TRAVEL APPLICATION

Approvals

HELPFUL HINTS

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

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

Travel and Expense Reporting

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

Approvals Workflow Inbox

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Non-Travel
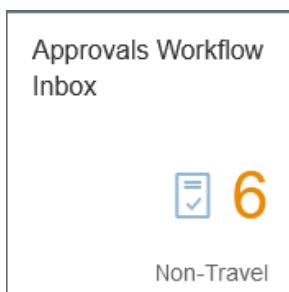
The application opens and displays reports per the individual employee.

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). 💬 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.

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

Click anywhere on the attachment line to view the receipt. Receipt image appears in a pop-up window.
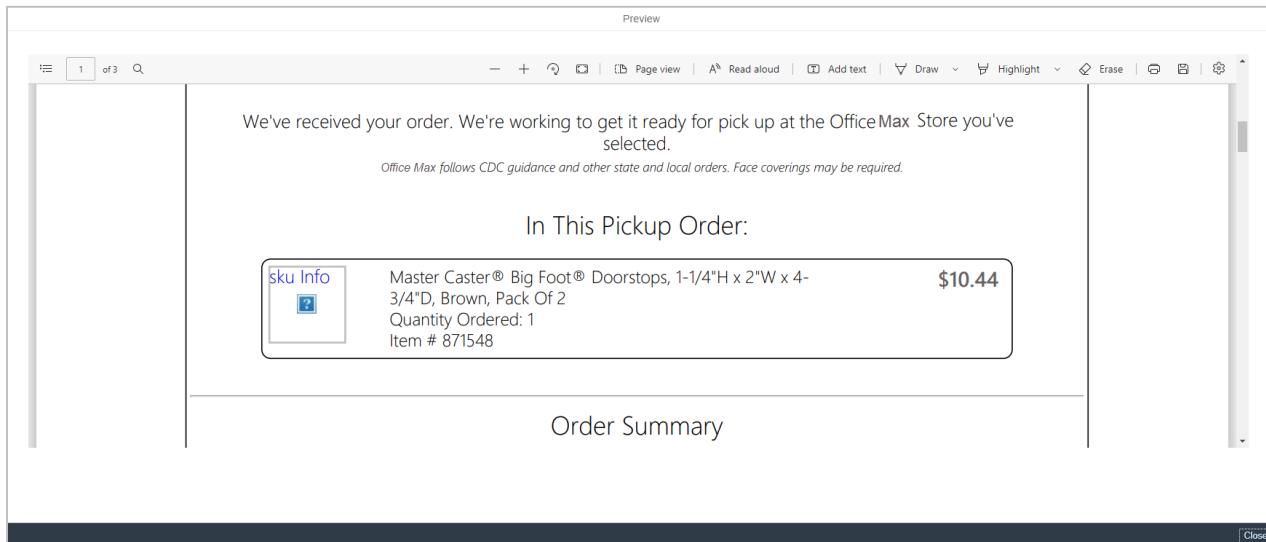
Click **Close** when finished reviewing the attachment.

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

When ready to act upon the non-travel expense, several options are available: *approve, approve & forward, and return for changes.*
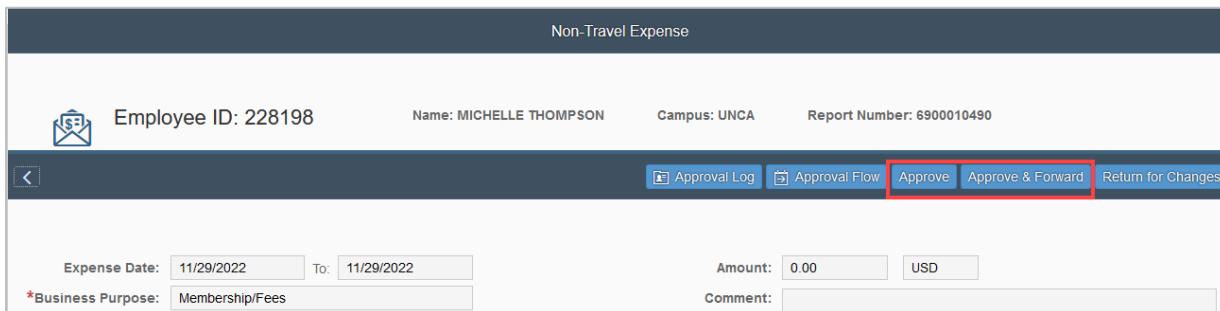
Click [Approve] to approve and move the expense to the next step in the approval process. Click [Approve & Forward] to approve and select an ad-hoc approver to assign as the next step in the approval process.

Once an expense has been approved, the *approve*, *approve & forward*, and *return for changes* buttons are no longer active.
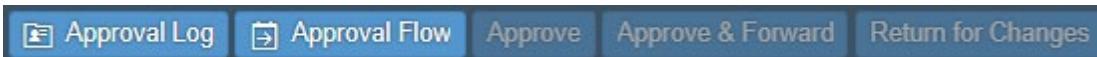
RETURN A REPORT

To return a report, click [Return for Changes].
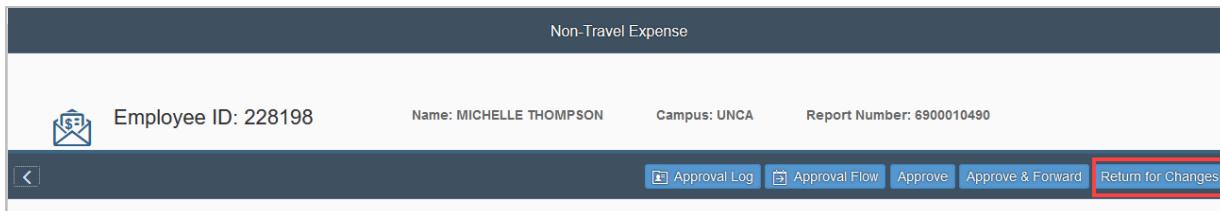
Enter a comment in the pop-up window and click *ok.*
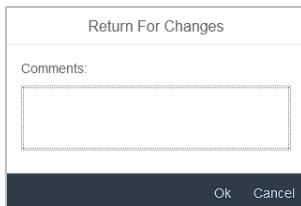
VIEW THE APPROVAL LOG AND APPROVAL FLOW

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.