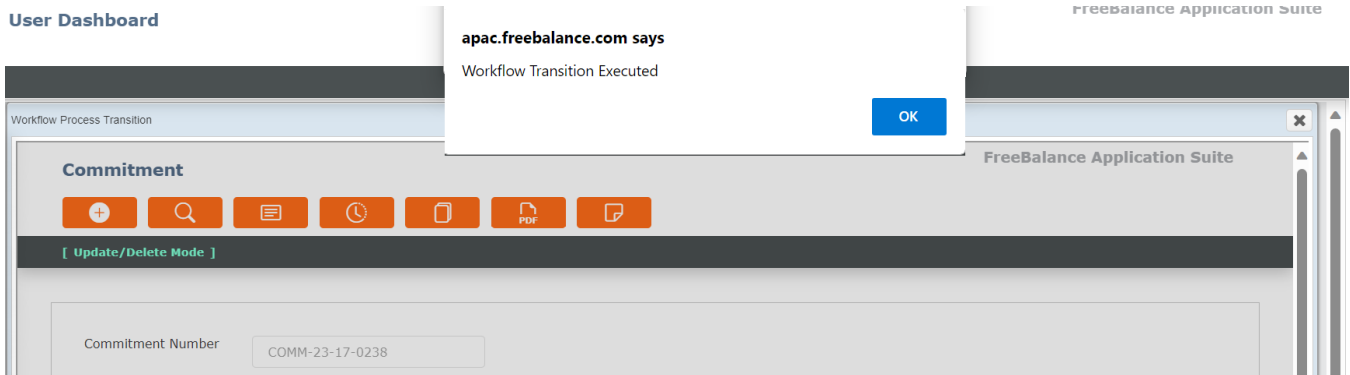
User Dashboard



Step 7. Click the finish button.



Step 8. Click Ok on the displayed message.



Step 9. The status of the transaction is now updated. Click the close icon to proceed with the new transaction to review and endorse.

User Dashboard

Workflow Process Transition

FreeBalance Application Suite

Commitment

[View Mode]

Commitment Number: COMM-23-17-0238

Fiscal Year: FY 2023

Fiscal Period: OCTOBER

Issue Date: 7/9/2023

Budget Office: 1702

Workflow Status: Approval Requested

Workflow Process Status: Endorsed

Step 10. Click the Check button on the next transaction and repeat the process of endorsement

User Dashboard

Commitment Workflow Execution

Update	Application ID	From Stage	Task Deadline Date	To Stage
<input checked="" type="checkbox"/>	COMM-23-17-0238	Endorsed	26/10/2023	
<input checked="" type="checkbox"/>	COMM-23-17-0258	For Endorsement	12/9/2023	
<input checked="" type="checkbox"/>	COMM-23-17-0263	For Endorsement	13/9/2023	
<input checked="" type="checkbox"/>	COMM-23-17-0291	For Endorsement	20/9/2023	
<input checked="" type="checkbox"/>	COMM-23-17-0324	For Endorsement	13/10/2023	

Step 11. Click the x icon to close the List of Commitments to endorse/approve.

