## Overview

- When an employee submits an Authorization Request, it is sent to their respective line manager for approval.
- Line managers receive notifications each time a report is submitted that requires them to take an action.
- The line manager receives the full information of the request. The amount, submitting user, and the individual estimated expense items are all visible.
- Line managers have the option to approve or reject the request and add their comments.
- There are options for additional actions a line manager can perform, in place of or in addition to approving or rejecting.

Note: Approved Authorizations will expire after 180 days if not used or applied to an expense item. Requests will check if budget funds are available, but funds are not reserved (encumbered) by the authorization request. There is no need to remove or delete an unused authorization request.
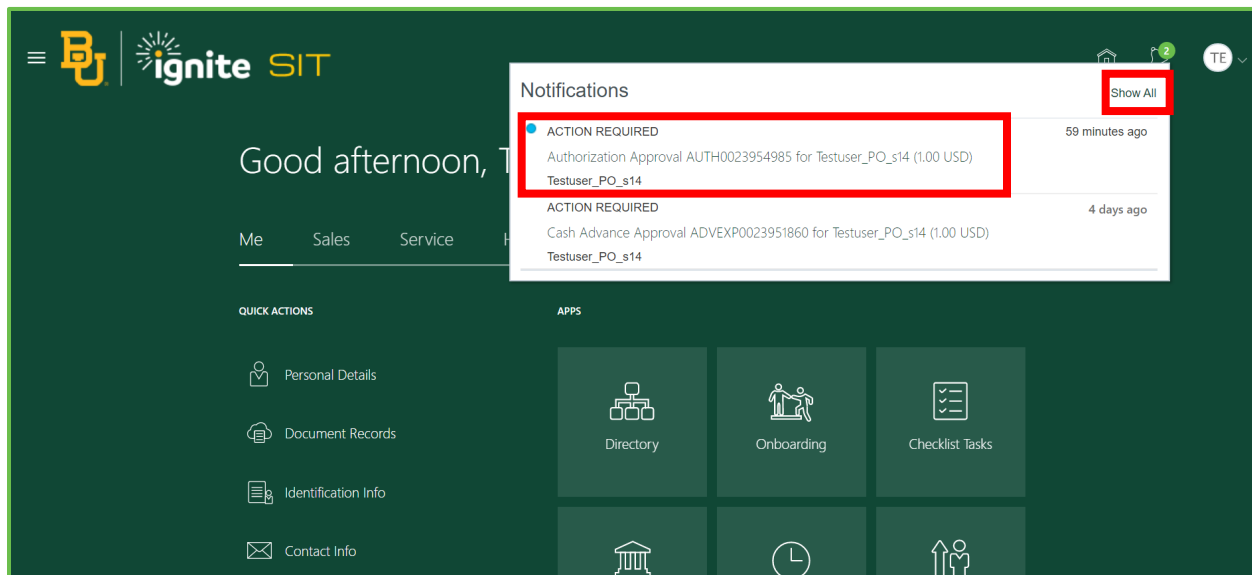
1. Opening a Submitted Authorization Request

