QuickStart Training Guide: The Approver Role

For Managers Who Approve Employees’ Expense Reports
If you are a Manager who is using ExpensAble Corporate to approve employees’ expense reports, this information is for you! This QuickStart Training Guide will walk you through an overview on how to use ExpensAble Corporate to approve or reject employees’ expenses.

This QuickStart Training Guide discusses:

- Logging into ExpensAble Corporate
- Some Useful Tips
- Approving or Rejecting Expense Reports
- Issues to Consider when Approving or Rejecting Expense Reports

This QuickStart Training Guide is an overview, not a detailed training document. If you need more assistance, contact your ExpensAble Corporate Administrator to obtain additional training and documentation.

This QuickStart Training Guide assumes familiarity with using a personal computer and accessing our website via the Internet.

If you are not comfortable with any of these skills, please talk with your manager about receiving training before using ExpensAble Corporate.

Your company may have produced its own instructions of how they want you to use ExpensAble Corporate. Please read those instructions in addition to this QuickStart Training Guide.

Logging Into ExpensAble Corporate
To log into ExpensAble Corporate, you will need your company login name, your individual user ID and your individual password. Your company's ExpensAble Corporate administrator will provide this information.

| Hands-on | Screens/prompts |
1. Open a browser and go to www.insperity.com/signin (1)
   Click on ExpensAble (2)
   **Note**: Add this URL to your Favorites or Bookmarks for fast access next time.

2. Log into ExpensAble Corporate by entering your:
   - Company ID
   - Username
   - Password
   Click Sign In
   **Note**: Select Remember Me checkbox and the Company and Username will pre-populate for you
3. **Note:** ExpensAble Corporate does require pop-up windows to operate. Once you click Sign In, if you see a prompt to allow pop-ups, select **Always allow**.

4. During the first log in you may be asked to change your password as it was preset by the Administrator.

   The Settings screen appears. Enter the current password, a new password, confirm the password and then select and answer the security question.

   **Note:** if you don’t answer the security question and forget your password, your company Administrator is the only one that can reset the password.
5. Once a new password has been selected and the security question answered, click Save.

6. Once the new settings are saved, the Overview page is displayed.

The Overview Home page

The Overview Home page is the launch area for all actions in ExpensAble Corporate. Expense reports can be reviewed, approved, forwarded or rejected from the Overview. Links to other functionality (as determined by the roles you are assigned) are also displayed here. Additional functionality for the
Approver role includes Spot Audit and viewing Analysis Reports specific to those employees and departments included in the Approver’s approval workflow.

**Training Videos/Help**

To ensure a successful introduction we recommend viewing the training videos that reside in each screen and via the Help menu. The videos displayed in the **Related Training** drop-down on the screens only contain training that is applicable to the screen you are on. To see all the videos click the Help menu. Each video is between 30 seconds and 3 minutes long and should provide good insight and value.
Some Useful Tips
ExpensAble Corporate is designed to be intuitive and easy to use. Here are some useful tips to get you started:

- Reading the buttons and menus in ExpensAble Corporate will give you a great deal of information on how to enter and label your expenses.
- The Help function can provide answers to many questions.

Approving or Rejecting Expense Reports
When an employee submits an expense report, ExpensAble Corporate automatically routes the report to the appropriate manager for review. Depending on how the report routing was defined, the report could route to a departmental manager (most common), a Bill To manager or the approval manager of the department being charged for the expenses (Charge to Department).

As manager you can then decide to approve the report and send it along for reimbursement, forward the report to another manager or reject the report and send it back to the employee for modifications.
Each time one of your employees sends an expense report for your approval, you will receive an E-mail notification that a report awaits your review.

**To Review a Report:**
- Click on the Approval link in the Overview screen to view any expense reports awaiting your approval.
- Open the report by clicking on the underlined report amount. Use the Expenses tab to view detailed information.
- Select Approve, Forward, or Reject.
- If you approve the report, ExpensAble Corporate will automatically route the expense report to the next approver or to Accounting Review if no other approval is required.
- If you reject the report, a comment is required to alert the submitter as to why you rejected the report. ExpensAble Corporate will automatically route the expense report back to the employee so the required changes can be made.
- If you forward the report, a comment is required to alert the person receiving the report as to why they are receiving the report.
- An Expense report can only be approved or rejected in total. You cannot approve or reject the employee's travel expenses on an item-by-item basis unless the special feature “Line Item Reject” has been enabled.

**Issues to Consider When Approving or Rejecting Expense Reports**
An expense report may be marked with one or more “policy warning flags”, displayed as an exclamation point on the Approval screen. This indicates that one or more items in the report do not conform to the travel expense policy standards established by your company in ExpensAble Corporate. These warning flags are there to alert you of discrepancies with the travel expense policy standards. To view the policy violations, click on the expense report from the approval screen, when the report is displayed, click the Summary tab. The violation information is located at the bottom of the Summary screen. An expense report can be approved with “warning flags.”

If you have concerns about travel expense policies, you may want to discuss them with your company’s travel expense administrator. If your company decides to change their travel expense policies, ExpensAble Corporate can easily be updated to match the new policies.

**Attaching Missing Receipts**
ExpensAble Corporate is designed to allow an Approver to attach receipts to a submitter's expense report on their behalf. The receipt(s) may be attached to the entire report or to the individual expenses (line item receipt).
1. While inside the expense report pending approval, click the Expenses tab to see the individual expenses. Click the paperclip icon in the toolbar (1) to attach receipt(s) to the report itself. Click the small paperclip icon next to the expense to attach receipt(s) to the individual expense. **Note:** when clicking the smaller paperclip (2), the submitter’s E-bin will be opened.

2. If the small expense line attach icon is clicked, the E-bin displayed is that of the submitter not the approver. Therefore if there are receipts missing and the submitter has them in their E-bin, the approver can attach them for the submitter.