

# OFFICE OF THE CONTROLLER

## Tips and Tricks: Accessing Approvals and Understanding Workflow

September 2025





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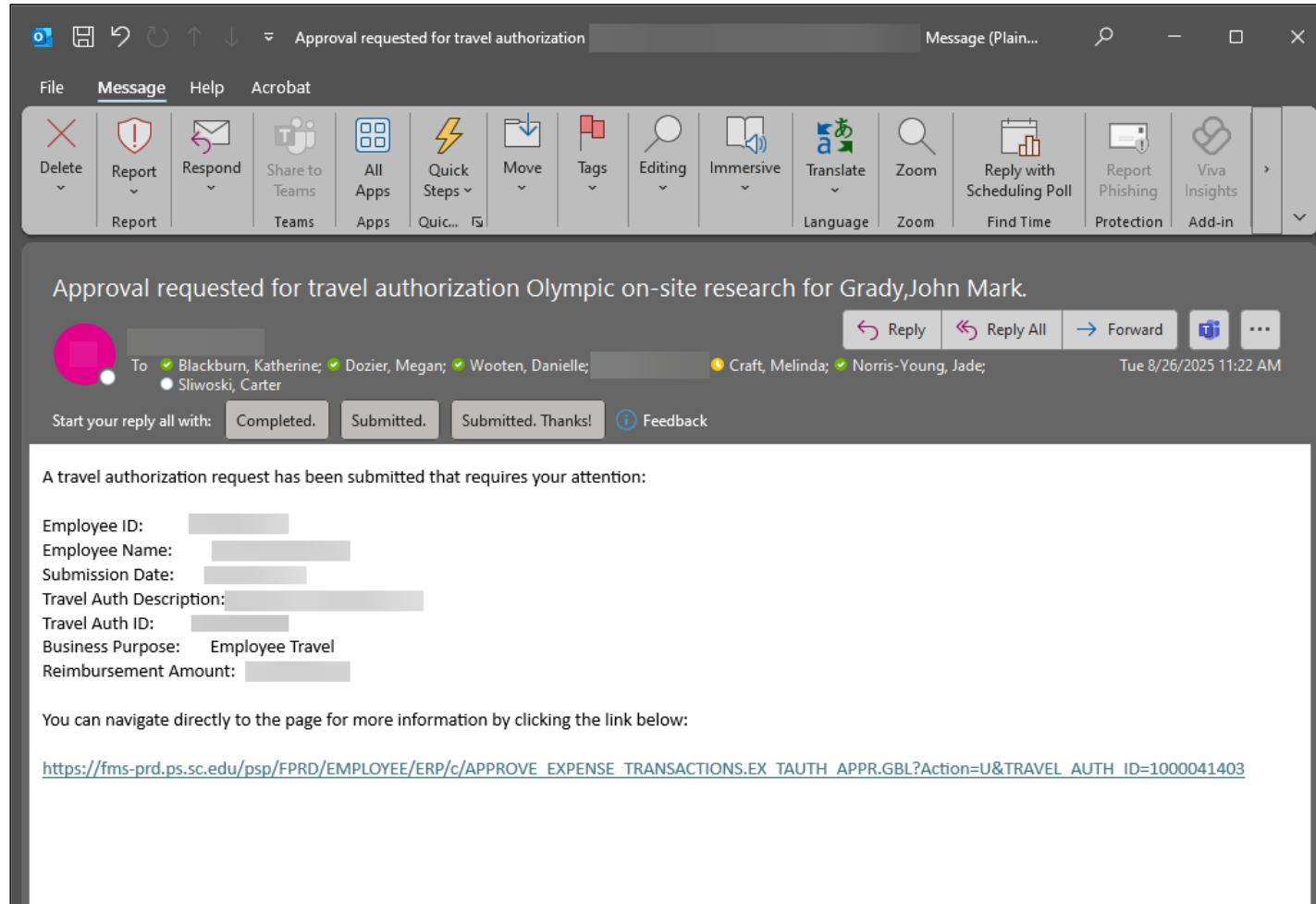


# Travel and Expenses



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# Accessing Approvals in PeopleSoft



There are two ways to access approvals:

