

EX.020.301 – USING THE APPROVE TRANSACTIONS PAGE

Purpose	<ul style="list-style-type: none"> To identify the three methods that can be used to review and approve expense transactions. To identify how the Summary Approvals page is accessed in the Self-Service Portal. To identify the actions that can be completed on the Summary Approvals page. To use the Summary Approvals page.
Description	<p>There are three methods which can be used to review and approve expenses transactions:</p> <ul style="list-style-type: none"> Email Notification Worklist Summary Approvals page <p>The Summary Approvals page is accessed through the Manager Self-Service link. By using the Summary Approvals page, an approver can process multiple transactions at one time.</p> <p>Each of these methods provides the approver with the same set of options: Approve, Reviewed, Deny, Send Back, Hold, and Budget Check. The main difference is the navigation used to reach these approval options. It is not recommended that Budget Check be run for multiple transactions from this page.</p> <p>For more information on the other approval methods, see business process EX.020.300 - Understanding Approval Methods.</p>
Security Role	BOR_EX_APPROVAL
Dependencies/ Constraints	None
Additional Information	None

Procedure

Below are step by step instructions on how to use the Summary Approvals page.

Step	Action
1.	Click the NavBar icon.
2.	Click the Menu link.
3.	Click the Manager Self-Service link.
4.	Click the Approve Transactions link
5.	Click the Approve Transactions link.
6.	<p>There are seven (7) tabs across the top of this menu which can limit your scope if Approvers wish to focus on a particular type of transaction:</p> <ul style="list-style-type: none"> • Overview • Expense Reports • Time Reports (not used) • Time Adjustments (not used) • Travel Authorizations • Cash Advances • Errors
7.	<p>Search for transactions in a '<i>Pending</i>' approval status.</p> <p>Note: <i>Approvers can change the sort order of transactions and view them sequentially in the new order.</i></p>
8.	<p>Select one of the five main actions below depending on the transaction:</p> <ul style="list-style-type: none"> • Approve • Reviewed • Send Back • Hold • Budget Check: Although Budget Check is available on this page, it is not recommended Approvers run this function for multiple transactions at once from this page. <p>Note: <i>There is a select checkbox next to each transaction which allows Approvers to select multiple transactions and then perform one function, such as Send Back, for all selected transactions.</i></p>
9.	<p>The convenience of using the summary approval page should not interfere with a user's responsibility to carefully review each transaction before performing an approval action.</p>

Step	Action
10.	To review the details of a transaction, click on an entry in the Description column.
11.	Click an entry in the Description column.
12.	When the transaction displays, Approvers can review the details of the report to determine the appropriate action (e.g. Approve, Send Back, Deny, etc.).
13.	Navigate to the bottom of the page.
14.	For Expense Reports and Travel Authorizations, there is a Detail button in the bottom right corner of the page which, if clicked, will display further details for the transaction.
15.	<p>If the transaction has not yet been budget checked and this is a requirement for your institution, users can budget check the transaction at this time.</p> <p>For additional information, see EX.020.151 – Budget Checking Expense Reports.</p>
16.	<p>There are three options at the bottom of the page to select:</p> <ul style="list-style-type: none"> • Return to Approval List • Next in List: functions as a forward button to review the next transaction in the queue. • Previous in List: functions as a backward button to review the previous transaction in the queue.
17.	Those items the user approved have been routed to the next approver level and will no longer appear in the user's Summary Approvals page.