



# Expense Approval Management

## PeopleSoft Expenses 9.2

### Approving a Travel Authorization

#### Table of Contents

Approve Travel Authorizations .....	2
Approve from Email Link .....	2
Approve Using Approve Transactions .....	6
Delegate Approval Authority .....	9

## Approve Travel Authorizations

There are a number of ways to Approve Travel Authorizations:

1. Use the Approval Requested email received from the Submitter and click on the email link included
2. In Evolve navigate to Manager Self Service>Travel and Expenses>Approve Transactions

### Approve from Email Link

Click on the link included in the email notification. The link will take you to the Evolve Login page. Sign in and you will be taken directly to the Travel Authorization Summary Page of the request.

1,500.00 CAD

3 line(s) are pending your approval

In Process

**Summary**

Name	[REDACTED]	Authorization ID	000000022	Submitted for Approval
Total Amount	1,500.00 CAD	Date From	06/27/22	
Travel Auth Description	Conference in Dallas	Date To	06/30/22	
Business Purpose	General Travel & Expense	Submission Date	06/23/22	
		Updated on	06/23/22 - 11:20 AM	

▼ Lines

Pending All

Select	Date/Expense Type	Amount	
<input type="checkbox"/>	06/27/22 Hotel/Motel Intl	500.00 CAD	>
<input type="checkbox"/>	06/27/22 Airfare Intl	750.00 CAD	>
<input type="checkbox"/>	06/27/22 Dinner Meal Allowance Intl	250.00 CAD	>

