

# Millennium FAST TEM Approver Report

The Approver History Report provides an overview of all documents that an individual or group of individuals has approved.

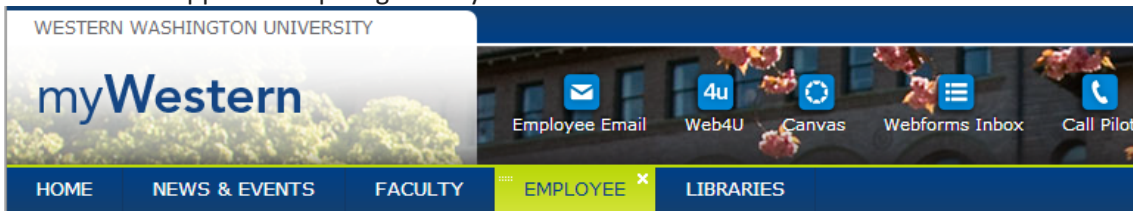
## Benefits of the report:

- It allows non-delegates to see the details of a trip.
- Approvers can look at the details of a trip that they approved in the past (long after they've lost the ability to see the details via Workflow).

## Details available include:

- Trip Name
- Who did the data-entry (delegate or traveler)
- Itinerary – dates and cities
- Expense items – dates, expense type, amounts, whether reimbursable or non-reimbursable
- Approval history

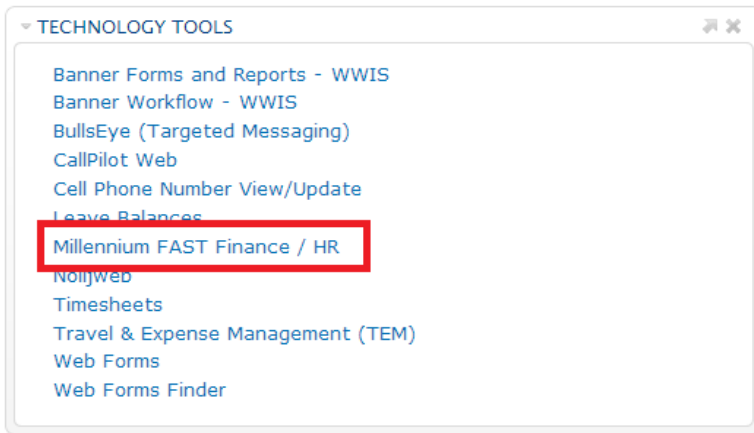
To access the Approver Report go to [MyWestern.wwu.edu](http://MyWestern.wwu.edu)



Select Technology Tools



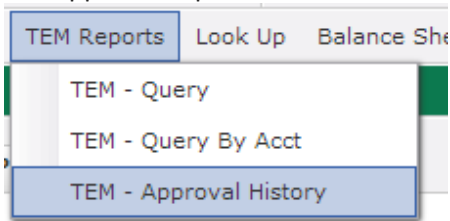
And click Millennium FAST Finance / HR from the available choices



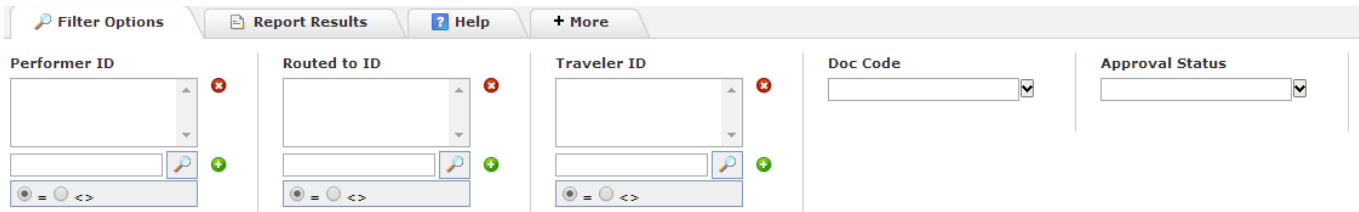
The Approver History report is under Finance Reporting



The approver report is the third on the list under TEM Reports



## Filtering



Available filters:

- **Performer:** The person who actually performed the approval action. This could be the designated approver, or their proxy. Can enter one ID or many.
- **Routed To:** The designated approver, i.e. the person that shows up as Approver in the TEM status history screen. Can enter one ID or many.
- **Traveler:** The person taking the trip. Can enter one ID or many.
- **Doc Code:** The travel authorization (TA) or reimbursement (TR) document number. Can enter one TA or TR number. Entering a TA/TR number allows you to see the *complete* approval history for a given document, i.e. every approver on that document, from Travel Services thru to the final approver.
- **Approval Status:** Blank by default, can select one of these approval actions from a dropdown: *Approved*, *Denied*, *Returned* (returned for correction).

To see the complete history of approvals for a TA/TR document, leave **Performer**, **Routed To**, and **Approval Status** blank, and filter just by **Doc Code**, or by **Traveler**.

Filtering by **Traveler** and leaving other filters blank allows you to see both a complete list of TA/TRs for that traveler, and the approval history for each of those TA/TRs.

The **Approval Status** filter should generally be left blank, unless you are looking for documents which had a specific type of approval action. If entered, it will show only approval history records which had that specific status:

- “Approved”: If you select this, you’ll see only records where the action was to approve. This will not necessarily reflect the final status of the document, as additional approval actions may have occurred afterwards.
- “Returned”: If you select this, you’ll see only records where the action was to return for correction. This will not necessarily reflect the final status of the document, as additional approval actions may have occurred afterwards.
- “Denied”: If you select this, you’ll see only records where the action was to deny. Since denial ends all approval action on a document, this should represent the final status of that document.

