

Approving Travel Transactions

To approve transactions, you must have the security role **UF_EX_MANAGER**. With this role, a user can approve, view and print travel transactions.

1. Login to **myUFL**
 - Open an internet browser
 - Navigate to my.ufl.edu
 - Click the Access myUFL button
 - Enter your GatorLink username and password
 - Click the Login button
2. Click the **NavBar**, then the **Main Menu** button and navigate to: **Financials > Manager Self Service > Travel & Expense Center > Approvals > Approve Transactions.**

A transaction stays in an Approver's Worklist until the approver acts on the transaction. Once acted upon, the transaction is removed from the Worklist.

Select	Alert	Transaction Type	Total Unit	Name	Employee ID	Description	Transaction ID	Date Submitted	Status
<input type="checkbox"/>		Cash Advance	500.00 USD	TBD, Faculty	00000002	Conference	0000005590	02/17/2015	Submitted
<input type="checkbox"/>		Cash Advance	520.00 USD	TBD, Faculty	00000002	IT Conference	0000005594	02/12/2015	Submitted
<input type="checkbox"/>		Cash Advance	150.00 USD	TBD, Faculty	00000002	Travel Meeting	0000005597	02/13/2015	Submitted
<input type="checkbox"/>		Expense Report	80.00 USD	TBD, Faculty	00000002	Travel Meeting	0000602319	02/13/2015	Submitted

Transaction Type Tabs

You can click on each tab to review and approve a specific type of transaction

Search Pending Transactions

You can use the Search Pending Transaction box to search for specific transactions based on UFID, Name, Status, Total, etc.

Change Sort Order

Use the Change Sort Order option to adjust the order of the transaction on your list. Secondary sort options are also available. Select the Ascending or Descending option to further define the sort results.

Overview Tab

All transactions waiting for approval will appear on this Overview tab. Here, you can see fields entered into the transaction that will help you identify them.

Details about the transactions can be accessed by clicking the links in the Description or Transaction ID fields.

Important Note: Expense transactions will include travel related, and non-travel related.

For your convenience, there are two sets of transaction buttons. One at the top of your Transactions to Approve list, and one at the bottom. The buttons include:

Approve

- Approve the transaction and move it forward for further processing.
- Once approved, the originator and the traveler will receive an automatically generated email notification.
- This action changes the transaction status to Approved.

Send Back

- Click to return the travel authorization to the employee for correction or revision.
- If you send a transaction back to the employee, you must also provide an explanation in the Comments field at the bottom of the page.
- This action changes the status to Pending.

Hold

- Click to place the transaction on hold. Holding a transaction *claims* it for the approver. Placing the transaction on hold means only the holding user can take action on the transaction.
- This action changes the transaction status to Hold by Approver.

Refresh List

- Use this button to refresh the list of transactions in your browser. It has no impact on the transaction.

Budget Check

- Each travel transaction must be budget checked prior to approval. You can wait for the overnight budget checking process, or click the Budget Check button.
- A budget checked transaction has a status of Valid.

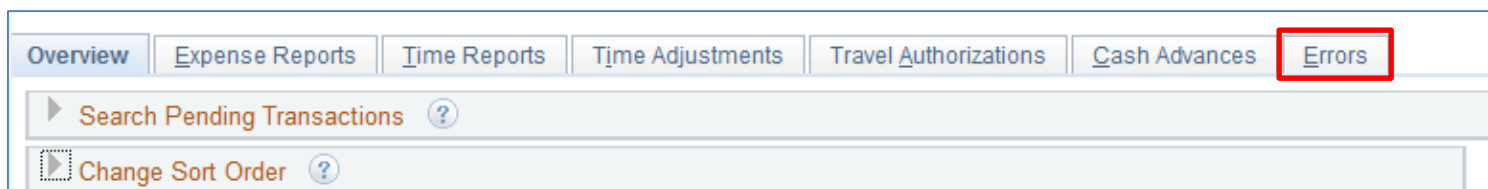
To act upon a transaction, simply select it by clicking the checkbox in the Select column of the appropriate row.

Use the Select All or Clear All to change the Select checkbox.

Errors

Click the Error tab to review the error screen.

Transaction that cannot be moved forward without addressing errors will appear on the Errors tab with an explanation of the error.



Each time you approve, a confirmation page will be displayed.

Click the OK button to confirm and continue.

The number of transactions you are acting upon will appear here.

Approve Transactions

Approval Action Confirmation

March 03, 2015 08:03 AM EST

Approval Transaction Selected

Expense Reports	0
Time Reports	0
Time Adjustments	0
Travel Authorizations	0
Cash Advances	1

Total Transactions 1

These transactions will be Approved

If you need help with...

- Technical issues, contact the UF Help Desk at 392-HELP or helpdesk@ufl.edu
- Policies and Directives, contact the Travel Office at 392-1241