THE UNIVERSITY *of* EDINBURGH

People and Money System

We realise this formatting may not be accessible for all – to request this document in an alternative format please email finance.helpline@ed.ac.uk

Managing Financial Approvals in People and Money

Contents

Introduction

This guide explains how to manage financial approvals in People and Money. The screenshots in this guide refer to staff expenses approvals but the approval functionality is the same for approval of most transaction types including staff expenses, purchase requisitions and invoices.

Approvers are responsible for checking transactions before approving them, in particular that coding is correct and receipts are attached for expense reports in people and Money. This guidance explains where to find this information. Further information about approver responsibilities is available here.

In Brief ...

This section provides an overview of the steps and can be used as a brief summary. Detailed steps follow in the next section.

1. Approve or Reject a Request

You will be notified of a request for approval in two ways. One will be via an email and the other via the **Bell** notifications in People and Money. The steps below cover both. If you require further information about the request before approving or rejecting it, refer to the Request Information section below.

Via email

1. Open the email
2. Once you have checked the information and any attachments click on **Approve** or **Reject** which opens a new email (Nb. Refer to Appendix 1 for guidance on viewing account coding for expense reports)
3. Type any **comments** in the email (this isn't necessary if approving but if rejecting use the comments section to explain why it's being rejected)
4. Click **Send**

Via People and Money

1. In the **Home** page, click the **Bell** icon to view the approval notification
2. If the notification is not visible click **Show All** and **Worklist**
3. Click the approval request link to expand the details
5. Type any **comments** in the email (this isn't necessary if approving but if rejecting use the comments section to explain why it's being rejected)
4. Once you have checked the information click on the **Approve** or **Reject** button (Nb. Refer to Appendix 1 for guidance on viewing account coding for expense reports)

2. Other Approver Actions

An approver may also request information or re-route an approval task to a colleague using Route Task or Reassign.

2.1 Request Information

Via email

1. Open the notification email
2. Click on the **Request Info** button which opens a new email
3. Enter **comments** in the email
4. Click **Send**

Via People & Money

1. In the **Home** page, click the **Bell** icon to view the approval notification
2. If the notification is not visible click **Show All** and **Worklist**
3. Click the approval request link to expand the details
4. Click on the **Actions** button and select **Request Information** from the drop-down menu
5. Enter the **comments**, select **back to me** and click **OK**

2.2 Re-routing an Approval Task to a Colleague

There are two options available for re-routing approval tasks, **Route Task** and **Reassign.**

Route Task allows you to approve the transaction and then add a colleague who **isn't** in the approval workflow but who you want to approve it into the workflow directly after you. If further approval is required, it will then return to your approval hierarchy moving to the person that would normally have approved it after you.

Reassign allows you to forward the approval task onto someone else in a different approval workflow and **not** approve it yourself. If further approval is required, it will follow the assignee's approval hierarchy rather than returning to your own.

2.2.1 Route Task

1. In the **Home** page, click the **Bell** icon to view the approval notification
2. If the notification is not visible click **Show All** and **Worklist**
3. Click the approval request link to expand the details
4. View the transaction information
5. Click on **Actions** and select **Route Task** from the drop down menu
6. Start to type in the name of the person you want to add into the approval workflow and click **Search**
7. Select the name from the list and click **OK**
8. Add a comment and click **Approve**

2.2.2 Reassign an Approval Task

1. In the **Home** page, click the **Bell** icon to view the approval notification.
2. If the notification is not visible click **Show All** and **Worklist**
3. Click the approval request link to expand the details.
4. View the transaction information
5. Click on **Actions** and select **Reassign** from the drop down menu
6. Start to type in the name of person you wish to reassign the task to and click **Search**
7. Select the name from the list and click **OK**
8. Add a comment and click **Submit**

In Detail …

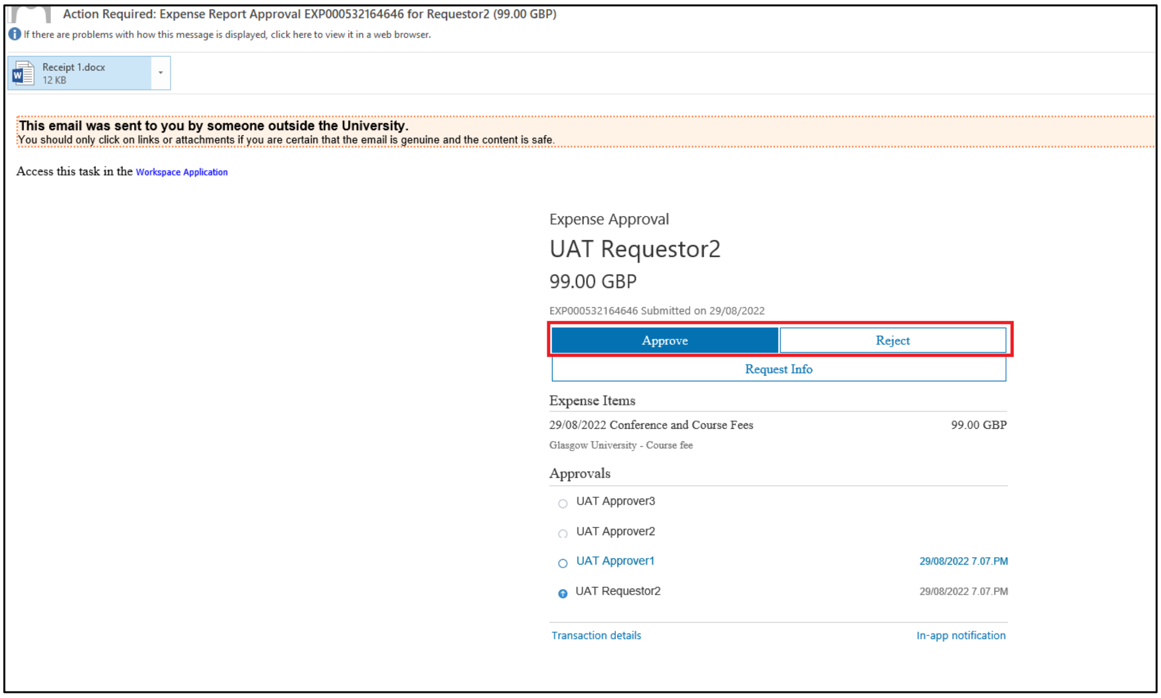
This section provides the detailed steps.

1. Approve or Reject a Request

You will be notified of a request for approval in two ways. One will be via an email and the other via the **Bell** notifications in People and Money. The steps below cover both. If you require further information before approving or rejecting it refer to the Request Information section below.

Via email

1. Open the email notification
2. Once you have viewed the information and reviewed any documents attached to the email, click on **Approve** or **Reject** which opens a new email (Nb. Refer to Appendix 1 for guidance on viewing account coding for expense reports).

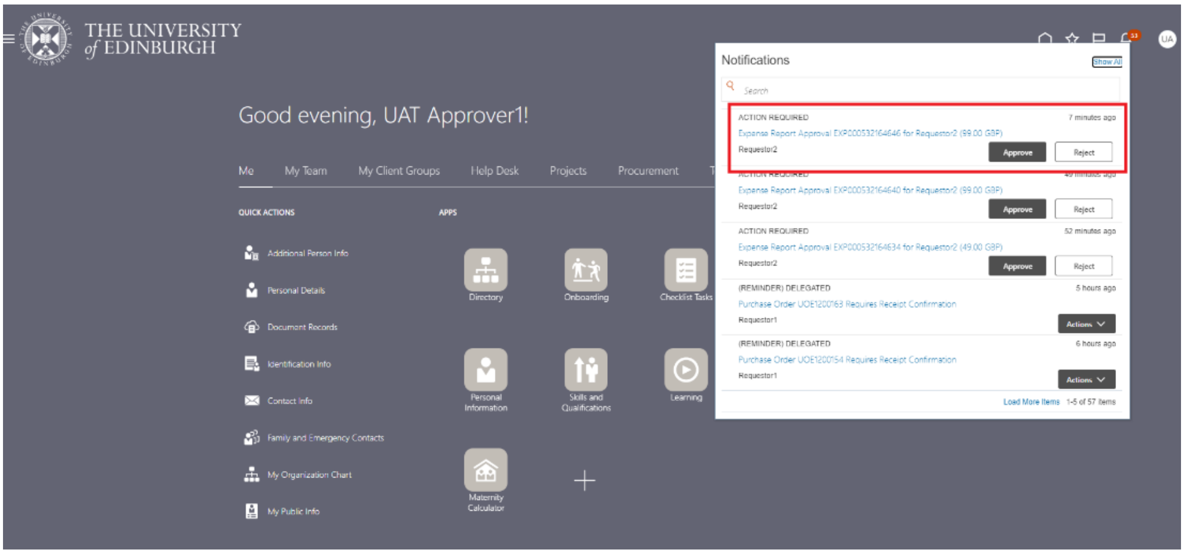


3. Type any **comments** in the email if required (this isn't necessary if approving but if rejecting use the comments section to explain why it's being rejected) and click **Send**

Via People and Money

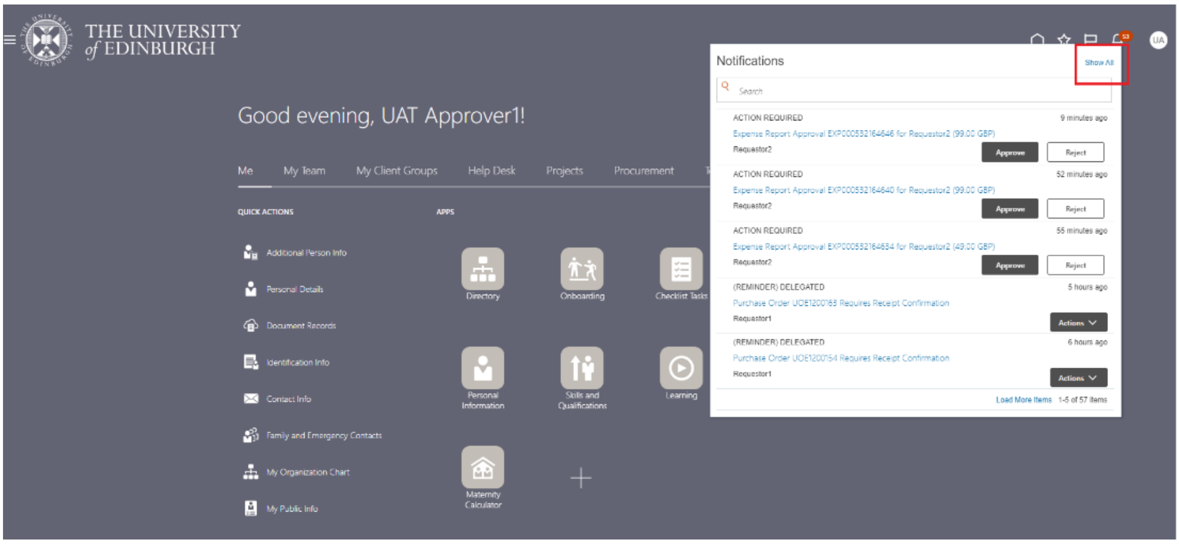
1. In the **Home** page, click the **Bell** icon to view the approval notification.

