

## TRAVEL APPLICATION

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### Approvals

## HELPFUL HINTS

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Once a report is approved, the approver can only view the *approval log* and *approval flow*. An approved report will remain in the *approved* tab until the expense is sent for payment.



#### Supported browsers:

- PC: Chrome and Edge
- Macintosh: Chrome and Safari

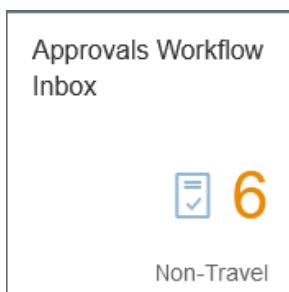
## PROCEDURE

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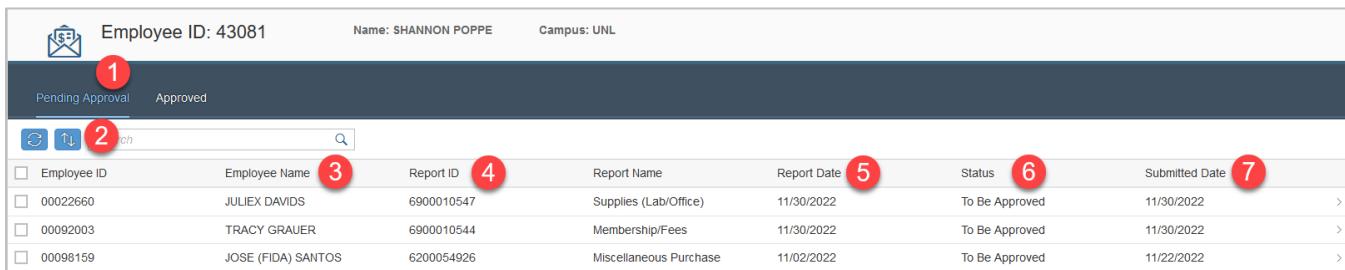
Within Firefly, click on the *Travel and Expense Reporting* tile.



The travel page appears. Click *Approvals Workflow Inbox*. Note: A/P processors will select *Payment Services Processing Inbox*.



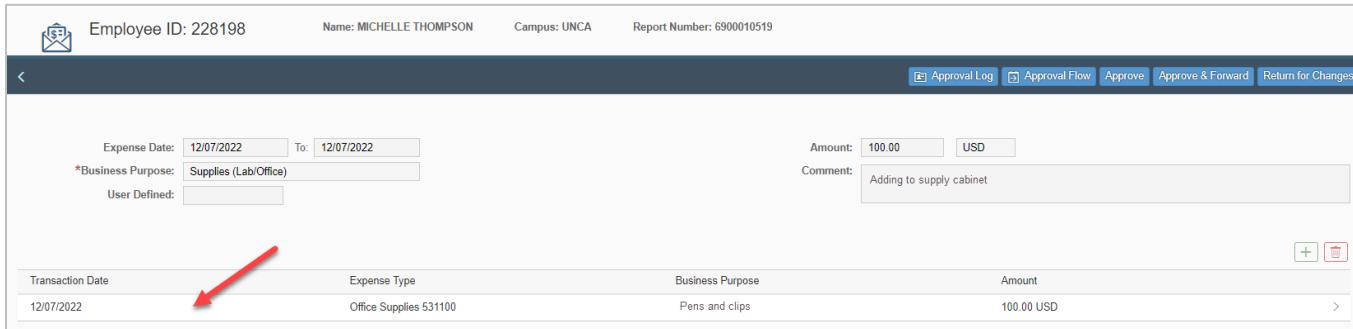
The application opens and displays reports per the individual employee.



Employee ID: 43081	Name: SHANNON POPPE	Campus: UNL
<span style="border: 1px solid #ccc; border-radius: 50%; padding: 2px 5px; margin-right: 5px;">1</span> <span>Pending Approval</span> <span>Approved</span>		
<span style="border: 1px solid #ccc; border-radius: 50%; padding: 2px 5px; margin-right: 5px;">2</span>	Employee Name <span style="border: 1px solid #ccc; border-radius: 50%; padding: 2px 5px; margin-left: 5px;">3</span>	Report ID <span style="border: 1px solid #ccc; border-radius: 50%; padding: 2px 5px; margin-left: 5px;">4</span>
<span style="border: 1px solid #ccc; border-radius: 50%; padding: 2px 5px; margin-right: 5px;">5</span>	Report Name	Report Date <span style="border: 1px solid #ccc; border-radius: 50%; padding: 2px 5px; margin-left: 5px;">6</span>
<span style="border: 1px solid #ccc; border-radius: 50%; padding: 2px 5px; margin-right: 5px;">7</span>	Status	Submitted Date
<input type="checkbox"/> 00022660	JULIEX DAVIDS	6900010547
<input type="checkbox"/> 00092003	TRACY GRAUER	6900010544
<input type="checkbox"/> 00098159	JOSE (FIDA) SANTOS	6200054926
	Supplies (Lab/Office)	11/30/2022
	Membership/Fees	11/30/2022
	Miscellaneous Purchase	11/02/2022
	To Be Approved	11/30/2022
	To Be Approved	11/30/2022
	To Be Approved	11/22/2022

