Card Program
Manager Approving - Faculty & Staff

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As a Manager you will need to approve single transactions (e.g. department purchasing) or Expense Folders (e.g. travel expense reports).

On your Home Page, do you have Expense Folders to Sign Off?

Yes

No

Go to Step #5

1. Click either:
   - Left Navigation Bar: Expense Folders Requiring Signoff

2. A listing of all expense folders will be shown. Click on the first expense folder.

3. Review contents of expense folder.
   - Clicking Print will provide all details including comments.
   - You can select a line and Flag it for more information (see other instructions).
   - Once reviewed, click Sign Off.
     Optional: You will be presented with a comments box. Enter comments if necessary.

4. Repeat steps 2-3 for all expense folders.

Return to your Home Page by clicking on the icon.
After expense folders are signed off or flagged (or if expense folders never existed) you may have single transactions (e.g. from purchasing cards) to approve.

**Click** either:
- Left Navigation Bar: Transactions Requiring Signoff

A listing of all transactions will be shown. Find only those transactions that aren’t bundled (see Bundled In column). **Click** on a transaction.

**Review** details and comments. You may **add comments** if required. You can **Flag** the transaction it for more information (see other instructions).

Once reviewed, **click Sign Off**.

Optional: You will be presented with a comments box. Enter comments if necessary.

**Repeat** steps 6-7 for all transactions requiring signoff.

**Return** to your Home Page by clicking on the icon. You should have nothing else once everything is approved. Note: Flagged transactions will still remain in the Home Page until resolved by the Cardholder – with flagged transactions, there will be no Action Required.