

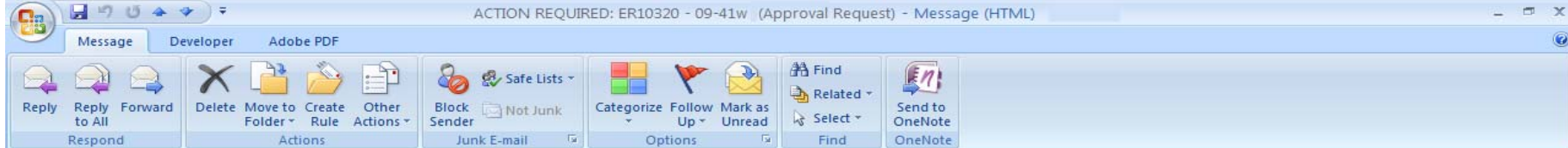
# Approving from Email Notifications

Expense Report **Approvals** may be done

- using **Action Required** email notification
  - delivered to approvers' default @UW email

## *TIP*

- Pine Users can view ariba emails in html format by hitting the '>' key twice



Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

From: Ariba Administrator [ariba\_apps@u.washington.edu]

Sent: Fri 3/6/2009 2:01 PM

To: Joe Approver

Cc:

Subject: ACTION REQUIRED: ER10320 - 09-41w (Approval Request)

TIP

### ER10320 - 09-41w requires your approval because "Travel Office must approve"

Requester: Jane Preparer Created: 2:17 PM Wednesday, March 4, 2009

#### Actions:

Open

Cash Advance: 0.00 USD

From: Saturday, February 7, 2009

To: Saturday, February 7, 2009

#### Line Items

#	Date	Type	Description	Budget	Amount	Adjusted Amount
1	Saturday, February 7, 2009	UWLodgingPerDiem	Lodging Per Diem	123456	475.00 USD	475.00 USD
2	Saturday, February 7, 2009	UWMealPerDiem	Meal Per Diem	123456	240.00 USD	240.00 USD

Total Expenses: 715.00 USD

Amount Due: 715.00 USD

#### Comments

2:41 PM Wednesday, March 4, 2009

Jane Preparer - Workshop budget allows for actual cost of single-occupancy lodging up to \$95/night and per diem up to \$40/day.

10:20 AM Thursday, March 5, 2009

Jane Preparer - Non-UW traveler's signature received by fax.

#### Approval flow

As of 2:01 PM Friday, March 6, 2009 :

Status	Required	Reason	Approver	Date	Time
Ready	No	GlobalWatcher	(Multiple)		
Approved	Yes	Compliance Approver	Jane Preparer (on behalf of ComplianceOrgApprover-)	March 5, 2009	10:19 AM
Approved	Yes	Funding Approver	Jane Preparer (on behalf of FundingOrgApprover-)	March 5, 2009	10:20 AM
Approved	Yes	Preparer must approve	Jane Preparer	March 5, 2009	10:21 AM
Approved	Yes	Receipt Manager must approve	TRAVEL (on behalf of ReceiptManager)	March 6, 2009	2:01 PM
Ready	Yes	Travel Office must approve	TravelOffice		

#### Actions:

Open

From **Action Required** email double Click **Open** under **Actions** to access ER summary screen for approval

**TIP:**

Email **Subject** will list ER number, title and action required

Trip Name: 09-41w

Type of Traveler: Non-UW

Traveler/Claimant: Jane Traveler

US Citizen: No

NRA Info: [NRA Info](#)

Visa Type/Status: H-1B

Personal Time Taken: No

Personal Time Info: [Personal Time](#)

Include dates/times of business travel

Purpose of Trip: Participate in INT-09-41W workshop New Frontiers held at UW, February 3-6, 2009.

Number of Receipts Required: 1

\*\*\* Traveler Address Information \*\*\*

Home Address (city/state): Brooklyn, NY

Duty Station (city/state): Brooklyn, NY

\*\*\* Check Delivery Information \*\*\*

Address Type: Domestic

Delivery Address/Box No.: 11256 Some Ave.

