

Expense Manager Approver (Dept Approver)

How to approve an Expense Report submitted through the Automated Travel & Expense Center.

1. The assigned Expense Manager for the employee that submits the expense report will receive an email asking to approve it like the example below.

-----Original Message-----

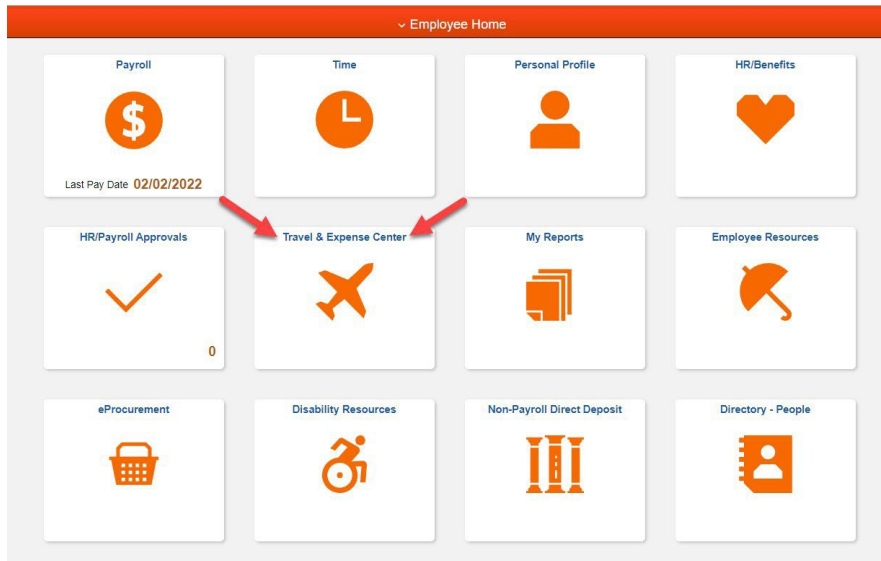
From: Brian W Pendergast [redacted]
Sent: Thursday, July 7, 2022 9:36 AM
To: Shaun T Wade [redacted]
Subject: Expense report 0088002083 for Pendergast,Brian W requires your attention

An expense report has been submitted that requires your action:

Employee ID: [redacted]
Employee Name: Pendergast,Brian W
Submission Date: 2022-07-07
Report Description: Atlanta Conference 6/1/22
Report ID: 0088002083
Request Type: Reimbursement
Total Amount: 220.00 USD
Reimbursement Amount: 220.00 USD

To access this information, sign into MYSLICE, click on the Travel and Expense Center, and then click on Approve Transactions

2. Sign into MYSLICE (<https://myslice.ps.syr.edu>) and click on the Travel & Expense Center tile:



3. Next, click on the Approve Transactions link in the Expenses WorkCenter.

The screenshot shows the 'Expenses WorkCenter' interface. At the top, there is a red bar with a back arrow and the text '< Employee Home'. Below this, the title 'Expenses WorkCenter' is displayed with a settings gear icon and a double arrow icon. There are two tabs: 'Main' (selected) and 'Reports/Queries'. A 'Links' section follows, containing a refresh icon and a vertical ellipsis icon. A list of links is shown, with 'Approve Transactions' highlighted in a grey box and a red arrow pointing to it. Other links include 'Expense Report Create/Modify', 'Expense Report View', 'Expense Report Print', and 'Expense Report Delete'. Above the 'Approve Transactions' link, there are three expandable categories: 'Travel and Safety', 'Credit Card Processing - Expenses', and 'Expense Processing - Employee'.

4. Then, click on either the “Description” or “Transaction ID” hyperlink in blue.

The screenshot shows the 'Transactions to Approve' section of the application. At the top, there are tabs for 'Overview' (selected), 'Expense Reports', 'Cash Advances', and 'Errors'. Below the tabs, there are two links: 'Search Pending Transactions' and 'Change Sort Order'. A 'Refresh List' button is located below these links. The main content is a table with the following columns: Urgency, Transaction Type, Total, Unit, Name, Employee ID, Description, Transaction ID, Date Submitted, Status, and Role. The first row of data is: Urgency: Green dot, Transaction Type: Expense Report, Total: 220.00, Unit: USD, Name: Pendergast, Brian W, Employee ID: [blurred], Description: Atlanta Conference 6/1/22, Transaction ID: 0088002083, Date Submitted: 07/07/2022, Status: Submitted for Approval, Role: Department Manager. Red arrows point to the 'Description' and 'Transaction ID' cells. Below the table, there is another 'Refresh List' button. At the bottom left, there are two links: 'Return to Approval List' and 'Employee Expense History'.