3 rows

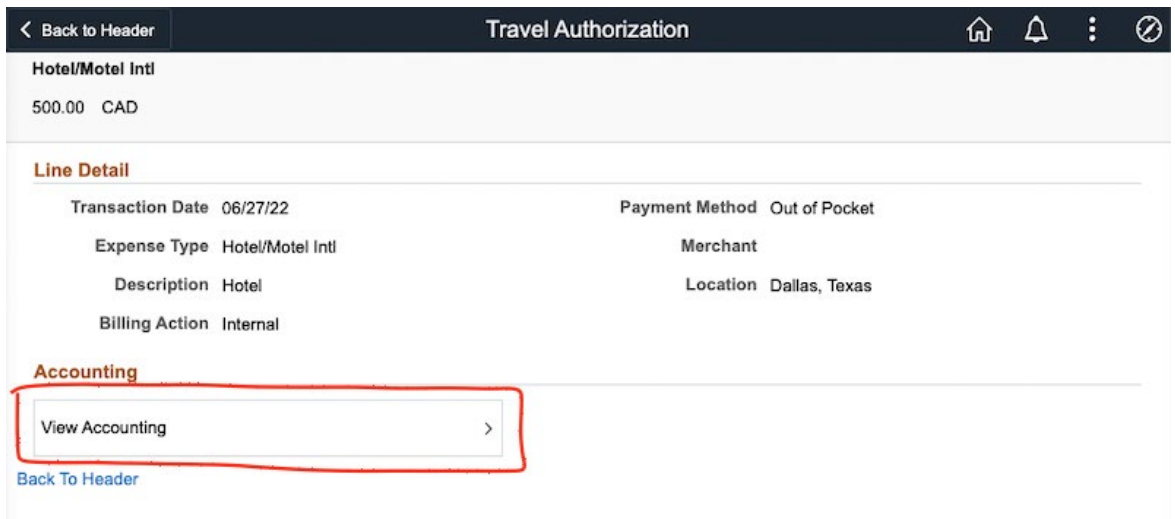
Approver Comments

Approval Chain >

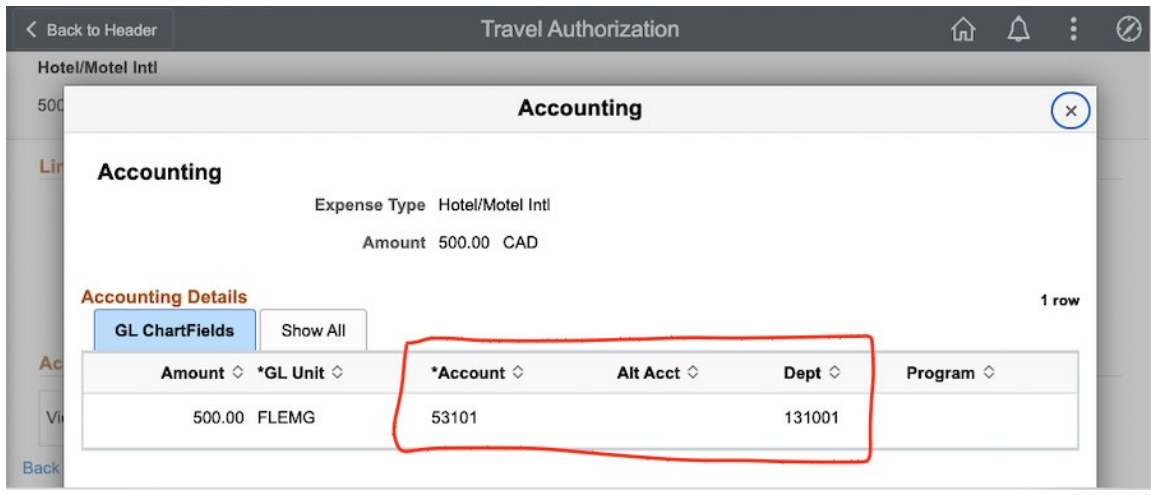
As an approver, you should ensure that 1) there is sufficient budget available and 2) the correct account and department are assigned to the expenses.

To see further details for an expense, click on the Expense type.

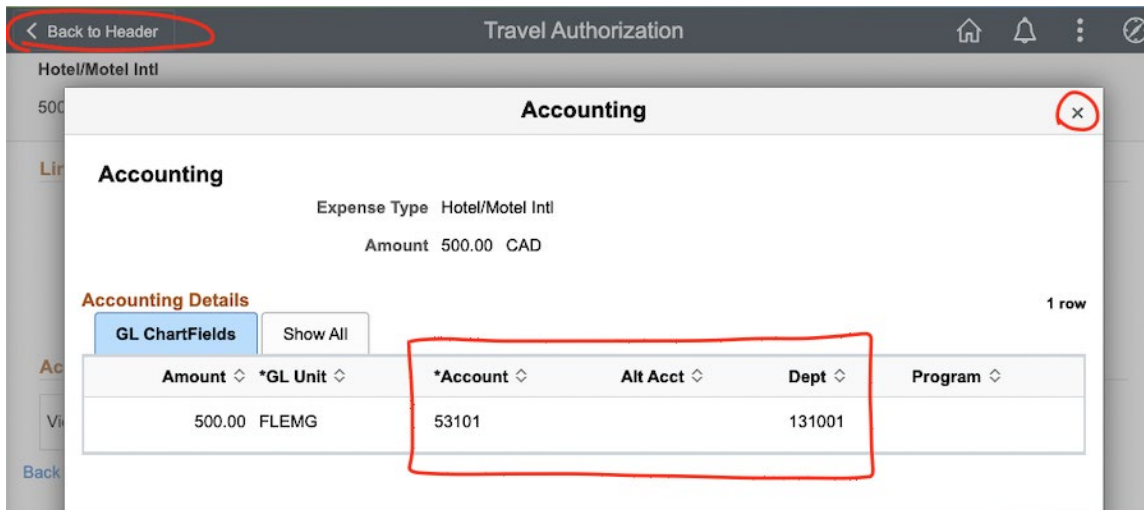
In this example, Hotel/Motel Intl was selected and the line details which open are shown on the next page.



