

EX.010.090 – ASSIGNING A DESIGNATED APPROVER

Purpose	<ul style="list-style-type: none"> To identify who should specify a Designated Approver. To identify why a Designated Approver is most often needed. To assign a Designated Approver.
Description	<p>An Expenses Approver at any level should specify a Designated Approver. A Designated Approver is needed because the system will not allow an approver to approve his/her own expense transactions. In this situation, or if the system cannot determine the correct approver for another reason there are two options:</p> <ul style="list-style-type: none"> Option 1: If a Designated Approver is listed on the employee profile, then a transaction will route to that named employee. Option 2: If there is no Designated Approver, then the transaction will route to the Workflow Administrator.
Security Role	BOR PeopleSoft User
Dependencies/ Constraints	None
Additional Information	None

Procedure

Below are step by step instructions on how to assign a Designated Approver.

Step	Action
1.	Click the NavBar icon.
2.	Click the Menu icon.
3.	Click the Travel and Expenses link.
4.	Click the Manage Employee Information link.
5.	Click the Update Profile link.
6.	Enter or search for the Empl ID for which a Designated Approver must be added.
7.	Click the Search button.
8.	Click the Organizational Data tab.
9.	<p>If you know the UserID of the Designated Approver, enter it directly into the Designated Approver field.</p> <p>To search for the UserID, click the Look-up icon at the end of this field. Once located, select the User ID to populate the Designated Approver field.</p>
10.	Click the Save button.
11.	<p>Now that a Designated Approver is assigned, any Travel & Expense transaction charged to that Approver's department will route to the Designated Approver instead.</p> <p>Note: An exception to the Designated Approver routing occurs when there are multiple approvers for a pooled approver level (either Reviewer or AP Auditor). In this situation, the system can route a traveler's transaction to a fellow approver for that same approval level, without having the Traveler approve his/her own transaction and without having to use a Designated Approver.</p>