This how-to sheet outlines the steps required:
For managers or cost object approvers to approve cash advance requests.

Who is the manager?
The manager (i.e. Manager Approval in the approval flow) must be an individual in a one-up role or higher from the claimant.

Who is the cost object approver?
The financial approval authority/ies (i.e. Cost Object Approval in the approval flow) for the index/es that a given report has been charged to.

What if the approver is both?
If the approver is both the manager and cost object approver they will be approving BOTH STEPS in the ‘Manager Approval’ step.

Change in Terminology:
Request was called ‘Authorization Report’ in the old system.

Governing Policies can be found on the University Secretariat’s site:
- Approval and Delegation of Authority
- Travel and Related Expenses
- Hospitality and Working Meal Expenses
- Alcohol and Cannabis Use Policy
1. From the landing page, click on the dark grey ‘Approvals’ button at the top of the screen.

2. If there is a number on the ‘Requests’ tab, a cash advance request is waiting for your approval.

   Click on the blue ‘Request Name’ you want to approve.

   **Tip:** As an approver, if you see this icon, you are approving as the ‘cost object approver’.

3. The columns will tell you ...
   - **Alerts:** hover over the speech bubble icon to view comments
   - **Expense Type**
   - **Details:** city
   - **Date:** date of purchase
   - **Amount:** amount on receipt
   - **Requested:** amount claimed for the expense
   - **Approved:** shows any changes made by approver

   **IMPORTANT!** A processor has already verified that the details provided here match the receipts.
4. Click on any row to view additional detail or modify fields.

The following fields can be modified:
- **Account Code**
- **Approved Amount**: This field can only be adjusted down.
- **Comments**: Field for Approver comments. Claimant comments appear below.

**Tip**: Hover over the question mark icon for an explanation about a given field.

5. To review supporting documentation, click on the blue ‘Attachments’ text and choose ‘View Documents’ from the drop down menu.

6. If you need to send the report back to the claimant, click on the blue ‘More Actions’ button and choose ‘Send Back to Employee’ from the drop down menu.
7. Read the ‘User Electronic Agreement.

Click the blue ‘Accept & Continue’ button to certify that the text in the ‘User Electronic Agreement’ window is true.

8. After you’ve finished approving a claim, the system will return to the remaining reports pending your approval.

Tip: To view reports that you have already approved, click on blue ‘View’ button.

What next?
- Visit the carleton.ca/facts/travel to find more how-to sheets.
- Questions about the system? Email financial.systems@carleton.ca.