



# Job Aid: Using the Approvals Dashboard in DATIM

*September 2019*

## Overview

The Approvals Dashboard in DATIM allows users to view an aggregated approval status of mechanisms in DATIM. In other words, it will show the sum total of mechanisms in each of the approval statuses for each Operating Unit (OU) by period. If needed the results can be downloaded as a CSV file.

This document outlines how to access and use the Approvals Dashboard.

## Access

In order to have access to the Approvals Dashboard, a request should be submitted to DATIM Support. It will then be routed to SGAC\_SI for approval. Once approval is granted, the approval dashboard will be added to the users account.

*It is important to note that the Approvals Dashboard cannot be restricted by OU. Access to the dashboard will allow every user to see the status for all OUs for all periods.*

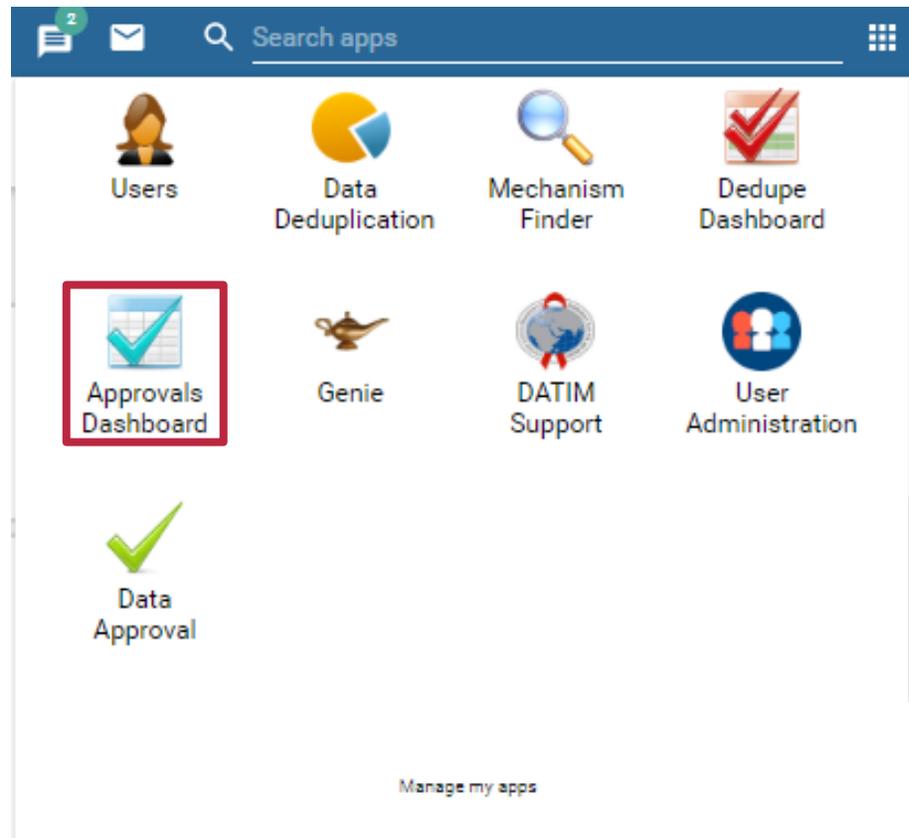
Any questions or issues about the dashboard should be directed to DATIM Support.

## How to access the Approvals Dashboard

**Step 1:** Login to DATIM.



**Step 2:** Select the Apps menu where you should see the Approvals Dashboard:



**Step 3:** Select the Approvals Dashboard App, which will take you here:

## Approvals Dashboard

Period Type  Start Date

Please specify **Period Type** and **Start Date**

**Step 4:** Choose **MER Targets**, **MER Results**, or **ER Expenditure Reporting** under the Period Type drop-down filter

## Approvals Dashboard

MER Results

MER Targets

ER Expenditure Reporting

Start Date

## Step 5:

Choose a corresponding **Start date** from the drop-down filter for the Results, Targets, or ER Expenditure Reporting that you selected.

The start date corresponds to the first day of the period you wish to view. For example, if I want to view MER Results for the FY18 Q4 period, I would select 2018-07-01, as that is the first day of the period (note you should **NOT** select the first day of **data entry** for that period, as data entry lags behind by one quarter).

For MER Targets and ER Expenditure Reporting, if you want to view approval status for COP17/FY18 mechanisms, you would select 2018-10-01, which is Fiscal Year 2018 (again, you would **NOT** select the fiscal year that data was entered, as targets data is entered for a future year).

### Approvals Dashboard

Period Type: MER Results Start Date: 2018-10-01 [DOWNLOAD](#)

Approvals	Partner	Agency	Inter-Agency	Global
Organisation Unit	Pending Submitted	Accepted Submitted	Accepted Submitted	Accepted
Angola	0 0	0 0	0 0	9
Asia Regional Program	0 0	0 0	0 0	11
Botswana	0 0	0 0	0 0	33
Burma	0 0	0 0	0 0	8
Burundi	0 0	0 0	0 0	10

## Approvals Dashboard

Period Type

MER Targets

2018-10-01

2017-10-01

2016-10-01

2015-10-01

Please specify **Period**

## Approvals Dashboard

Period Type

ER Expenditure Reporting

2018-10-01

2017-10-01

2016-10-01

2015-10-01

Please specify **Period Type** and **Start**

## Approvals Dashboard

Period Type

MER Targets

Start Date

2018-10-01

DOWNLOAD

Approvals	Partner	Agency	Inter-Agency	Global
Organisation Unit	Pending Submitted	Accepted Submitted	Accepted Submitted	Accepted
Angola	9 0	0 0	0 0	0
Asia Regional Program	11 0	0 0	0 0	0
Botswana	33 0	0 0	0 0	0
Burma	8 0	0 0	0 0	0
Burundi	18 0	0 0	0 0	0

Click on  
DOWNLOAD

### Step 6:

Once you select the Period Type & Date, the table will populate and the "Download" button is enabled. If you want to save a CSV file of the results click on "Download" and save the file:

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