
Disbursements Office**Approver Role Definitions:**

Completeness Check – This approver is responsible for checking the report for policy compliance and reviewing budgetary allocations. The Completeness Check approver and the Supervisor approver can be the same person or different people depending on the needs of the department. Typically this approver is an Account Clerk or Secretary.

Supervisor (Default Manager) – This approver is responsible for a secondary review of policy compliance, travel approval, and funding verification. Typically this approver is an employee's immediate supervisor and can also serve as the Completeness Check approver depending on the needs of the department.

Cost Object (COA) – This approver is responsible for reviewing and approving charges to their budgets. There may be more than one Cost Object Approver on a report if multiple FOAPs are being charged. The COA is only responsible for approving charges to their FOAP(s). Typically this approver is the authorized Banner approver for the FOAP.

Out of State travel – This approver is responsible for approving out of state travel expense reports and travel requests. This approver is the Dean or Vice President of the organization.

International travel – This approver is responsible for approving all international travel expense reports and travel requests. This approver is the President of the University.

Available actions at the approval step:

- **Change expense types** – most expense types can be modified at the approval step; however, the following expense types cannot be modified at the approval step:
 - Parent entries
 - Car Mileage
 - Travel Allowance entries
 - Hotel entries (parent or child)
- **Change transaction dates** (cash transactions only)
- **Change or add allocations** (see [Allocations and FOAP Quick Reference](#) for more information & instruction)
- **Add additional approvers to the automated approval flow** (see below for more information & instruction)

Adding approvers to the automated approval flow:

Under what circumstances would an approver need to be manually added to the automated approval flow?

The automated approval flow is limited to a certain number of approvers. In some cases, colleges or departments require an additional approver that does not fit into the automated approval flow. In these situations, the additional approver needs to be manually added to the approval flow by another approver who is already in the automated approval flow.

How to add an approver to the approval flow:

Once in the request or report, click on Details then Approval Flow.

Candidate dinner [REDACTED]

Send Back to Employee Approve Approve & Forward

Summary Details Receipts Print / Email Hide Exceptions

Report

- Report Header
- Totals
- Audit Trail
- Approval Flow
- Comments
- Allocations
- Allocations

Exception

Please ensure that you have attached an Alcohol Authorization Form.

Expense Type	Vendor Name	Business Purp...	City	Payment Type
Alcohol	616	Candidate's din...	Grand Rapids,...	Cash

Report Summary

Report Totals

Amount Due Co.	Amount Due Em.
\$0.00	\$51.53

Once in the Approval Flow, you will have the option to add an approver step before or after the next approver in the approval flow.

Approval Flow for Report: Candidate dinner [REDACTED]

(04/07/2015 Approved)

Back Office Approval:

Olson, Patti A. + x

(04/07/2015 Approved)

→ User-Added Approver:

Zoet, Emily J. + x

User-Added Processor:

+ + x

Add a step after this step

Approve Send Back

Save Workflow Cancel

A "User-Added Approver" box will appear. Start typing the name of the approver you wish to add and select that person from the drop-down options that appear.

After the approver is selected, click Save Workflow.

Approval Flow for Report: Candidate dinner- [REDACTED] x

Olson, Patti A. + x
(04/07/2015 Approved)

→ User-Added Approver:

Zoet, Emily J. + x

User-Added Approver:

Grandy, Michael A. (grandym1@ferris.edu) + x

User-Added Processor:

+ + x

Approve Send Back

Save Workflow Cancel

Go back into the Approval Flow, verify that the added approver is there, then click Approve.