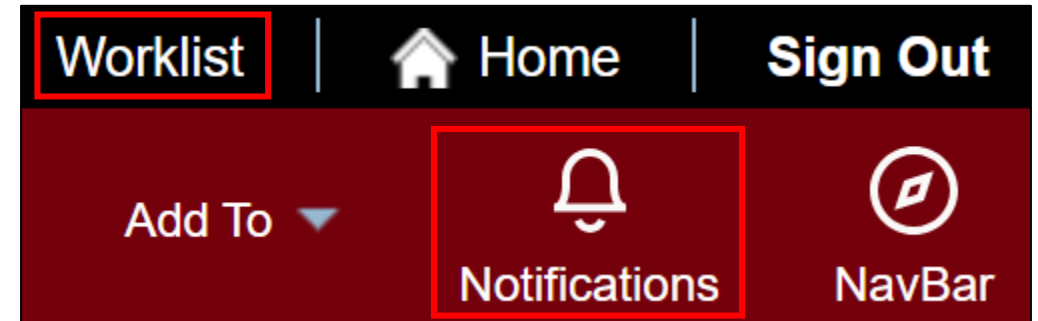
- Access Approvals via the **Email Notification**
- Access Approvals via the **Worklist** or **Notifications** in PeopleSoft Finance.



# Accessing Approvals in PeopleSoft

After logging in to PeopleSoft Finance:

1. Click the **Notification Bell** or **Worklist** link in the top right corner.



- In the Notifications, Look for “**Your Approval is required**” or “**Certify Expense**”
- In the Worklist, click the link.

2. Use the navigation:

- **Main Menu > USC Finance eForms > Approvals**

**Pro-Tip:** Always double-check which eForm/Report you’re opening!



# Travel Authorizations and TRVs

## Student and Non-Employee

- Once the correct eForm approval page is accessed, review and verify the documentation attached to the eForm.

Travel Authorizations (TAs)	Travel Reimbursement Vouchers (TRVs)
<ul style="list-style-type: none"><li>• Default Account</li><li>• Destination</li><li>• Dates</li><li>• Name/Names</li><li>• Estimated Expenses</li><li>• Review chart field in the accounting details is correct.</li><li>• Attachment</li></ul>	<ul style="list-style-type: none"><li>• Name</li><li>• Address</li><li>• Dates of Travel and Expenses Correspond.</li><li>• <a href="#">Meal Matrix Reference</a> – Time of Departure/Return for per diem.</li><li>• <a href="#">Travel Checklist</a> – Attach paid receipts.</li><li>• Review chart field in the accounting details is correct.</li></ul>

- If the information is correct, click the Approve button.
- If the eForm needs to be corrected, add a comment and click the Recycle button.



# Expense Report

- If there are multiple expense reports pending your approval, please note the expense report number after the Certify Expense.
- Review and verify the documentation attached the expense report.
  - [Meal Matrix Reference](#) – Time of Departure/Return for per diem.
  - [Travel Checklist](#) – Attach paid receipts.
  - Review chart field in the accounting details is correct.
- If the Expense Report is Correct, click Approve.
- If the Expense Report needs Correction, add a Comment and click the Send Back button.



# Expense Report Status

Status	Status Description
<b>Pending Status</b>	not submitted for approval. The expense report can be modified and deleted.
<b>Submitted for Approval</b>	the expense report is submitted, waiting for approval.
<b>In Process</b>	the expense report is in approval workflow.
<b>Approved</b>	approval for the expense report is complete and waiting on processing.
<b>Paid</b>	the expense report is processed and complete.

**\*\*Note:** Once in a “Paid” status, the transaction is posted to the General Ledger overnight. Expenses are posted to your budget when the expense report is paid.\*\*





