

## How to . . .

### Override approvals for expenses

<b>Purpose</b>	There may be instances where the Administrator or Superuser will need to manually approve expense sheets if they are unable to be approved normally.
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- 1) Navigate to Menu > Project Cost > Registration > Expense Sheets. In this window, use the search function to search for the Expense sheet you are trying to approve. When you have located the sheet, note the Approval number found in the upper right of the expense sheet.

The screenshot shows the 'Expense Sheets' application window. The 'Approval' section is highlighted with a purple arrow pointing to the 'Approval No.' field, which contains the value '106'. Other fields in the 'Approval' section include 'Approver' (000126), 'Approver Name' (Anne Hering), and 'Approver Ref.' (Company Employee 4). The 'Status' section shows the sheet was submitted and transferred by 'jhsu@bzzaagent.com' and 'ahering@bzzaagent.com' respectively, both on 6/12/2009, and is currently 'Approved'.

Entry Date	Job No.	Act. No.	Description	Quantity	Unit Price	Curren Amount	Curren	Tax Code	Tax, Curren	Currency	Exchange R	Work
6/12/2009	1010000	730	Airfare	1.000000		500.00	500.00		0.00	USD	1.000000	730

- 2) Now navigate to Menu > Set up > Approval > Approvals. In this window, enter the Approval number from the Expense sheet into the Approval No. fields. Also be sure that only the box 'Show Lines' is ticked. Hit Enter and the table part will populate with the Expense sheets outstanding for the employee.

	Type	Approver	Approver Name	Approver Reference	Approver En	Substitute	Substitute Name	Substitute Reference	Substitute E	Ap
1	Expense Sheet	000125	Kate Grant	Expense Sheet Super		000149	Keith Waterhouse			App
2	Expense Sheet	000126	Anne Hering	Company Employee 4		000149	Keith Waterhouse	Company Employee 5		App

- 3) In the table part, find the fields marked Approval Status and New Status. Note that these fields may be further to right. Once you find them, you can drag them over so they will be easier to locate in the future. In the New Status column, use the drop down to select Approved, then hit Enter. The expense sheet has been approved. It may however still need to be approved by finance depending on your set up before it can be posted.

The screenshot shows the 'Approvals' application window. The interface includes a menu bar (File, Edit, Menu, Reports, Navigate, Search, Action, Window, Help) and a toolbar. On the left, there is a 'Selection Criteria' panel with various filters and checkboxes. Below it is a 'Remarks' section. The main area contains a table with the following data:

	Substitute Name	Substitute Reference	Substitute E	Approval Status	New Status	Remarks	Level	Integer Key	Integer Key	Integer
1	Keith Waterhouse			Approved	Approved		1	10700000	0	0
2	Keith Waterhouse	Company Employee 5		Approved	Approved		2	10700000	0	0

A dropdown menu is open for the 'New Status' field of the second row, showing the following options: Approved, Rejected, and Released. A purple arrow points from the text above to the 'New Status' column header.