

How to send a reminder to Approvers for Pending Requests

10 Steps

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Created by

Engagifii Inc.

Creation Date

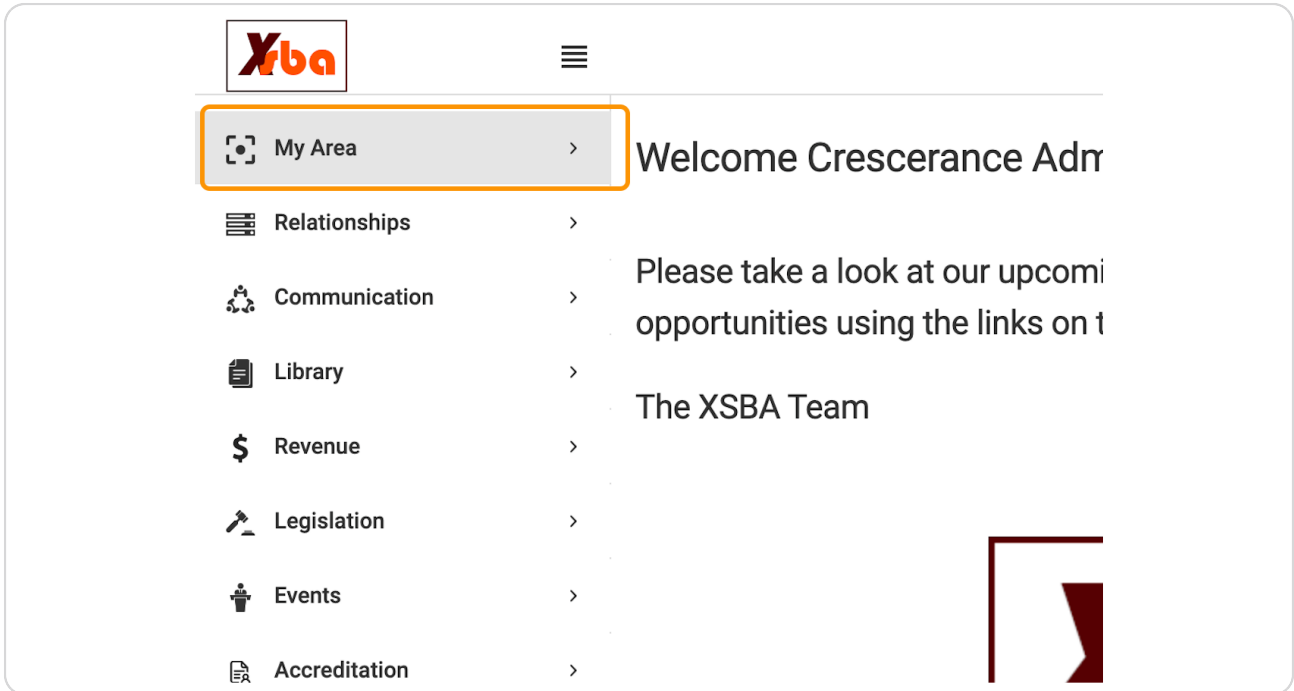
November 22, 2023

Last Updated

November 22, 2023

STEP 1

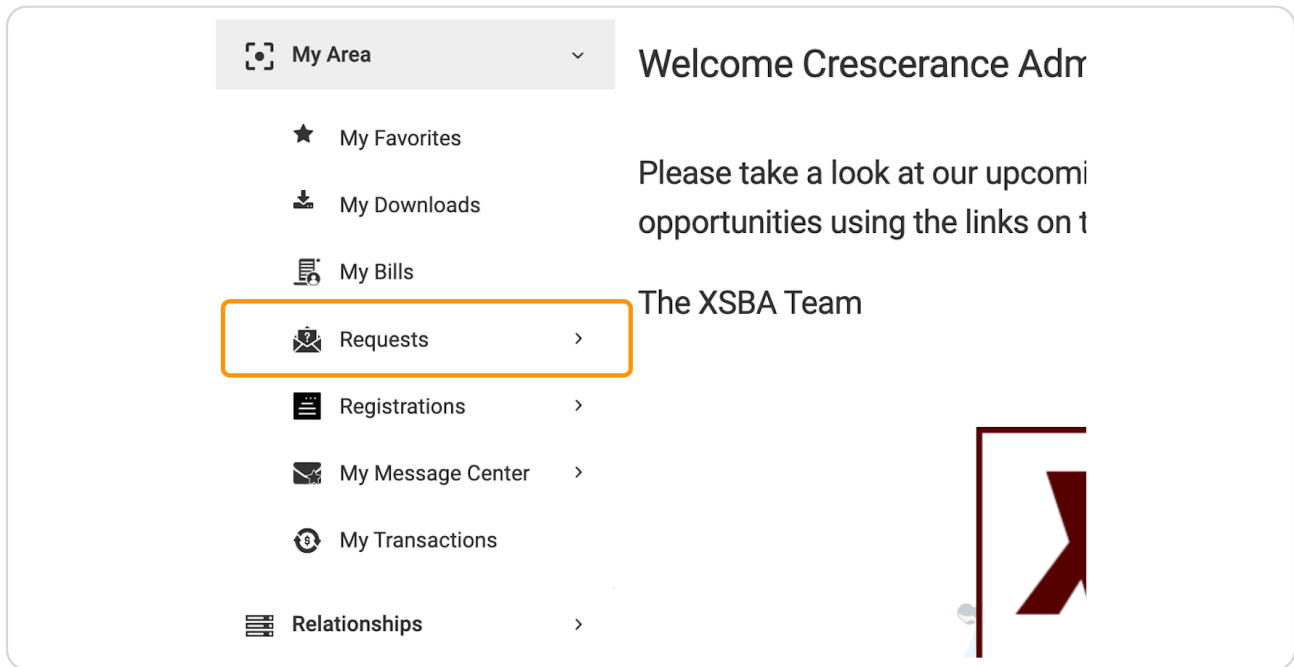
Click on My Area



The screenshot shows the XSBA Home dashboard. At the top left is the XSBA logo. To its right is a hamburger menu icon. Below the logo and menu is a navigation menu with the following items: 'My Area' (highlighted with an orange border), 'Relationships', 'Communication', 'Library', 'Revenue', 'Legislation', 'Events', and 'Accreditation'. Each item has a right-pointing chevron. To the right of the navigation menu is a main content area with the text: 'Welcome Crescerance Adr', 'Please take a look at our upcomi opportunities using the links on t', and 'The XSBA Team'. At the bottom right of the main content area is a dark red graphic element consisting of a square frame with a triangle inside.