# Demonstration

- How to approve a TA/TRV and Expense Report



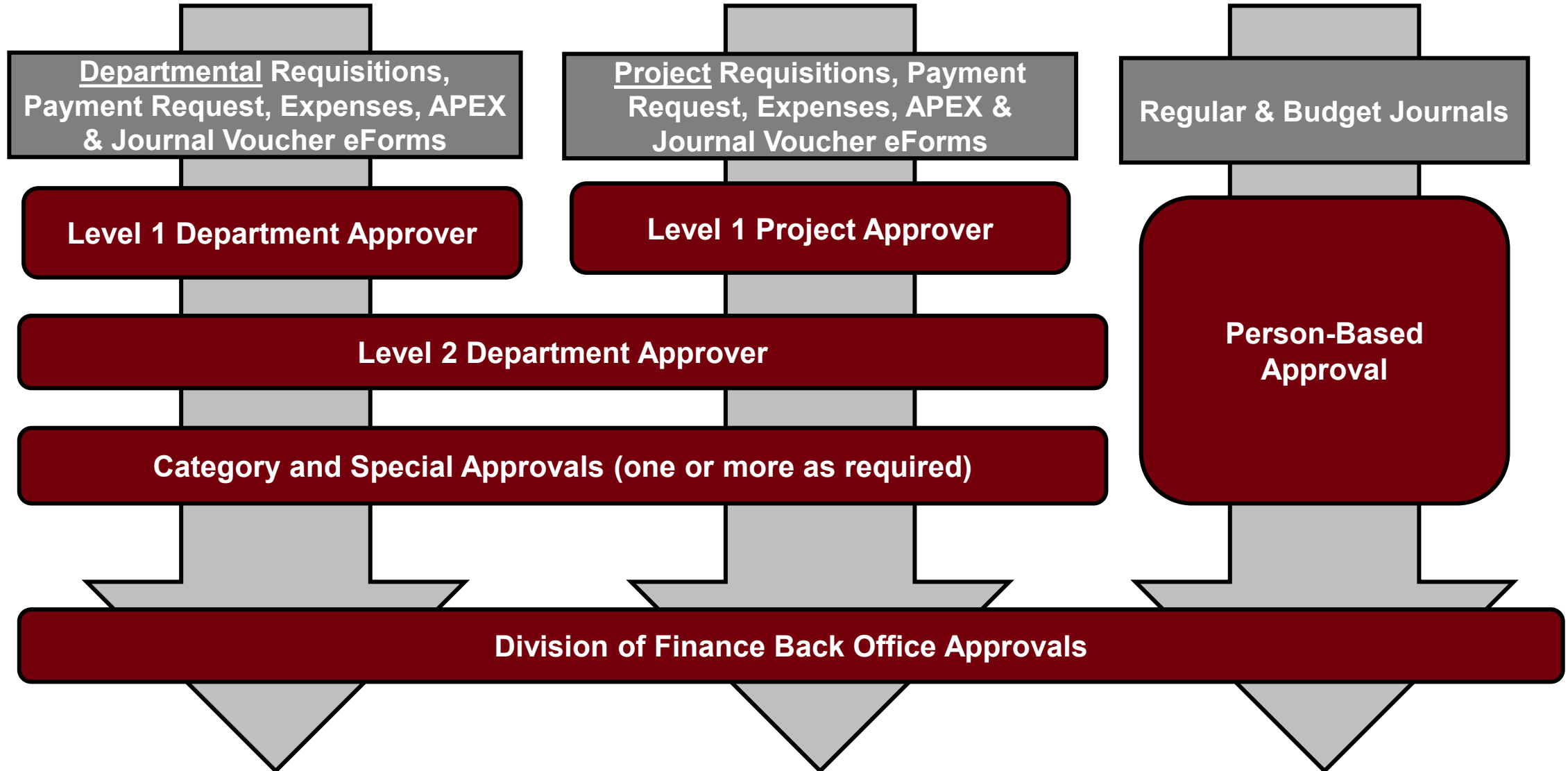
# Transaction Corrections



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# PeopleSoft Finance Approval Workflow Levels

**\*Note:** Employee expense reimbursements require employee approval prior to the levels shown below



# JE Approval Status

JEs follow a different approval workflow than all other PeopleSoft transactions.

JE approvers are assigned at the specific user ID level, unlike all other transactions which are assigned based on the department/project that is being used for the entry.

Each JE will contain a department level approver and a Controller's Office level approver.



# JE Approval Statuses

## No Status

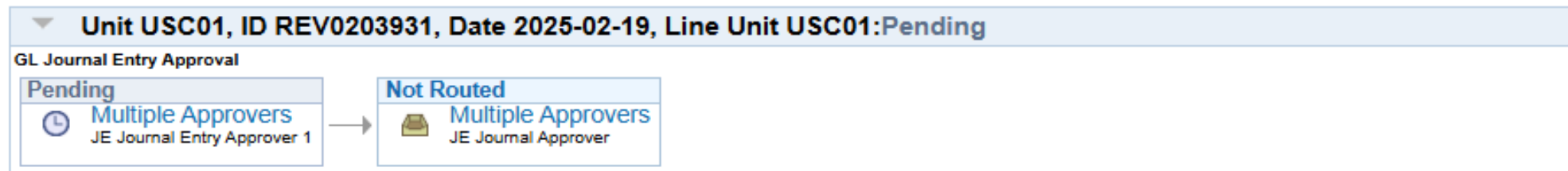
The JE has not yet been submitted for approval. Be sure both the Journal Status and Budget Status are both “V” and select the Submit button on the approval tab of the entry to start the workflow.

