## Supervisor Approval

To approve expenses:

1.

Home Page HSBC 🚺 Home Expenses Transactions Authorities Reports Outstanding Tasks heading, click on (No. Outstanding Tasks New Actions
No new actions are available as you do not have a Card Account loaded ~ 10 Waiting Approval against your profile. Reset to Myself P-Johansson, Bentley C-Bynge, Nathaniel

The Approval Tasks window will open. The approvals list displays transactions for all subordinates that require supervisor approval. The list can be filtered according to the Search Parameters (by user/subordinate, Expense Group, Reference ID, Activity. Merchant).

From the Home Page under the

of) Waiting Approvals.

TIP: Hovering over the 🗾 icon beside individual transactions will display the transactions details for review:

2. Supervisor Actions - select the transaction(s) for approval/review and click the relevant action icon.

> The transactions can be actioned in bulk or individually.

## **Supervisor Actions**

<b>Individual:</b> Click icon beside the transaction:	<b>Bulk:</b> Select one or more transactions for action and click	
*	Approve	<b>Approve</b> – Selected Transaction(s) are approved and progress in Workflow.
Q	Review	<b>Review</b> – The Transaction details are displayed. A link to stored receipt images is also provided.
9	Query	Query – A query message box is displayed and requires a direct question / comment. On clicking the OK button, the query is reversed in the Workflow back to the User with the Query note on the Transaction display.    Prompt  Processing Query. Please enter your comments.    OK  Cancel
	Reverse	<b>Reverse</b> – removes the transaction from the Approval stage to the previous workflow stage (usually verification). No query or note will display on the transaction.
	N/A	<b>View Attached Notes</b> – opens a new window displaying any additional notes associated with transaction (if available).

Select a User Statement Period Activity Waiting Approva All Users All Periods Employee ID Merch All Merchants . unt Type Expense Gro Act All Expense Groups All Types ID Type Sort By User Doc nt ID Query... rove Search Reset Act Sele Account Ty Merchant Date Purpose unt Waiting Since Expense Type waiting Approval [C-Callery, Brandon - DEMOAH016] 2 >4 General VISA visa 02-12-2015 TRAVEL INSURANCE Travel Insurance 52.33 17-08-2016 Purchase 46.23 18-08-2016 Rail Travel VISA Visa 10-01-2016 2 10.741 General TRAINLINE.COM Rail travel - cusot meeting 2 149,941 1 15-01-2016 REFUND Rail travel -46.23 18-08-2016 Rail Travel VISA Visa TRAINLINE.COM General 2 149,741 1 General VISA Visa 17-01-2016 STARBUCKS Coffee before me - Customer ABC 2.95 18-08-2016 Purchase 2 149.741 1 General VISA Visa 08-02-2016 HILTON HOTELS Accomodation - Client Visit 240.88 18-08-2016 Purchase 2 34. 741 3 10-12-2015 46.23 21-11-2016 Purchase VISA visa TRAINLINE.COM Train to Cu 2