STEP 2

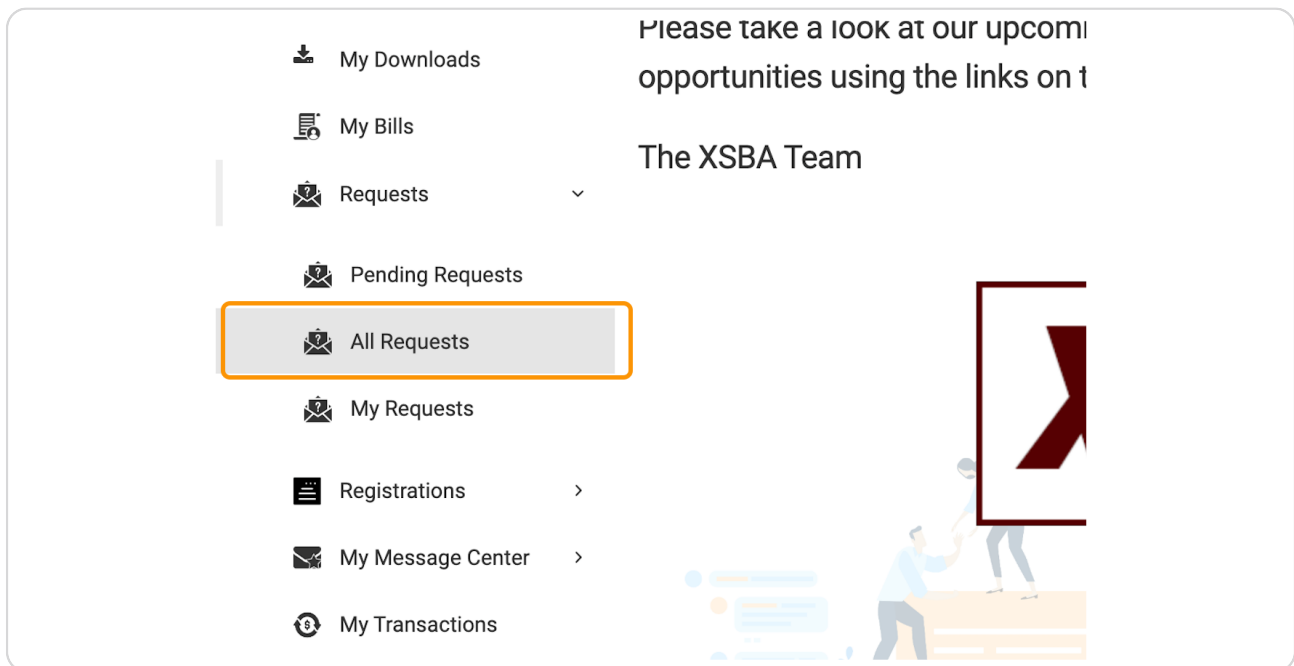
Click on Requests



The screenshot shows a user dashboard. On the left is a sidebar menu with the following items: 'My Area' (with a camera icon and a dropdown arrow), 'My Favorites' (with a star icon), 'My Downloads' (with a download icon), 'My Bills' (with a document icon), 'Requests' (with an envelope icon and a right-pointing arrow, highlighted with an orange border), 'Registrations' (with a document icon and a right-pointing arrow), 'My Message Center' (with an envelope icon and a right-pointing arrow), 'My Transactions' (with a dollar sign icon), and 'Relationships' (with a list icon and a right-pointing arrow). The main content area on the right displays a welcome message: 'Welcome Crescerance Adr', followed by the text 'Please take a look at our upcoming opportunities using the links on t' and 'The XSBA Team'. A large, stylized red logo is partially visible on the right side of the dashboard.