> [Approval History](#)

## Pending for Level 1

The JE is complete and has been submitted but not yet approved at the departmental level. Click on “Multiple Approvers” hyperlink under the word Pending and reach out to those users listed to approve step one of the entry. Entries in this status can still be changed if needed but will need to be resubmitted after the changes are made.

### GL JE Journal Approval



# JE Approval Statuses

## Pending for Level 2

The JE has been submitted and approved at the departmental level and is awaiting approval from the Controller's Office. Due to the volume of JEs being submitted in the system, please wait at least seven to ten days before reaching out on the approval status.

Notice this entry contains a "Skipped" section. This shows that the JE creator is also listed as an approver but is being skipped due to them submitting the JE. Entries in this status can still be changed if needed but will need to be resubmitted after the changes are made.

### GL JE Journal Approval

The screenshot displays the 'GL JE Journal Approval' interface. At the top, it shows 'Unit USC01, ID 0000204079, Date 2025-02-20, Line Unit USC01: Pending' and a 'View/Hide Comments' link. Below this, the 'GL Journal Entry Approval' section shows a flow of approvals. On the left, a green box labeled 'Approved' shows 'Katherine Blackburn' as 'JE Journal Entry Approver 1' with a timestamp of '02/21/25 - 1:03 PM'. Two arrows point from this box to two other boxes on the right. The top box is labeled 'Skipped' and shows 'Jason W. Bashore' as 'JE Journal Approver' with a timestamp of '02/21/25 - 1:03 PM'. The bottom box is labeled 'Pending' and shows 'Multiple Approvers' as 'JE Journal Approver'. At the bottom of the interface, there is a 'Comments' section with a right-pointing arrow.

# JE Approval Statuses

## Approved at Both Level 1 and 2

JE's approved at both levels have completely made it through the workflow process and are posted to the General Ledger. No changes can be made to these entries. You should be able to see them and their balances in Peoplesoft when running queries and inquiries.

Remember, the entries will not show up in the Finance Intranet until the day following the last approval.

### GL JE Journal Approval

Unit USC01, ID 0000203027, Date 2025-02-05, Line Unit USC01: **Approved** [View/Hide Comments](#)

GL Journal Entry Approval

<b>Approved</b> ✓ <a href="#">Rebecca Denisi</a> JE Journal Entry Approver 1 02/06/25 - 8:30 AM	→	<b>Approved</b> ✓ <a href="#">Jason W. Bashore</a> JE Journal Approver 02/06/25 - 8:57 AM
--	---	--

▶ **Comment History**



# JE Approval Statuses

## Skipped at Level 1

If you notice a “Skipped” message in level one as seen below, the system is letting you know that the user submitting the entry does not have any approvers assigned.

Reach out to the General Ledger (GL) team at [genacctg@mailbox.sc.edu](mailto:genacctg@mailbox.sc.edu) and they will assist you in getting approvers set up.

### GL JE Journal Approval

The screenshot displays a user interface for 'GL JE Journal Approval'. At the top, a header bar shows 'Unit USC01, ID 0000203994, Date 2025-02-19, Line Unit USC01:Pending' and a 'View/Hide Comments' link. Below this, the main content area is titled 'GL Journal Entry Approval'. It features two status boxes: 'Skipped' on the left and 'Pending' on the right, connected by a right-pointing arrow. The 'Skipped' box contains a warning icon and the text 'No approvers found' and 'JE Journal Entry Approver 1'. The 'Pending' box contains a clock icon and the text 'Multiple Approvers' and 'JE Journal Approver'. At the bottom of the interface, there is a 'Comments' section with a right-pointing arrow.



# JE Approval Statuses

## Denied at Level 1 or 2

JEs can be denied at both level one and level two. Clicking on the comment section will allow the user to see the reason the JE was denied. If a JE is denied, it still can be corrected if needed.