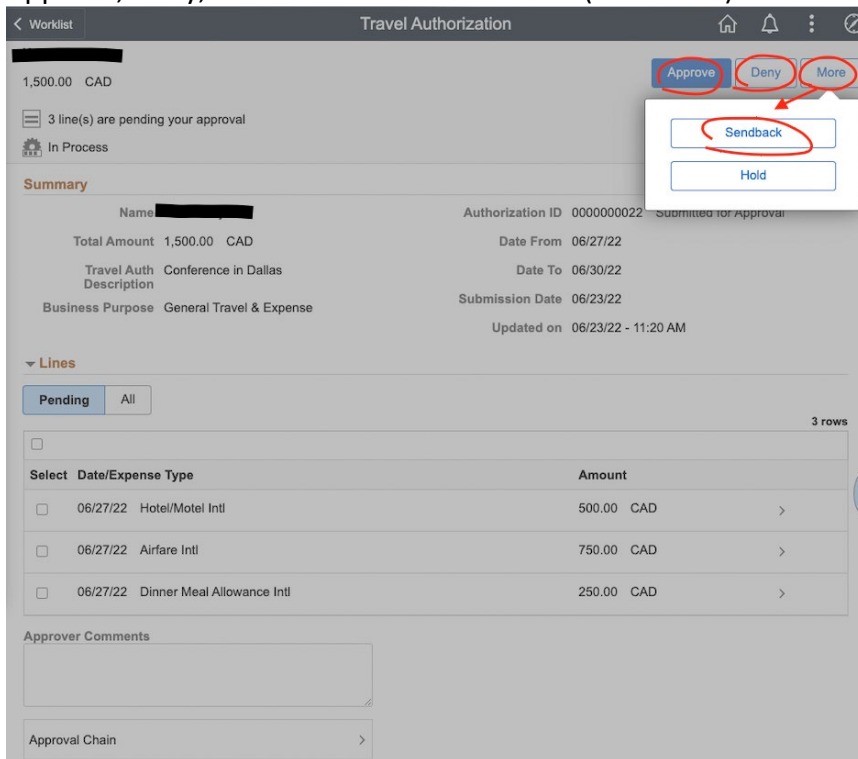
Click on View Accounting. You will see the account number and department number



Close the screen by clicking on X on the upper right corner and click on Back to Header as in below



Once you have reviewed, On the Summary page the approver can do the following actions: Approve, Deny, Click on more for Send Back (see below)



No	Action	Description
1	Approve	Click Approve and request will be routed to next approver
2	Send Back	Click Send back and request will return to requestor for more information
3	Hold	Put request on Hold and will not be processed or routed
4	Deny	Decline request and return to requestor

To approve a Travel Auth, Select all lines to approve and Click on Approve

Worklist Travel Authorization

2,000.00 CAD **Approve** Deny More

2 line(s) are pending your approval

In Process

**Summary**

Name [Redacted] Authorization ID 000000025 Approvals in Process

Total Amount 2,000.00 CAD Date From 06/27/22

Travel Auth Description Conference Date To 06/30/22

Business Purpose General Travel & Expense Submission Date 06/24/22

Updated on 06/27/22 - 11:12 AM

▼ Lines

Pending All 2 rows

Select	Date/Expense Type	Amount
<input checked="" type="checkbox"/>	06/27/22 Hotel/Motel Intl	1,000.00 CAD
<input checked="" type="checkbox"/>	06/27/22 Airfare Intl	1,000.00 CAD

Approver Comments

Approval Chain

Enter Comments if needed and click on Submit

Worklist Travel Authorization

2,000.00 CAD **Approve** Deny More

2 line(s) are pending your approval

In Process

**Summary**

Name [Redacted] Authorization ID 000000025 Approvals in Process

Total Amount 2,000.00 CAD Date From 06/27/22

Travel Auth Description Conference Date To 06/30/22

Business Purpose General Travel & Expense Submission Date 06/24/22

Updated on 06/27/22 - 11:12 AM

▼ Lines

Pending All 2 rows

Select	Date/Expense Type	Amount
<input checked="" type="checkbox"/>	06/27/22 Hotel/Motel Intl	1,000.00 CAD
<input checked="" type="checkbox"/>	06/27/22 Airfare Intl	1,000.00 CAD

Approver Comments

Approval Chain

**Approve**

You are about to approve this request.

Approver Comments

Approved by manager

**Submit** Cancel

## Approve Using Approve Transactions

Navigate to Manager Self Service>Travel and Expenses>Approve Transactions

The screenshot shows the 'Approve Transactions' interface with the 'Travel Authorizations' tab selected. The table below lists the transactions:

