WORKING WITH TRANSACTIONS

Action	Description	Step	Instructions
Approve	To apply a new level of approval to a transaction. You cannot approve a transaction that you have created or edited.	1	Click the **Approve Transactions** widget on your homepage. Or, type page code WRKLSTC into the global navigation search bar at the top of your SAMS screen. Either option opens the Financial Worklist page.
		2	Use the search fields in the Filters section of the Financial Worklist page to find the transaction. Then, click the 3-dot menu at the right-hand side of the record row.
		3	In the options that appear, click on **Take Task**. At this stage, no one else can approve the transaction or edit it.
		4	Click on the blue transaction ID to open the record. If each component of the transaction is correct and complete, click **Approve** at the upper right-hand corner of the screen. Now, depending upon workflow settings, the transaction is either in Final phase, or it is ready for its next level of approval.
Reject	Rejecting a transaction shows users that it needs at least one correction. Rejecting the transaction also makes it possible for an authorized user to edit the transaction as needed.	1	Click the **Approve Transactions** widget on your homepage. Or, type page code WRKLSTC into the global navigation search bar at the top of your SAMS screen. Either option opens the Financial Worklist page.
		2	Use the search fields in the Filters section of the Financial Worklist page to find the transaction.Then, click the 3-dot menu at the right-hand side of the record row.
		3	In the options that appear, click on **Take Task**. At this stage, no one else can approve the transaction or edit it.
		4A	From here, there are two ways to reject the transaction. One is to click on the record row 3-dot menu again at the right-hand side of the screen. Choose **Related Actions**, then select **Reject**. Now an authorized user can edit the transaction as needed.
		4B	The other option is to click on the blue transaction ID to open the transaction. From the open transaction, click on the **Reject** button at the top right-hand corner of the screen. Now an authorized user can edit the transaction as needed.
Discard	An authorized user can discard (delete) a transaction in Draft phase. If the transaction is in Pending phase, reject it to move it to Draft phase. A discarded transaction no longer appears on the transaction catalog.	A1	**Option A:** With the transaction open, click the 3-dot menu at the upper right-hand corner of the screen. Select **Discard**.
		A2	A Discard Confirmation message box appears on the screen. Select **Yes**.
		B1	**Option B:** From the transaction catalog, find the transaction you need to discard. In the transaction's record row, click the 3-dot menu at the right-hand side of the screen. Select the **Discard/Cancel** option.
		B2	A Discard/Cancel Confirmation message box appears on the screen. Click **Yes**.
Override	An authorized user can override certain error messages in SAMS, which later allows a transaction to move to Final phase.	1	With the transaction open, click the 3-dot menu at the top right-hand corner of the screen. Select **Override**.
		2	If the override action is successful, a message appears to say that SAMS applied your override level to the transaction. For the override action to take effect, click the **Submit** button at the top right corner of the page.
		3	Note: Use caution when applying an override. When someone overrides a transaction, that action applies to every error condition on the transaction with an override level less than or equal to that person's override access level.