User Dashboard

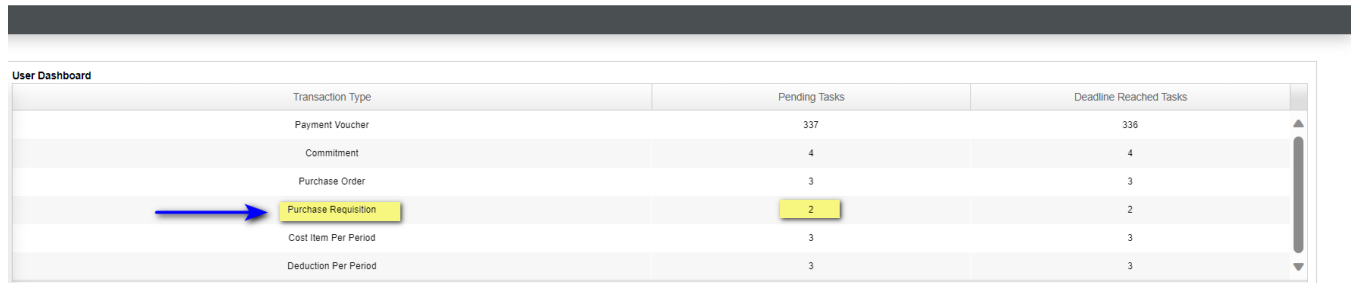
Commitment Workflow Execution

Update	Application ID	From Stage	Task Deadline Date	To Stage
<input checked="" type="checkbox"/>	COMM-23-17-0238	Endorsed	26/10/2023	
<input checked="" type="checkbox"/>	COMM-23-17-0258	For Endorsement	12/9/2023	
<input checked="" type="checkbox"/>	COMM-23-17-0263	For Endorsement	13/9/2023	
<input checked="" type="checkbox"/>	COMM-23-17-0291	For Endorsement	20/9/2023	
<input checked="" type="checkbox"/>	COMM-23-17-0324	For Endorsement	13/10/2023	

Step 12. This will close the Commitment list to process and will go back to the dashboard. It will also display the other transactions to process. Click on the next transaction to repeat the process of review/endorsement/authorization/approval of transactions.

User Dashboard

FreeBalance Application Suite



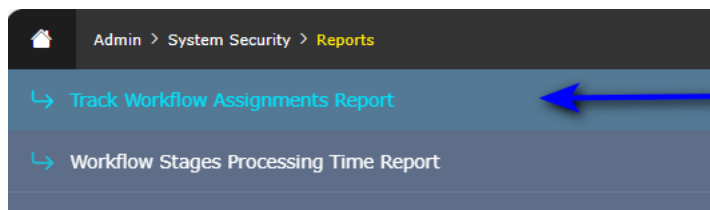
Transaction Type	Pending Tasks	Deadline Reached Tasks
Payment Voucher	337	336
Commitment	4	4
Purchase Order	3	3
Purchase Requisition	2	2
Cost Item Per Period	3	3
Deduction Per Period	3	3

3 How to check assigned transactions to users.

3.1 Track Workflow Assignment Report

This report provides the list of all transactions assigned to a specific user.

Step 1. Navigate the Menu > Admin > System Security > Reports > Track Workflow Assignment Report.



Step 2. Provide the filters based on need as described below. Note that only the fields with (*) are mandatory. If the other filters are not necessary, leave it blank.

- **Application User:** Filters the user that will be generated in the report.
- **Workflow Process:** Filters the specific Workflow Process that will be generated in the report.
- **Current Stage and Target Stage:** Filters the stage from and to that will be generated in the report.
- **Comment:** User can enter additional comments that can be printed in the generated report.
- **Deadline Date:** Filters the transactions per deadline date that will be included in the generated report.
- **Entity Name:** Select the Transaction from the left pane and click the select (>) button. This will filter the transactions that will be generated in the report.

Track Workflow Assignments Report



Entity ID

Application User

Workflow Process

Current Stage

Target Workflow Status

Comment

Step 3. Select the Transactions applicable then click the Icon >

Track Workflow Assignments Report



Entity Name ↓

Employee
Journal Voucher
Payment Voucher
Cost Item Per Period
Deduction Per Period
Commitment
Commitment
Employee Assignment
Revenue Voucher
Payment Extract Payment
Budget Control
Warrants, Supplements & Virement Voucher
Budget Plan
Purchase Order
Purchase Requisition
com.fb.gpr.document.dom.ProcurementDocument
Budget Version

Step 4 Click the button applicable to generate the report.