1. To view submitted **Authorization Requests**, click on the **Notifications Bell** in the top right corner of the screen.
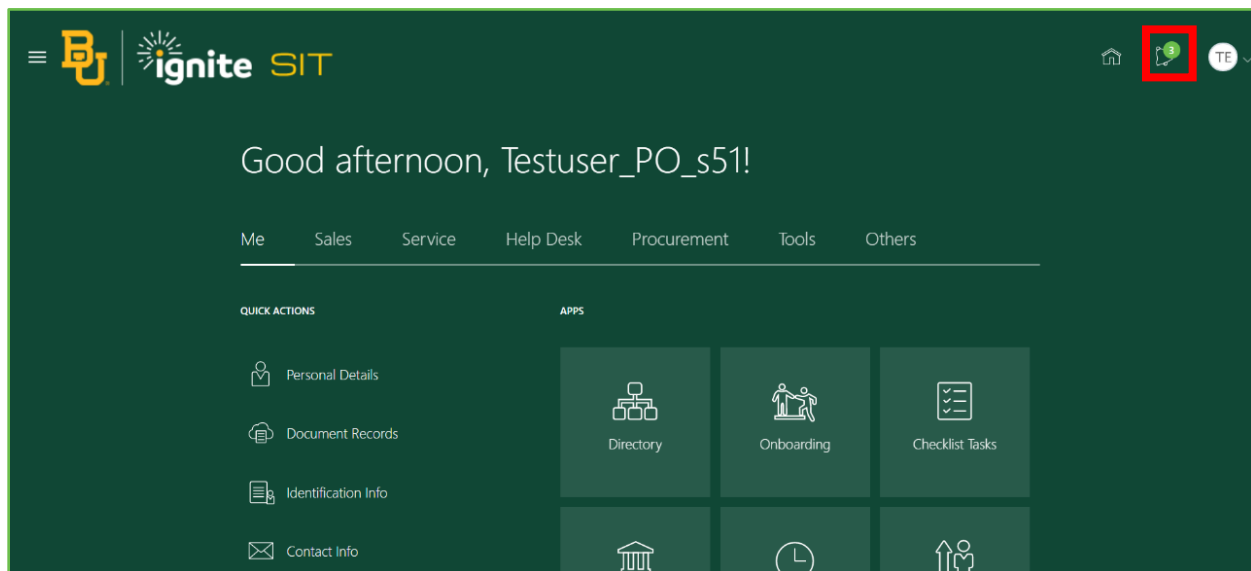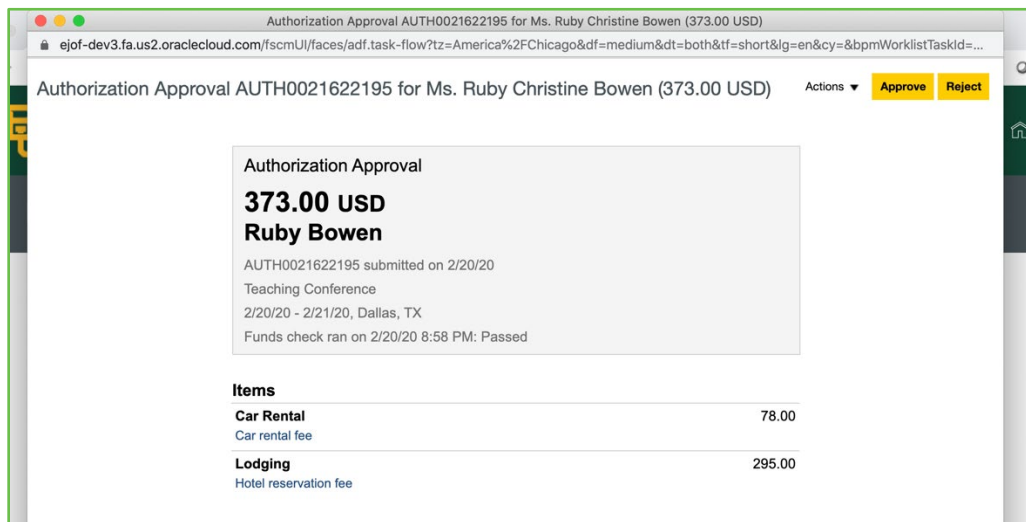

2. Select the **Authorization Request** you wish to manage by clicking on the link from the displayed list. If it is not showing in the most recent notifications, select "**Show All**" to view all the notifications available to you and select the link from there.