Just remember that after the correction is made, the JE will need to be edited again and submitted to restart the approval workflow process. If the JE was denied and does not need to be corrected, please reach out to the GL team for assistance deleting the entry.

### GL JE Journal Approval

Unit USC01, ID 0000198792, Date 2025-02-24, Line Unit USC01: **Denied** [View/Hide Comments](#)

GL Journal Entry Approval

**Denied** Katherine Blackburn  
JE Journal Entry Approver 1  
02/24/25 - 11:25 AM

→

**Terminated** Multiple Approvers  
JE Journal Approver

**Comments**

**Katherine Blackburn at 02/24/25 - 11:25 AM**  
Please add valid supporting documentation to this entry. All JEs require some form of attachment that fully supports the entry. This can include emails, memos, screenshots, spreadsheets, etc.



# JE Approval Statuses

## Terminated at Level 1 or 2

If a JE is adjusted and edited after it has been submitted for approval, it may fall to a Terminated status. If this happens, correct the entry as needed and then re-edit it.

Once the entry is back to Valid, use the Submit button on the approval tab of the JE to restart the approval workflow.

The screenshot displays the 'GL JE Journal Approval' interface. At the top, a dropdown menu shows 'Unit USC01, ID 0000202758, Date 2025-02-03, Line Unit USC01: Terminated'. Below this, the 'GL Journal Entry Approval' section contains two boxes, each with a red 'X' and the word 'Terminated' in red. The first box is labeled 'Multiple Approvers' and includes the text 'JE Journal Entry Approver 1' and '02/03/25 - 11:43 AM'. An arrow points from this box to the second box, which is also labeled 'Multiple Approvers' and includes the text 'JE Journal Approver'.



# JE Approval Statuses

Status	Descriptions
<b>No Status</b>	The JE hasn't been submitted yet. Both Journal and Budget must be "V" before hitting submit.
<b>Pending for Level 1</b>	The JE has been submitted but waiting on departmental approval; it is still editable, but changes mean you'll need to resubmit.
<b>Pending for Level 2</b>	The JE has been approved at the departmental level and is awaiting Controller's Office approval; it can be edited if necessary but must be resubmitted after changes.
<b>Approved at Both Levels</b>	The JE has been fully approved and posted to the General Ledger; it can no longer be edited and will appear in PeopleSoft immediately and on the Finance Intranet the following day.
<b>Skipped at Level 1</b>	The JE has skipped departmental approval because the creator is also listed as an approver or has no approvers assigned; the GL team must be contacted to resolve this.
<b>Denied (Level 1 or 2)</b>	The JE has been denied at either the departmental or Controller's Office level, and corrections must be made and resubmitted, or the GL team contacted for deletion if no correction is needed.
<b>Terminated (Level 1 or 2)</b>	The JE has been edited after submission, causing the workflow to terminate, and must be corrected, validated, and resubmitted to restart the process.

# Supplier Portal



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# Approval Workflow

- All new **Supplier Registrations** will be approved first at the **Department level** and then a final approval made at the Supplier Team level.
- Departments are responsible for **denying** the registration if they are not familiar with the supplier or do not intend to do business with the supplier.
- Departments will not request more information, **only** the Supplier Team will Request More Information.
- All new **User ID Requests** will be approved by the **Supplier Team only**. These are current USC suppliers that need access to their profile on the self-service portal to make changes to the information already in the system.



# Supplier Approval: Department

Navigation: **Main Menu > Worklist** or **Click the link in the email**

- Cannot access if logged into HCM.
- Can do registration status check here as well.

Use the **Manage Request Approval** page to manage approvals for registration of new suppliers.

Registration ID: REG0000061  
Company Name: Big Solutions LLC  
Entered on: 07/02/2020  
Email ID: Baileydk@mailbox.sc.edu  
Approval Status: Pending Approval  
Country: USA United States  
SetID: USC01  
Address: 1400 Nix Road  
OFAC Checking: OFAC checked  
City: Columbia Postal: 29208  
Duplicates Supplier: Not Found  
State: SC