2. Click the approval request link to expand the details.

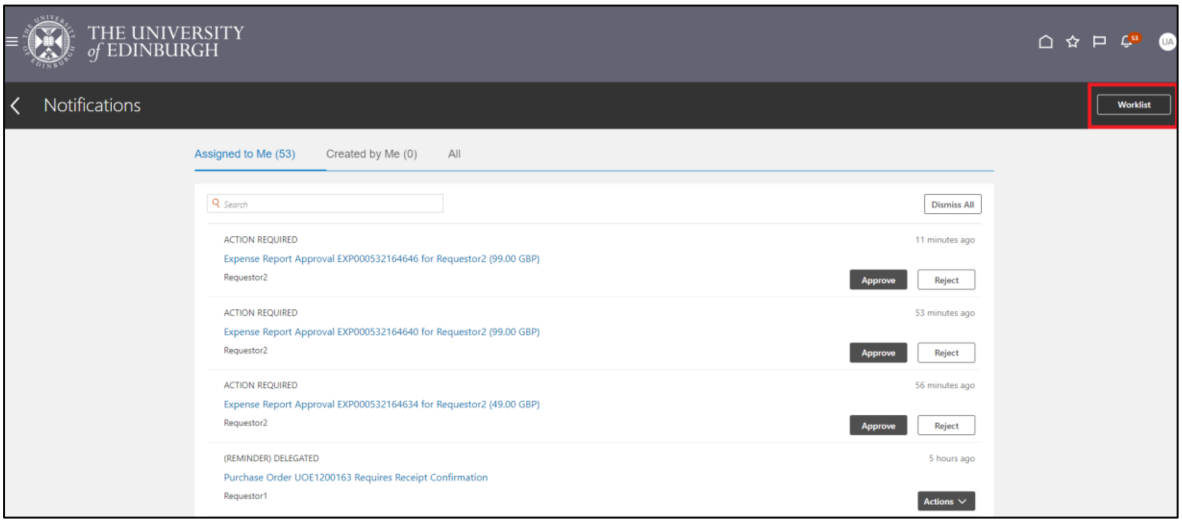


Follow steps 3-5 only if the notification is not visible

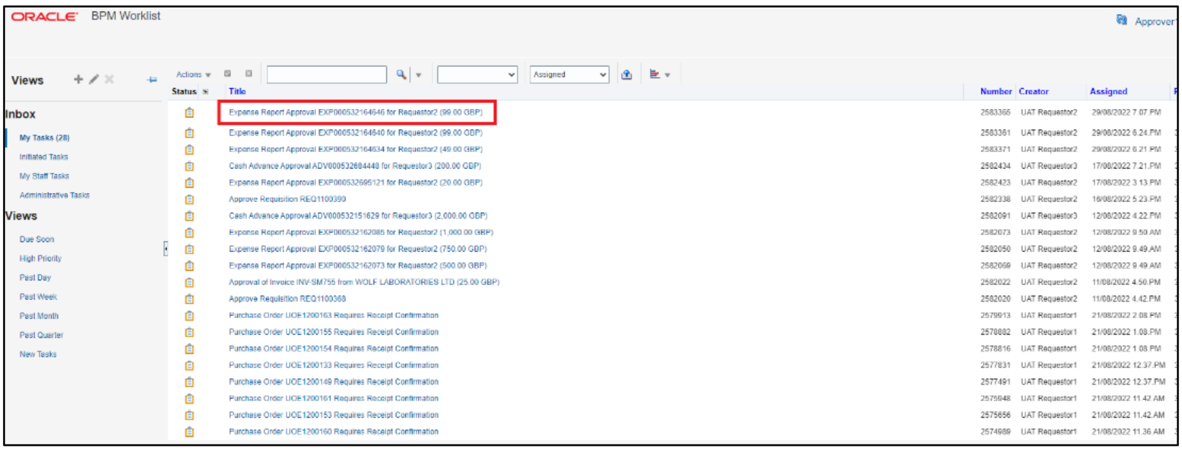
3. If the notification is not visible click **Show All**



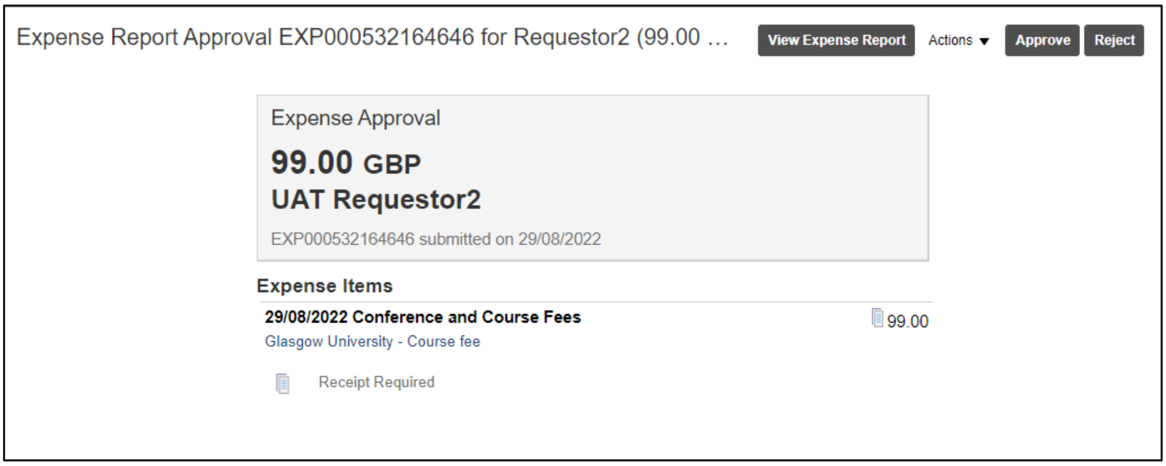
4. Click on **Worklist**



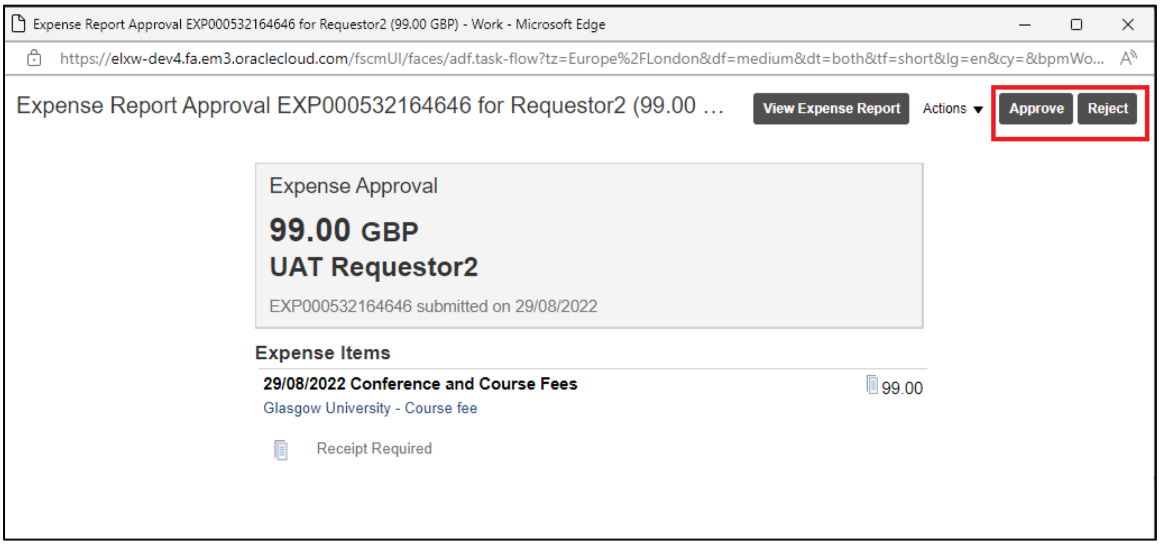
5. Click the approval request link to expand the details.



6. Clicking on the link provides further details about the request (Nb. Refer to Appendix 1 for guidance on viewing account coding for expense reports).



7. Once you have reviewed the information approve or reject the transaction by clicking on the appropriate button.



8. Enter a comment in the **Comment** field if required (this isn't necessary if approving but if rejecting use the comments section to explain why it's being rejected), then click the **Submit** button.

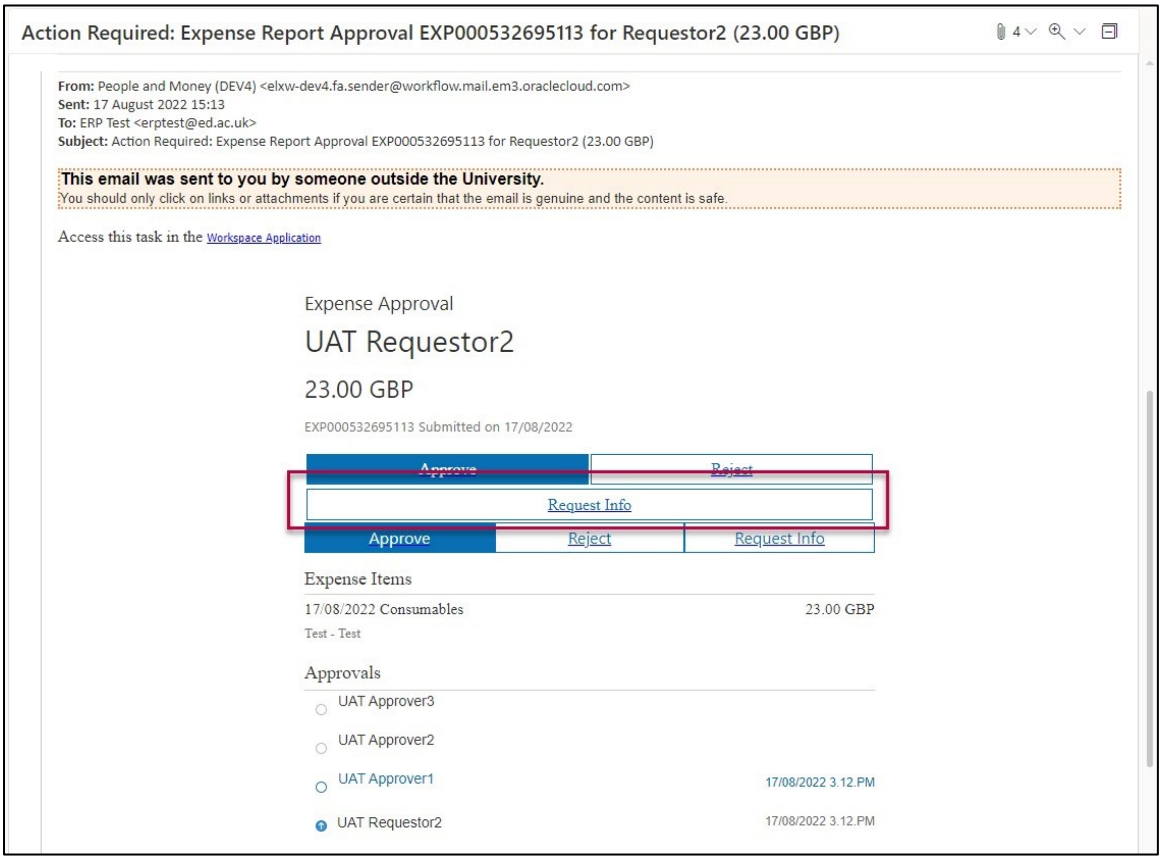
2. Other Approver Actions

2.1 Request information

To request additional information before approving or rejecting a transaction follow the steps below.

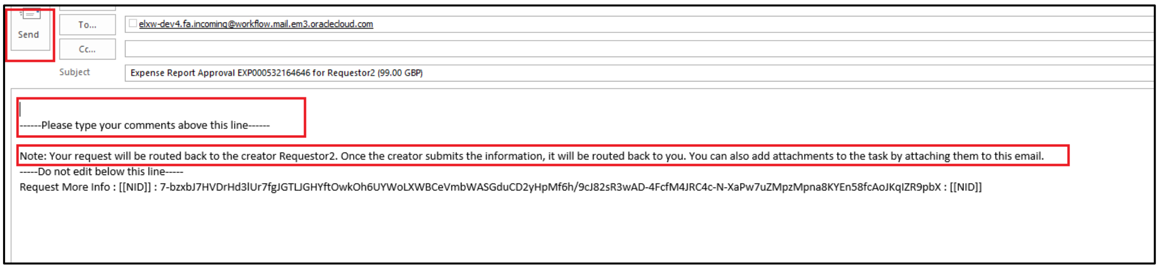
Via email

1. Open the email notification
2. Click the **Request Info button** which opens a new email



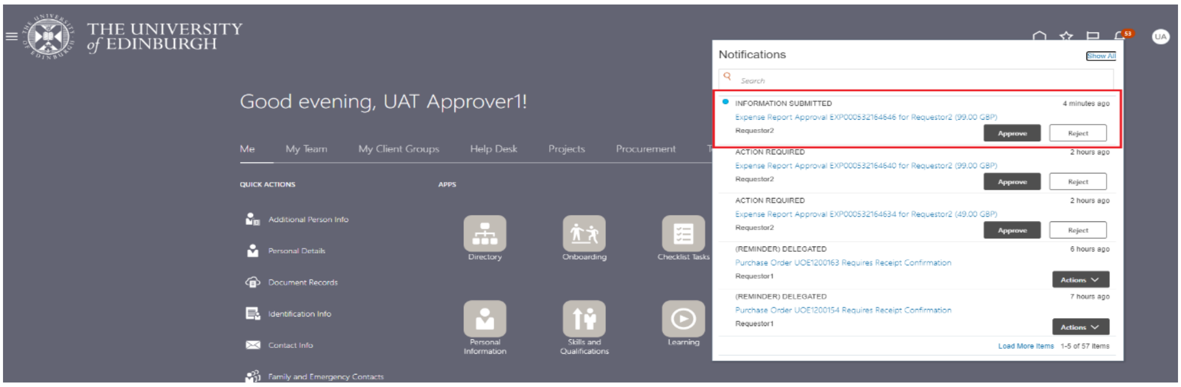
1. Enter the request for information in the email.
2. Click **Send**

The **Note** section in the email explains the next steps. The information will be routed back to you.