3. A **pop-up window** will open containing the selected **Authorization Request.**
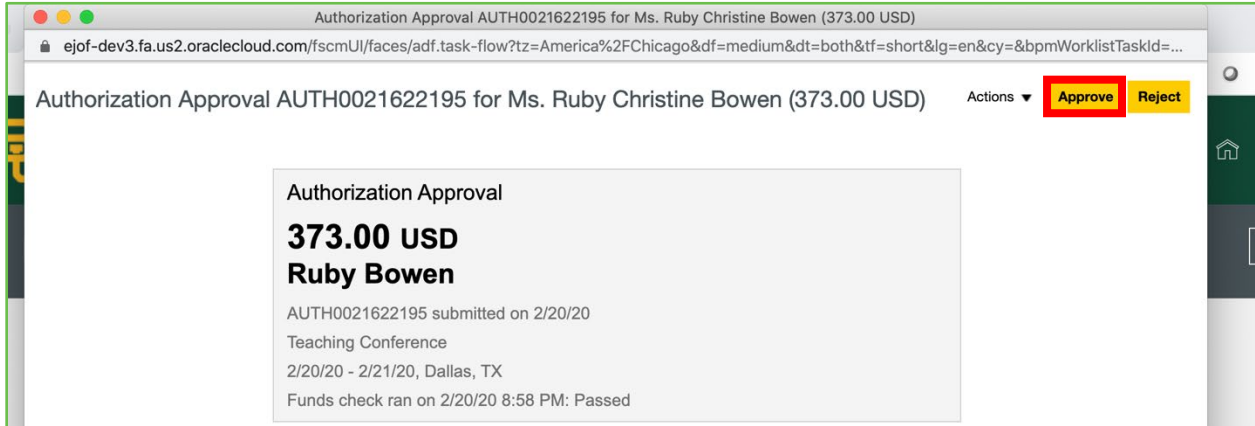

2. Approving an Authorization Request

1. When the selected **Authorization Request** opens, review the information displayed on the page. The **authorization amount**, **submitting user**, and other details are shown, including individual **estimated expense items**. The date and time of a **funds check** are displayed with the corresponding pass or fail status.