1. The banner defaults to *Pending Approval*.
2. Sort columns.
3. Employee who submitted the report.
4. Report ID.
5. Report date.
6. Status of the report (open, submitted, or approved). i Approved status can be at any step within the approval process.
7. Submitted date.

Click on an expense report to open and review. The report header and details appear. Click the expense line to view details and the attached receipt.



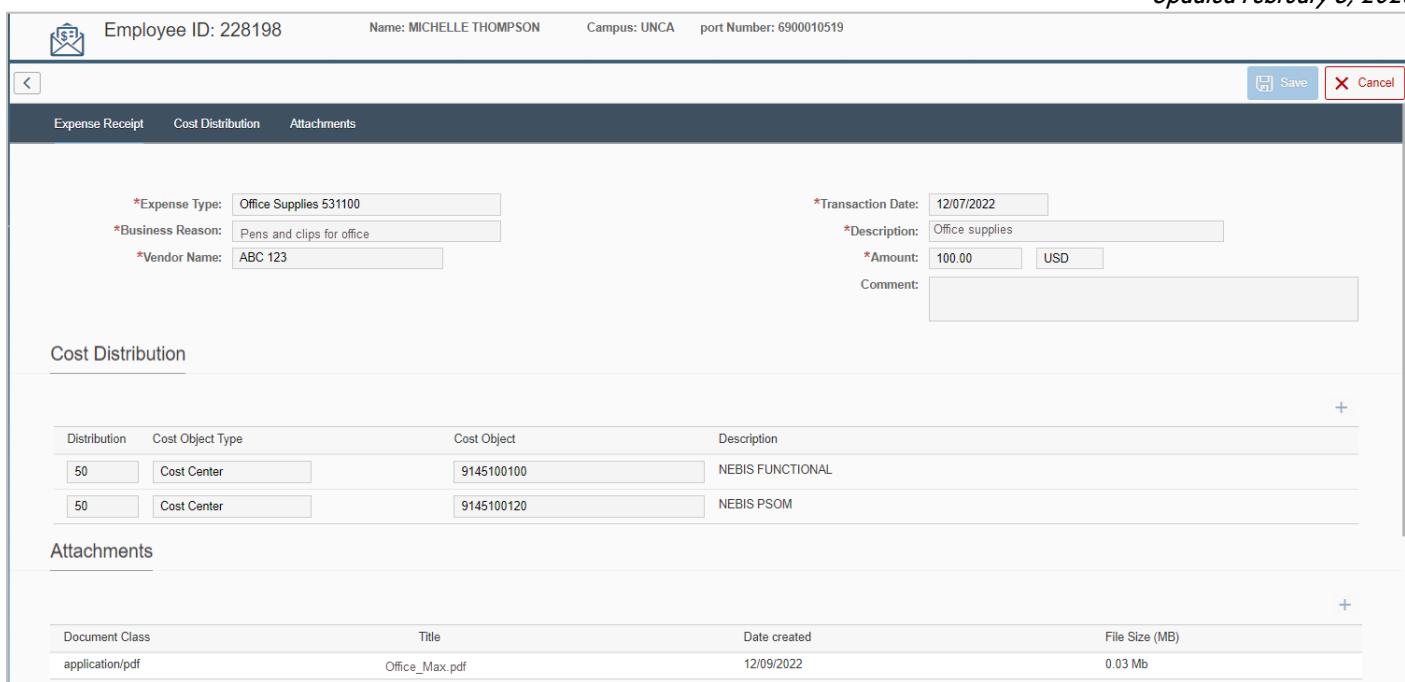
Employee ID: 228198	Name: MICHELLE THOMPSON	Campus: UNCA	Report Number: 6900010519
<span style="border: 1px solid #ccc; border-radius: 50%; padding: 2px 5px; margin-right: 5px;">1</span> <span>Approval Log</span> <span>Approval Flow</span> <span>Approve</span> <span>Approve &amp; Forward</span> <span>Return for Changes</span>			
Expense Date: <input type="text" value="12/07/2022"/>	To: <input type="text" value="12/07/2022"/>	Amount: <input type="text" value="100.00"/>	USD
*Business Purpose: <input type="text" value="Supplies (Lab/Office)"/>	User Defined: <input type="text"/>	Comment: <input type="text" value="Adding to supply cabinet"/>	
Transaction Date	Expense Type	Business Purpose	Amount
12/07/2022	Office Supplies 531100	Pens and clips	100.00 USD

