

## Reimagined Approvals – March Release 2020

### Frequently Asked Questions

**1. I can't find the 'approve all' function – is it designed this way or has Fraedom removed this function?**

Approve Selected Items / Approval All – is not included in the new feature but remains available (where already enabled) in the legacy screen, by selecting 'Advanced approvals' from the [Options] menu in the bottom right corner of the opened details of any selected expense.

**2. After the next release on March 8<sup>th</sup>, how long will the legacy approval screens be available for?**

At this stage we do not have a timeline to deprecate the old approvals screen. They will remain for the foreseeable future and we will advise all customers well in advance of removing access.

**3. I can't see my really old transactions displayed on the new screens. How do I access them? e.g. Home page: 5 items to approve (3 recent, 2 really old).**

'Really old' expenses may not be retrieved in the new screen, which – unlike advanced approvals – respects the configurable company option - Statement - Period History. If that option is not enabled, the default is six periods. If it is enabled, an optional value sets the number of statement periods and the new approvals screen 'reaches back' only so far as that number of statement periods. Older items can be found by using existing reports, e.g., Expenditure Analysis >Transaction Search – Company or Usage and Monitoring > Approval Status.

**4. On the home screen it shows I have 5 expenses to approve, however when I go into approvals I can only see 3, where 2 of these are older than 6- months old. Why do we not show expenses over 6 months old? How can we access these/remove them from the list of approvals?**

Yes, the calculation behind the number of approvals indicated on the home screen has not been changed (so will include those older items) and will, therefore, not always match what's seen in the list in the new screen. It also includes, where applicable, non-card/non-cash issuers which are not yet supported in the new screen, but remain accessible, instead, from the navigation sidebar (e.g., Expense Reports, Requisitions, Phone, Voucher).

## 5. What is 'disputed transaction'? I saw it available as a filter.

Where configured, if a cardholder has an expense they want to dispute, e.g. the dollar amount is not the same as the receipt they have, or they haven't received the goods to which the expense relates, they can mark this transaction as disputed.

Depending on your company set up, a pop-up window may appear advising the cardholder of the next action to take. "Expense disputed" displays in the status bar at the top of the expense details pane.

By selecting 'Dispute' they are not informing the card issuer they have disputed the expense. They must follow your company policy to progress the dispute after it's been flagged in the solution. Identifying it as disputed in Fraedom enables an administrator to report on it and, if required, it can be handled differently when extracted from the system into your company's finance system.

## 6. What is a credit transaction? I saw it available as a filter.

If a merchant refunds a card, it will display in Fraedom as a credit, with a "-" in front of the dollar value. This filter isolates those items.

## 7. What is reset rule?

In legacy approvals, a radio button can at any time be used to reset a workflow rule to 'Approval required'. In the new screen, once a rule has been approved or declined, 'Reset rule' enables the approver to change their mind, returning the workflow status to 'Approval required'.

## 8. How do approvers know a card holder has taken a requested action?

After querying an item, it only returns to the approver's 'To do' list once the cardholder has added a mandatory comment in the expenses screen (where it will, once queried by an approver, appear in the cardholder's 'To do' list). The cardholder taking the requested action, alone (e.g., changing a charge code or adding a receipt) without adding a comment is insufficient to move the expense back to the approver's 'To do' list.

## 9. Where does the 'Timeline' button take you from the options menu within an Approval?

The timeline provides a snapshot of tasks that either the cardholder or approver has performed on a particular expense. This feature helps in auditing the actions performed by each of the users (cardholder, one or more approvers). Clicking Timeline in the Options menu opens the Timeline pane to the right of the approval details pane.

## 10. Is there still access to the Statement periods for our CabCharge voucher module. How will it be affected in this release?

You will be able to find approvals for Cabcharge Vouchers in the vertical navigation side bar on the left once you open the approvals screens. Once you click the Cabcharge button, this will take you to the legacy approval screens. This also applies to the Phone, Expense Reports and Requisitions modules.

## 11. Can you approve one rule and query the other?

Yes - If there are 2 (or more) rules in an expense, you can act independently on each rule by hitting the [...] options button to approve one rule, then query another. The workflow status would change to 'Information Required' in the latter case for the cardholder, and to 'Queried/Awaiting response' for the approver.

## 12. Valid tax receipts “yes” or “no” - is this Freedom identifying that it is not a valid tax invoice, or the cardholder?

The cardholder - when cardholders are adding a receipt to an expense before approving they have an opportunity to declare whether or not the receipt they are uploading is a valid tax receipt.

## 13. If an approver wants to change the coding can they do it through this screen?

No, approvers are unable to edit a cardholder's coding on the new screen. However, by navigating to Options > Advanced approvals (in the bottom right corner of any selected expense), approvers who already have editing rights will still be able to edit the coding from the legacy screens.

## 14. We were advised that the Decline option was turned off (greyed out) by default. Is this still true in the new version?

Two configurable options are available in the solution to disable an approvers ability to decline a workflow rule. One disables it at company level, in which case, the screen will contain no reference at all to a 'Decline' action, while the other controls it *per issuer*. For the latter, the 'Decline' action will be available for those issuers for which it has not been disabled, and on expenses for issuers where it has been disabled, while it appears in the [...] menu, it is greyed out (disabled), so is unavailable as an action.