

### 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

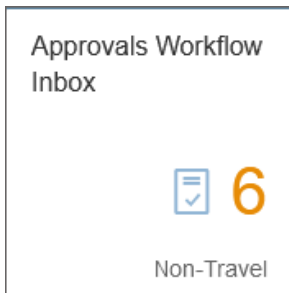
### PROCEDURE

---

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



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



# APPROVALS: ACTING ON A NON-TRAVEL EXPENSE REPORT

Updated February 6, 2023

The application opens and displays reports per the individual employee.

Employee ID	Employee Name	Report ID	Report Name	Report Date	Status	Submitted Date
00022660	JULIEX DAVIDS	6900010547	Supplies (Lab/Office)	11/30/2022	To Be Approved	11/30/2022
00092003	TRACY GRAUER	6900010544	Membership/Fees	11/30/2022	To Be Approved	11/30/2022
00098159	JOSE (FIDA) SANTOS	6200054926	Miscellaneous Purchase	11/02/2022	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). 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.

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

Updated February 6, 2023

Employee ID: 228198    Name: MICHELLE THOMPSON    Campus: UNCA    port Number: 6900010519

Save    Cancel

Expense Receipt    Cost Distribution    Attachments

\*Expense Type: Office Supplies 531100  
\*Business Reason: Pens and clips for office  
\*Vendor Name: ABC 123

\*Transaction Date: 12/07/2022  
\*Description: Office supplies  
\*Amount: 100.00    USD  
Comment:

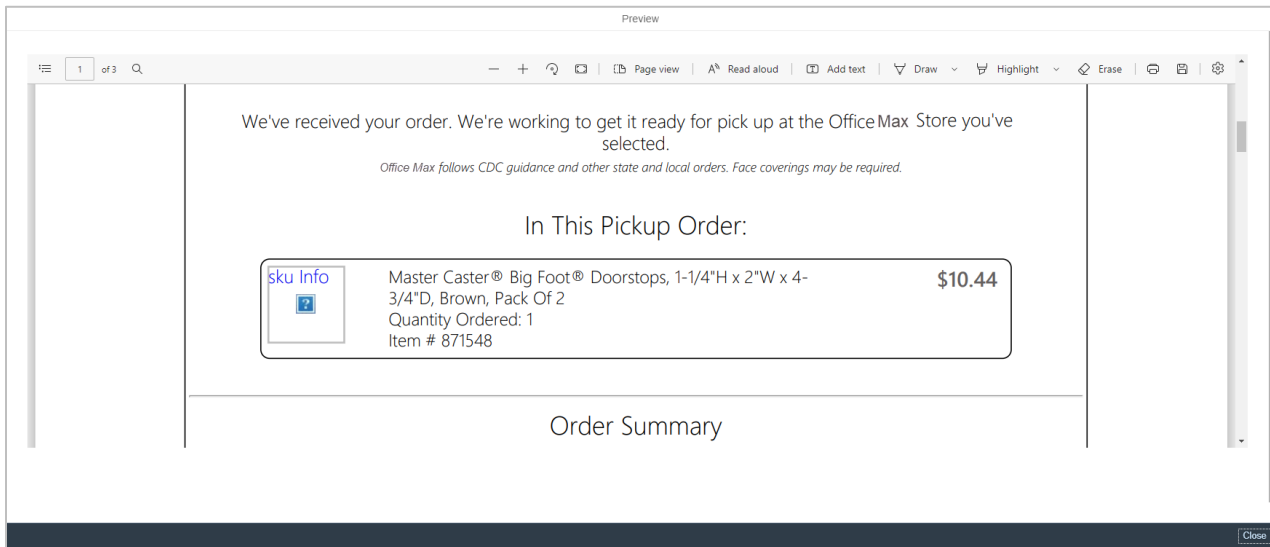
Cost Distribution

Distribution	Cost Object Type	Cost Object	Description
50	Cost Center	9145100100	NEBIS FUNCTIONAL
50	Cost Center	9145100120	NEBIS PSOM

Attachments

Document Class	Title	Date created	File Size (MB)
application/pdf	Office_Max.pdf	12/09/2022	0.03 Mb

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.

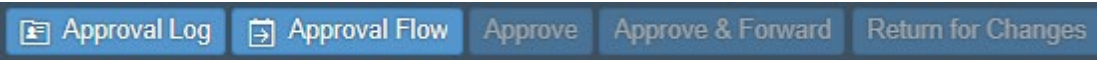
APPROVALS: ACTING ON A NON-TRAVEL EXPENSE REPORT

Updated February 6, 2023

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*.

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

*Updated February 6, 2023*

[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.