Filtering by **Performer** and/or **Routed to** will return only those history records which match the filter. In other words, if a TA had four approvals from four different people and you enter just one of their IDs as a filter, you’d get back just one record for that TA, not four.

When filtering by **Performer** and **Routed To**, you can use the “equal to” and “not equal to” selectors in combination to get different results. Some examples of how these filters can be entered:

- (1) Enter: **Performer ID** “equal to” (leave **Routed To** blank)

Results: Documents where this person did the approval, regardless of whether they were the designated approver or the proxy

The image shows two filter input boxes side-by-side. The left box is labeled 'Performer ID' and has a dropdown menu with 'W00322739' selected. Below the dropdown is a search icon and a radio button selector with the 'equal to' option selected. The right box is labeled 'Routed to ID' and is currently blank. It also has a search icon and a radio button selector with the 'equal to' option selected.

- (2) Enter: **Routed To** “equal to” (leave **Performer ID** blank)

Results: Documents where this person was the designated approver, regardless of who performed the approval

The image shows two filter input boxes side-by-side. The left box is labeled 'Performer ID' and is currently blank. It has a search icon and a radio button selector with the 'equal to' option selected. The right box is labeled 'Routed to ID' and has a dropdown menu with 'W00322739' selected. Below the dropdown is a search icon and a radio button selector with the 'equal to' option selected.

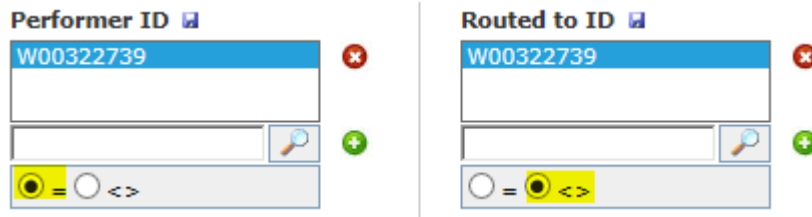
- (3) Enter: **Performer ID** “equal to”, **Routed To** “equal to”, same ID on each filter

Results: Documents where this person was both the designated approver and the performer

The image shows two filter input boxes side-by-side. The left box is labeled 'Performer ID' and has a dropdown menu with 'W00322739' selected. Below the dropdown is a search icon and a radio button selector with the 'equal to' option selected. The right box is labeled 'Routed to ID' and has a dropdown menu with 'W00322739' selected. Below the dropdown is a search icon and a radio button selector with the 'equal to' option selected.

- (4) Enter: **Performer ID** “equal to”, **Routed To** “not equal to”, same ID on each filter

Results: Documents where this person was acting as proxy and was not the designated approver



## Report results

Doc Code	Status Date	Routed to ID	Routed to Name	Performer ID	Performer Name	Approval Status	Description	Traveler ID	Traveler Name
TA000088	10-JUL-2013 08:10 am	W00903530	Shepard, William	W00903530	Shepard, William	Approved	Authorization Approval for Catherine Riordan TA000088	W00944150	Riordan, Catherine
TA000088	11-JUL-2013 07:15 am	W00903530	Shepard, William	W00903530	Shepard, William	Approved	Authorization Approval for Catherine Riordan TA000088	W00944150	Riordan, Catherine
TA000088	16-JUL-2013 10:38 am	W00903530	Shepard, William	W00903530	Shepard, William	Approved	Authorization Approval for Catherine Riordan TA000088	W00944150	Riordan, Catherine
TA000093	10-JUL-2013 08:10 am	W00903530	Shepard, William	W00903530	Shepard, William	Approved	Authorization Approval for Catherine Riordan TA000093	W00944150	Riordan, Catherine
TA000093	11-JUL-2013 07:15 am	W00903530	Shepard, William	W00903530	Shepard, William	Approved	Authorization Approval for Catherine Riordan TA000093	W00944150	Riordan, Catherine
TA000112	10-JUL-2013 08:10 am	W00903530	Shepard, William	W00903530	Shepard, William	Approved	Authorization Approval for Barbara Stoneberg TA000112	W00436800	Sandoval, Barbara
TA000112	16-JUL-2013 10:38 am	W00903530	Shepard, William	W00903530	Shepard, William	Approved	Authorization Approval for Barbara Stoneberg TA000112	W00436800	Sandoval, Barbara
TA000176	11-JUL-2013 07:15 am	W00903530	Shepard, William	W00903530	Shepard, William	Approved	Authorization Approval for Catherine Riordan TA000176	W00944150	Riordan, Catherine
TA000176	16-JUL-2013 10:39 am	W00903530	Shepard, William	W00903530	Shepard, William	Approved	Authorization Approval for Catherine Riordan TA000176	W00944150	Riordan, Catherine

Columns returned:

- **Doc Code:** TA or TR document number.
- **Status Date:** Date/time of that approval.
- **Routed To ID:** W-number of the designated approver.
- **Routed To Name:** Name of the designated approver.
- **Performer ID:** W-number of the person who performed the approval.
- **Performer Name:** Name of the person who performed that approval.
- **Approval Status:** Approval action taken: Approved, Denied, Returned.
- **Description:** Includes traveler name and document number(s).
- **Traveler ID:** W-number of the traveler.
- **Traveler Name:** Name of the traveler.

By default, results are sorted by document number, then date/time of the approval.