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## EX.020.302 - Using the Summary Approvals page (Core)

#### Trigger:

#### Concept

This topic demonstrates how to use the Summary Approvals page through the Core application. There are three methods which can be used to review and approve expenses transactions: Email Notification, Worklist and the Summary Approvals page. The Summary Approvals page can be accessed through the Core system or the Self-Service Portal (see business process EX.020.301).

Each of these methods provides the approver with the same set of options: Approve, Deny, Send Back, Hold, and Budget Check. The main difference is the navigation used to reach these approval options.

Through the Summary Approvals page, you can view all transactions or limit the scope by using one of these active tabs: Expense Reports, Travel Authorizations, Cash Advances, and Errors. In addition, you can take an approval action on all or selected transactions.

For more information on the other approval methods, see Business Process EX.020.300, Understanding Approval Methods.

**Topic Objectives:**

Upon completion of this topic, you will be able to:

- Identify the purpose of the Summary Approvals page.

- Identify the actions that can be completed on the Summary Approvals page.

- Use the Summary Approvals page.

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| Assumptions |
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| Dependencies/Constraints |
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#### Additional Information

#### Procedure

For this topic, we are going to review the Summary Approvals page through the Core system. Let’s see how this is done.

| Step | Action |
| --- | --- |
|  | Click the **Travel and Expenses** link. |
|  | Click the **Approve Transactions** link in the Travel and Expenses Menu. |
|  | Click the **Approve Transactions** link in the Approve Transactions Menu. |
|  | There are 7 tabs across the top of this menu which can limit your scope if you wish to focus on a particular type of transaction.  **Overview**,**Expense Reports**, Time Reports (not used), Time Adjustments (not used), **Travel Authorizations**, **Cash Advances**, and **Errors**. |
|  | In the Description column, you can click on any of the transactions that are listed to review the details for that report. |
|  | Click an entry in the **Description** column to view the details of the transaction. |
|  | When the transaction is displayed, you can review the details of the report to determine the appropriate action (e.g. approve, send back, deny, etc) |
|  | Click the **vertical** scrollbar to navigate to the bottom of the page. |
|  | There are three options at the bottom that you may select from.  **Return to Approval List**,**Next in List** and **Previous in List**.  If you wish to look at transaction details without returning to the main menu, the **Next in List** and **Previous in List** links function as forward and back buttons. |
|  | Click the **Return to Approval List** link. |
|  | There are five main actions that can be completed on this page. This can be thought of as "one stop shopping."  **Approve**,**Review**,**Send Back**,**Hold**, and **Budget Check**. |
|  | Transactions can be individually selected, or the **Select All**button near the top left corner of the screen can be used. |
|  | Click the **Select All** link. |
|  | For this example, you can assume that the transactions have already been successfully budget checked and reviewed for accuracy and compliance.  Click the **Approve** button. |
|  | You are asked to provide an **Approval Confirmation** before the action is performed. Double check the type and number of transactions that you are approving before clicking the **OK** button. |
|  | Click the **OK** button. |
|  | Congratulations. You have just completed the **Using the Summary Approvals Page (Core)** topic. Below is a summary of the key concepts of this lesson:  - Through the Summary Approvals page in the Core application, you can review and take approval actions on expense transactions.  - Through the Summary Approvals page, you can take one of the following approval actions on expense transactions: Approve, Deny, Send Back, Hold, and Budget Check.  - By using the Summary Approvals page, you can choose to take an approval action on more than one expense transaction at a time.  **End of Procedure.** |