

EXPENSE APPROVER WORKFLOW FAQs

Q: What are the approval levels?

A: There are five classifications of Approvers. The two required levels are the Department Manager 1 and the AP Auditor. An institution may decide to use any of the other three approval [eq]10 (ui)6 .Q.10 2]



Q: How will I know that a transaction is waiting for my approval?

A: When a Traveler



Q: If I receive a transaction in error, can I reassign this transaction to another Approver?

A: The Reassign function allows an Approver to take a transaction that is currently awaiting approval and reassign it to another Approver. For more information, see [EX.080.106 - Reassigning Approval Work in Self-Service](#).

CAUTION: The user that you reassign expense transactions to must have the appropriate role to be able to approve. Check with your institution security administrator for more information on security roles.

Q: If I am both the Traveler and an Approver for the same department, do I approve my own transactions?

A: A Traveler is not permitted to approve his/her own transactions. When the User ID submitting the expense transaction is the same as who is listed in the Approver Assignments, the system WILL NOT route the transaction to this individual. Instead, it routes to the Designated Approver.

Every Expense Approver should specify a Designated Approver. If one is not specified, the transaction will route to the Workflow Administrator and must be manually reassigned. ITS recommends having correct Approver Assignments and a Designated Approver established to ensure expense transactions are routed to the appropriate approvers and approved in a timely manner.

The Designated Approver is set on the Traveler's Expense Profile. For more information, see [EX.010.090 – Assigning a Designated Approver](#).

Q: Where is this Department and Project information located on a transaction?

A: Each line on an expense transaction contains its own Accounting Details. These values pull from the Default ChartField Values on the traveler's Expense Profile but can



Q: Can an Approver change the ChartField/Accounting Details on a transaction?

Occasionally, Approvers may need to revise the ChartField information on a transaction. Approvers can adjust the following fields:

- Account
- Fund
- Department
- Program
- Class
- Budget Ref
- Project

Q: Where can I see who has already approved a transaction and can I determine who the transaction will route to next?

One major benefit of having electronic Workflow is the ability to view the approval actions that were taken on a transaction and determine who is still required to approve the transaction.

Approvers can view the following sections after selecting the transaction from their

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Q: If I click the "Send Back" button on a transaction where does this route the transaction and are all approval levels required if it is subsequently re-submitted?

If Approvers select the Send Back button, the transaction routes back to the Traveler/Expense Submitter.

If the transaction is then re-submitted it is required to pass through all approval levels - it will not skip the levels that approved the transaction the first time.

Q: If I am on vacation or out of the office for an extended period of time, can I have another user approve the items in my worklist queue?

A: In this case, the Approver can assign an Alternate Approver to review and approve transactions. The Alternate Approver is a temporary override that is based on a set date range.

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