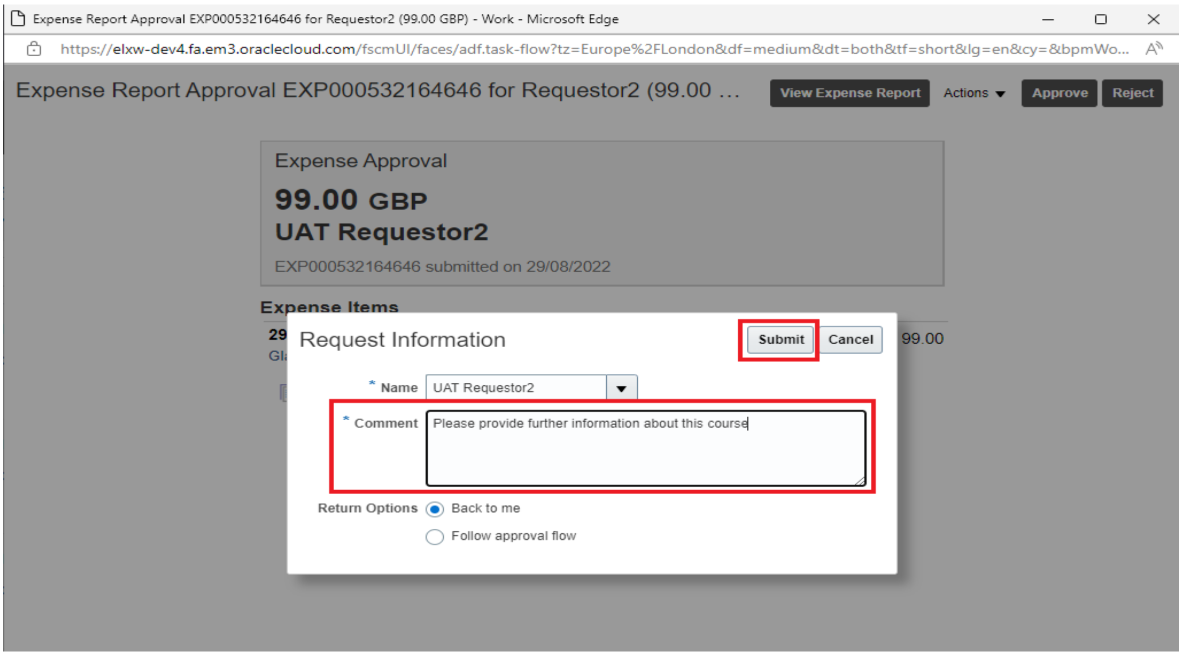
Via People & Money

1. In the **Home** page, click the **Bell** icon to view the approval notification.
2. Click the approval request link to expand details.



3. Click on the **Action** button and select **Request Information** from the drop-down menu

4. The **Request Information** window is displayed



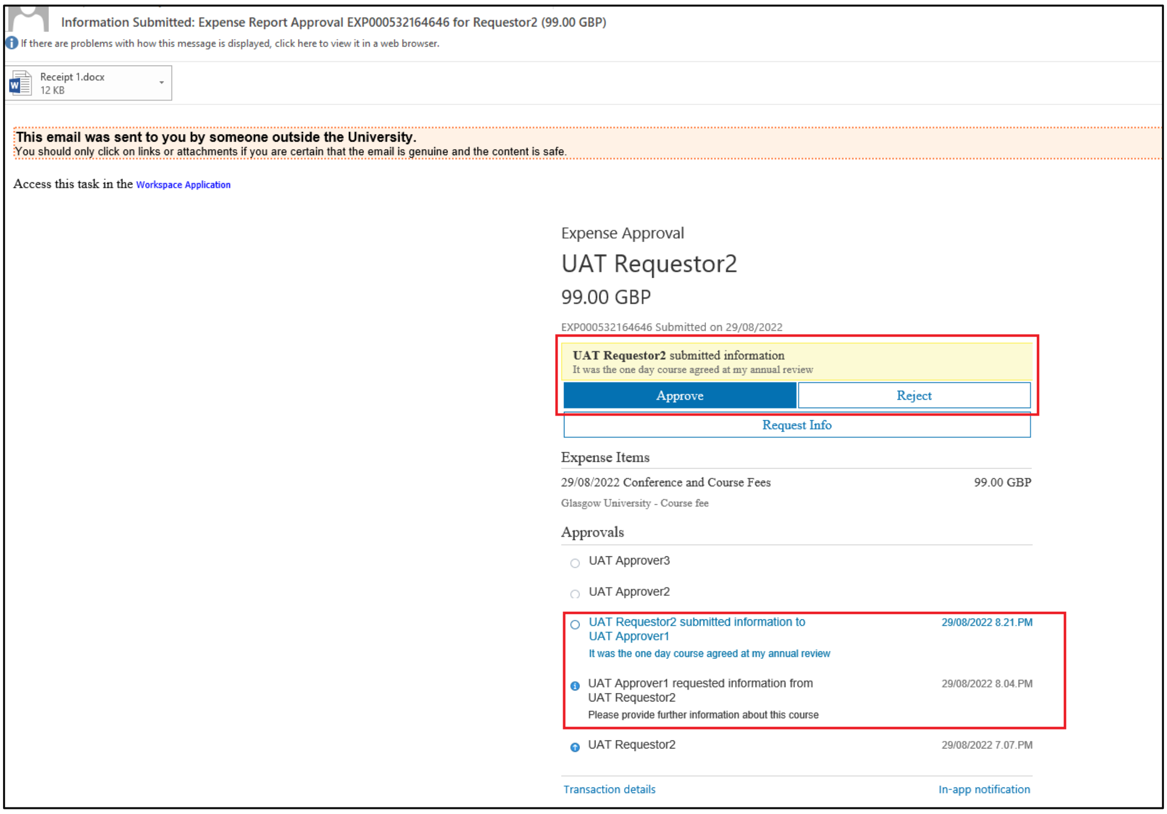
5. The **Name** field defaults to the requestor but can be changed if the information is to be requested from another individual.
6. Enter the details of the request for information in the **Comment** field.
7. The **Return Options** defaults to **Back to me** to return the notification directly to you once the information is provided. Select **Follow approval flow** if you want it to go back to the first approver for information and re-approval before returning to you.
8. Enter the request for information in the **comments field** and click the **Submit** button.
9. The requestor will receive the request for information by email and notification in People and Money

2.1.1 Viewing the Information Submitted

The Approver will receive the information by email and notification in People and Money

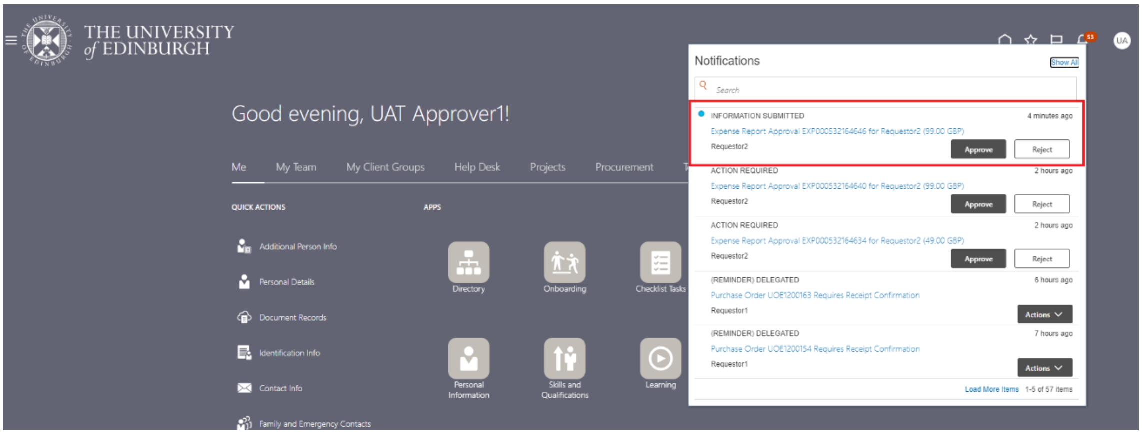
Via email

1. Open the email notification
2. The request for information and response is shown in the Approvals section of the email notification

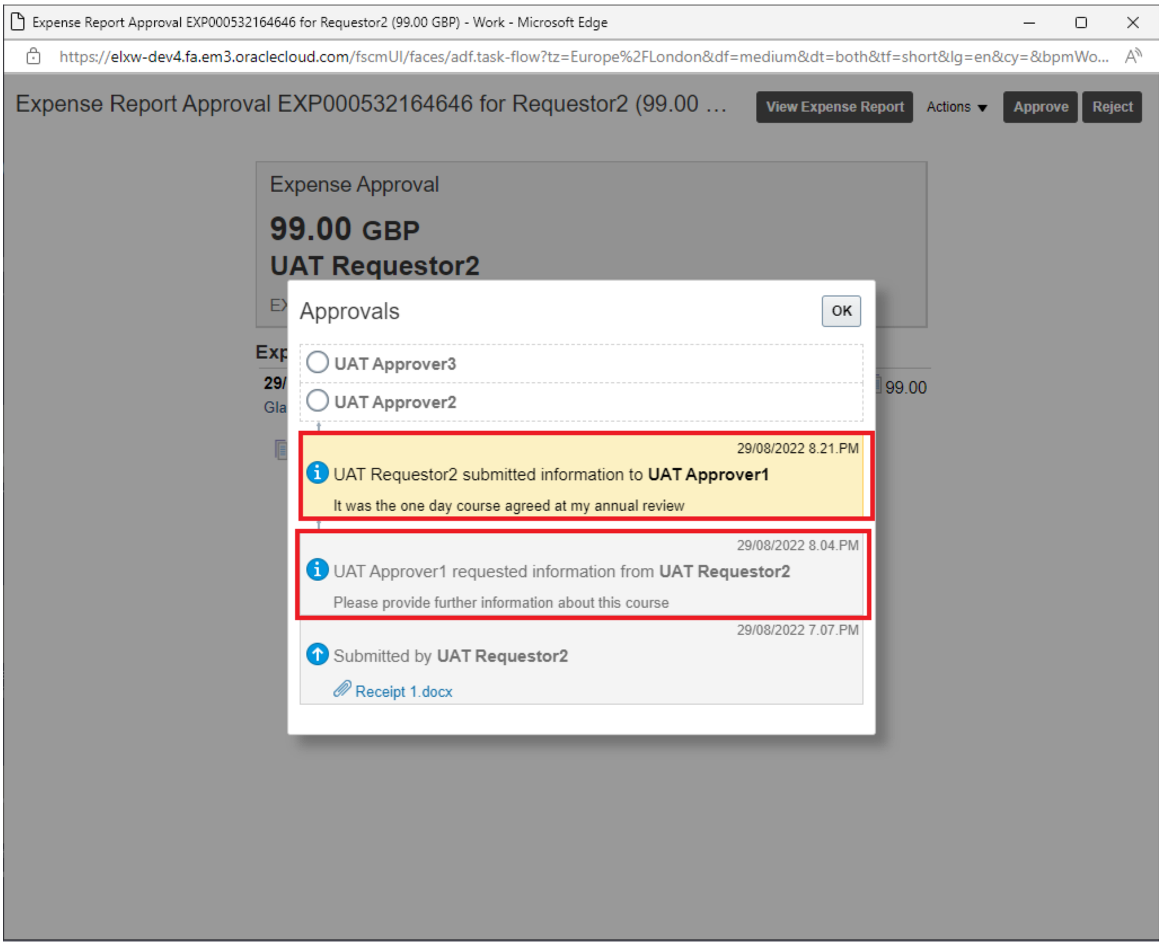


Via People and Money

1. In the **Home** page, click the **Bell** icon to view the information submitted notification
3. Click the information submitted link to expand the details.



4. The request for information and response is shown in the Approvals section



2.2 Re-routing an Approval Task to a Colleague

There are two options available for re-routing approval tasks, **Route Task** and **Reassign.** These options are only available in People and Money, not via email notifications (Appendix 1 explains how to access this functionality from an email notification).

Route Task allows you to approve the transaction and then add a colleague who **isn't** in the approval workflow but who you want to approve it into the workflow directly after you. If further approval is required, it will then return to your approval hierarchy moving to the person that would normally have approved it after you.