STEP 3

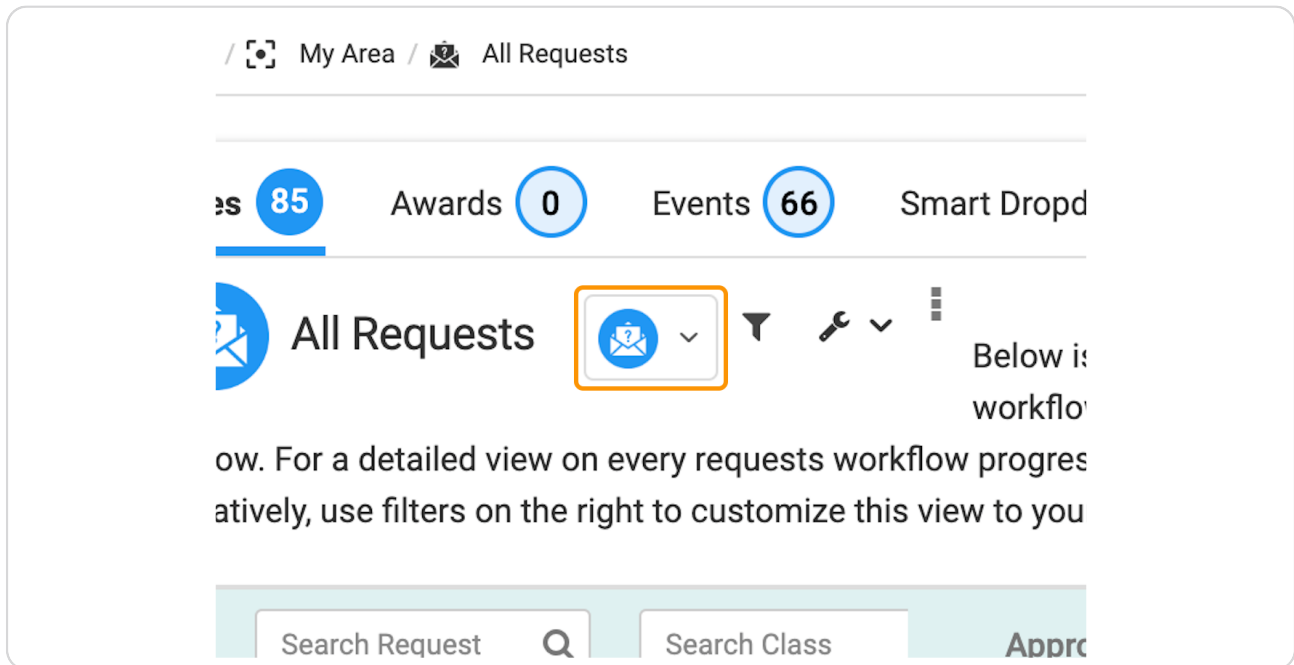
Click on All Requests



The screenshot shows the same user dashboard as in Step 2, but with the 'Requests' menu item expanded. The expanded menu includes: 'My Downloads', 'My Bills', 'Requests' (with a dropdown arrow), 'Pending Requests', 'All Requests' (with an envelope icon and a right-pointing arrow, highlighted with an orange border), 'My Requests', 'Registrations', 'My Message Center', and 'My Transactions'. The main content area on the right remains the same, displaying the welcome message and the XSBA Team text. The large red logo is also visible.

