People and Money System

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Managing Financial Approvals in People and Money

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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
4. 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)
5. 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 dropdown 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).

![Email notification screenshot](image)

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.
2. Click the information submitted link to expand the details.

3. 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**

![Expense Report](image)

4. Click on **View Expense Report**

![Expense Report](image)

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.

![Image](image1.png)

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.

![Image](image2.png)
3. Click on the PDF email attachment to view further information about the requisition

![Requisition Details]

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

![Task Details]

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PM-3422 22 of 26 Aug 2022
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

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**Invoice Approval**

<table>
<thead>
<tr>
<th>Details</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>From</td>
<td>UAT Requester1</td>
</tr>
<tr>
<td>Requestor</td>
<td>Requestor2</td>
</tr>
<tr>
<td>Description</td>
<td>Text</td>
</tr>
<tr>
<td>Supplier Site</td>
<td>YH42.27X</td>
</tr>
<tr>
<td>Business Unit</td>
<td>University of Edinburgh</td>
</tr>
</tbody>
</table>

**Amount Summary**

<table>
<thead>
<tr>
<th>Line Type</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item</td>
<td>35.00</td>
</tr>
<tr>
<td>Tax</td>
<td>7.00</td>
</tr>
<tr>
<td>Total</td>
<td>42.00</td>
</tr>
</tbody>
</table>

**Cost Center Summary**

<table>
<thead>
<tr>
<th>Cost Center</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>AN55 Balance Sheet</td>
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</tr>
<tr>
<td>Balance Sheet</td>
<td>0.78</td>
</tr>
<tr>
<td>Total</td>
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</tr>
</tbody>
</table>

**Lines**

<table>
<thead>
<tr>
<th>Invoice Line</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item</td>
<td>35.00</td>
</tr>
<tr>
<td>Tax</td>
<td>7.00</td>
</tr>
<tr>
<td>Total</td>
<td>42.00</td>
</tr>
</tbody>
</table>

**Installments**

<table>
<thead>
<tr>
<th>Due Date</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>29/01/2022</td>
<td>42.00</td>
</tr>
<tr>
<td>Payment Method</td>
<td>UNC 3A1.5 Street Credit</td>
</tr>
<tr>
<td>Payment Priority</td>
<td>99</td>
</tr>
<tr>
<td>Total</td>
<td>42.00</td>
</tr>
</tbody>
</table>

**Approvals**

- UAT Approver1
- UAT Approver2

**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**.