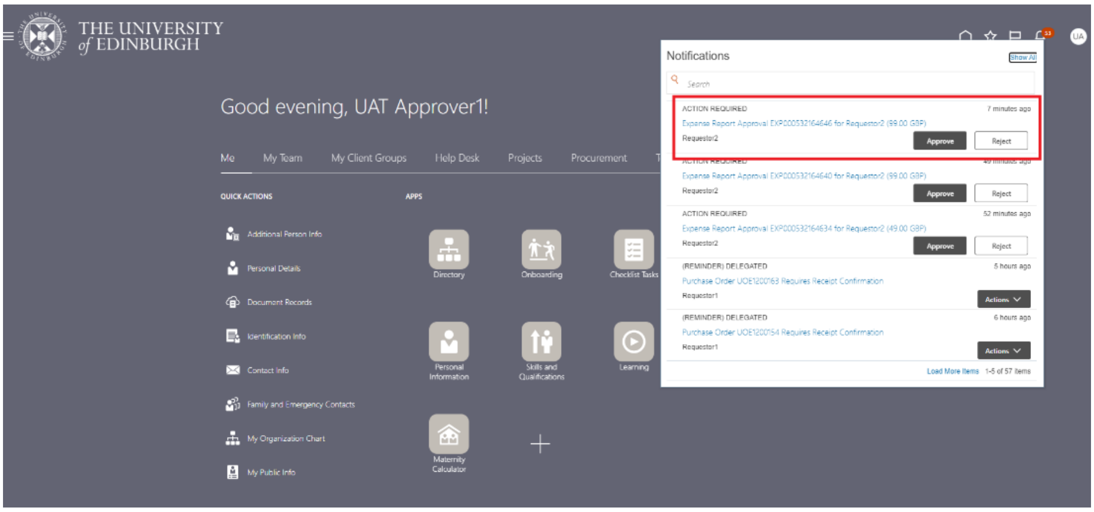
An example of when to use **Route Task** is where a transaction has two lines, one item that the requestor's line manager needs to approve and another item that someone else needs to approve because it relates to spend in their area. The line manager would approve the transaction and then send it on to the second approver.

Reassign allows you to forward the approval onto someone else in a different approval workflow and **not** approve it yourself. If further approval is required, it will follow the assignee's approval hierarchy rather than returning to your own.

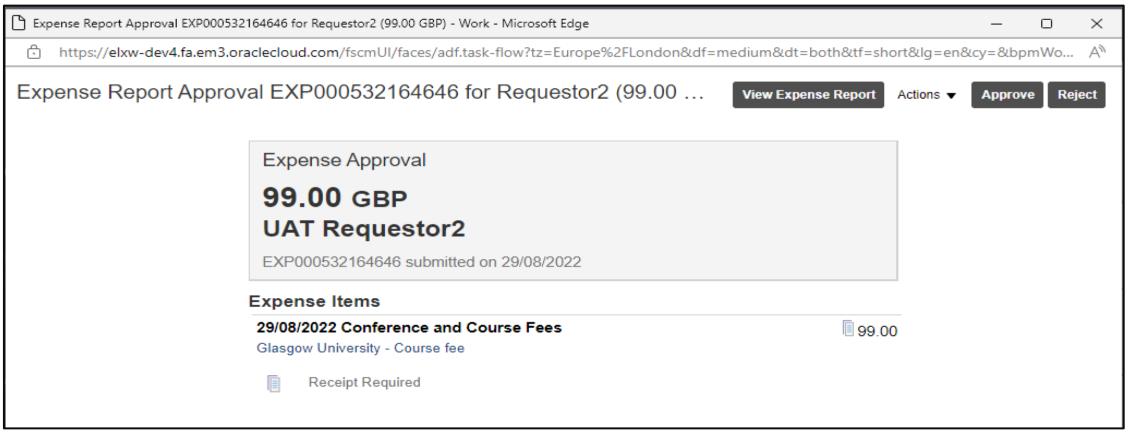
An example of when to use **Reassign** is where a transaction for approval relates solely to work carried out in another area which you may wish to reassign to the appropriate budget holder for approval.

2.2.1 Route Task

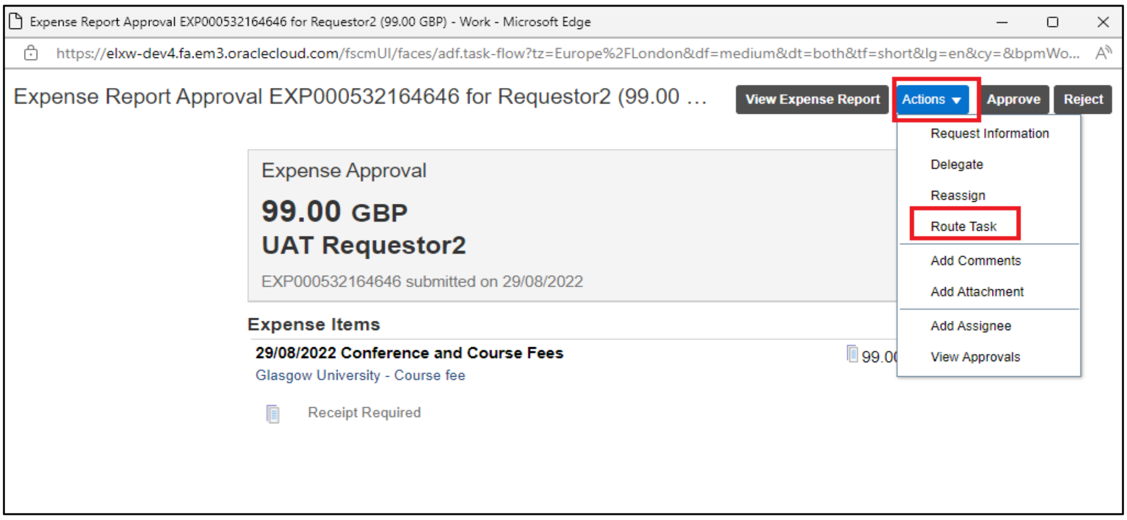
1. In the **Home** page, click the **Bell** icon to view the approval notification



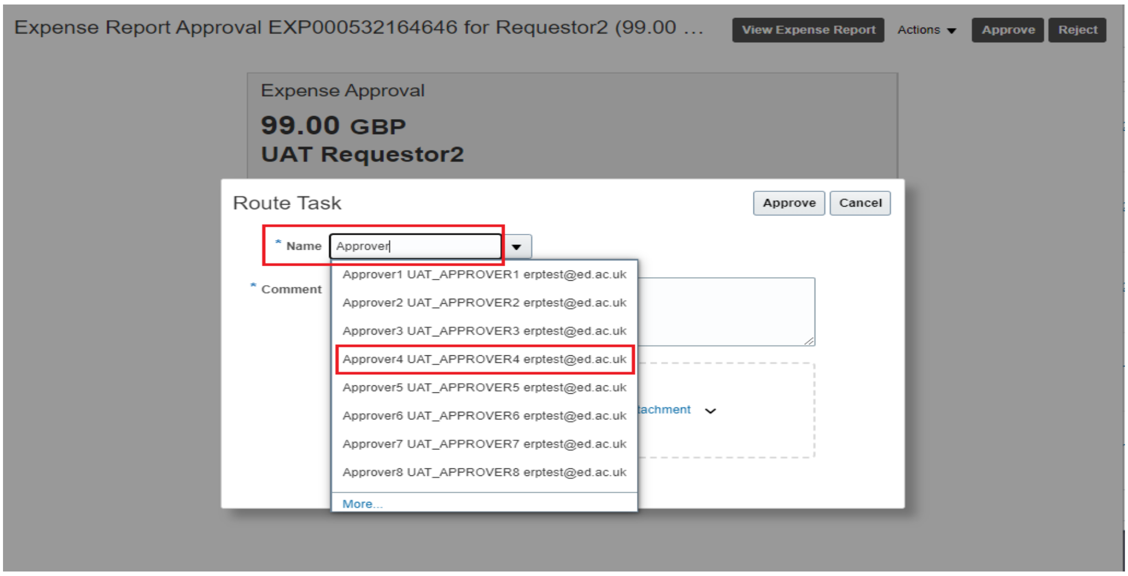
2. Click the approval request link to expand details and view the transaction information



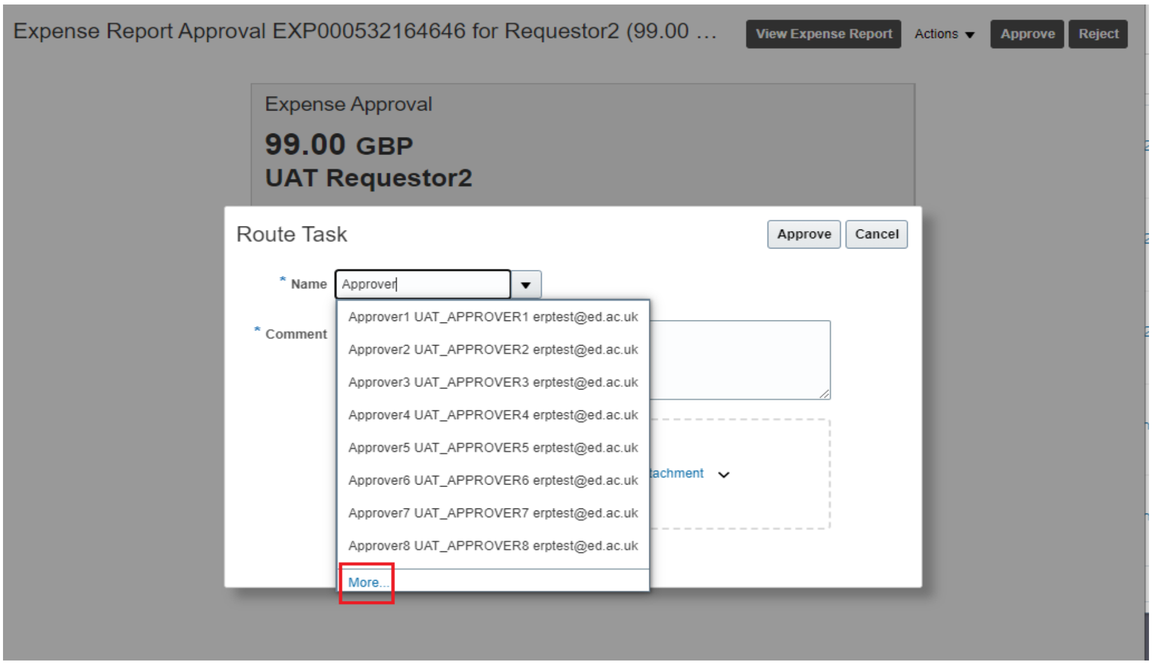
3. Click on **Actions** and select **Route Task** from the drop-down menu



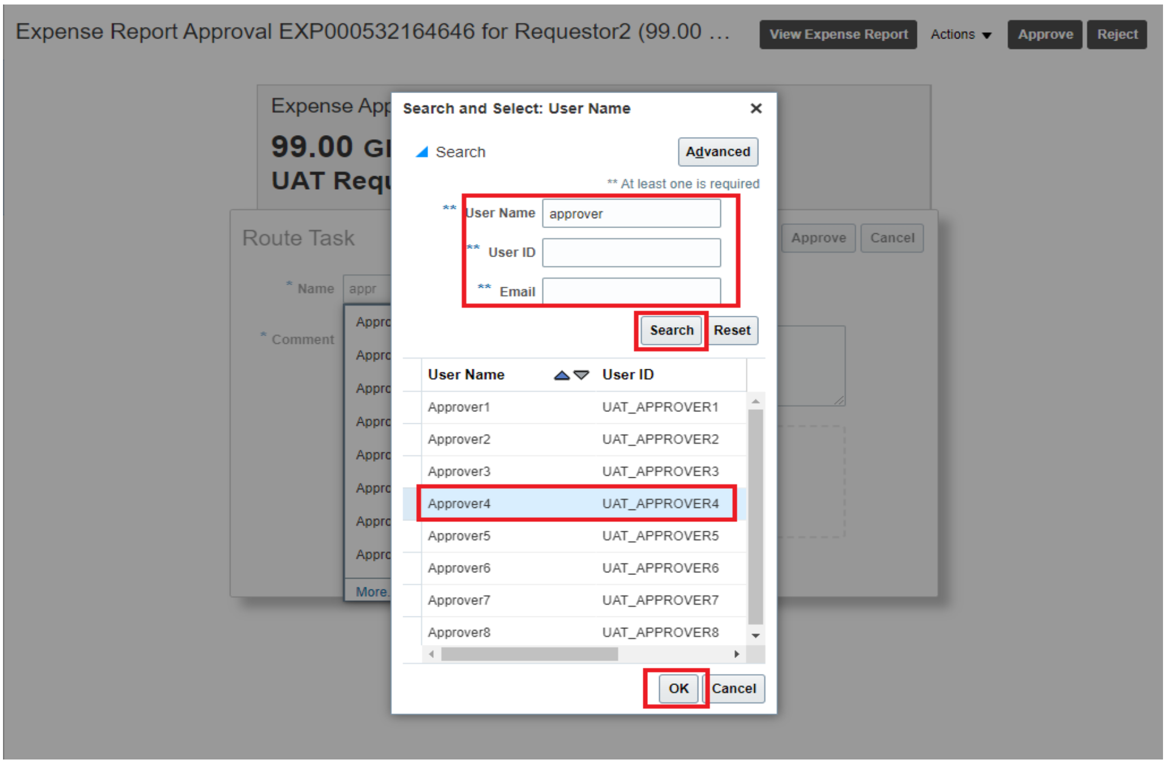
4. Start to type in the name of the person you want to add into the approval workflow and select the person from the displayed list



