APPROVER INSTRUCTIONS

This guide provides information needed for an approver to manage transactions. Within this guide, you will learn how to:

- Review and sign off on a transaction

Review and Sign Off on a Transaction

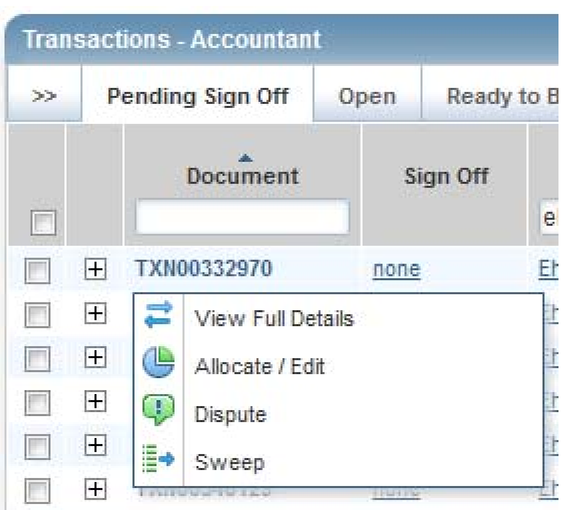
NOTE: Approvers are usually not required to edit the account number or enter a description. The approver should review the transaction to determine that it is a reasonable, appropriate and legitimate transaction for the department. If you are required to edit the account number and subcodes, see the instructions for accountholder.

Procedure:

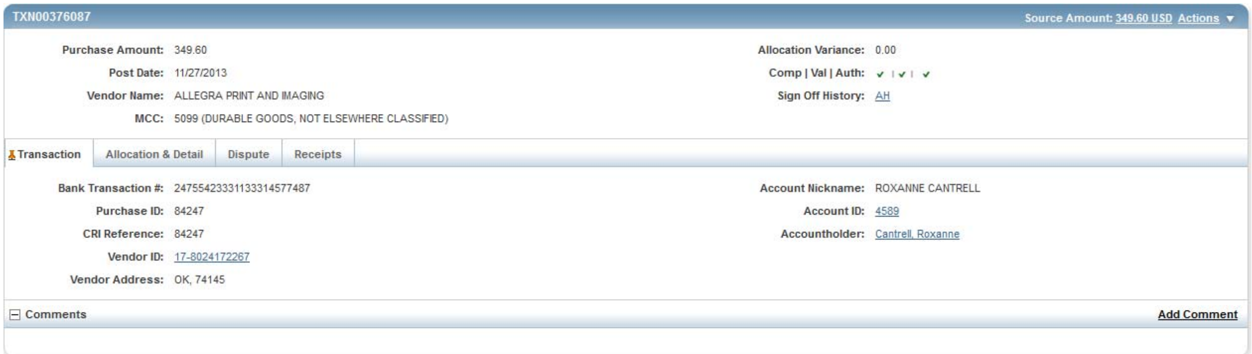
To review a transaction, complete the following:

1. On the **Home Page** under **Expenses>Transactions>Approver**, click on the **Pending** link. The **Pending Sign Off** screen is displayed.

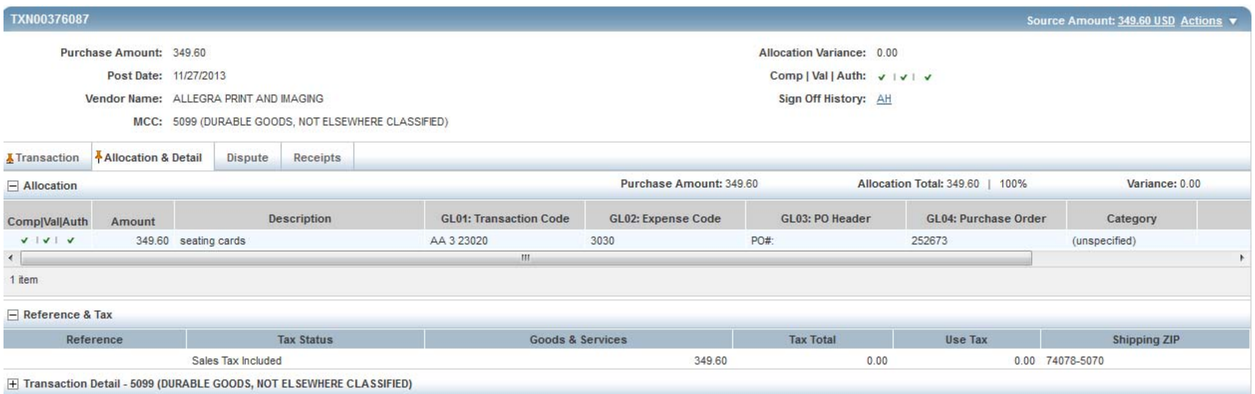
2. Click the desired **Document** number**.** A menu displays.



3. Select **View Full Details**. The **Transaction Details** screen displays.

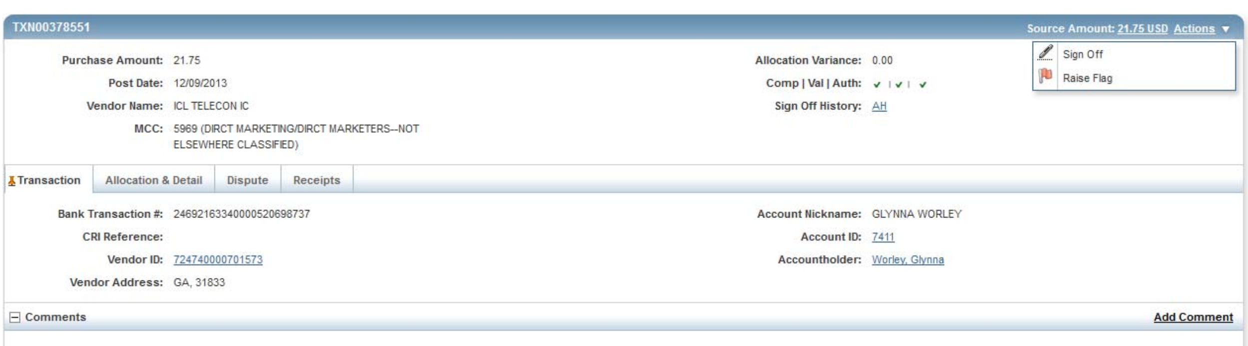


4. Select the **Allocation & Detail** tab.



5. Read the description entered into the **Description** field by the accountholder. To the best of your ability determine if this is a reasonable, authorized, legitimate transaction for the University, and the account number and subcode are correct.

6. In the upper right corner of the **Allocation & Detail** tab, click on the **Actions** drop down menu.



7. Click **Sign Off**. The **Confirm Sign Off** screen displays.

8. Click **OK**.

9. This completes the procedure.