Urgency	Transaction Type	Total	Unit	Name	Employee ID	Description	Transaction ID	Date Submitted	Status	Role
●	Expense Report	220.00	USD	Pendergast, Brian W	[blurred]	Atlanta Conference 6/1/22	0088002083	07/07/2022	Submitted for Approval	Department Manager

- The Dept. Approver will now see the Expense Report Summary, including the “Approval History” of which employee submitted the reimbursement.
- Go to the “Expense Details” link at the top righthand corner of the screen to review the expense report details.

Approve Expense Report - Expense Summary

Brian Pendergast Actions ...Choose an Action [Expense Details](#) GO

Request Type: Reimbursement Report: 0088002083 Submitted for Approval
 Description: Atlanta Conference 6/1/22 Created: 07/07/2022 Matthew O'Keefe
 Reference: Last Updated: 07/07/2022 Matthew O'Keefe

Budget Status: Not Budget Checked Budget Options

Totals Urgency: ● [View Analytics](#) [Notes](#) [Attachments \(1\)](#)

Employee Expenses (1 Line)	220.00 USD	Non-Reimbursable Expenses	0.00 USD	Employee Credits	0.00 USD
Cash Advances Applied	0.00 USD	Prepaid Expenses	0.00 USD	Supplier Credits	0.00 USD
Amount Due to Employee		220.00 USD	Amount Due to Supplier		0.00 USD

Approval History

Action	Role	Name	Date/Time
Submitted	Employee	Matthew O'Keefe	07/07/2022 9:36:00AM

Comments

Approve Send Back Hold Save Changes

- Click on “Attachments” to view receipts, and “Expand All” to view the Chartstring(s) of the submitted expense(s) if needed. After review, click on “Summary and Approve” at the top righthand corner of the screen and either “Approve” or “Send Back” the report.

Approve Expense Report - Expense Details

Brian Pendergast Actions ...Choose an Action [Summary and Approve](#) GO

Request Type: Reimbursement Report: 0088002083 Submitted for Approval
 Description: Atlanta Conference 6/1/22 Created: 07/07/2022 Matthew O'Keefe
 Reference: Last Updated: 07/07/2022 Matthew O'Keefe

Expenses Urgency: ● [View Analytics](#) [Notes](#) [Attachments \(1\)](#)

Expand Lines | Collapse Lines | **Expand All** | Collapse All

*Date	*Expense Type	Business Purpose	*Amount	*Currency	Approve	+ -
06/01/2022	Conference/Meeting	Presenting at conference	220.00	USD	<input type="checkbox"/>	

Expand Lines | Collapse Lines | Expand All | Collapse All Total 220.00 USD

Note: If the report needs to be sent back, the system requires a reason to be entered in the comment box on why it is being sent back. Please refer to the screen shot under step #6.

- When clicking the “Attachments” link, the Dept. Approver will be able to click the file name links to view all attached receipts as shown in the screenshot below. The receipts will pop-up in a separate window, and we recommend dragging the window with the receipts to another monitor for easier viewing, while looking over the expenses and the Chartstring(s).

Expense Report Attachments x

[Help](#)

Report ID 0088002083

Details

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1-1 of 1
View All

File Name	Description	User	Name	Date/Time Stamp
Conference.pdf		MKOEFE	Matthew O'Keefe	07/07/2022 9:33:26AM

Adding large attachments can take some time to upload, therefore, it is advisable to save the transaction before adding large attachments.

- Below is the view of the expenses when the Expense Manager (Dept Approver) clicks on “Expand All.” This will expand the view for all expenses in the report and allow the user to see the Chartstring(s) including additional information like the location.

Approve Expense Report - Expense Details Summary and Approve

Brian Pendegast Actions: ...Choose an Action

Request Type: Reimbursement Report: 0088002083 Submitted for Approval
 Description: Atlanta Conference 6/1/22 Created: 07/07/2022 Matthew O'Keefe
 Reference: Last Updated: 07/07/2022 Matthew O'Keefe

Expenses Urgency: ● View Analytics Notes Attachments (1)

Expand Lines | Collapse Lines | **Expand All** | Collapse All Total: 220.00 USD

*Date	*Expense Type	Business Purpose	*Amount	*Currency	Approve
06/01/2022	Conference/Meeting	Presenting at conference	220.00	USD	+ -

230 characters remaining

*Payment Type: Personal Funds Exchange Rate: 1.00000000
 *Location: ATLANTA, GA Base Currency Amount: 220.00 USD

Accounting Details

Amount	*GL Unit	Monetary Amount	Currency Code	Exchange Rate	Fund	Dept	Program	Account	Mycode	PC Bus Unit	Project
220.00	SYRUN	220.00	USD	1.00000000	11	31006	00001	560729			