STEP 4

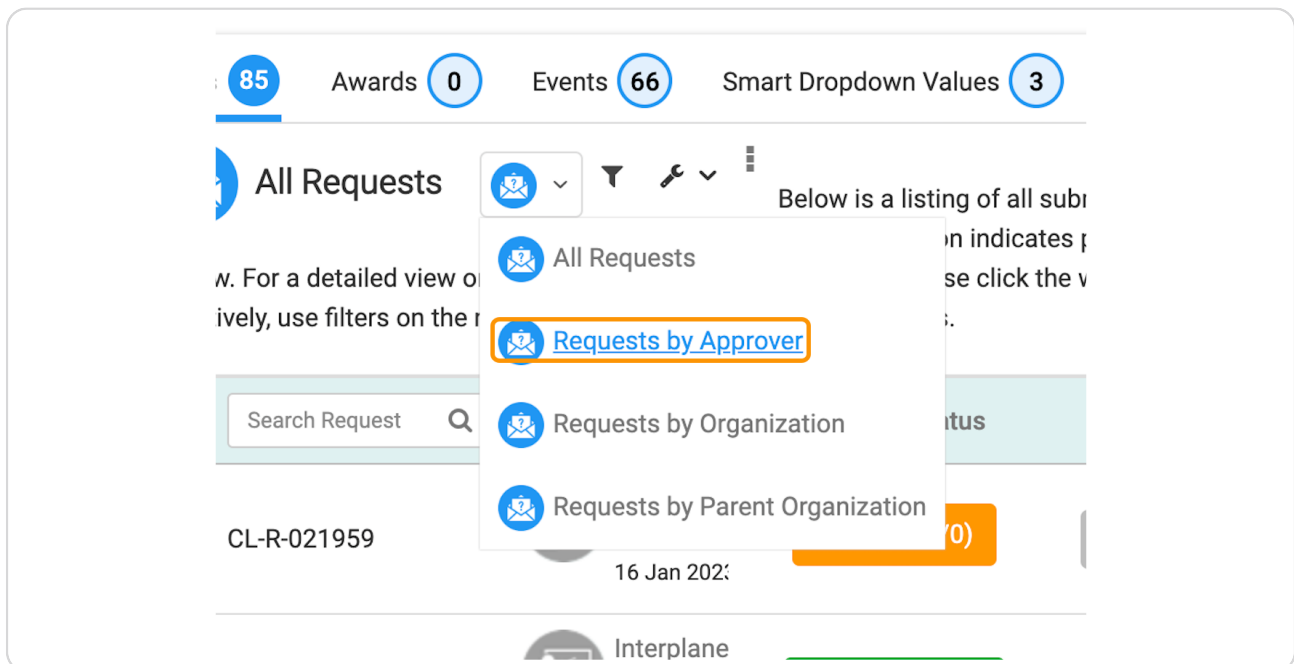
Click on highlight



The screenshot shows the top navigation area of the Engagifii dashboard. At the top, there is a breadcrumb trail: "/ My Area / All Requests". Below this, there are four main navigation tabs: "Requests" (with a count of 85), "Awards" (with a count of 0), "Events" (with a count of 66), and "Smart Dropdown Values". The "Requests" tab is currently selected and highlighted with a blue underline. Below the tabs, there is a section titled "All Requests" with a blue envelope icon. A dropdown menu is open from this icon, and the "All Requests" option is highlighted with an orange border. To the right of the dropdown, there are icons for a funnel, a wrench, and a vertical list. Below the navigation area, there is a search bar with the text "Search Request" and a magnifying glass icon, and another search bar with the text "Search Class".

STEP 5

Click on Requests by Approver



The screenshot shows the same dashboard as in Step 4, but with the dropdown menu expanded. The "Requests by Approver" option is highlighted with an orange border. The dropdown menu also includes "All Requests", "Requests by Organization", and "Requests by Parent Organization". The "Requests by Approver" option has a count of 3. Below the dropdown, there is a search bar with the text "Search Request" and a magnifying glass icon. Below the search bar, there is a table with the following visible content:

Request ID	Date	Status
CL-R-021959	16 Jan 2021	(0)

At the bottom of the page, there is a navigation bar with the text "Interplane" and a green underline.

STEP 6

You can view the pending requests awaiting an approver to approve.

The screenshot shows the Xba system interface. On the left is a navigation menu with options like 'My Area', 'My Favorites', 'My Downloads', 'My Bills', 'Requests', 'Pending Requests', 'All Requests', 'My Requests', 'Registrations', 'My Message Center', 'My Transactions', 'Relationships', 'Communication', and 'Library'. The main content area is titled 'Requests by Approver' and displays a table of pending requests. At the top, there are navigation links for 'Classes 85', 'Awards 0', 'Events 66', 'Smart Dropdown Values 3', and 'Person Profile Changes'. Below the table, there is a text box explaining the workflow: 'Below is a listing of all submitted requests. The workflow button indicates progress on the items workflow. For a detailed view on every requests workflow progress, please click the workflow button. Alternatively, use filters on the right to customize this view to your needs.'