City (Domestic)/Country (Foreign): Brooklyn

State: NY

ZIP Code: 11205

Receipts:

My Labels: [Label...](#)



Expenses

Type ↑	No.	Date	Description	Amount	Tax Amount	Adj. Amount	Adj. Tax	Require Receipt	
	1	02/07/09	Lodging Per Diem	\$475.00 USD	\$0.00 USD	\$475.00 USD	\$0.00 USD	Yes	<a href="#">Detail</a>
	2	02/07/09	Meal Per Diem	\$240.00 USD	\$0.00 USD	\$240.00 USD	\$0.00 USD	No	<a href="#">Detail</a>

Company Expenses:	\$715.00 USD
Personal Expenses:	\$0.00 USD
Reimbursement Amount:	\$715.00 USD

1. Review each item listed under **Expenses** of ER

2. Use **Detail** button to review specifics for each item

**TIP:** scroll down to view entire ER comments/attachments below reimbursement amount

[Back](#)

LINE ITEM DETAILS

Date: 02/07/2009  
Amount: \$475.00 USD

[Currency exchanges rates](#)

Paid By: Traveler  
Tax Amount: ⓘ \$0.00 USD  
Description: Lodging Per Diem

Travel Destination: In-State  
Location: WASHINGTON  
County Info: [County Info](#)  
Check-in Date: Mon, 2 Feb, 2009  
Check-out Date: Sat, 7 Feb, 2009  
Number of Nights: 5  
Max Allowed: \$158.00 USD  
Daily Rate: \$89.00 USD  
Daily Taxes: \$13.88 USD  
Override Amount: ⓘ \$475.00 USD  
Room Desc.:

ACCOUNTING - BY LINE ITEM

No.	Accounting Information	Split Amount
1	Account Code: 041000 (IN-STATE - PER DIEM) Bien:2007 Budget Number: ⓘ 123466 (BUDGETNAME) Bien:2007 Org Code: 3456789000 (ORGRNAME) Bien:2007 Task: Option: Project:	100%

COMMENTS - BY LINE ITEM

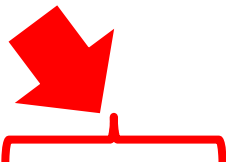
[Add Comment](#)

ATTACHMENTS - BY LINE ITEM

**Detail** of items allows you to :

- view budgetary information
- view comments
- add comments or attachments

Use **Back** button to return to ER summary



Summary Approval Flow History Policy Violations

Trip Name: 09-41w

Type of Traveler: Non-UW

Traveler/Claimant: Jane Traveler

US Citizen: No

NRA Info: [NRA Info](#)

Visa Type/Status: H-1B

Personal Time Taken: No

Personal Time Info: [Personal Time](#)  
Include dates/times of business travel

Purpose of Trip: Participate in INT-09-41W workshop New Frontiers held at UW, February 3-6, 2009.

Receipts: Receipts have been received.

My Labels: [Apply Label...](#)

Number of Receipts Required: 1  
\*\*\* Traveler Address Information \*\*\*

Home Address (city/state): Brooklyn, NY

Duty Station (city/state): Brooklyn, NY  
\*\*\* Check Delivery Information \*\*\*

Address Type: Domestic

Delivery Address/Box No.: 11256 Some Ave.

