Expenses Electronic Approvals - Employees

Expenses Electronic Approvals enables a paperless employee reimbursement process by replacing the wet signature of the employee and the employee's supervisor on the expense report with an online approval that is part of NUFinancials workflow.

- **If you are submitting** the Expense Report for yourself, a certification message appears at that time.
- **If a proxy has submitted** an Expense Report on your behalf, you will receive an email (to your NU email address) when an expense report requires your certification.

Expense Report Workflow Approval Sequence

A. **Employee Certification**
B. Project Approver (if applicable)
C. Chart String Approvers (Level 1, 2, 3, as applicable)
D. Expenses Supervisor
E. ASRSP (if applicable)
F. Accounts Payable

This is a sample of the email notification you will receive:

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Subject: Expense report 0000245565 for Mette, Will requires your attention

An expense report has been submitted that requires your action:

Employee ID: 2690440
Employee Name: Mette, Will
Submission Date:
Report Description: Sample Certification & Routing
Report ID: 0000245565
Business Purpose: Department Gatherings
Total Amount: 195.00 USD
Reimbursement Amount: 195.00 USD

You can navigate directly to the approval page by clicking the link below:
http://nupin.northwestern.edu/pss/fmsprd/EMPLOYEE/ERP/c/NU_WORKFLOW/NU_PF_INBOX.GBL?
Action=E&CAPTURE_ID=0000245565&ACCOUNT=76787&DEPTID=4011200

Below are, depending on your role, the minimum responsibilities for certification or approval of this expense report:

**Employee Certification**
- Requests permission for travel from the appropriate supervisor or confirms authorization from the sponsor.
- Verifies that the submitted travel expenses are ordinary and necessary expenses of traveling away from home on authorized University business.

**Expenses Supervisor Approval** (The department chair or faculty supervisor approves travel for faculty, the immediate supervisor approves for staff)
- Acknowledges prior approval to travel for period of the trip.
- Validates the stated business purpose of the trip.
- Agrees that the total expense reimbursement complies with University policy and is reasonable given their knowledge of the nature of the trip.

More detail on the roles and responsibilities is available at the Financial Operations website.
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1. Click the blue hyperlink in the email to go directly to the Expense Report.
2. Log In with your Net ID and Password.
   • Use VPN off-campus to connect http://www.it.northwestern.edu/vpn
   • The Expense Report opens in NUFinancials.
   • Review the Expense Report and scroll down to the bottom of the page.

3. Click Approve or Send Back (with Comments).

4. Click OK to the certification message. This is your electronic signature.
   • The Expense Report will be automatically routed for subsequent levels of approval.
Alternate Navigation to NUFinancials Approval Inbox

If you do not have the approval notification email:

1. Log In to the NUPortal https://nuportal.northwestern.edu/
   - Use VPN off-campus to connect http://www.it.northwestern.edu/vpn

2. Click Financial, on the left.
3. The Approval Inbox appears on the right; click the number next to Expense Report.

4. Click the Report ID link to open the Expense Report.
   - Follow the approval steps listed previously.

NEED HELP? Contact IT Support Center • 847-491-4357 (1-HELP) • consultant@northwestern.edu