Track Workflow Assignments Report



Entity Name

Employee
Cost Item Per Period
Deduction Per Period
Commitment
Employee Assignment
Payment Extract Payment
Budget Control
Warrants, Supplements & Virement Voucher
Budget Plan
com.fb.gpr.document.dom.ProcurementDocument
Budget Version

Journal Voucher
Payment Voucher
Commitment
Revenue Voucher
Purchase Order
Purchase Requisition

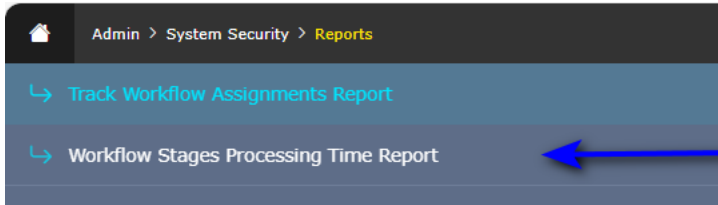
Step 5. The report will be generated in this format.

Application User	Entity Name	Entity ID	Deadline Date	Current Workflow Stage	Target Workflow Stage
Abetai Eterika	Payment Voucher	PV-23-14-0022	19/8/2023	Prepared	For Authorization
Abetai Eterika	Payment Voucher	PV-23-14-0022	19/8/2023	Prepared	Cancelled
Abetai Eterika	Payment Voucher	PV-23-14-0030	18/8/2023	Prepared	For Authorization
Abetai Eterika	Payment Voucher	PV-23-14-0030	18/8/2023	Prepared	Cancelled
Abetai Eterika	Payment Voucher	PV-23-14-0050	19/8/2023	Prepared	For Authorization
Abetai Eterika	Payment Voucher	PV-23-14-0050	19/8/2023	Prepared	Cancelled
Akineti Ioane	Payment Voucher	PV-23-01-0033	19/8/2023	Prepared	For Authorization
Akineti Ioane	Payment Voucher	PV-23-01-0033	19/8/2023	Prepared	Cancelled

3.2 Workflow Stages Processing Time Report

This report will give information on how much time was spent by each users in processing their transition and approval process.

Step 1. Navigate the Menu > Admin > System Security > Reports > Workflow Stages Processing Time Report.



Step 2. Provide the filters based on need as described below. Note that only the fields with (*) are mandatory. If the other filters are not necessary, leave it blank.

- **Fiscal Year:** Filters the Year where transactions are created.
- **Organisation:** Filters the type of Organization (By Ministry, or By Division) and click Lookup in the next field. Or the user can enter the Division or Ministry code.
- **Document Type:** This will filter the type of transaction that can be included in the generated report.
- **From and To Date:** Filters the dates of the transactions to be generated in the report.
- **Comment:** User can enter additional remarks for to be included in the generated report.

Work flow Stages Processing Time Report

PDF

EXCEL

XLSX

RTF

DOCX

ODT

ODS

* Fiscal Year

* Organization + -

* Document Type

* From Date 📅

* To Date 📅

Comment

Step 3. Generate the report in the file format selected by clicking the button above the filter screen.

Work flow Stages Processing Time Report



* Fiscal Year:

* Organization: 15

* Document Type:

* From Date:

* To Date:

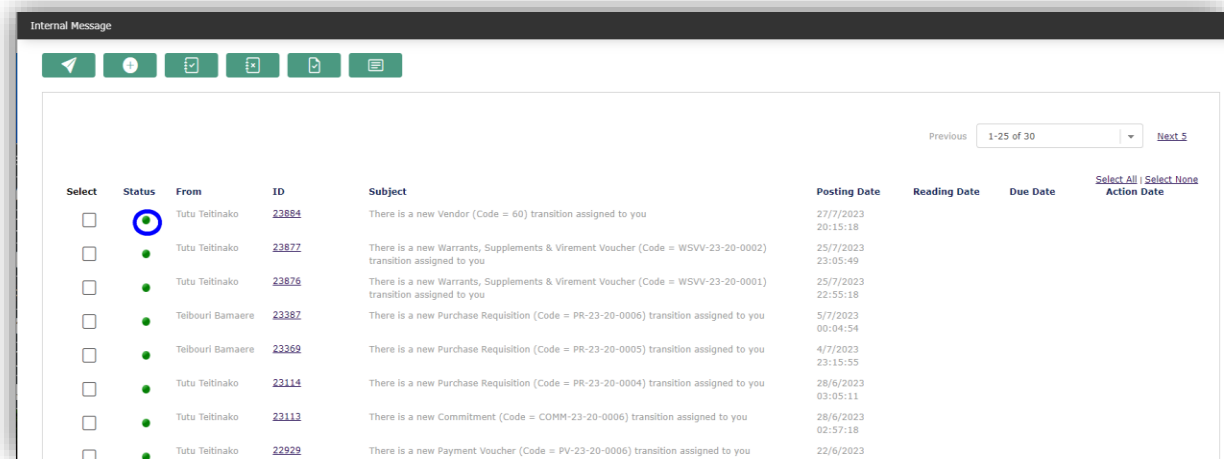
Comment:

