Approve an Expense Report

This topic is for University only. Healthcare does not use the electronic manager approval process.

Navigation: Smart Solutions > Smart Workflow > Transaction Approval > Approval Inbox

1. Input
   a. Search Type: Expense Report
   b. To narrow the search results, add more search criteria.

2. Click .

3. Click the Report ID for the Expense Report you want to open.


5. Review the Expense Report.

6. To view the attached receipts, click View Image. You must scroll to the right of the page to see this link.

7. To view the SmartKey and Account for each expense line
   a. Click the Detail link to the right of the expense type.
   b. The Expense Detail page displays. Click Accounting Detail.
   c. The Accounting Detail page displays. Review the SmartKey and Account values.
   d. To return to the Expense Report Entry page, click OK, then click Return to Expense Report.

Note: If the Expense Report contains more than one expense line, repeat step 7 to review the SmartKey and Account for the additional lines.

8. If the Expense Report is ready for approval, click Approve. For approved Expense Reports, skip to Step 11.

9. If the Expense Report is not ready for approval, input applicable comments in the Comment field.

10. After entering comments, select one of the following actions:
   a. Click Deny to deny the Expense Report.
   b. Click Hold to place the Expense Report on hold.

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c. Click [Push Back] to push the Expense Report back to a prior level.

11. **Remember to close the new window after you finish working on the Expense Report.**

12. The Approval Inbox redisplay. To refresh the list of Expense Reports, click [Search].

### Adding a Reviewer or Approver

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1. **Input**
   a. Search Type: Expense Report
   b. To narrow the search results, add more search criteria.

2. Click [Search].

3. Click the **Report ID** for the Expense Report you want to open.


5. On the Approval Map, click [+] to add a reviewer or an approver.

6. Enter or look up the **User ID** for the reviewer or approver you are adding.

7. Click [Reviewer] if adding a reviewer.

8. Click [Insert].

9. The new reviewer or approver is added to the chain.

10. Take action on the Expense Report. For example, approve the Expense Report.

11. **Remember to close the new window after you finish working on the Expense Report.**

12. The Approval Inbox redisplays. To refresh the list of Expense Reports, click [Search].