**Identification & Classification**

U.S. Tax Identification Number 600000000

► **Profile Questions**

**Self Categorization**

► **Review / Edit Approvers**

Approve Deny Request More Information



# Demonstration

- How to approve a Supplier



# Resources & Contacts



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## Office of the Controller

### Office of the Controller

### General Accounting

### Grants and Funds Management

### Compliance and Tax Management

### Payroll Department

### Operational Management and Reporting

### External Financial Reporting and Transparency

### Resource and Training Toolbox

#### Business Manager

[Grant Administration](#)[Principal Investigator](#)[Policies & Procedures](#)[Forms](#)[Newsletters](#)[PeopleSoft Finance Training Schedule](#)[Listserves](#)[Social Media](#)

### Contact Us

## Business Manager

The role of each Business Manager at the University of South Carolina varies across each college and department. Each Business Manager handles several responsibilities that directly influence the success of their departments and the University overall. They provide business expertise on a variety of topics including, but not limited to budget, expenses, supplier onboarding, transaction corrections, and University policies and procedures.

Below is a list of tasks a Business Manager may be responsible for within their college/department. Sections include links to training resources that support each task.

**Note:** Each year the Controller's Office provides refresher trainings starting the month of February thru the end of April. Registration links for all scheduled trainings are sent to our BIZMANAGER listserv end of January, provided in our monthly newsletter, and in a prior week reminder email. On demand training can be found in the sections below.

#### Account Funding Change

Expand all



#### AP Uploads



#### Business Expense Prepaid Cards



#### Cash Advances



#### Cost Transfer



#### Departmental Deposits



#### Employee Reimbursement (Non-travel)



#### Endowments



#### Finance Intranet



# Where to Find the Resources

For training resources, visit our [Business Manager](#) page in the Resource and Training Toolbox section.



# Controller's Office Training Survey



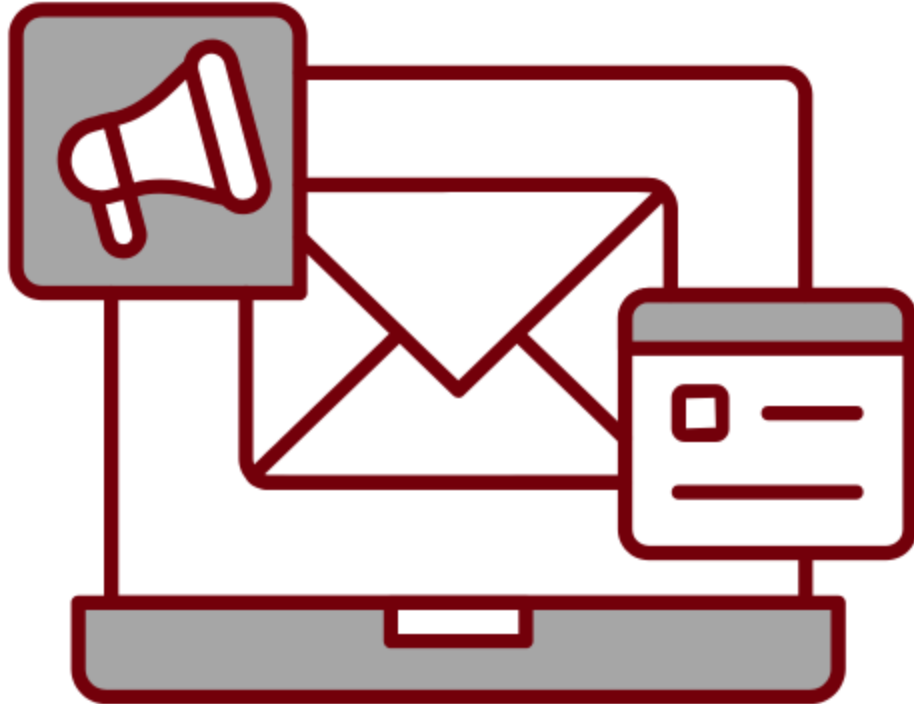
**We'd love your feedback!**

Scan the QR code or use this [link](#) to take a short survey and help us improve future Controller's Office trainings and resources. Your input directly shapes the topics, tools, and tips we share with the university community.



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# Contact Us



For specific questions, please visit our [website](#) to find the appropriate contact.



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# Questions



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# THANK YOU!

## Office of the Controller



Alone, we can do so little; together,  
we can do so much.



**Address:**

1600 Hampton Street  
Columbia, SC 29208



**Contact Number:**

Phone: 803-777-2602  
Fax: 803-777-9586



**Email Address:**

[controller@sc.edu](mailto:controller@sc.edu)



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