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

Select Technology Tools

And click Millennium FAST Finance / HR from the available choices

If you have any questions call X4550 or email Devlin.Sweeney@wwu.edu
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**.

If you have any questions call X4550 or email Devlin.Sweeney@wwu.edu
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

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

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

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

If you have any questions call X4550 or email Devlin.Sweeney@wwu.edu
Results: Documents where this person was acting as proxy and was not the designated approver

Report results

<table>
<thead>
<tr>
<th>Doc Code</th>
<th>Status Date</th>
<th>Routed to ID</th>
<th>Routed to Name</th>
<th>Performer ID</th>
<th>Performer Name</th>
<th>Approval Status</th>
<th>Description</th>
<th>Traveler ID</th>
<th>Traveler Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>TA000108</td>
<td>10-XX-2013 08:10 am W0093530</td>
<td>Shepard, William W0093530</td>
<td>Shepard, William</td>
<td>Approved</td>
<td>Authorization Approval for Catherine Rondan TA000108</td>
<td>00044156</td>
<td>Rondan, Catherine</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TA000108</td>
<td>10-XX-2013 08:10 am W0093530</td>
<td>Shepard, William W0093530</td>
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<td></td>
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<tr>
<td>TA000108</td>
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<td>Shepard, William W0093530</td>
<td>Shepard, William</td>
<td>Approved</td>
<td>Authorization Approval for Barbara Stoneberg TA000112</td>
<td>000436806</td>
<td>Sandisk, Barbara</td>
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<td></td>
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<td>Shepard, William</td>
<td>Approved</td>
<td>Authorization Approval for Barbara Stoneberg TA000176</td>
<td>00044156</td>
<td>Rondan, Catherine</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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 the 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.