

Quick Topic - Skip Final Expense Approvers in Expense Requesting

Title: Skip Final Expense Approvers in Expense Requesting

Brief description:

This best practice may be useful if you have configured your approval groups with a financial user as the final approver (for the purposes of confirming receipts, etc.), yet you do not care to involve that same user with any expense request processing.

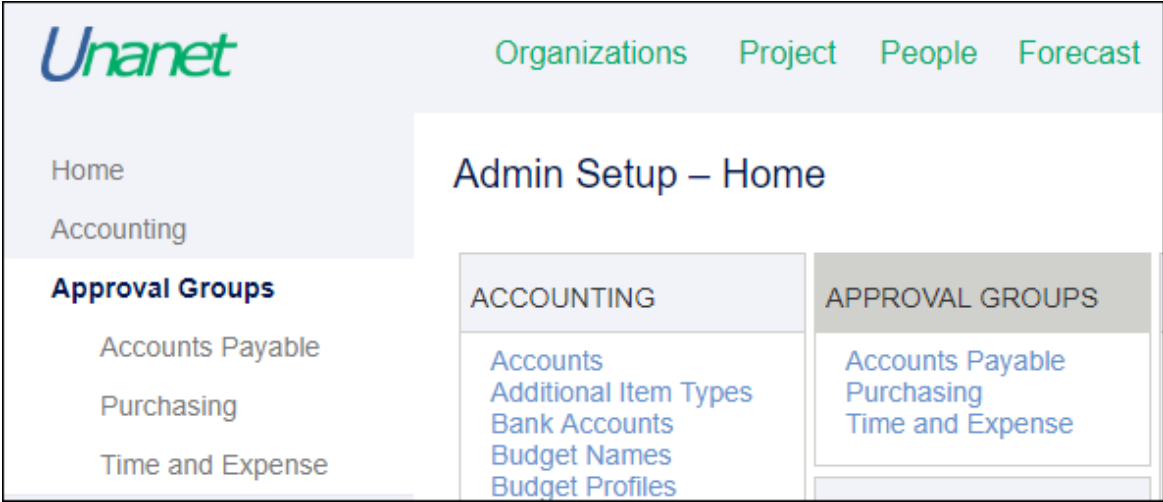
What's covered in this document:

- [Configuration of Approval Group](#)
- [Configuration of Approver's Person Profile](#)
- [Configuration of Expense Property Settings](#)
- [Additional Information](#)

Configuration of Approval Group

Step 1: Click **Admin > Setup > Approval Groups**. Select **Accounts Payable**, **Purchasing**, or **Time and Expense**.

Step 2: Select **+Approval Group** to create a new Approval Group. Add a name and description, click **Save**. Add all pertinent approvers (and submitters) under the appropriate tabs.



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Home Accounting Approval Groups Accounts Payable Purchasing **Time and Expense** Expense Miscellaneous People Project Time User-Defined Fields

Admin Setup – Time and Expense Changes were saved.

Summary **Approvers** Leave Submitters Time Submitters Exp Request Submitters Exp Report Submitters

MANAGE APPROVERS FOR THE A T&E APPROVAL GROUP APPROVAL GROUP

AVAILABLE PEOPLE: <Please use filter to populate>

APPROVERS: Controller, Frank T. CFO, Fran M.

FILTER: Org. Code Last Name

Save Cancel

Configuration of Approver's Person Profile

Step 3: Configure the Approver's Person Profile to be a "Zero Approver" by inputting "0" in the Approval Authority Amount field. Click **Save**.

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Profile Accounts Accruals Alternates Credit Cards Default Project/Task Dilution Organization Access Payroll Info Signature Skills

People – Profile for Fran M. CFO (fcfo)

Profile Roles Time **Expense** Purchasing Rates Password Other

Person was saved.

Expense Request Approval Group: Leadership-Expense

Expense Report Approval Group: Leadership-Expense

Vendor:

Approval Authority Amount: 0.00

Preferred Payment Method: *Company Paid

Vehicle Number (Company Car):

Preferred Currency:

Preferences: Receive Expense Notification E-mails

* Indicates required field

Save Cancel

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Configuration of Expense Property Settings

Step 4: Navigate to **Admin > Properties > Approval Process > Approvals** and configure properties to Ignore Zero Approvers for Requests.

Step 5: Under both *Enable Dynamic Approval Sequence* and *Skip Zero Approver* check the "Expense Request" option. Both property settings need to be TRUE (selected) in order for this best practice approval workflow to ignore zero approvers in requests.

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Admin – Configure System Properties

[View all property settings](#)

CONFIGURE YOUR UNANET SYSTEM [AUDIT TRAIL](#)

Category	Property	Value
Unanet	Enable Dynamic Approval Sequence	
	Expense Report	<input checked="" type="checkbox"/>
	Expense Request	<input checked="" type="checkbox"/>
	Purchase Requisition	<input type="checkbox"/>
	Purchase Order	<input type="checkbox"/>
Approval Process	Vendor Invoice	<input type="checkbox"/>
	Skip Zero Approver	
	Expense Request	<input checked="" type="checkbox"/>
Time	Allow Customers to View Approval History	
	Expense Report	<input type="checkbox"/>
Expense	Allow Customers to View Attachments	
	Expense Report	<input type="checkbox"/>
	Purchase Requisition	<input type="checkbox"/>
	Purchase Order	<input type="checkbox"/>
	Vendor Invoice	<input type="checkbox"/>

Values in light gray italics are overridden in the unanet.properties file.

[Save](#) [Cancel](#)

Note: In the event the zero approver is the only approver listed in the approval group, they will still be required to approve the expense request.

Additional Information

[Help Docs - Expense Dashboard](#)

[Help Docs - Dynamic Approval Sequence](#)