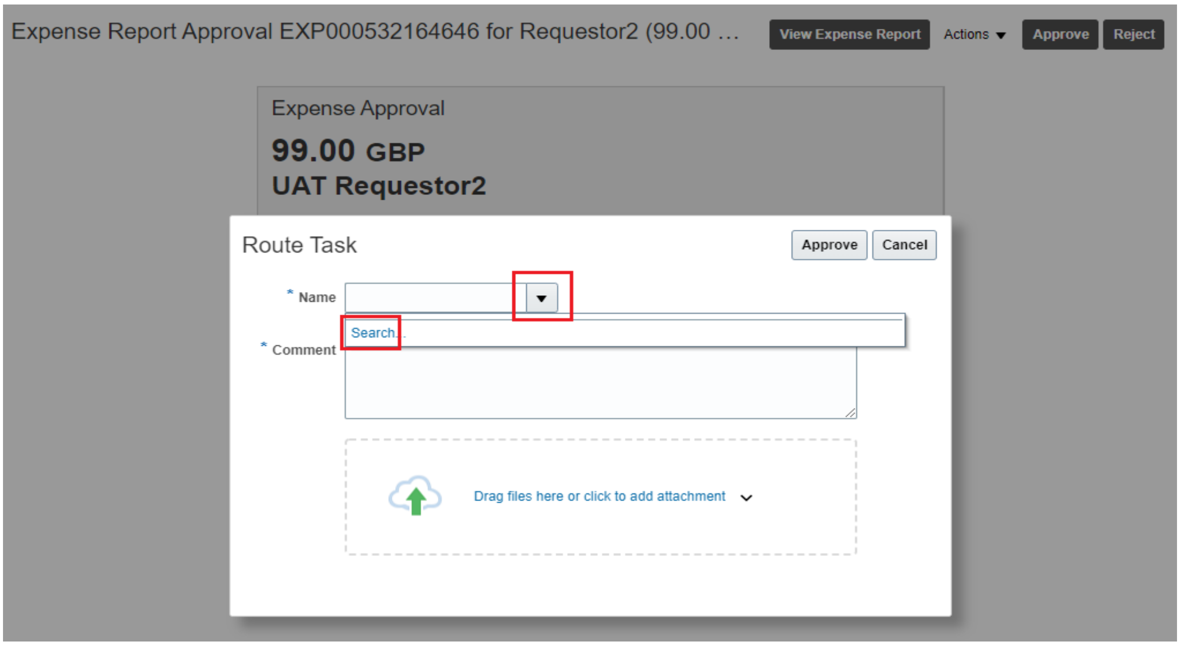
5. If the name is not displayed click on **More**



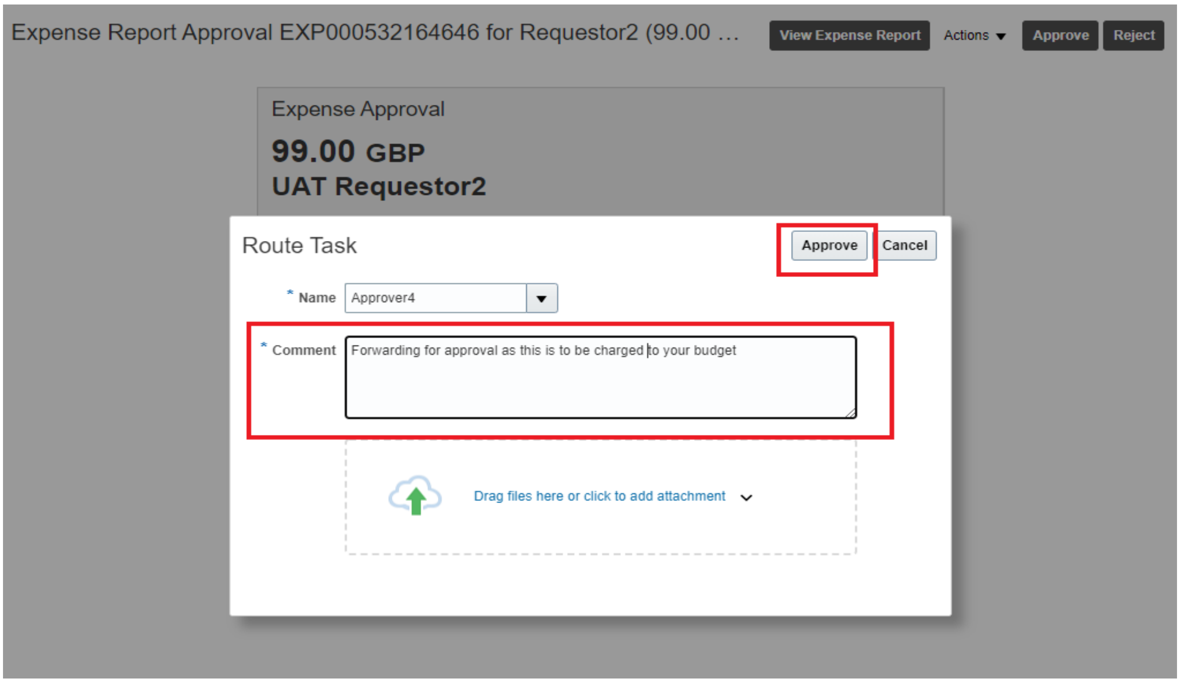
6. Enter details and click **Search**, then select the name from the list and click **OK**



7. The search screen can also be accessed by clicking on the downward arrow and **Search**

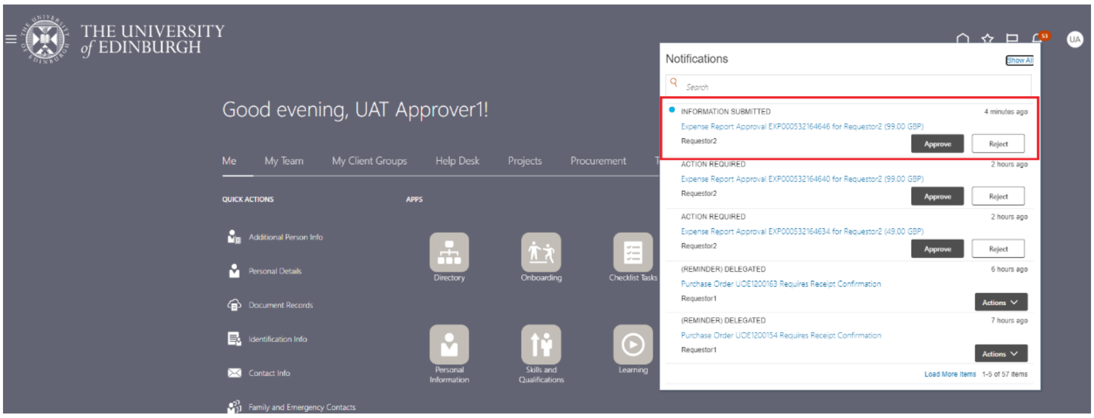


8. Add a comment and click **Approve** to route the approval task to another person

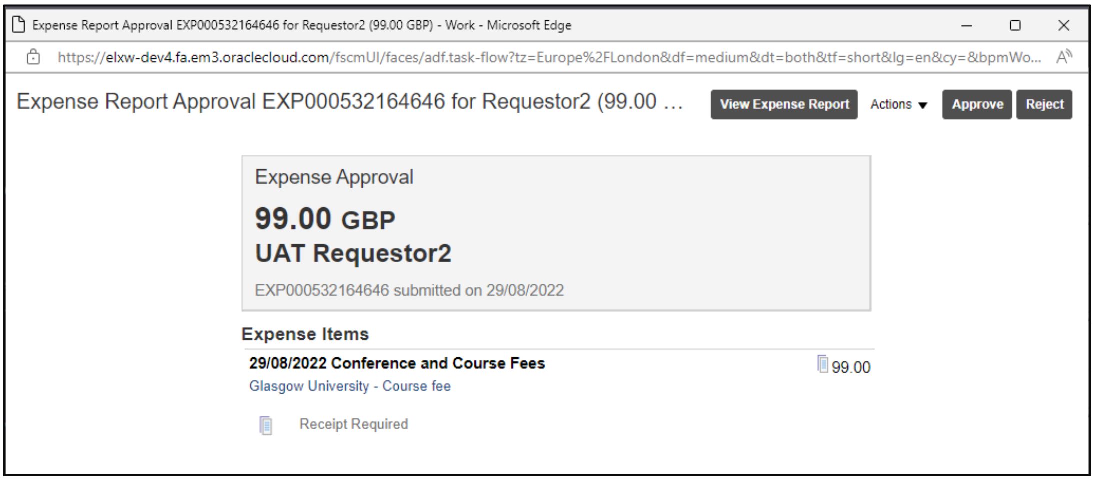


2.2.2 Reassign an Approval Task

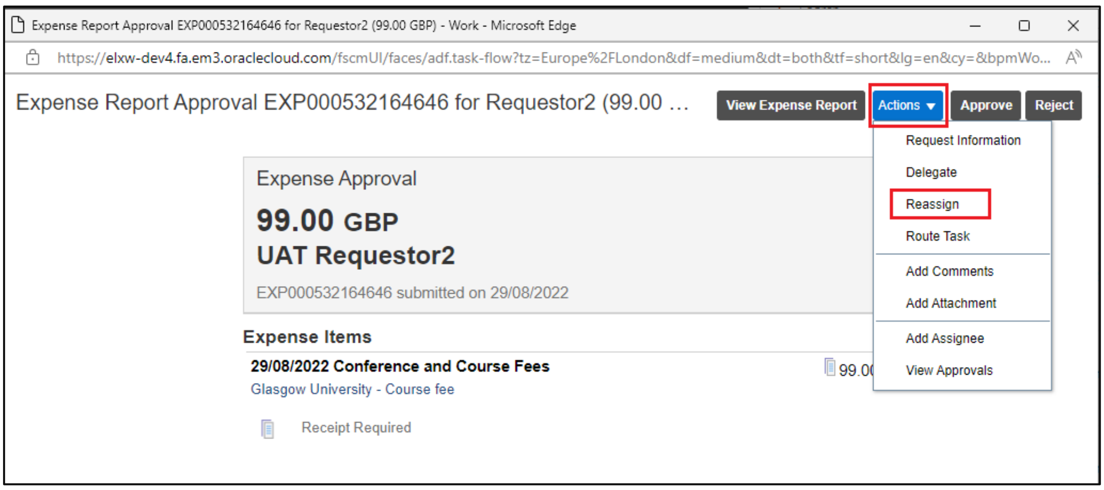
1. In the **Home** page, click the **Bell** icon to view the approval notification.
2. Click the approval request link to expand the details.