Risk	Alert	Transaction Type	Total	Unit	Name	Employee ID	Description	Transaction ID	Date Submitted	Status	Role
		Expense Report	13.00	CAD	[REDACTED]	[REDACTED]	asdgag	000000073	06/21/2022	Submitted for Approval	Department Manager
⚠️	⚠️	Expense Report	500.00	CAD	[REDACTED]	[REDACTED]	Test	000000076	06/21/2022	Submitted for Approval	Department Manager
⚠️	⚠️	Expense Report	158.00	CAD	[REDACTED]	[REDACTED]	July 2022 expenses	000000081	06/22/2022	Submitted for Approval	Department Manager
⚠️	⚠️	Expense Report	13.00	CAD	[REDACTED]	[REDACTED]	August 2022	000000084	06/23/2022	Submitted for Approval	Department Manager
		Travel Authorization	1100.00	CAD	[REDACTED]	[REDACTED]	Conference in Calgary	000000020	06/23/2022	Submitted for Approval	Travel Authorization Dept App
		Travel Authorization	1600.00	CAD	[REDACTED]	[REDACTED]	Conference in Dallas	000000021	06/23/2022	Submitted for Approval	Travel Authorization Dept App
		Travel Authorization	1500.00	CAD	[REDACTED]	[REDACTED]	Conference in Dallas	000000022	06/23/2022	Submitted for Approval	Travel Authorization Dept App
		Travel Authorization	2083.65	CAD	[REDACTED]	[REDACTED]	Conference in L.A.	000000027	06/27/2022	Submitted for Approval	Travel Authorization Dept App

At this page you originally land on the Overview tab which lists all Expense transactions awaiting approval.

Click on the Travel Authorization tab to see only Travel Authorizations. Click on the Transaction Id to open the Travel Authorization Approval page

The screenshot shows the 'Approve Transactions' interface with the 'Travel Authorizations' tab selected. The table below lists the transactions:

Total	Curr	Budget Status	Name	Employee ID	Description	Transaction ID	Trip Date	Date Submitted	Status	Role
1100.00	CAD	Valid	[REDACTED]	[REDACTED]	Conference in Calgary	000000020	06/27/2022	06/23/2022	Submitted for Approval	Travel Authorization Dept App
1600.00	CAD	Valid	[REDACTED]	[REDACTED]	Conference in Dallas	000000021	07/04/2022	06/23/2022	Submitted for Approval	Travel Authorization Dept App
1500.00	CAD	Valid	[REDACTED]	[REDACTED]	Conference in Dallas	000000022	06/27/2022	06/23/2022	Submitted for Approval	Travel Authorization Dept App
2083.65	CAD	Valid	[REDACTED]	[REDACTED]	Conference in L.A.	000000027	06/29/2022	06/27/2022	Submitted for Approval	Travel Authorization Dept App

Approve Travel Authorization

### Travel Authorization Summary

**General Information**

<b>Description</b>	Conference in L.A.	<b>Authorization ID</b>	000000027
<b>Business Purpose</b>	General Travel & Expense	<b>Reference</b>	
<b>Status</b>	Submitted for Approval	<b>Updated on</b>	06/27/2022 11:12:19AM
<b>Date From</b>	06/29/2022	<b>To</b>	07/06/2022

By [Redacted]

[Attachments](#) [Notes](#)

Accounting Defaults More Options

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

**Details** Personalize | Find |

Expense Type	Date	Amount	Currency	Attachments	Approve
Airfare Intl	06/29/2022	1,000.00	CAD	<a href="#">Attachments</a>	<input checked="" type="checkbox"/>
Breakfast Meal Allowance Intl	06/29/2022	65.00	CAD	<a href="#">Attachments</a>	<input checked="" type="checkbox"/>
Hotel/Motel Intl	06/29/2022	600.00	CAD	<a href="#">Attachments</a>	<input checked="" type="checkbox"/>
Taxi and Uber Intl	06/29/2022	100.00	CAD	<a href="#">Attachments</a>	<input checked="" type="checkbox"/>
Parking	06/29/2022	318.65	CAD	<a href="#">Attachments</a>	<input checked="" type="checkbox"/>

**Totals**

<b>Total</b>	2,083.65	CAD
<b>Less Non-Approved</b>	0.00	CAD
<b>Total Authorized</b>	2,083.65	CAD

**Pending Actions** Personalize | Find |  | First 1-3 of 3 Last

Role	Name	Action	Date/Time
TAAPPROVER	[Redacted]		
TASMT	[Redacted]		
TAPRES	[Redacted]		

