

## EX.010.090 – ASSIGNING A DESIGNATED APPROVER

<b>Purpose</b>	<ul style="list-style-type: none"> <li>To identify who should specify a Designated Approver.</li> <li>To identify why a Designated Approver is most often needed.</li> <li>To assign a Designated Approver.</li> </ul>
<b>Description</b>	<p>An Expenses Approver at any level should specify a Designated Approver. A Designated Approver is needed because the system will not allow an approver to approve his/her own expense transactions. In this situation, or if the system cannot determine the correct approver for another reason there are two options:</p> <ul style="list-style-type: none"> <li>Option 1: If a Designated Approver is listed on the employee profile, then a transaction will route to that named employee.</li> <li>Option 2: If there is no Designated Approver, then the transaction will route to the Workflow Administrator.</li> </ul> <p>For more information on how the Expenses module uses the Designated Approver function as well as an overview of Expenses Workflow for Approvers, see <a href="#">EX.010.501 – Understanding Expenses Workflow for Approvers</a>.</p>
<b>Security Role</b>	<b>BOR PeopleSoft User</b>
<b>Dependencies/ Constraints</b>	None
<b>Additional Information</b>	None

## Procedure

Below are step by step instructions on how to assign a Designated Approver.

Step	Action
1.	Click the <b>NavBar</b> icon.
2.	Click the <b>Menu</b> icon.
3.	Click the <b>Travel and Expenses</b> link.
4.	Click the <b>Manage Employee Information</b> link.
5.	Click the <b>Update Profile</b> link.
6.	Enter or search for the <b>Empl ID</b> for which a Designated Approver must be added.
7.	Click the <b>Search</b> button.
8.	Click the <b>Organizational Data</b> tab.
9.	<p>If you know the UserID of the Designated Approver, enter it directly into the <b>Designated Approver</b> field.</p> <p>To search for the UserID, click the Look-up icon at the end of this field. Once located, select the User ID to populate the Designated Approver field.</p>
10.	Click the <b>Save</b> button.
11.	<p>Now that a Designated Approver is assigned, any Travel &amp; Expense transaction charged to that Approver's department will route to the Designated Approver instead.</p> <p><b>Note:</b> An exception to the Designated Approver routing occurs when there are multiple approvers for a pooled approver level (either Reviewer or AP Auditor). In this situation, the system can route a traveler's transaction to a fellow approver for that same approval level, without having the Traveler approve his/her own transaction and without having to use a Designated Approver.</p>