Step 4. The report will be generated in this format

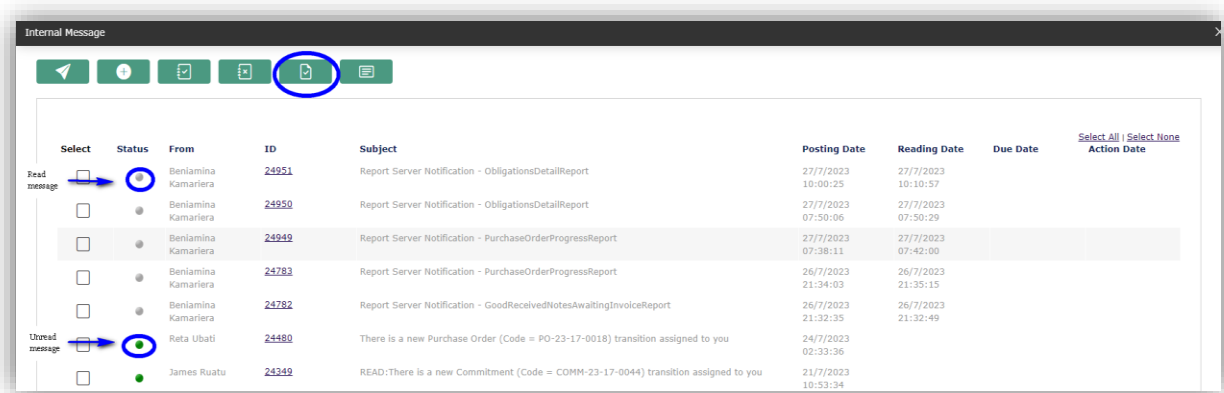
Work flow Stages Processing Time Report From 1/7/2023 To 31/7/2023											
											Report Date : 30/8/2023
											Report Time : 09:32:31 AM
											User : account.officer
											Environment : Null
											Page 1 of 1
Fiscal Year : 2023 Department : Entity Name : Operating Unit : Document Type : Purchase Requisition											
Document No	Transaction Type	User	Workflow Status	Workflow Stages		Received Information		Released Information		Total	
				From	To	Received Date	Received Time	Released Date	Released Time	Time Spent	Cumulative Time Spent
PR-23-17-0001	MANUAL	Taareta Tebetanga	APPROVAL_REQUESTED	Prepared	For Endorsement	19/7/2023	11:39:48 AM	19/7/2023	11:41:09 AM	00:01:20	00:01:20
	MANUAL	Beniamina Kamariera	CREATED	For Endorsement	Prepared	19/7/2023	11:41:09 AM	19/7/2023	11:53:58 AM	00:12:49	00:14:10
	MANUAL	Taareta Tebetanga	APPROVAL_REQUESTED	Prepared	For Endorsement	19/7/2023	11:53:58 AM	19/7/2023	11:56:56 AM	00:02:57	00:17:07
	MANUAL	Beniamina Kamariera	APPROVAL_REQUESTED	For Endorsement	Endorsed	19/7/2023	11:56:56 AM	19/7/2023	12:11:42 PM	00:14:46	00:31:54
	MANUAL	James Ruatu	APPROVED	Endorsed	Approved	19/7/2023	12:11:42 PM	19/7/2023	12:26:07 PM	00:14:24	00:46:19
PR-23-17-0003	MANUAL	Beniamina Kamariera	CANCELLED	Prepared	Cancelled	25/7/2023	03:04:57 PM	25/7/2023	03:28:53 PM	00:23:55	00:23:55
PR-23-17-0004	MANUAL	Ruteta Tetabo	APPROVAL_REQUESTED	Prepared	For Endorsement	31/7/2023	03:59:52 PM	31/7/2023	04:16:53 PM	00:17:01	00:17:01
	MANUAL	Beniamina Kamariera	CREATED	For Endorsement	Prepared	31/7/2023	04:16:53 PM	1/8/2023	11:23:44 AM	19:06:50	19:23:52