**Action History** Personalize | Find |  | First 1 of 1 Last

Role	Name	Action	Date/Time
Employee	[Redacted]	Submitted	06/27/2022 11:12:19AM

**Comments**

[Return to Approval List](#)

[Previous in List](#)

Click on the any of the expense lines, to see the description, attachments as well as the GL account and Department

Approve Travel Authorization

### Expense Detail for Airfare Intl (Line 1)

Authorization ID 000000027

#### About This Expense

Date 06/29/2022 [Attachments](#)

Payment Type Out of Pocket

Expense Billing Code Internal

Airfare Receipt Number

Location

Description TO to LA

Amount 1,000.00 CAD

#### Accounting Summary

Set Personalizations | Find | First 1 of 1 Last

Amount	GL Unit	Account	Alt Acct	Dept	Program
1000.00	FLEMG	53101		131001	

[Update Accounting Detail](#)

Approve Authorization

[Previous Expense](#)

[Next Expense](#)

[Return to Travel Authorization Summary](#)

To return to the approval page, click on Return to Travel Authorization Summary

Approve Travel Authorization

### Expense Detail for Airfare Intl (Line 1)

Authorization ID 000000027

#### About This Expense

Date 06/29/2022 [Attachments](#)

Payment Type Out of Pocket

Expense Billing Code Internal

Airfare Receipt Number

Location

Description TO to LA

Amount 1,000.00 CAD

#### Accounting Summary

Set Personalizations | Find | First 1 of 1 Last

Amount	GL Unit	Account	Alt Acct	Dept	Program
1000.00	FLEMG	53101		131001	

[Update Accounting Detail](#)

Approve Authorization



[Previous Expense](#)

[Next Expense](#)

[Return to Travel Authorization Summary](#)

Click on Approve, or one of the other options as appropriate.

**Comments**

Approved by Manager |  

[Approve](#) [Send Back](#) [Hold](#) [Deny](#)

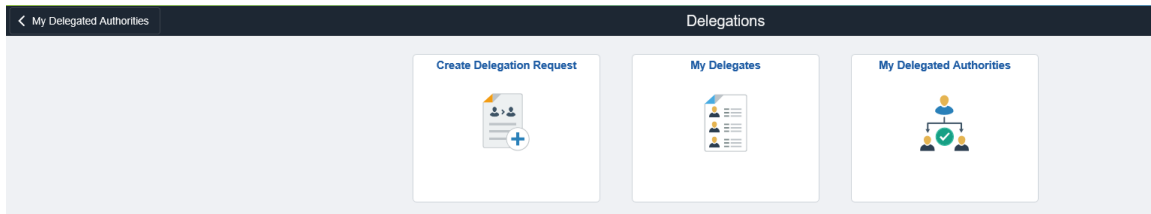
[Return to Approval List](#) [Previous in List](#)



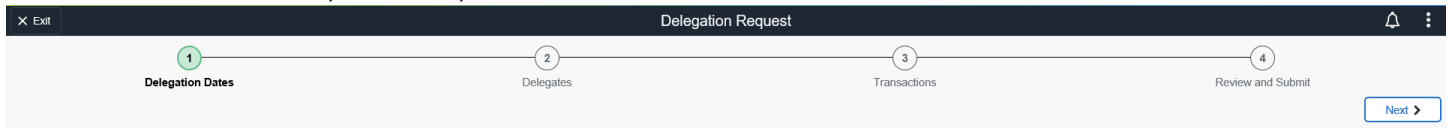
# Delegate Approval Authority

The following steps demonstrate how to create a delegation request for expense reports and travel authorizations. Once a request is created, the appointed delegates will need to accept the request. Delegation is routed to the delegate if an Expense Request or Travel Authorization submit date is within the range of the delegation request.