City (Domestic)/Country (Foreign): Brooklyn

State: NY

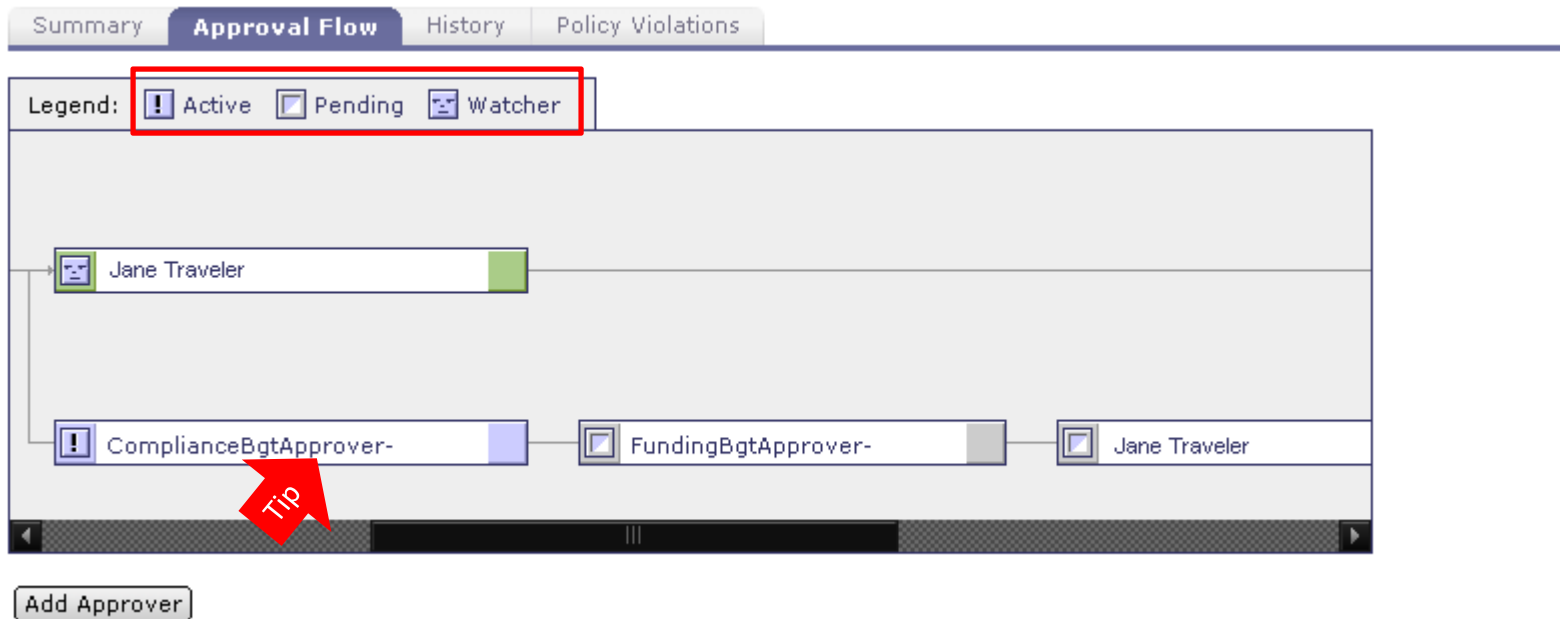
ZIP Code: 11205

Expenses									
Type ↑	No.	Date	Description	Amount	Tax Amount	Adj. Amount	Adj. Tax	Require Receipt	
	1	02/07/09	Lodging Per Diem	\$475.00 USD	\$0.00 USD	\$475.00 USD	\$0.00 USD	Yes	<a href="#">Detail</a>
	2	02/07/09	Meal Per Diem	\$240.00 USD	\$0.00 USD	\$240.00 USD	\$0.00 USD	No	<a href="#">Detail</a>

Company Expenses: \$715.00 USD  
 Personal Expenses: \$0.00 USD  
 Reimbursement Amount: \$715.00 USD

COMMENTS - ENTIRE EXPENSE REPORT

Use tabs to access details for ER Approval Flow and History



## Sample **Approval Flow**

Approvals/Notifications are made in approval flow role order

Legend:

Active= Role where action needed

Pending= Role awaiting action

Watcher=No action required

**TIP:** Click on role/name in flow to view authorizers for that role

Summary

Approval Flow

**History**

Policy Violations

Date ↓	User	Real User	Action	Summary
Fri, 6 Mar, 2009	Ariba System		Expense sent.	Expense report has been sent.
Fri, 6 Mar, 2009	Ariba System		Sending expense.	Sending expense report.
Fri, 6 Mar, 2009	Travel Office Approver	approver	Approved	<a href="#">ER10320</a> approved.
Fri, 6 Mar, 2009	TRAVEL	rcptmngr	Approved	<a href="#">ER10320</a> approved.
Fri, 6 Mar, 2009	TRAVEL	rcptmngr	Receipts Recv.	Receipts have been received.
Thu, 5 Mar, 2009	Joe Preparer	preparer	Approved	<a href="#">ER10320</a> approved. <a href="#">Comments</a> .
Thu, 5 Mar, 2009	John Approver	approver	Approved	<a href="#">ER10320</a> approved.
Thu, 5 Mar, 2009	John Approver	approver	Approved	<a href="#">ER10320</a> approved.
Wed, 4 Mar, 2009	Joe Preparer	preparer	Submitted	<a href="#">ER10320</a> submitted for approval. <a href="#">Comments</a> .

This screen accessed by clicking **History** Tab and shows all activity associated with this ER

Trip Name: 09-41w

Type of Traveler: Non-UW

Traveler/Claimant: Jane Traveler

US Citizen: No

NRA Info: [NRA Info](#)

Visa Type/Status: H-1B

Personal Time Taken: No

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Include dates/times of business travel

Purpose of Trip: Participate in INT-09-41W workshop New Frontiers held at UW, February 3-6, 2009.

Number of Receipts Required: 1

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Receipts: |

My Labels: [Apply Label...](#)

Expenses								
Type ↑	No.	Date	Description	Amount	Tax Amount	Adj. Amount	Adj. Tax	Require Receipt
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Company Expenses:	\$715.00 USD
Personal Expenses:	\$0.00 USD
Reimbursement Amount:	\$715.00 USD

Review expense items and details; add clarification comments prior to approval then select **Approve** or **Deny**

**TIPS:**

- Options may vary (approve, deny, edit, withdraw) depending on role
- Deny, withdraws ER and sends it back to preparer for edits and resubmission through approval flow.
- Use Deny with caution, preparer/compliance approvers may edit without denying
- Comments field may provide clarification and prevent denials