4 How to manage Internal Messages

The Internal message is where all the system or user sent notifications will be prompted. By default, only the Unread Messages as indicated by the green round mark, can be seen from the screen.



To show even the opened or read messages, users must click the **Show both Read and New Internal Messages** button



To **avoid flooding of messages**, that may cause some **confusion**, users must follow these steps.

1. Ensure that all messages are opened and read.
2. If the required actions are taken, delete the already opened messages. Show both Read and New Internal Message. Tick the selection box beside all Read Messages (as indicated by ground mark).

Internal Message

Select	Status	From	ID	Subject	Posting Date	Reading Date	Due Date	Select All Select None Action Date
<input checked="" type="checkbox"/>		Beniamina Kamariera	24951	Report Server Notification - ObligationsDetailReport	27/7/2023 10:00:25	27/7/2023 10:10:57		
<input checked="" type="checkbox"/>		Beniamina Kamariera	24950	Report Server Notification - ObligationsDetailReport	27/7/2023 07:50:06	27/7/2023 07:50:29		
<input checked="" type="checkbox"/>		Beniamina Kamariera	24949	Report Server Notification - PurchaseOrderProgressReport	27/7/2023 07:38:11	27/7/2023 07:42:00		
<input checked="" type="checkbox"/>		Beniamina Kamariera	24783	Report Server Notification - PurchaseOrderProgressReport	26/7/2023 21:34:03	26/7/2023 21:35:15		
<input checked="" type="checkbox"/>		Beniamina Kamariera	24782	Report Server Notification - GoodReceivedNotesAwaitingInvoiceReport	26/7/2023 21:32:35	26/7/2023 21:32:49		
<input type="checkbox"/>		Reta Ubati	24480	There is a new Purchase Order (Code = PO-23-17-0018) transition assigned to you	24/7/2023 02:33:36			
<input type="checkbox"/>		James Ruatu	24349	READ:There is a new Commitment (Code = COMM-23-17-0044) transition assigned to you	21/7/2023 10:53:34			
<input type="checkbox"/>		Beniamina Kamariera	24347	The following Commitment transition has been Reviewed	21/7/2023 10:51:02			
<input checked="" type="checkbox"/>		Batarawa Teeu	24346	There is a new Commitment (Code = COMM-23-17-0044) transition assigned to you	21/7/2023 10:48:43	21/7/2023 10:50:21		

3. Scroll down, and from the bottom of the Internal Message screen, click on the **Delete** button. This will delete the selected messages, retaining only the Unread or unopened ones.

