



Account Manager Approval Steps

How to Approve

1. Log in to **SAP Portal**. Click on **Worklist**.
2. Select the travel document to review. Basic information displays at the bottom of the screen for quick review.
3. For details, click **Display Form** to view PDF document.
4. After re-viewing, click **Approve** or **Reject**.
5. If needed, view attachments by clicking on link to open SAP GUI.
6. On top right hand corner, click icon for drop down menu. Select **Attachment list**.
7. Open the documents.

Click here.

Subject
 Travel Request for traveler - Ms Linda F Clark (AP)
 Travel Request for traveler - Ms Krista Salas (AP)
 Travel Request for traveler - Ms Happy Traveler (Acct Mgr)

Row 1 of 127

Travel Request for traveler - Ms Happy Traveler (Acct Mgr)

Trip Number: 7300000044
 Sent: Jun 6, 2011 by Traveler, Happy
 Status: New
 Personnel no.: 00034985 Trip no.: 7300000044

Comment: Account Manager Approval

Trip begins: 03/21/2011 10:00:00
 Trip ends: 03/25/2011 11:00:00
 Reason: Conference for Architectural Integrity
 Location: Milan ITALY
 Country: 3 ITALY Milan
 Total costs: USD 4,188.00
 Advance: USD0.00

Primary details about the trip are displayed for the approver.

Attachments

Type	Title
	EmployeeTrip: 7300000044

Click here to open SAP GUI.

Travel Request for traveler - Ms Happy Traveler (Acct Mgr):

Approve travel request Reject travel request

Click appropriate action task.

Display Form Forward Assign To Me

Click here to open Adobe PDF form.

Create...

Attachment list

Private note

Send

Relationships

Workflow

Service: Attachment list

AttachmentFor7300000682

Title	Creator Name
Meeting Agenda	Sergio Rey

Approval Requirements

In-State & All Cost Assignments	Account Manager
Out-of-State	Vice President / Deans
Excess Lodging	Vice President / Chairs
Sponsored Program Funds	Office of Sponsored Programs
Federal Export Control (Out of Country)	Office of Research Compliance
Foreign Travel	President
Traveler is Approver	Organization Supervisor

Special points of interest:

- You can assign a substitute for travel.
- Every account manager for each costing will be required to approve.
- E-mail notifications are sent every hour if you have a **new** task to approve. No reminders.