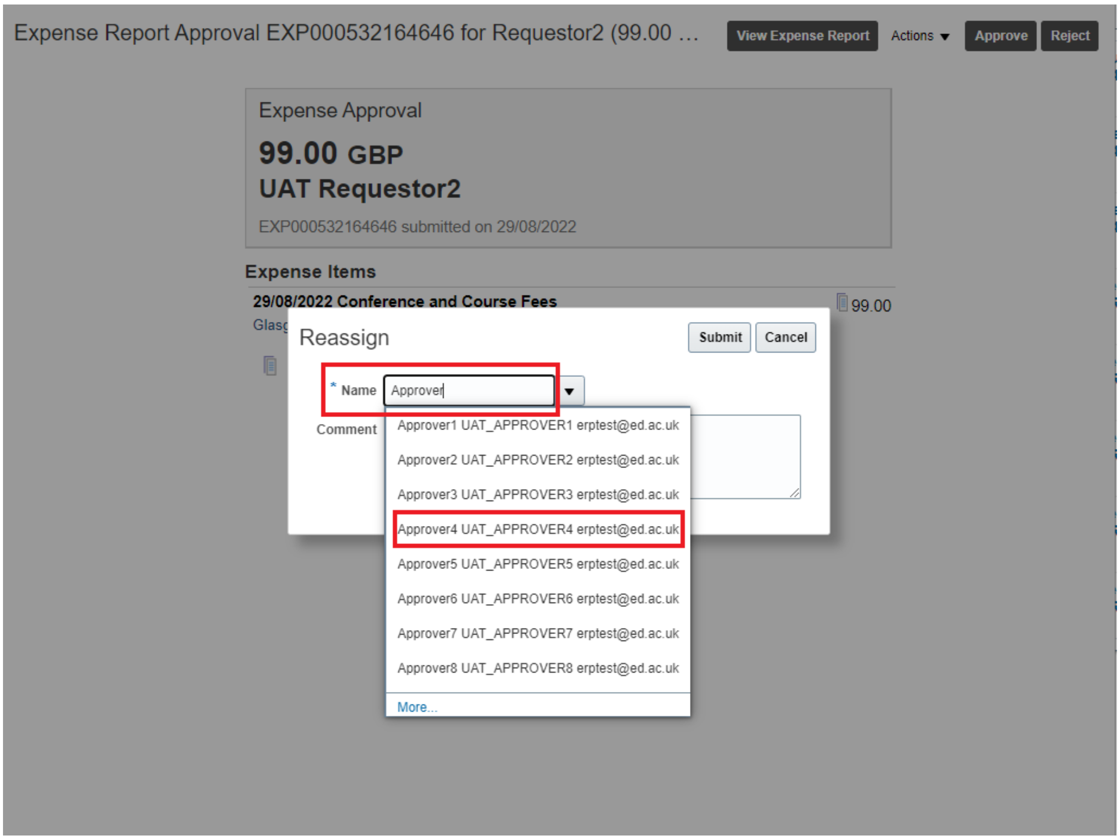
3. View the transaction information



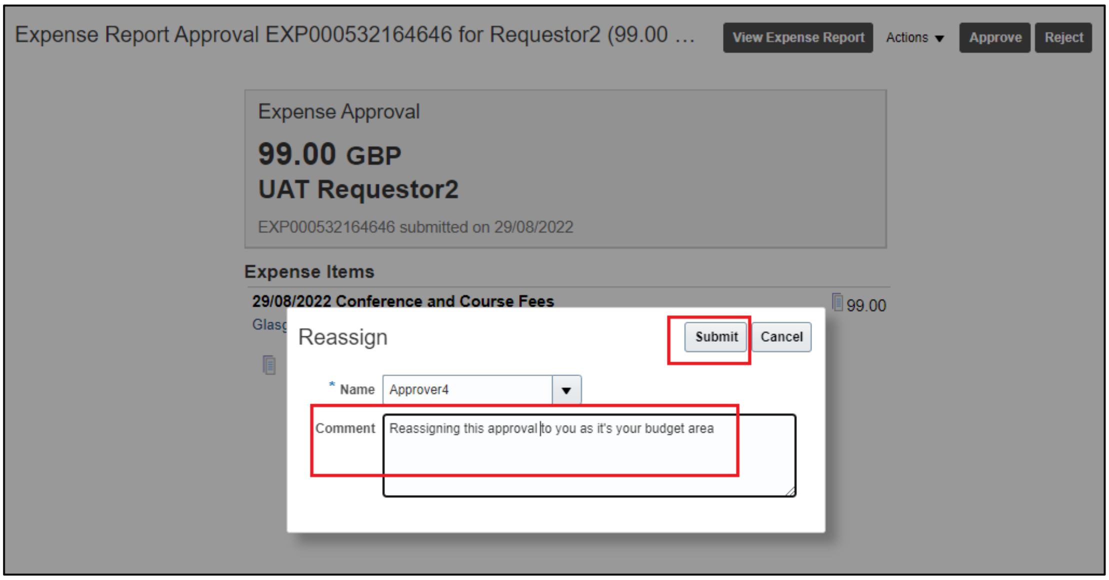
4. Click on **Actions** and select **Reassign** from the drop-down menu



5. Start to type in the name of the person you wish to reassign the task to and select from the list.

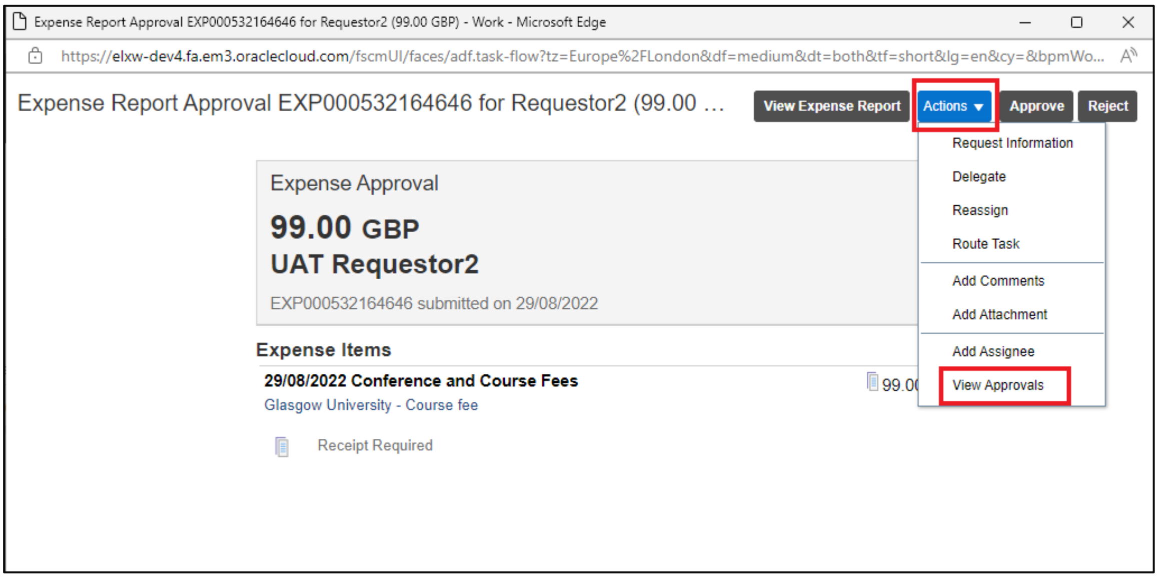


6. Enter a comment and click **Submit** to reassign the approval request.

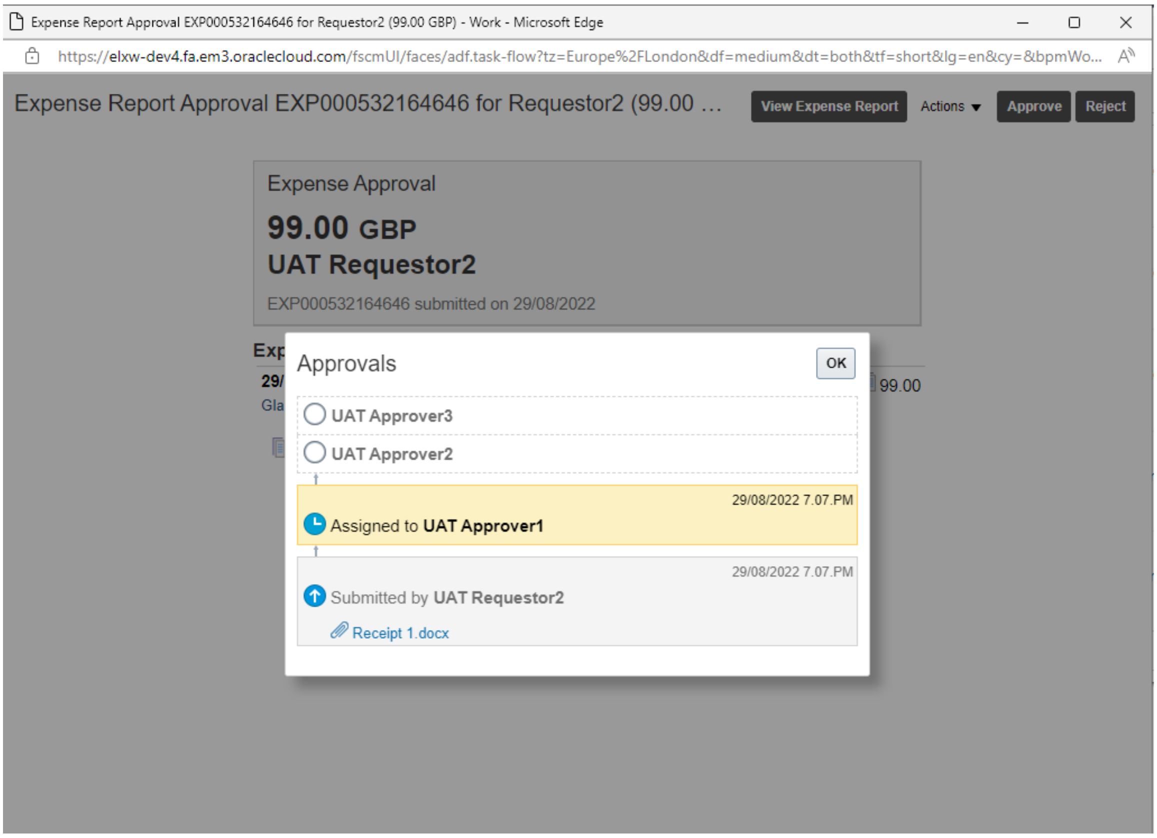


2.3 View Approvals

1. To view where the approval task is in the approval hierarchy click on Actions and select **View Approvals** from the drop down menu



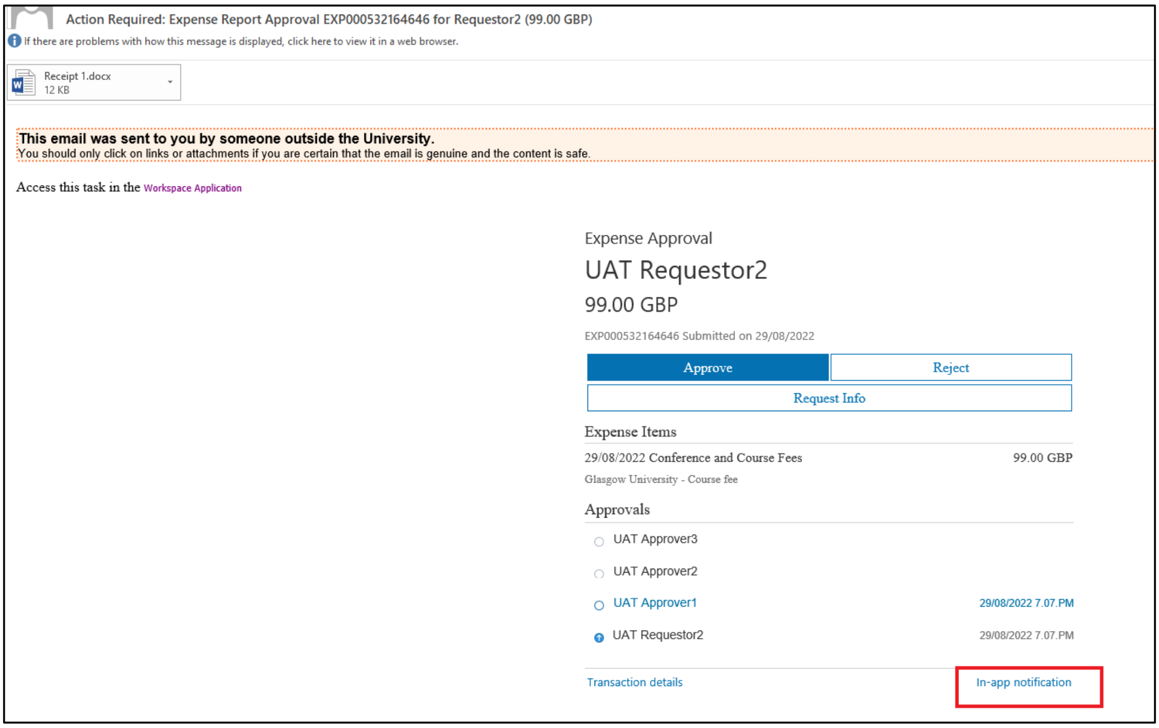
2. The approval hierarchy and status is displayed



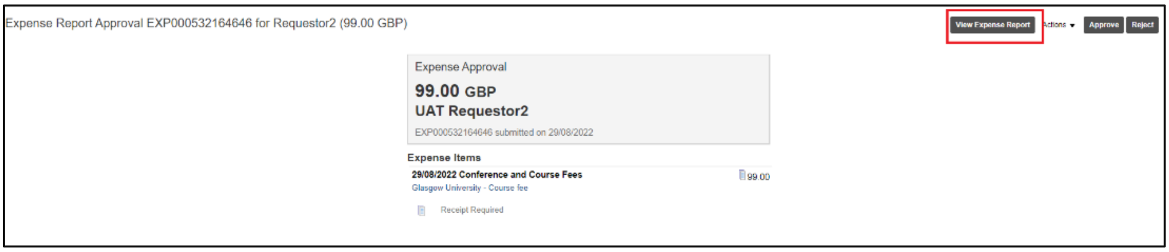
Appendix 1 - Accessing additional information and approval actions from email Notifications