1. Navigate to **Manager Self Service > Finance Delegations**.
2. Click on the **Create Delegation Request** tile.



3. Enter a start date, end date, and comment. Click Next



### Step 1 of 4: Delegation Dates

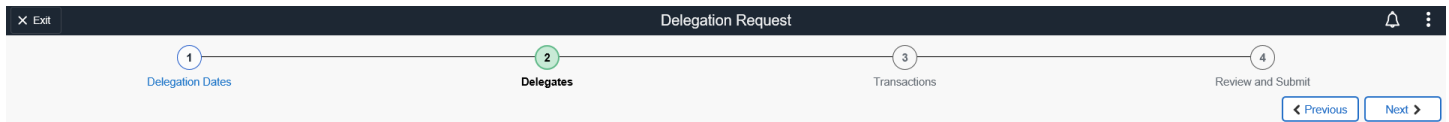
\*Start Date

End Date

Leave blank for open-ended delegations

\*Comment

4. Select delegates or click **Add Delegate** if necessary. Please ensure that the delegate selected is an existing approver. Otherwise they will not have the security access to approve transactions.



### Step 2 of 4: Delegates

Select All Clear All Add Delegate

4 rows

Name	Email ID	Phone
<input type="checkbox"/> Annie Lam	Annie.Lam@flemingcollege.ca	
<input type="checkbox"/> Leah Koehler	kamal.atyani@flemingcollege.ca	
<input type="checkbox"/> Linda J. Humphries	kamal.atyani@flemingcollege.ca	
<input checked="" type="checkbox"/> Mark Morden	kamal.atyani@flemingcollege.ca	

5. Select the transaction(s) to delegate. Click Next.

The screenshot shows the 'Delegation Request' application interface. At the top, there is a progress bar with four steps: 1. Delegation Dates, 2. Delegates, 3. Transactions (highlighted in green), and 4. Review and Submit. Below the progress bar, there are buttons for '< Previous' and 'Next >'. The main content area is titled 'Step 3 of 4: Transactions' and includes buttons for 'All', 'Approve', and 'Initiate'. There are also 'Select All' and 'Clear All' buttons. A table with the following content is visible:

Description
<input checked="" type="checkbox"/> Expense Reports
<input checked="" type="checkbox"/> Travel Authorization

2 rows

6. Review and submit delegation request.

The screenshot shows the 'Delegation Request' application interface at Step 4 of 4: Review and Submit. The progress bar now highlights Step 4 in green. Below the progress bar, there are buttons for '< Previous' and 'Submit'. The main content area is titled 'Step 4 of 4: Review and Submit' and includes a 'Delegation Details' section with the following information:

Start Date	23/05/2022
End Date	31/05/2022
Comment	Vacation coverage
Delegates	Mark Morden
Transactions	Expense Reports Travel Authorization

7. The appointed delegates will receive an email stating that they have been requested as a delegate together with a link to accept the delegation. **Delegates must click the link and accept the delegation to complete the process.**

John Pacey or an administrator on behalf of John Pacey has submitted a delegation request to you.

Transaction(s): Vacation coverage: Expense Reports, Travel Authorization  
From: 2022-05-23  
To: 2022-05-31

You can review the request, then accept or reject the request, using the link below.

[https://fpltp.flemingc.on.ca/psp/FPLTP/EMPLOYEE/ERP/c/EODL\\_ALL.EODL\\_MY\\_DLGT\\_AUTH.GBL?Page=EODL\\_DLGT\\_AUTH\\_PG&Action=U&EODL\\_DELEGATOR\\_OID=jpacey&EODL\\_DELEGATOR\\_RCD=0&TRANSACTION\\_NAME=Travel%20Authorization&EODL\\_TRAN\\_ALLOWED=A&FROM\\_DATE=2022-05-23&EODL\\_PROXY\\_OID=mmorden](https://fpltp.flemingc.on.ca/psp/FPLTP/EMPLOYEE/ERP/c/EODL_ALL.EODL_MY_DLGT_AUTH.GBL?Page=EODL_DLGT_AUTH_PG&Action=U&EODL_DELEGATOR_OID=jpacey&EODL_DELEGATOR_RCD=0&TRANSACTION_NAME=Travel%20Authorization&EODL_TRAN_ALLOWED=A&FROM_DATE=2022-05-23&EODL_PROXY_OID=mmorden)

[↩ Reply](#) [➡ Forward](#)

Active Accepted Ended Rejected Revoked **Submitted**

Accept Reject



Transactions	Delegator	Start Date / End Date	Request Status
<input checked="" type="checkbox"/> Expense Reports, Travel Authorization	John Pacey	05/23/2022 05/31/2022	Submitted

Are you sure you want to accept the selected delegations?

Yes No