The expense line shows detailed information, including cost distribution and the attached receipt.

## APPROVALS: ACTING ON A NON-TRAVEL EXPENSE REPORT

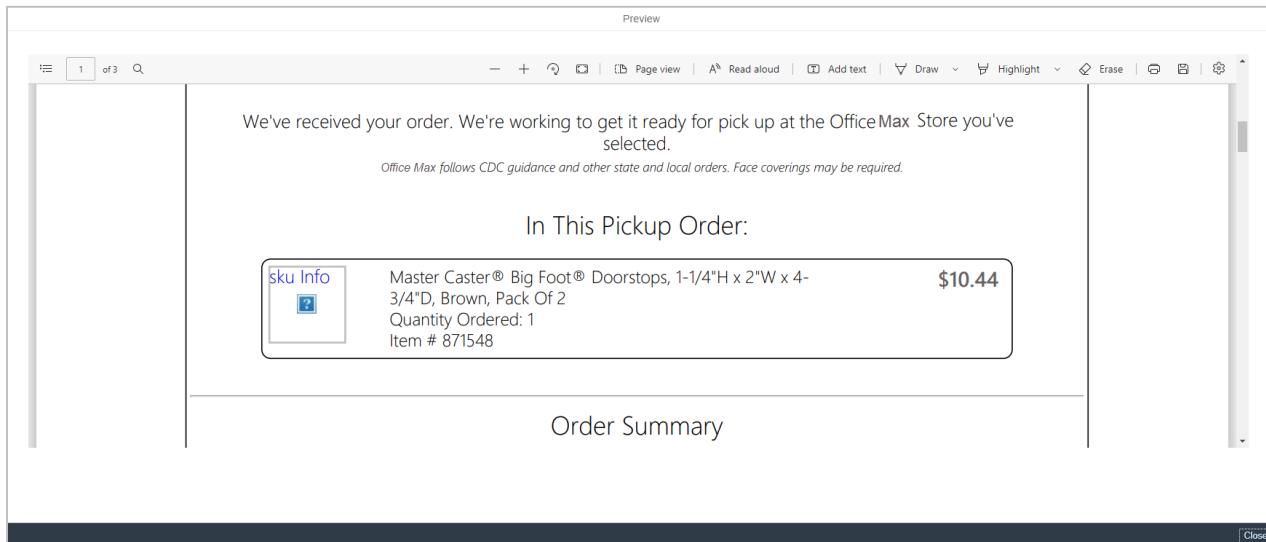
## Travel Quick Reference Guide

Updated February 6, 2023



The screenshot shows a web-based expense report form. At the top, it displays the employee ID (228198), name (MICHELLE THOMPSON), campus (UNCA), and port number (6900010519). Below this is a toolbar with a back arrow, a save button, and a cancel button. The main content area is divided into sections: 'Expense Receipt' (containing fields for expense type, business reason, vendor name, transaction date, description, amount, and comment), 'Cost Distribution' (listing cost center assignments), and 'Attachments' (listing a single PDF file named 'Office\_Max.pdf' with a file size of 0.03 Mb). The 'Attachments' section includes a note: 'Click anywhere on the attachment line to view the receipt. Receipt image appears in a pop-up window.'

Click anywhere on the attachment line to view the receipt. Receipt image appears in a pop-up window.



Click **Close** when finished reviewing the attachment.