1.1 Expense Reports

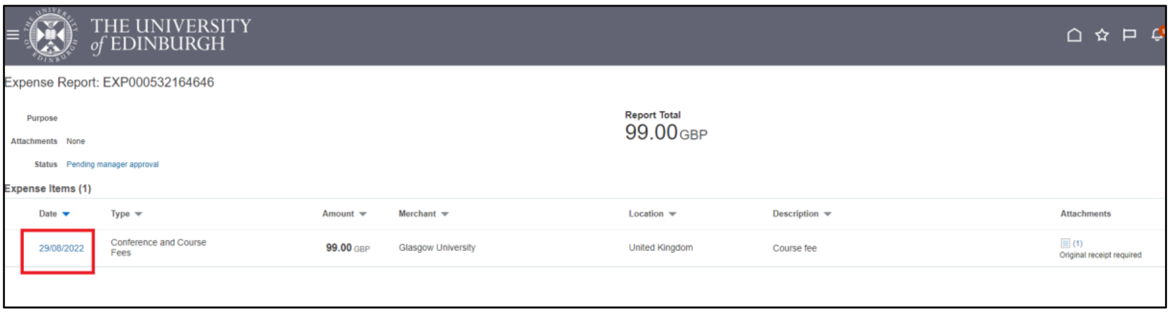
1. Open the email notification
2. The expense report details are displayed and the receipts are attached to the email
3. To view the account details click on the **In-App Notification**



4. Click on **View Expense Report**



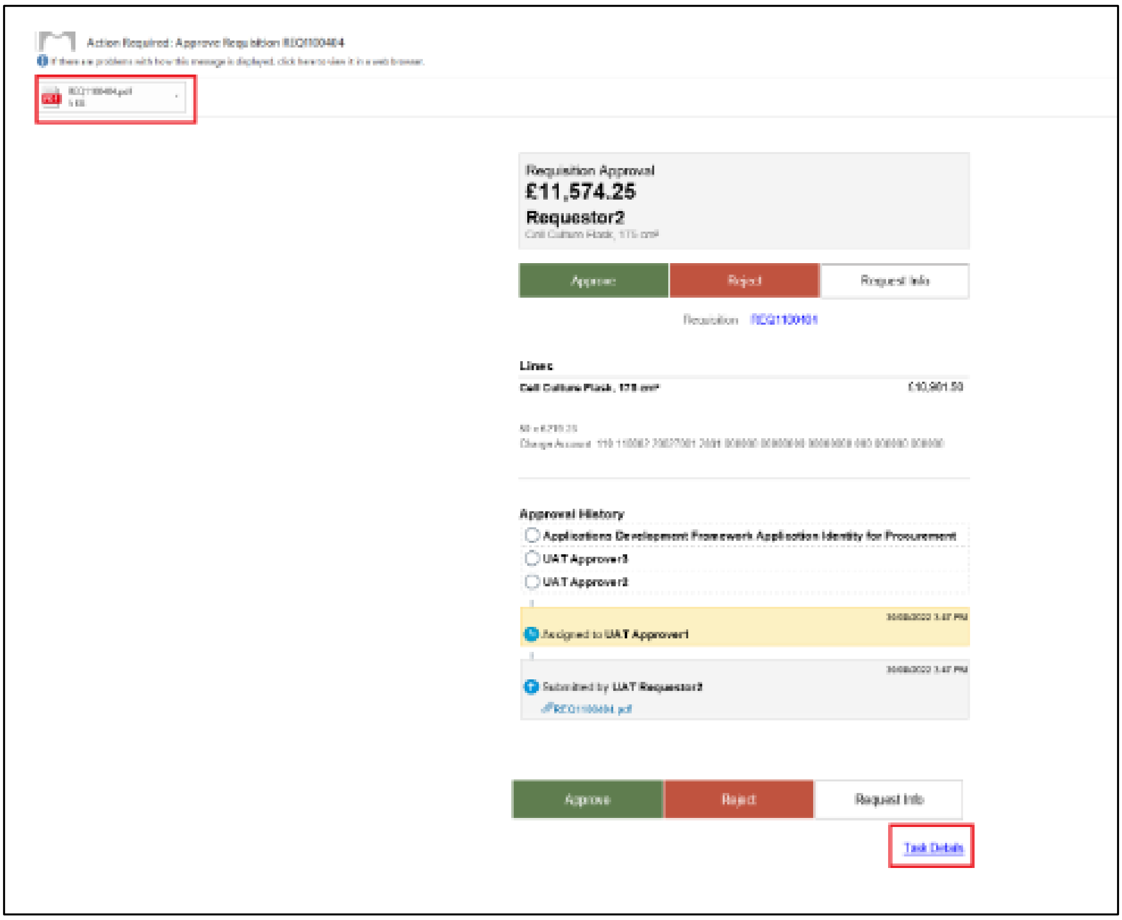
5. Click on **Date** to expand the expenses report



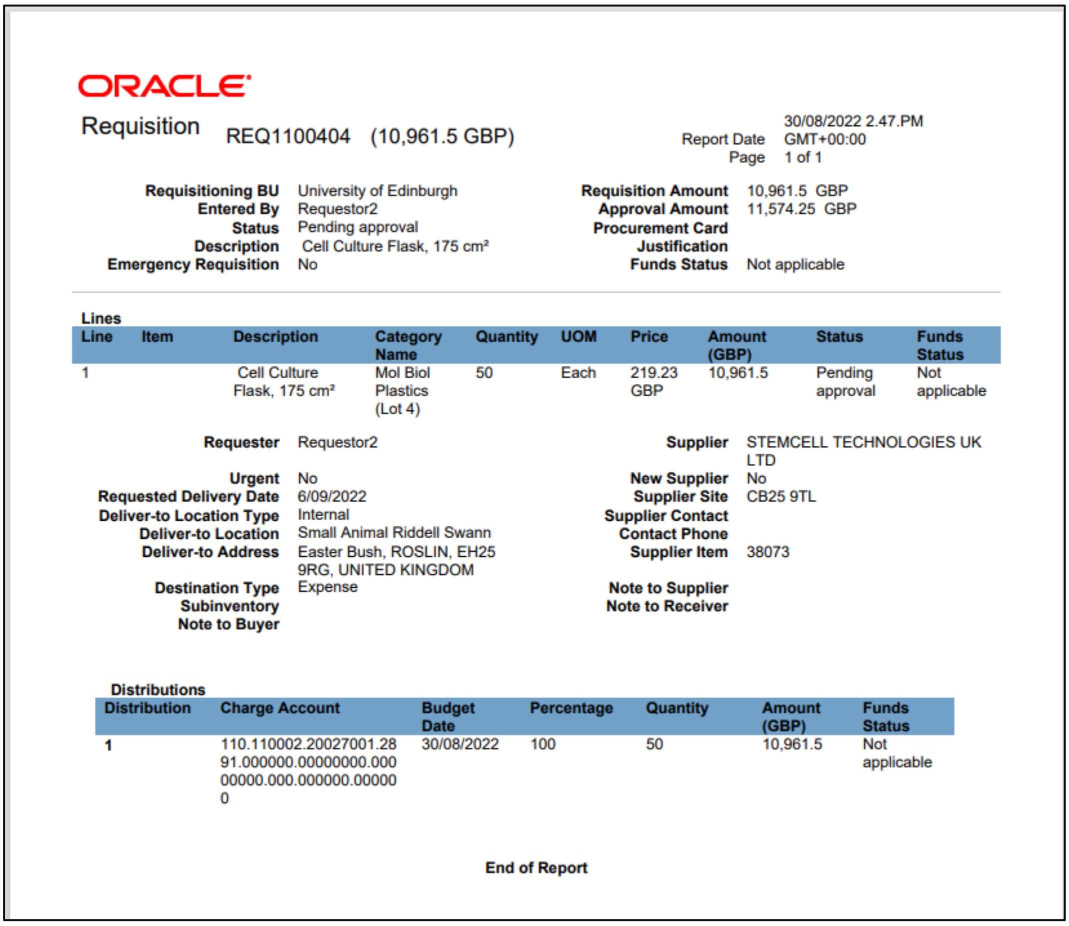
6. View receipts and account details. Once reviewed click **Done** then either return to the email notification to approve, reject or request further information or click on the **Bell** notification to access additional approval options (e.g. route task or reassign) via the approval notification in People and Money.

1.2 Purchase Requisition

1. Open the email notification
2. The requisition details are displayed and the requisition is attached to the email as a PDF.



3. Click on the PDF email attachment to view further information about the requisition



ORACLE

Requisition REQ1100404 (10,961.5 GBP)

Report Date 30/08/2022 2.47.PM GMT+00:00
Page 1 of 1

Requisitioning BU	University of Edinburgh	**Requisition Amount**	10,961.5 GBP
Entered By	Requestor2	**Approval Amount**	11,574.25 GBP
Status	Pending approval	**Procurement Card**	
Description	Cell Culture Flask, 175 cm²	**Justification**	
Emergency Requisition	No	**Funds Status**	Not applicable

Lines

Line	Item	Description	Category Name	Quantity	UOM	Price	Amount (GBP)	Status	Funds Status
1		Cell Culture Flask, 175 cm²	Mol Biol Plastics (Lot 4)	50	Each	219.23 GBP	10,961.5	Pending approval	Not applicable

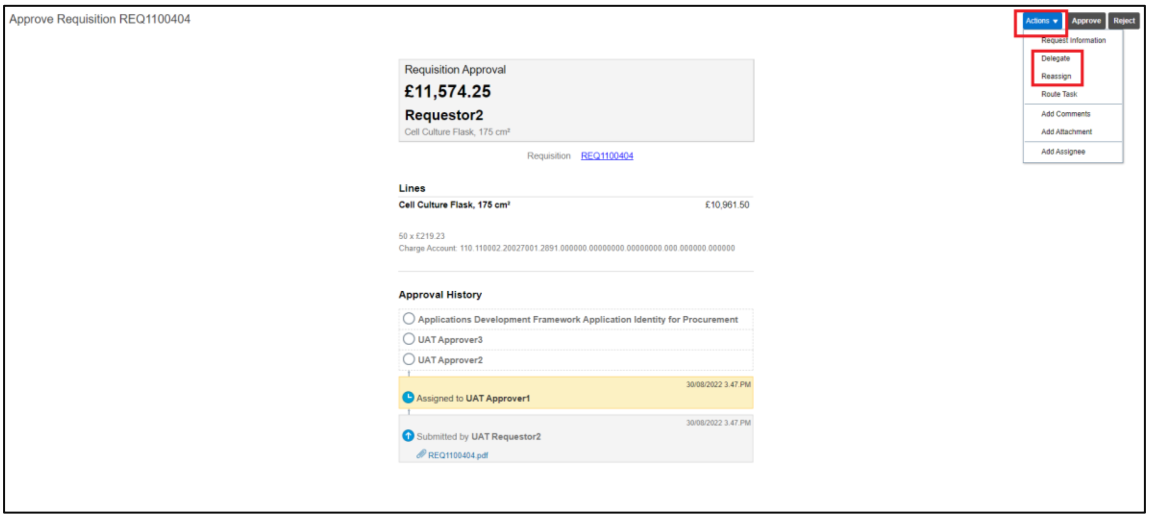
Requester	Requestor2	**Supplier**	STEMCELL TECHNOLOGIES UK LTD
Urgent	No	**New Supplier**	No
Requested Delivery Date	6/09/2022	**Supplier Site**	CB25 9TL
Deliver-to Location Type	Internal	**Supplier Contact**	
Deliver-to Location	Small Animal Riddell Swann	**Contact Phone**	
Deliver-to Address	Easter Bush, ROSLIN, EH25 9RG, UNITED KINGDOM	**Supplier Item**	38073
Destination Type	Expense	**Note to Supplier**	
Subinventory		**Note to Receiver**	
Note to Buyer			

Distributions

Distribution	Charge Account	Budget Date	Percentage	Quantity	Amount (GBP)	Funds Status
1	110.110002.20027001.2891.000000.00000000.00000000.000.000000.000000	30/08/2022	100	50	10,961.5	Not applicable

End of Report

4. Click on the **Task Details** to access the additional approval actions in People and Money



1.3 Manual Accounts Payable Invoices and Credit Memos

1. Open email notification
2. Click on **In-App Notification** to access the additional approval actions in People and Money

Action Required: Approval of Invoice INV-4545 from WOLF LABORATORIES LTD (42.00 GBP)

If there are problems with how this message is displayed, click here to view it in a web browser.

