

Guidance for Reviewing Expense Approver Roles

Roles involved in the expense report approval process are:

- Expense Support Specialist (ESS)
- Detail Worktag Approvers:
 - P2P Approver
 - Grant Manager
 - Gift Manager
 - Project Budget Specialist
- Senior Department Finance Approver (SDFA)

When considering adjustments in role assignments, please keep the following in mind:

- Ideally, the people holding the roles of Expense Support Specialist (ESS) and Senior Department Finance Approver (SDFA) will be unique from the Detail Worktag Approvers (P2P, grant, gift, project) in each Cost Center.
 - If the ESS also needs to be a Detail Worktag Approver (i.e. P2P approver for other processes), then you need to assign a second P2P approver since the same person can't approve the expense report at both steps.
- The Expense Support Specialist role only exists in the Expenses Module of Workday, but the Detail Worktag Approvers and SDFAs approve transactions in other Workday modules.
 - We recommend only having one or two ESSs but you may need two or more Detail Worktag Approvers to allow different people to approve processes in Workday outside of Expenses.
- You can assign multiple people to a role. For example, you can have two P2P approvers and two SDFAs.
 - Note: If there are multiple Expense Support Specialists in one Cost Center, each ESS will need to approve each expense report. This differs from other role approvals such as the Detail Worktag and SDFA approvals, where only one of the approvers in that role needs to approve the expense report.

To view the current approvers in your Cost Center:

1. Type your Cost Center into the Workday search bar and hit Enter. For example: CC0000
 1. If no results appear, select "More Categories" on the left.
2. Click on the correct Cost Center link, then click the "Roles" tab
3. Click on the "Assignable Role" header. Under Value, select:
 1. Expense Support Specialist, P2P Approver, and Senior Department Finance Approver.
 2. Click Filter
4. To view Grant Managers, Gift Managers, and Project Budget Specialists, search for the grant, gift, or project in the Workday search bar, and then filter based on the Role Assignment tab.