> **Note**: *The funds check does <u>not</u> reserve the funds necessary to cover the expense. The funds check only confirms that the funds are available for use at the time of the authorization.*
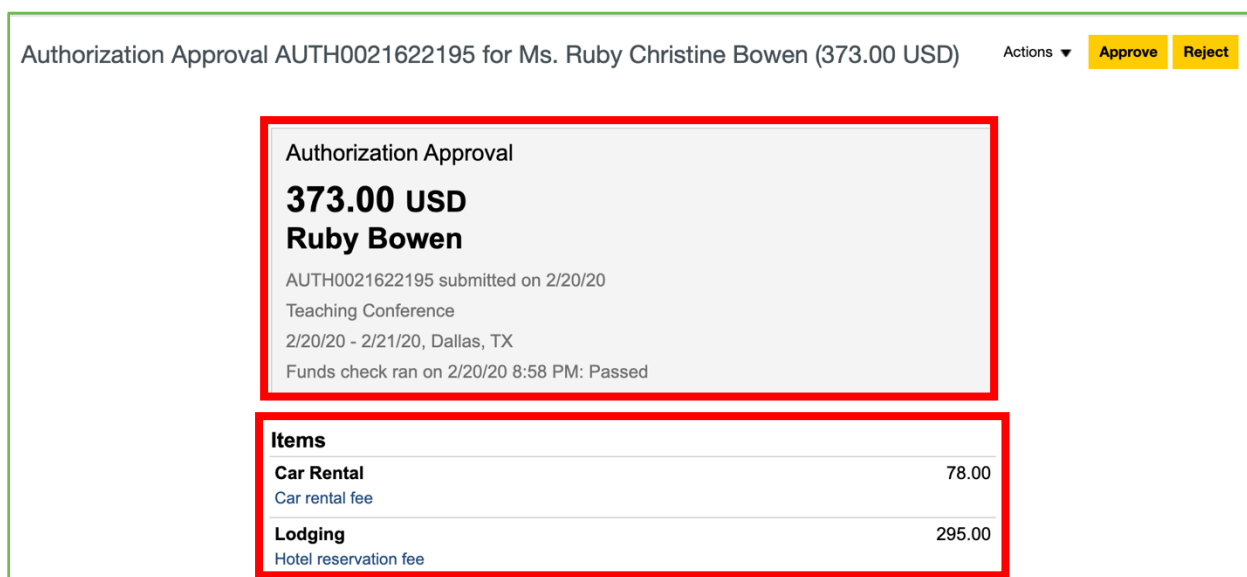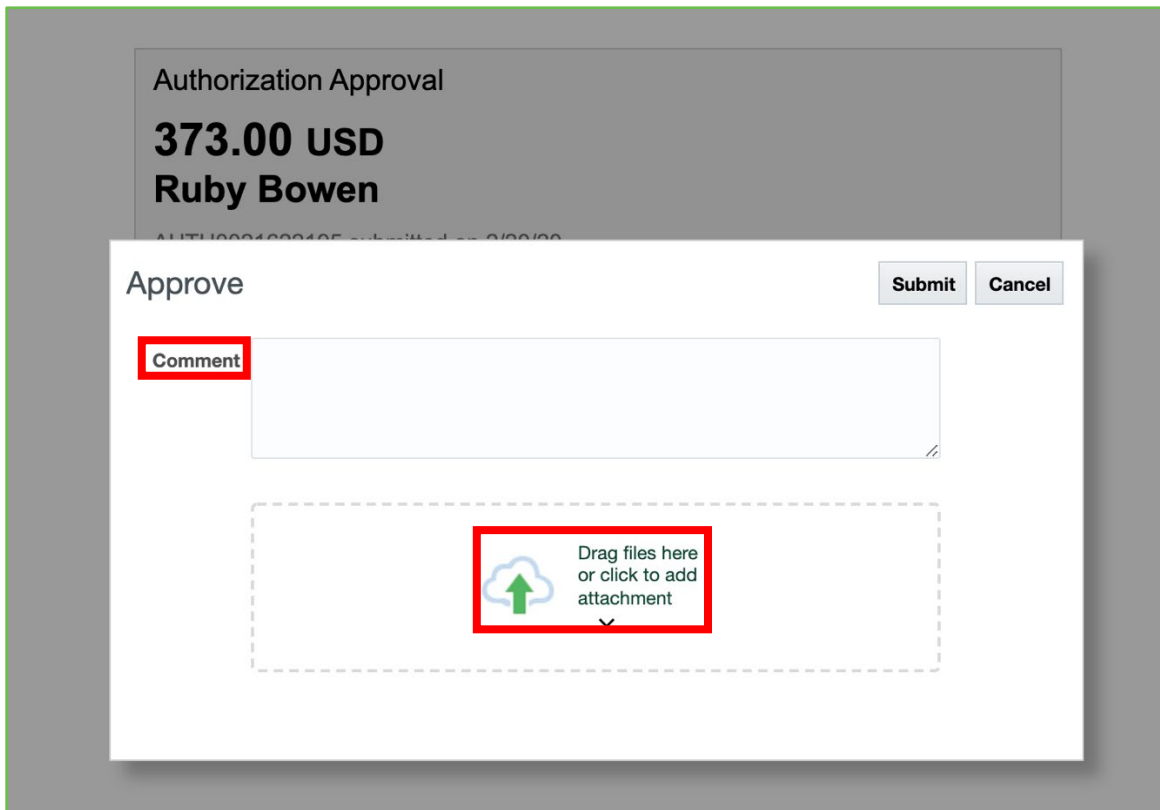
2. Click the "**Approve**" button in the top right corner to approve the **request**.
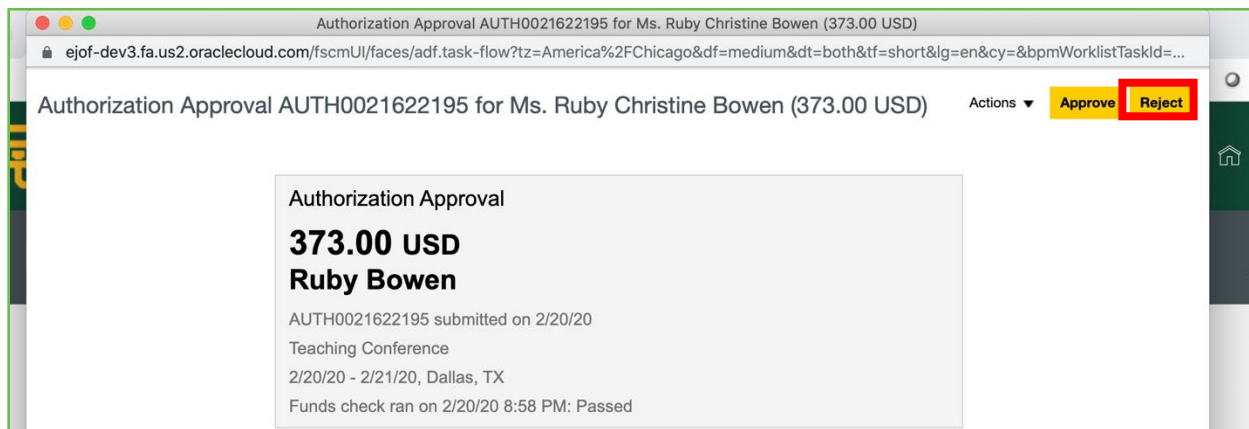

