Travel Authorizations, Cash Advances and Expense Reports upon submission are automatically routed for Approval. Approvers are notified by email of the transaction and are requested to review. To review the transaction they can select the link within the email which will navigate them directly to the approval page. Or they can select the transaction from their Worklist or navigate to NavBar > Navigator > Travel and Expenses > Approve Transactions > Approve Transactions.

Approval Roles

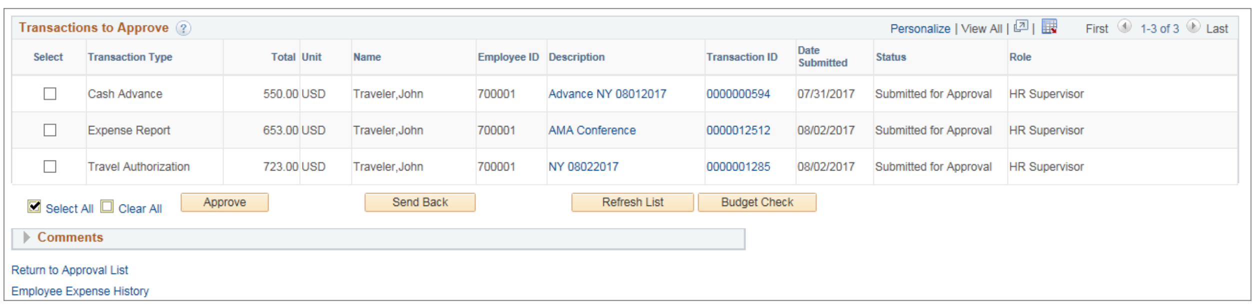
Reviewer – Exception approvers for International and Student Expense Types which are routed to the Provost's Office or the Financial Aid.

HR Supervisor – Employee's direct supervisor as listed on the Employee's Expenses Profile.

Department Expense Manager/Chartfield Approver – As defined by the division LFO.

Accounts Payable/Prepay Audit– Controller's Office review for Cash Advances and Expense Reports.

NavBar > Navigator> Travel and Expenses > Approve Transactions > Approve Transactions



Transactions to Approve

Personalize | View All | First 1-3 of 3 Last

Select	Transaction Type	Total	Unit	Name	Employee ID	Description	Transaction ID	Date Submitted	Status	Role
☐	Cash Advance	550.00	USD	Traveler,John	700001	Advance NY 08012017	0000000594	07/31/2017	Submitted for Approval	HR Supervisor
☐	Expense Report	653.00	USD	Traveler,John	700001	AMA Conference	0000012512	08/02/2017	Submitted for Approval	HR Supervisor
☐	Travel Authorization	723.00	USD	Traveler,John	700001	NY 08022017	0000001285	08/02/2017	Submitted for Approval	HR Supervisor

Select All Clear All Approve Send Back Refresh List Budget Check

Comments

Return to Approval List

Employee Expense History

From the Overview page, select the **Transaction ID** of the transaction that is to be reviewed and approved.

Action Options

Approve – Approver has reviewed for accuracy and approved for reimbursement.

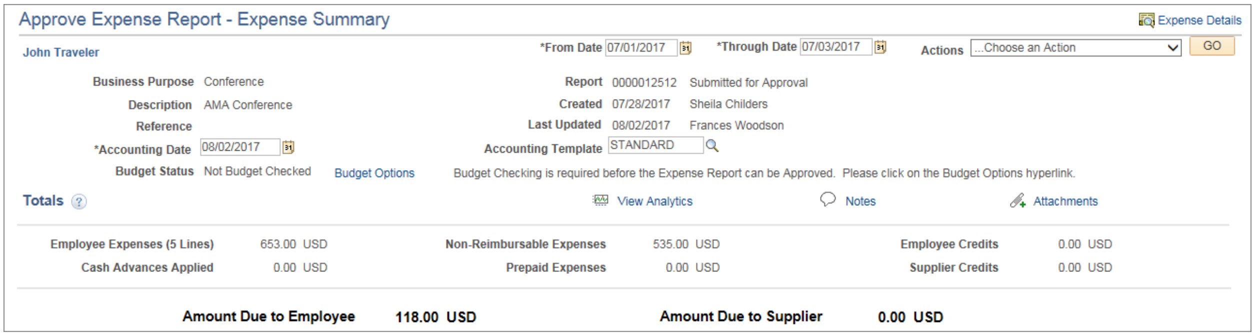
Send Back – Returns to employee/student for revision. An email notification will be sent to the employee.

Hold – Hold for later review.