<input type="checkbox"/>	<input type="text" value="Search Approver"/>	<input type="text" value="Current Position"/>	<input type="text" value="Search"/>	Action
<input type="checkbox"/>	[1] Alex Administrator-XSBA	Board Secretary	Xba	Send Reminder
<input type="checkbox"/>	[1] Beth Dutton	Board Vice Chair		Send Reminder
<input type="checkbox"/>	[1] Carl CP-Coordinator	Board Member		Send Reminder
<input type="checkbox"/>	[1] Chad Chatt-High	2 Positions		Send Reminder
<input type="checkbox"/>	[1] Cindy Carlton	Board Chair		Send Reminder
<input type="checkbox"/>	[1] Cody Coastal-High	Board Vice Chair		Send Reminder

STEP 7

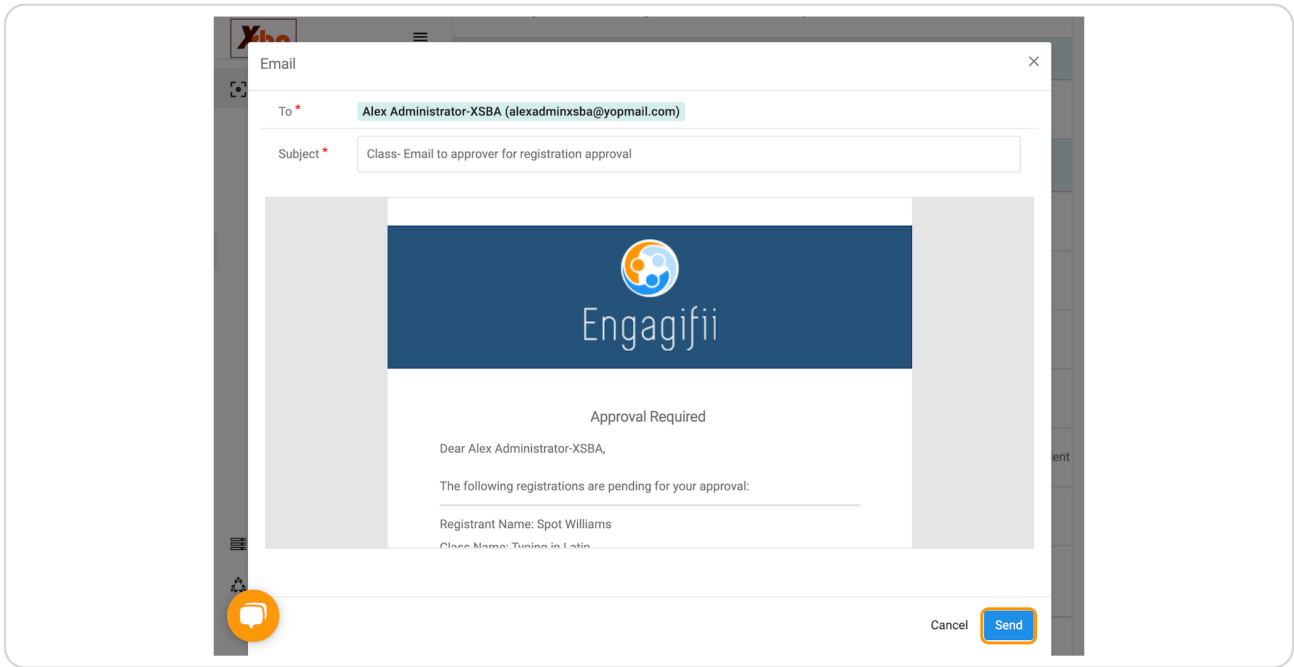
Click on Send Reminder

This screenshot is a zoomed-in view of the 'Requests by Approver' table from the previous step. The 'Send Reminder' button for the first row, 'Alex Administrator-XSBA', is highlighted with a red box. The table has search filters for 'Search Approver', 'Search Requestor', and 'Search Class'. The table data is as follows:

<input type="checkbox"/>	<input type="text" value="Search Approver"/>	<input type="text" value="Search Requestor"/>	<input type="text" value="Search Class"/>	<input type="text" value="Current Position"/>	Action
<input type="checkbox"/>	[1] Alex Administrator-XSBA				Send Reminder
<input type="checkbox"/>	CL-R-005613	Duffon, John	Latin is for cool pe... Typing in Latin	2 Positions	
<input type="checkbox"/>	CL-R-005617	Williams, Spot	Latin is for cool pe... Typing in Latin	2 Positions	
<input type="checkbox"/>	CL-R-005618	Goodall, Jane	Latin is for cool pe... Typing in Latin	Board Secretary	
<input type="checkbox"/>	CL-R-005619	Lilith, Hailey	Latin is for cool pe... Typing in Latin	Board Chair	
<input type="checkbox"/>	CL-R-005620	Woods, Elle	Latin is for cool pe... Typing in Latin	Assistant Superintendent	
<input type="checkbox"/>	CL-R-005621	Hiers, Laura	Latin is for cool pe... Typing in Latin	2 Positions	
<input type="checkbox"/>	CL-R-009177	Johnson, Dwayne	Financial Ethics Financial Ethics II 31 Aug 2022 at 9:26 AM	Board Chair	
<input type="checkbox"/>	[1] Beth Dutton				Send Reminder

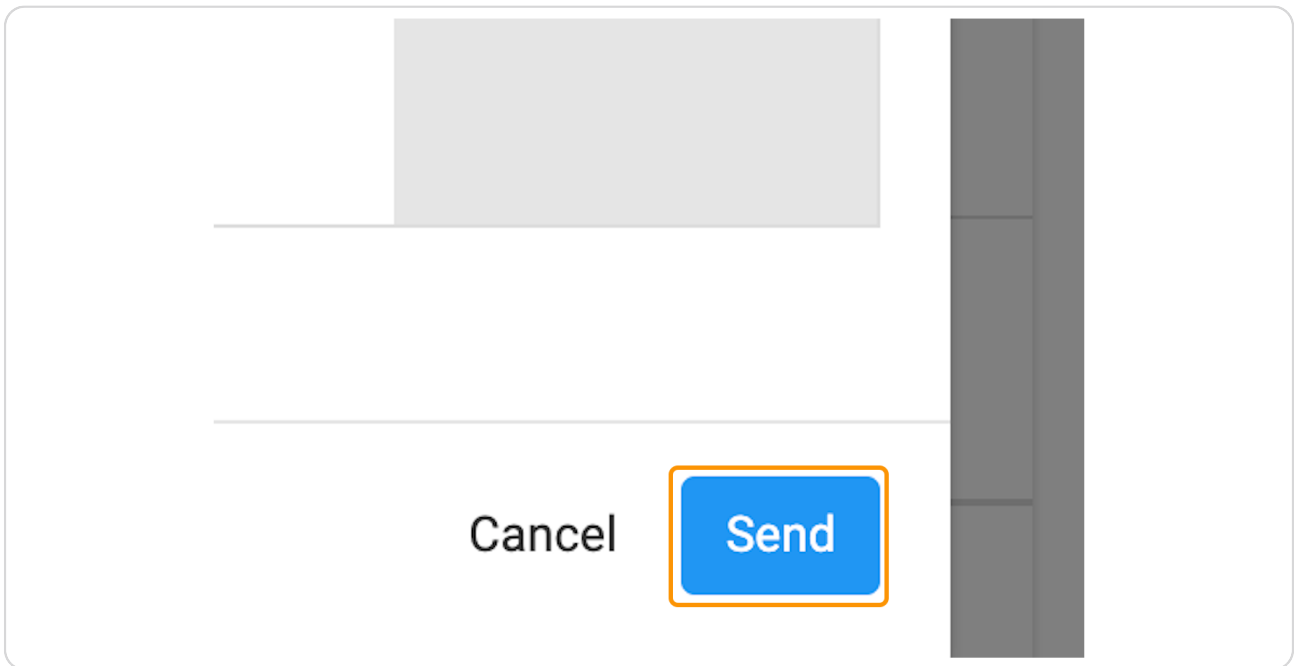
STEP 8

An email with a list of pending approvals will populate.



STEP 9

Click on send



STEP 10

Reminder Email is Sent