3. Add any optional **comments** or **attachments**.

4. Click "**Submit**".
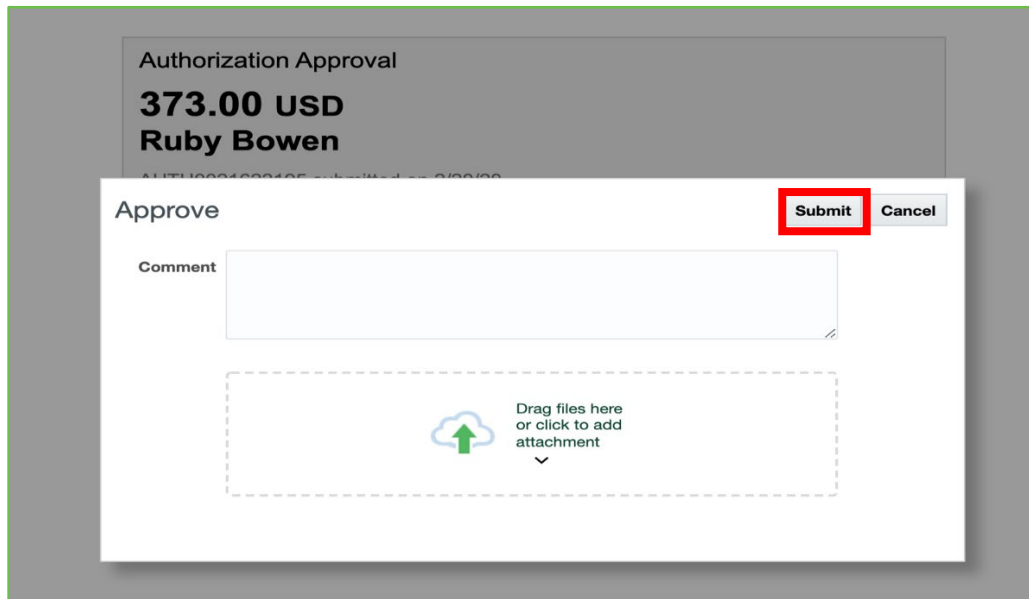
3. Reject an Authorization Request

1. After the review of the selected **Authorization Request** is complete and it is determined the request should be rejected. Click the "**Reject"** button in the top right corner to reject the **request**.
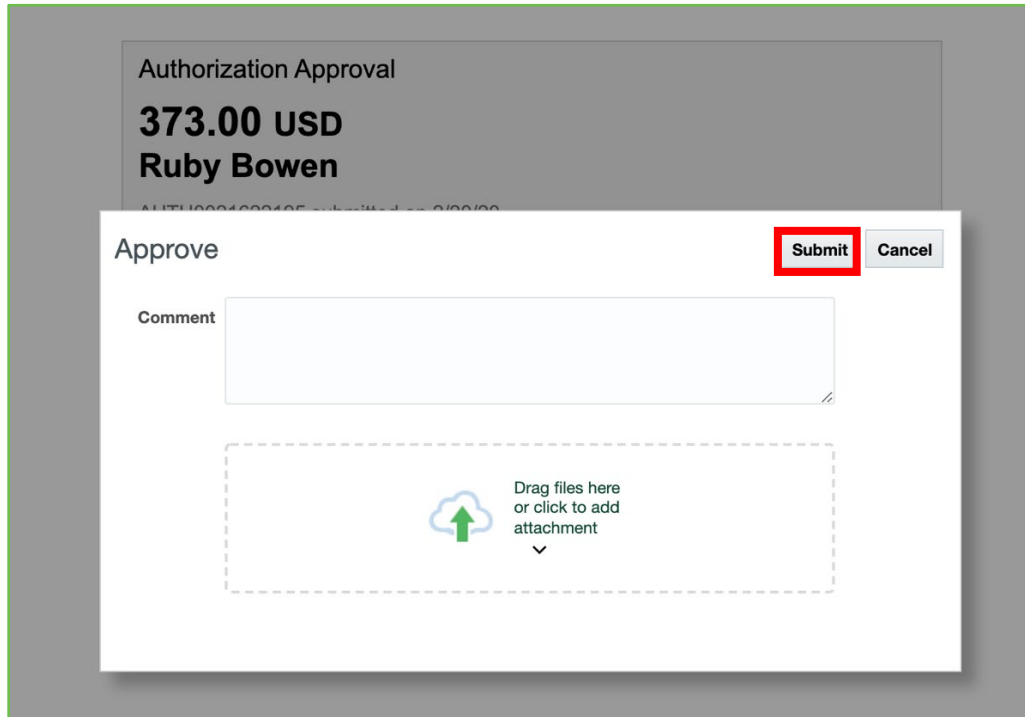
2. Add reason(s) for Rejection in the **Comment** field and any **attachments** as needed.

3. Click "**Submit**".

4. Other Actions

1. After review of the selected **Authorization Request** is complete, and it is determined the request should not be approved or rejected, you have the option to take **Additional Actions**. To view the available actions, click the "**Actions**" drop down in the top right.

2. Click the link of the **action** you wish to take and follow the instructions.
    a. **Check Funds** – this option allows you to do a recheck of funds if the Authorization request and its estimated expense have available funds to take from based on current system budgets.
    b. **View Results** – With this option, you can view the results of a performed funds check. The results can be viewed by Control Budgets or Transaction Lines.
    c. **Request Information** – Submit a request for more information to the employee about the request. Employees can only respond with a workflow comment. If the employee needs to modify the report, this action is not recommended!
    d. **Delegate** – Delegates the user's approval authority to another user to complete this task on behalf of the original approver.
    e. **Reassign** – Reassign the task to be performed by a different user. User must have their own approval authority.
    f. **Route task** – Route the task to another user for completion.
    g. **Escalate** – Escalate the task.
    h. **Suspend** – This will place the task in a hold state where it cannot be accepted, rejected, or processed. After a task has been suspended, there will be a resume button that allows you to unsuspend the task.
    i. **Add Comments** – this allows you to add comments to the workflow request (only visible within the workflow).
    j. **Add Attachments** – this allows you to add attachments to the workflow request (only visible within workflow).
    k. **View Approvals** – allows you to view the approval history of the request.