This email was sent to you by someone outside the University.
You should only click on links or attachments if you are certain that the email is genuine and the content is safe.

Access this task in the Workspace Application

Invoice Approval

42.00 GBP

WOLF LABORATORIES LTD

INV-4545

30/08/2022

Approve | Reject | Request Info

Details

From	UAT Requestor2
Requester	Requestor2
Description	Test
Supplier Site	YO42 2PX
Business Unit	University of Edinburgh

Amount Summary

Line Type	Amount
Item	35.00
Tax	7.00
Total	**42.00**

Cost Center Summary

Cost Center	Amount
AHSS Balance Sheet	41.22
Balance Sheet	0.78
Total	**42.00**

Lines

Invoice Line	Amount
6. Test	35.00
Distributions 110.110002.10010001.1133.000000.00000000.00000000.000.000000.000000 University of Edinburgh.General Unrestricted Funds.AHSS Balance Sheet.Other SFC Grants.No Analysis - Default.No Portfolio - Default.No Product - Default.No Entity.No Spare 01.No Spare 02	
7. Tax Test	7.00
Total	**42.00**

Installments

Due Date	Amount
1. 29/09/2022	42.00
Payment Method: UoE BACS Direct Credit	
Payment Priority: 99	
Total	**42.00**

Approvals

UAT Approver3

UAT Approver2

30/08/2022 4.20 PM
Assigned to **UAT Approver1**

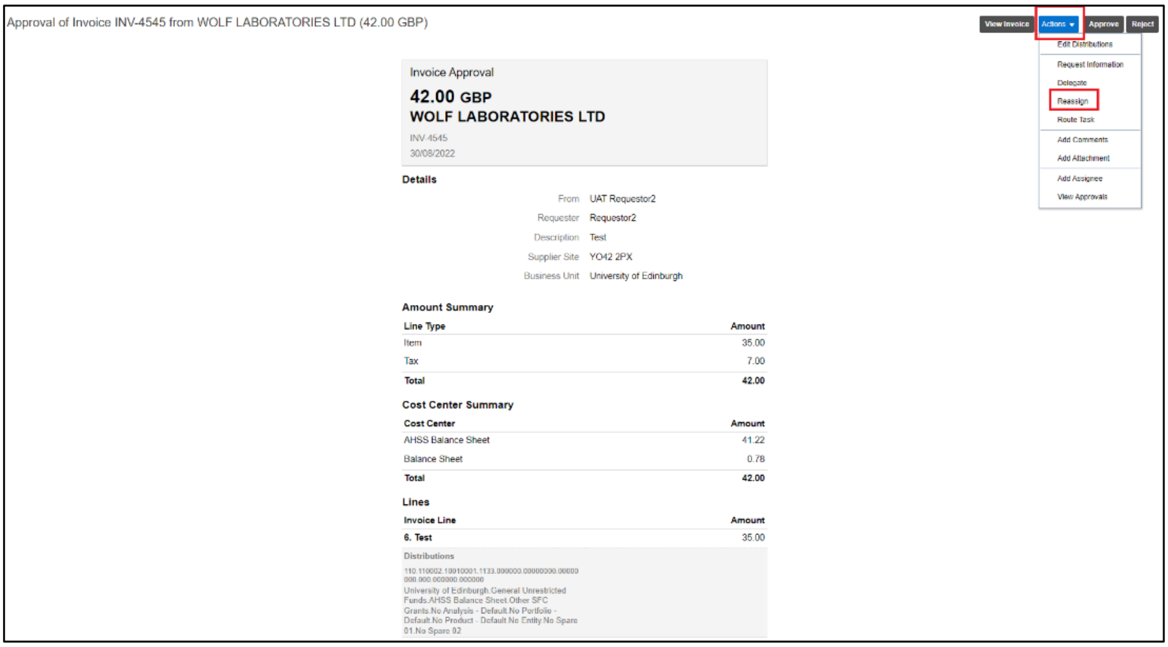
30/08/2022 4.20 PM
Submitted by **UAT Requestor2**

Approve | Reject | Request Info

Transaction details

In-app notification

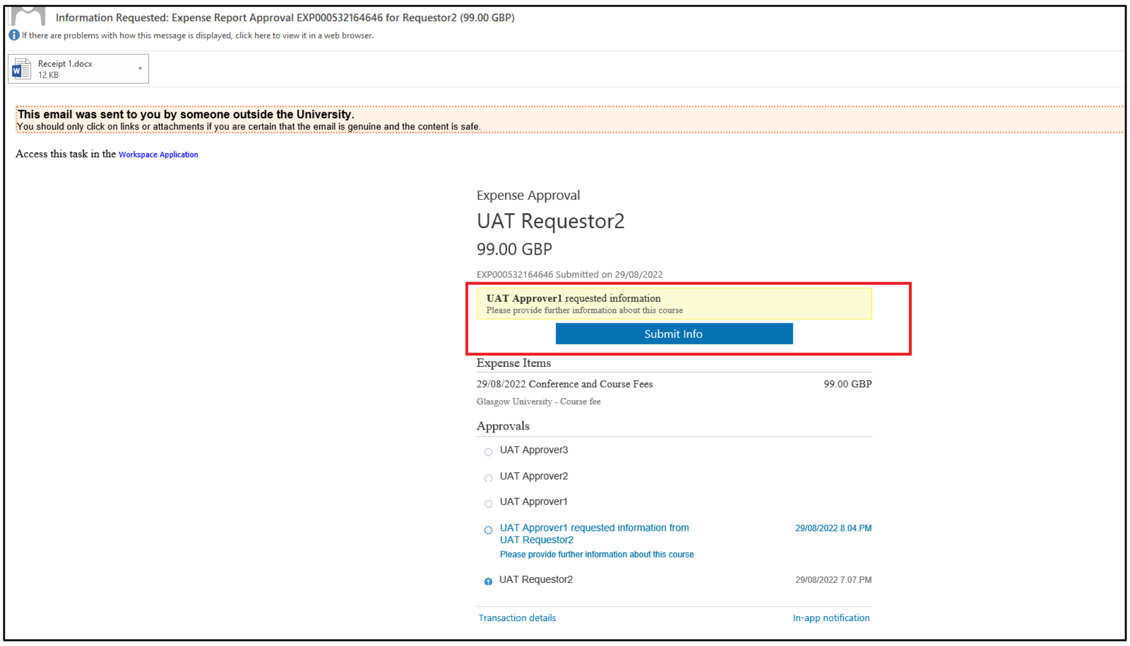
3. Click on **Actions** and select the required action from the drop-down menu. The invoice can also be approved or rejected from this screen.



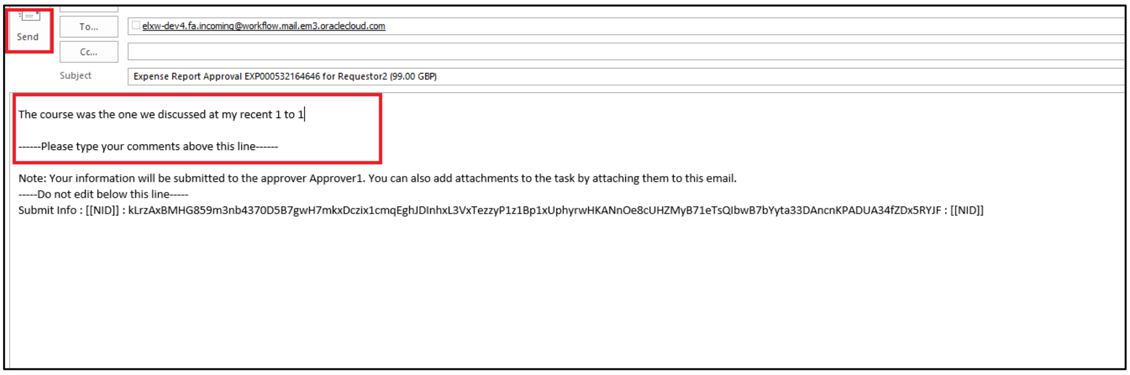
Appendix 2 - Submitting Information Requested by an Approver

Via email

1. Open the information request email notification as normal
2. Click on **Submit Info** which opens a new email

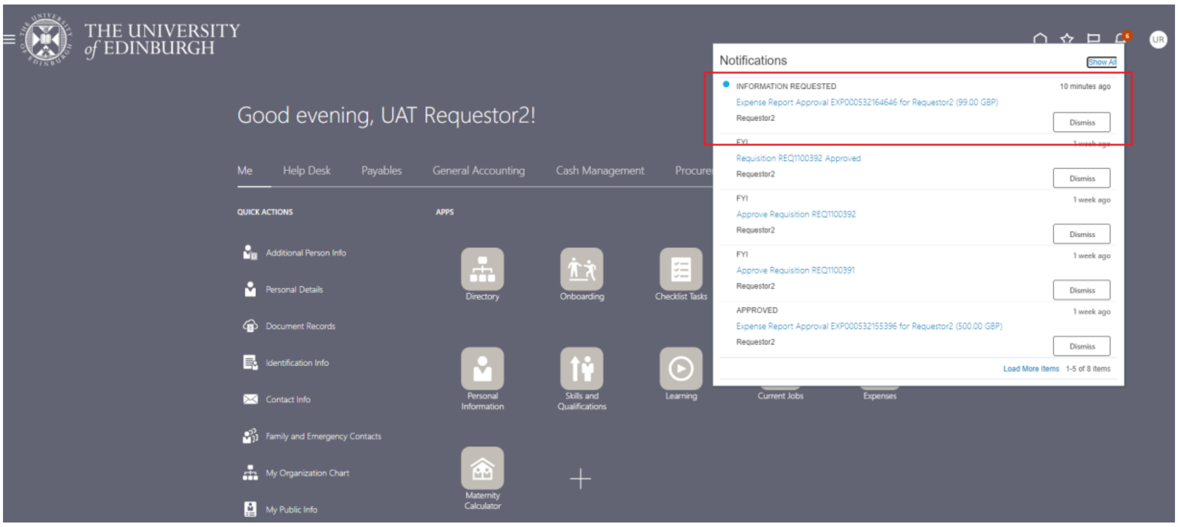


3. Provide the information in the email and click **Send**

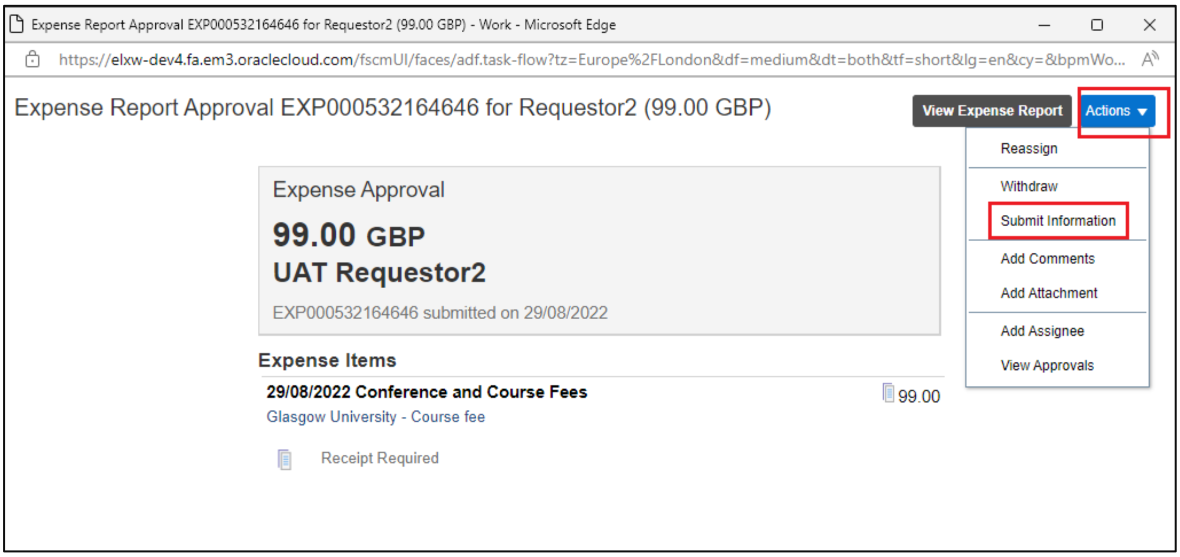


Via People and Money

1. In the **Home** page, click the **Bell** icon to view the information request
2. Click on the link to expand the request



3. Click on **Actions** and select **Submit Information** from the drop-down menu



4. Provide the information in the comment box and click **Submit**