Quick Reference Guide:
Approver Tips

Purpose:

This guide will help Approvers identify the different approval roles and what each role is reviewing for in financial transactions.

Approver Roles and Responsibilities:

Role	Approves	Responsibilities
Cost Center Manager	All Procurement, Expense and EIT transactions made on GL Projects	• Verify all required documentation is attached, accurate and complete • Verify that the GL Project being charged has sufficient funds • Verify that the employee charging to the GL Project has authority to do so • Verify compliance with Tulane and external polices • Verify that the GL Project (GLxxxxxx) is in the correct field (account field) and that **NO** Non-Sponsored or Sponsored Project (any project code that does NOT start with "GL") has been entered into the GL Project Field (account field) • Verify that the natural account being charged is appropiate. Revenue, salary or fund balance accounts should **NEVER** be charged for Expense or Procurement transactions.

Task Manager	All Procurement, Expense and EIT transactions made on Non-Sponsored or Sponsored Projects	• Verify all required documentation is attached, accurate and complete • Verify that the Non-Sponsored or Sponsored Project being charged has sufficient funds • Verify that the employee charging to the Non-Sponsored or Sponsored Project has authority to do so • Verify compliance with Tulane and external polices • Verify that the GL Project (GLxxxxxx) is in the correct field (account field) and that **NO** Non-Sponsored or Sponsored Project (any project code that does NOT start with "GL") has been entered into the GL Project Field (account field) • Verify that the natural account being charged is appropiate. Revenue, salary or fund balance accounts should **NEVER** be charged for Expense or Procurement transactions.
Line Manager	Approve Expense Reports	• Verify that the charges were approved • Verify that the employee had the authority to spend the funds
Labor Distribution Approvals	Budget Office and RASU are the only approvers for Labor Distribution creation or modifications	• Budget Office will review all GL and Non-Sponsored activity • RASU will review all Sponsored Project activity for sponsored agreement compliance

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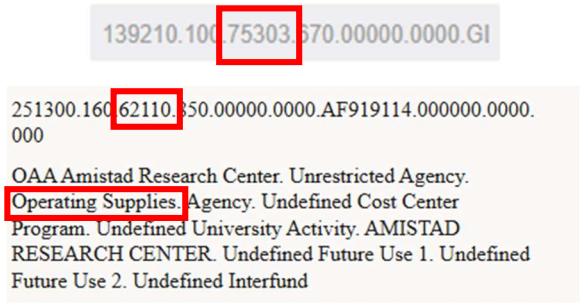
General Approver Tips:

Ensure the Natural Account matches the expense.



The Natural Account should start with either a 6 or 7 in Expense and Procurement.

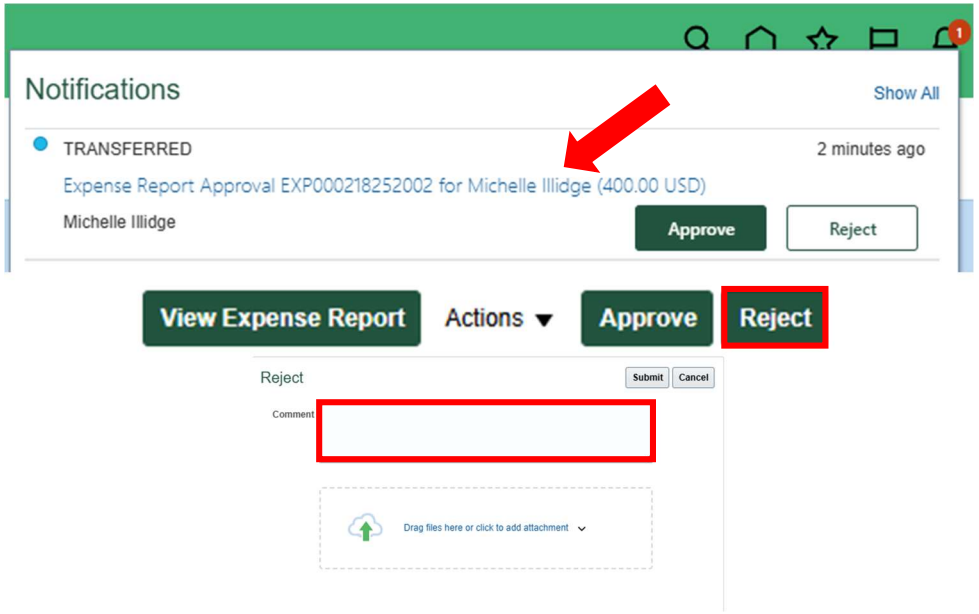
Natural Account 39990 (Fund Balance) should **NOT** be utilized for financial transactions.



When rejecting a transaction, **ALWAYS** leave comments for the user, so they may update appropriately before resubmitting.