Internal Message

<input checked="" type="checkbox"/>		Beniamina Kamariera	24949	Report Server Notification - PurchaseOrderProgressReport	27/7/2023 07:38:11	27/7/2023 07:42:00		
<input checked="" type="checkbox"/>		Beniamina Kamariera	24783	Report Server Notification - PurchaseOrderProgressReport	26/7/2023 21:34:03	26/7/2023 21:35:15		
<input checked="" type="checkbox"/>		Beniamina Kamariera	24782	Report Server Notification - GoodReceivedNotesAwaitingInvoiceReport	26/7/2023 21:32:35	26/7/2023 21:32:49		
<input type="checkbox"/>		Reta Ubati	24480	There is a new Purchase Order (Code = PO-23-17-0018) transition assigned to you	24/7/2023 02:33:36			
<input type="checkbox"/>		James Ruatu	24349	READ:There is a new Commitment (Code = COMM-23-17-0044) transition assigned to you	21/7/2023 10:53:34			
<input type="checkbox"/>		Beniamina Kamariera	24347	The following Commitment transition has been Reviewed	21/7/2023 10:51:02			
<input checked="" type="checkbox"/>		Batarawa Teeu	24346	There is a new Commitment (Code = COMM-23-17-0044) transition assigned to you	21/7/2023 10:48:43	21/7/2023 10:50:21		
<input type="checkbox"/>		Toromon Metutera	24182	There is a new Commitment (Code = COMM-23-17-0041) transition assigned to you	19/7/2023 03:10:21			
<input type="checkbox"/>		Toromon Metutera	24164	There is a new Commitment (Code = COMM-23-17-0040) transition assigned to you	19/7/2023 02:40:40			
<input type="checkbox"/>		Beniamina Kamariera	23964	There is a new Payment Voucher (Code = PV-23-17-0056) transition assigned to you	17/7/2023 01:13:35			
<input type="checkbox"/>		Beniamina Kamariera	23960	There is a new Purchase Requisition (Code = PR-23-17-0026) transition assigned to you	17/7/2023 00:42:54			
<input type="checkbox"/>		Beniamina Kamariera	23882	Report Server Notification - Payment Voucher	14/7/2023 04:44:58			
<input type="checkbox"/>		Beniamina Kamariera	23518	There is a new Payment Voucher (Code = PV-23-17-0027) transition assigned to you	5/7/2023 12:45:38			
<input type="checkbox"/>		Beniamina Kamariera	22276	There is a new Purchase Requisition (Code = PR-23-17-0022) transition assigned to you	4/7/2023 00:30:37			

Internal Message

Select	Status	From	ID	Subject	Posting Date	Reading Date	Due Date	Select All Select None Action Date
<input type="checkbox"/>	●	Reta Ubati	24480	There is a new Purchase Order (Code = PO-23-17-0018) transition assigned to you	24/7/2023 02:33:36			
<input type="checkbox"/>	●	James Ruatu	24349	READ:There is a new Commitment (Code = COMM-23-17-0044) transition assigned to you	21/7/2023 10:53:34			
<input type="checkbox"/>	●	Beniamina Kamariera	24347	The following Commitment transition has been Reviewed	21/7/2023 10:51:02			
<input type="checkbox"/>	●	Toromon Metutera	24182	There is a new Commitment (Code = COMM-23-17-0041) transition assigned to you	19/7/2023 03:10:21			
<input type="checkbox"/>	●	Toromon Metutera	24164	There is a new Commitment (Code = COMM-23-17-0040) transition assigned to you	19/7/2023 02:40:40			
<input type="checkbox"/>	●	Beniamina Kamariera	23964	There is a new Payment Voucher (Code = PV-23-17-0056) transition assigned to you	17/7/2023 01:13:35			
<input type="checkbox"/>	●	Beniamina Kamariera	23960	There is a new Purchase Requisition (Code = PR-23-17-0026) transition assigned to you	17/7/2023 00:42:54			
<input type="checkbox"/>	●	Beniamina Kamariera	23882	Report Server Notification - Payment Voucher	14/7/2023 04:44:58			
<input type="checkbox"/>	●	Beniamina Kamariera	23518	There is a new Payment Voucher (Code = PV-23-17-0027) transition assigned to you	5/7/2023 12:45:38			
<input type="checkbox"/>	●	Beniamina Kamariera	23276	There is a new Purchase Requisition (Code = PR-23-17-0022) transition assigned to you	4/7/2023 00:30:37			