Deny – Denys/Cancels and liquidates any associated encumbrance. An email notification will be sent to the employee.

Save Changes – Saves any updates made.

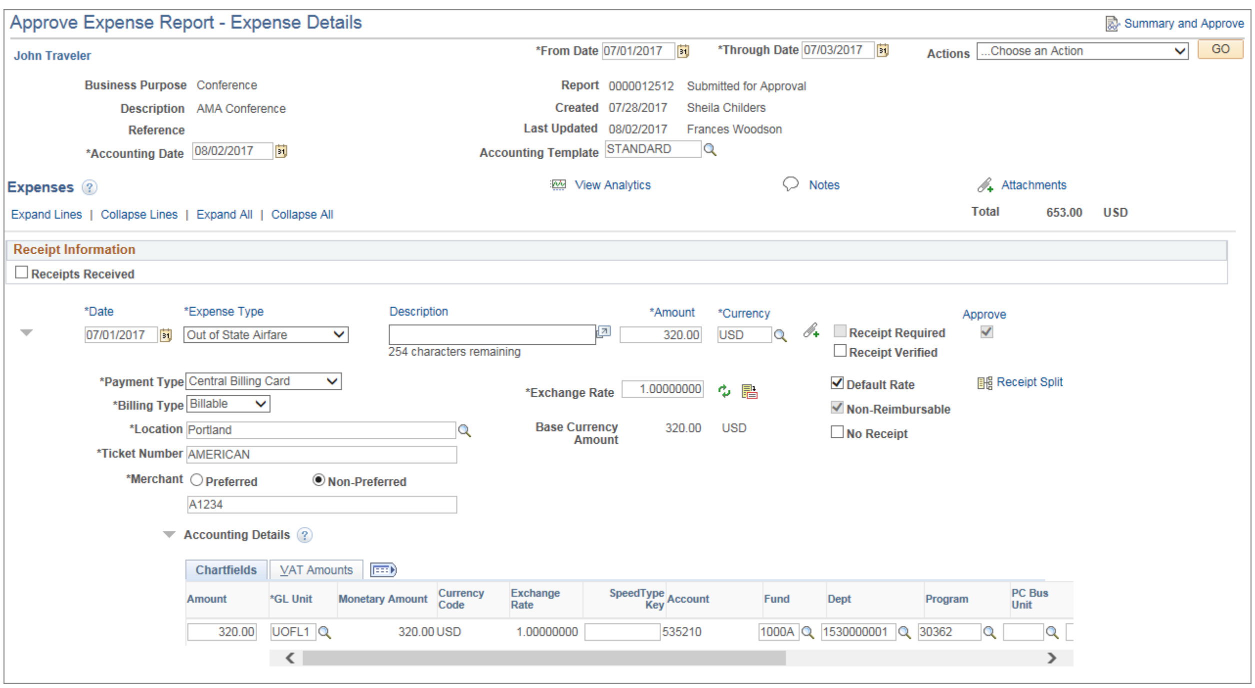
Expense Summary



<u>Note:</u> Budget Checking (Budget Status of Valid) is required before an Expense Report or a Travel Authorization can be approved. For those Travel Authorizations or Expense Reports with a Budget Status of 'Exception' please contact the Department Expense Manager/Chartfield Approver for assistance.

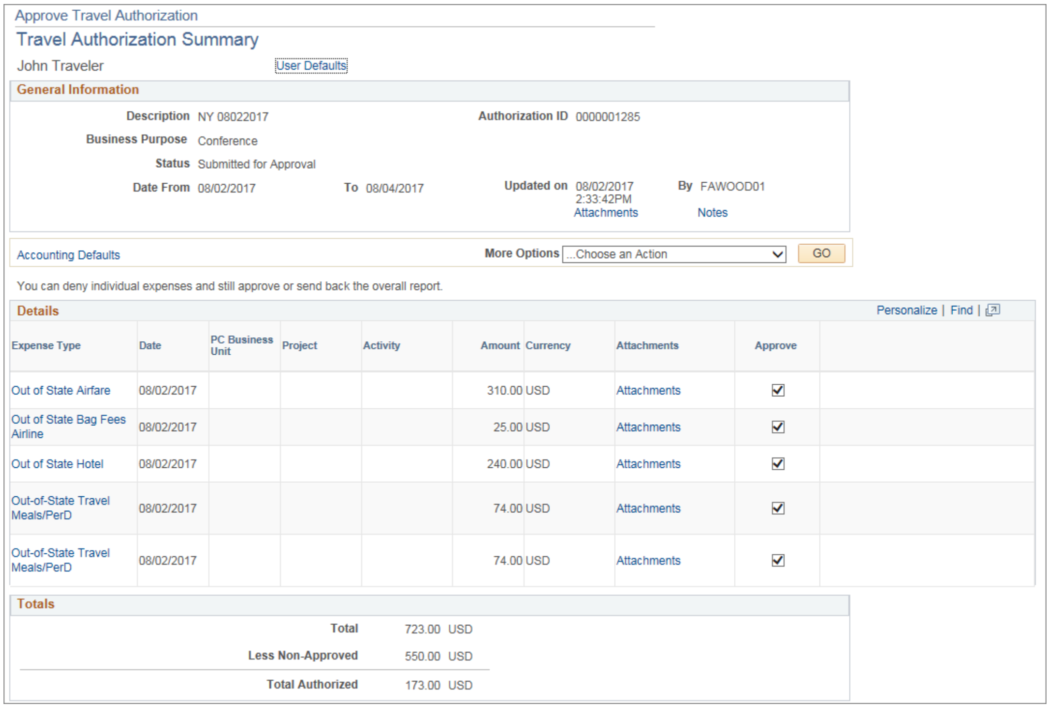
The approver may manually budget check the Expense Report or Travel Authorization by selecting the **Budget Options** link or allow the system to budget check during one of batch processes throughout the day.