You must open the item and add the comment.

Do not approve from the bell if you want to leave a comment.



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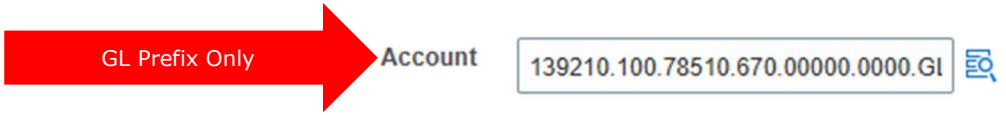
Expense Approval Musts:

Enhanced functionality within the approver email is currently being worked on to make the approval process easier. In the meantime, the Employee Expense Status Report is a great way to see the charging instructions clearly for an entire report without having to scroll through each item in Expense.

The Account Field should only contain projects starting with the **prefix GL.**



Project Number Field is where Sponsored and Non-Sponsored projects should be entered. This field is for projects with prefixes **NOT** beginning with the prefix "GL".



TIP The account field should **NOT** be erased when using the project number field and the fields should never match

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Ensure the Natural Account has not been changed and matches the expense type.



The Natural Account should start with either a 6 or 7 and should NEVER begin with a 3, 4, 5 or 9.

TIP The natural account field is the 3rd set of numbers in the accounting string

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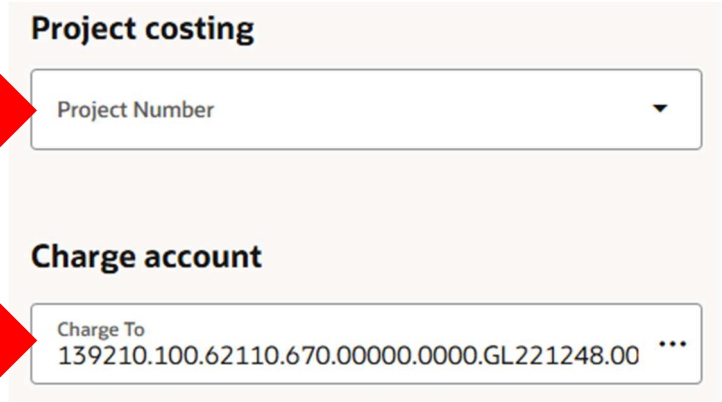
Procurement Approval Musts:

The Requisition Report in FDI is a great way to see the charging instructions clearly if you have questions.

Project Costing field is where Sponsored and Non-Sponsored projects are entered. This field is for projects with prefixes **NOT** beginning with a "GL".

Enter Non-GL Prefix Only



Charge Account field should only be used to charge projects starting with the "**GL" prefix.** Using this field for a Non-GL prefix will skip the accounting on the project and require correction.

Enter a GL Prefix Only

TIP The Project Number will appear in the charge string after saving- this is normal functionality in procurement

When requisitions are received for approval, ensure the requisition looks like this:

GL Project Entered Correctly

Charge Account	210110.100.62110.670.00000.0000.GL211400.000000.0000.000
Charge Account Description	OAA Office of Academic Affairs. Unrestricted Operations. Operating Supplies. Institutional Support. Undefined Cost Center Program. Undefined University Activity. OFFICE OF ACADEMIC AFFAIRS. Undefined Future Use 1. Undefined Future Use 2. Undefined Interfund

The Project and Task should appear if the Sponsored or Non-Sponsored Project was entered correctly in the Project Costing Field.

Non-GL Project Entered Correctly

Project	AMISTAD RESEARCH CENTER
Task	Default Task
Charge Account	251300.160.62110.850.00000.0000.AF919114.000000.0000.000

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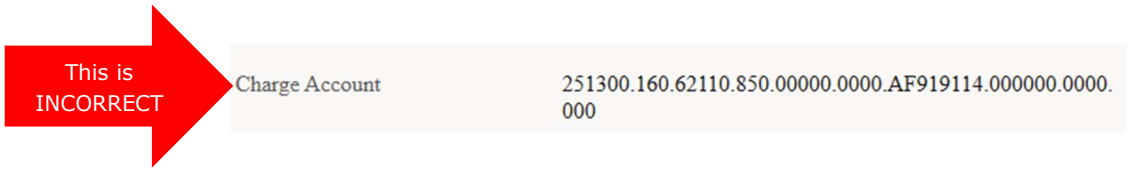
A Non-Sponsored or Sponsored project shown in the Charge To field without the Project/Task wording indicates a Sponsored or Non-Sponsored has been entered in the **wrong field** (Charge To Field).



A requisition for any item with a unit cost below $5K should **NOT** be assigned an 82xxx Natural Account which is for Capital Purchases.



E-IT Approval Musts:

Add comments **BEFORE** pressing the Approve or Reject Button.



TIP Look in Team Tasks for EITs to approve

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