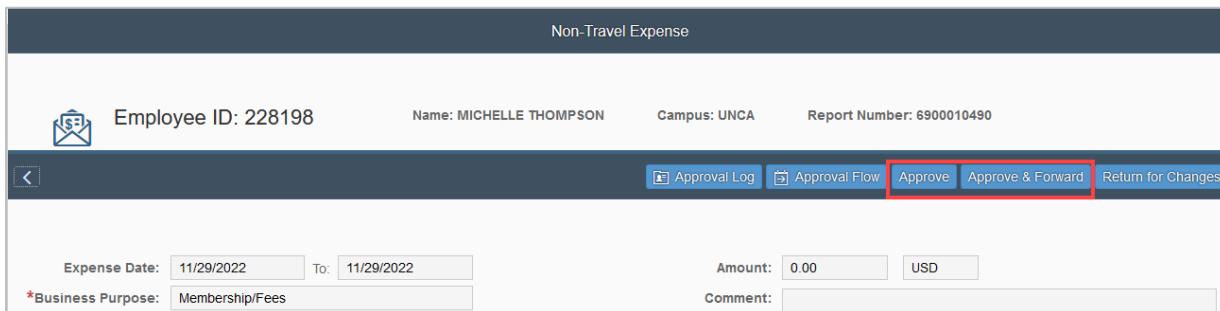
When finished reviewing the expense line, click **Cancel**. Continue to review expense lines if applicable.

## APPROVALS: ACTING ON A NON-TRAVEL EXPENSE REPORT

## Travel Quick Reference Guide

Updated February 6, 2023

When ready to act upon the non-travel expense, several options are available: *approve*, *approve & forward*, and *return for changes*.



Non-Travel Expense

Employee ID: 228198 Name: MICHELLE THOMPSON Campus: UNCA Report Number: 6900010490

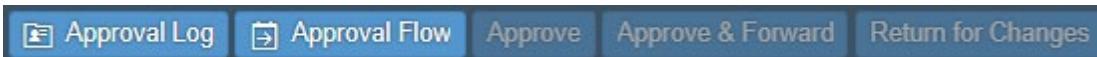
Expense Date: 11/29/2022 To: 11/29/2022 Amount: 0.00 USD

\*Business Purpose: Membership/Fees Comment:

Approval Log Approval Flow **Approve** **Approve & Forward** Return for Changes

Click **Approve** to approve and move the expense to the next step in the approval process. Click **Approve & Forward** to approve and select an ad-hoc approver to assign as the next step in the approval process.

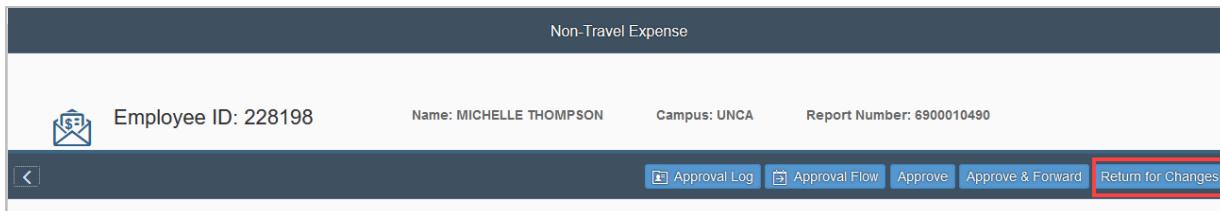
Once an expense has been approved, the *approve*, *approve & forward*, and *return for changes* buttons are no longer active.



Approval Log Approval Flow **Approve** **Approve & Forward** **Return for Changes**

## RETURN A REPORT

To return a report, click **Return for Changes**.

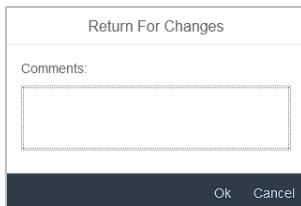


Non-Travel Expense

Employee ID: 228198 Name: MICHELLE THOMPSON Campus: UNCA Report Number: 6900010490

Approval Log Approval Flow **Approve** **Approve & Forward** **Return for Changes**

Enter a comment in the pop-up window and click *ok*.



Return For Changes

Comments:

Ok Cancel

## VIEW THE APPROVAL LOG AND APPROVAL FLOW

Click  **Approval Log** to review the status, date, and time of the approval process.

Approval Log							
User ID	Step	Status	Start Date	Start Time	Approval Date	Approval Time	Comments
Michelle Thompson	Financial Approver	Approval Pending	12/02/2022	10:00:59			
Melody Stark	Supervisor	Approved	12/02/2022	09:51:10	12/02/2022	10:00:58	

Click  **Approval Flow** to review the approval flow showing the approval steps and personnel to act on this expense report including supervisor, financial approver, and A/P audit.