Expense Details



Select **Expand All** to review the detail line and accounting distribution. Supporting documentation and receipts may be viewed by selecting the Attachments link. Approvers have access to update amounts and accounting distributions as needed. To change the account number select a different Expense Type (Note: this will require re-populating some fields). Return to the Expense Summary page to **Save Changes**.

Travel Authorization Summary



Approve Travel Authorization

Travel Authorization Summary

John Traveler   User Defaults

General Information

Description NY 08022017   **Authorization ID** 0000001285

Business Purpose Conference

Status Submitted for Approval

Date From 08/02/2017   **To** 08/04/2017   **Updated on** 08/02/2017 2:33:42PM   **By** FAWOOD01

Attachments   Notes

Accounting Defaults   **More Options** ...Choose an Action   GO

You can deny individual expenses and still approve or send back the overall report.

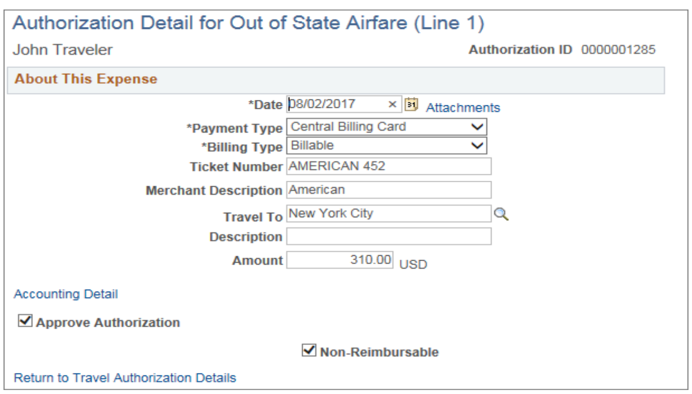
Details   Personalize | Find |

Expense Type	Date	PC Business Unit	Project	Activity	Amount	Currency	Attachments	Approve
Out of State Airfare	08/02/2017				310.00	USD	Attachments	☑
Out of State Bag Fees Airline	08/02/2017				25.00	USD	Attachments	☑
Out of State Hotel	08/02/2017				240.00	USD	Attachments	☑
Out-of-State Travel Meals/PerD	08/02/2017				74.00	USD	Attachments	☑
Out-of-State Travel Meals/PerD	08/02/2017				74.00	USD	Attachments	☑

Totals

Total	723.00	USD
Less Non-Approved	550.00	USD
Total Authorized	173.00	USD

Select the Expense Type to review the detail for the transaction.



Authorization Detail for Out of State Airfare (Line 1)

John Traveler   **Authorization ID** 0000001285

About This Expense

***Date** 08/02/2017   Attachments

***Payment Type** Central Billing Card

***Billing Type** Billable

Ticket Number AMERICAN 452

Merchant Description American

Travel To New York City

Description

Amount 310.00 USD

Accounting Detail

☑ **Approve Authorization**

☑ **Non-Reimbursable**

Return to Travel Authorization Details

Select the Attachments link to view supporting documentation and the Accounting Details link to view chartfield information.

Note: **Non-Reimbursable check box** should be checked for the **Payment Types** of Central Billing Card, University Paid (Procurement Card or Purchase Order), Wex Virtual Card or Pay Only.