

OFFICE OF THE CONTROLLER

Tips and Tricks: Accessing Approvals and Understanding Workflow

September 2025





Table of Contents

Travel and Expenses	3
Transaction Corrections	10
Supplier Portal	20
Resources and Contacts	24

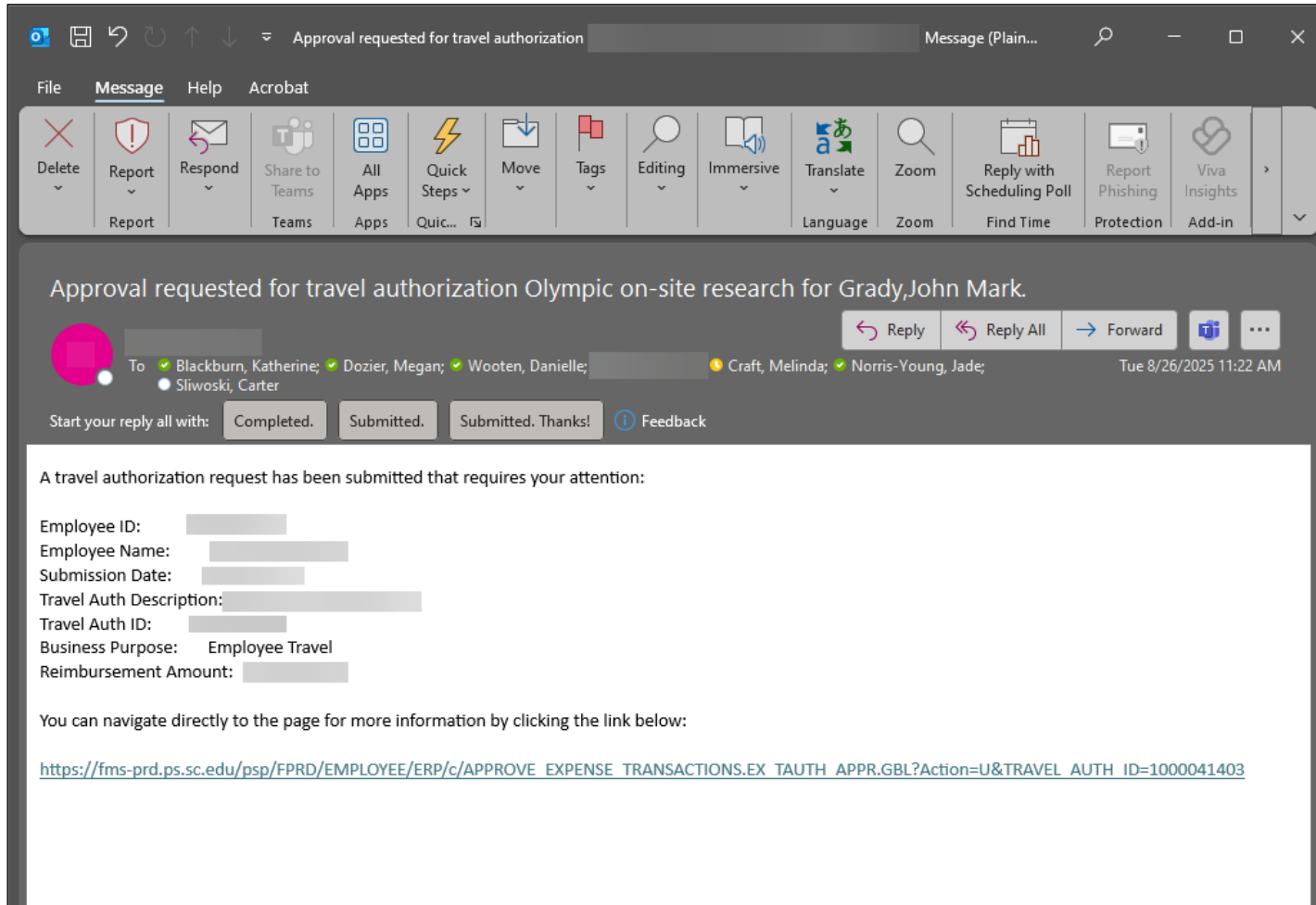


Travel and Expenses



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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.

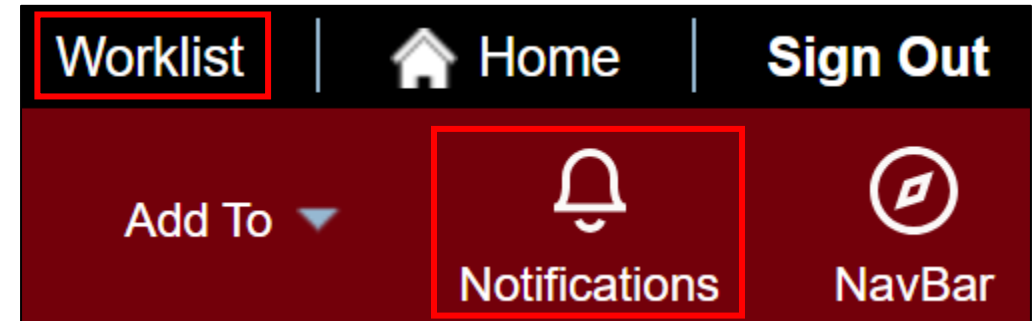


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Accessing Approvals in PeopleSoft

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">• Default Account• Destination• Dates• Name/Names• Estimated Expenses• Review chart field in the accounting details is correct.• Attachment	<ul style="list-style-type: none">• Name• Address• Dates of Travel and Expenses Correspond.• 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 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
Pending Status	not submitted for approval. The expense report can be modified and deleted.
Submitted for Approval	the expense report is submitted, waiting for approval.
In Process	the expense report is in approval workflow.
Approved	approval for the expense report is complete and waiting on processing.
Paid	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.**



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Demonstration

How to approve a
TA/TRV and Expense
Report



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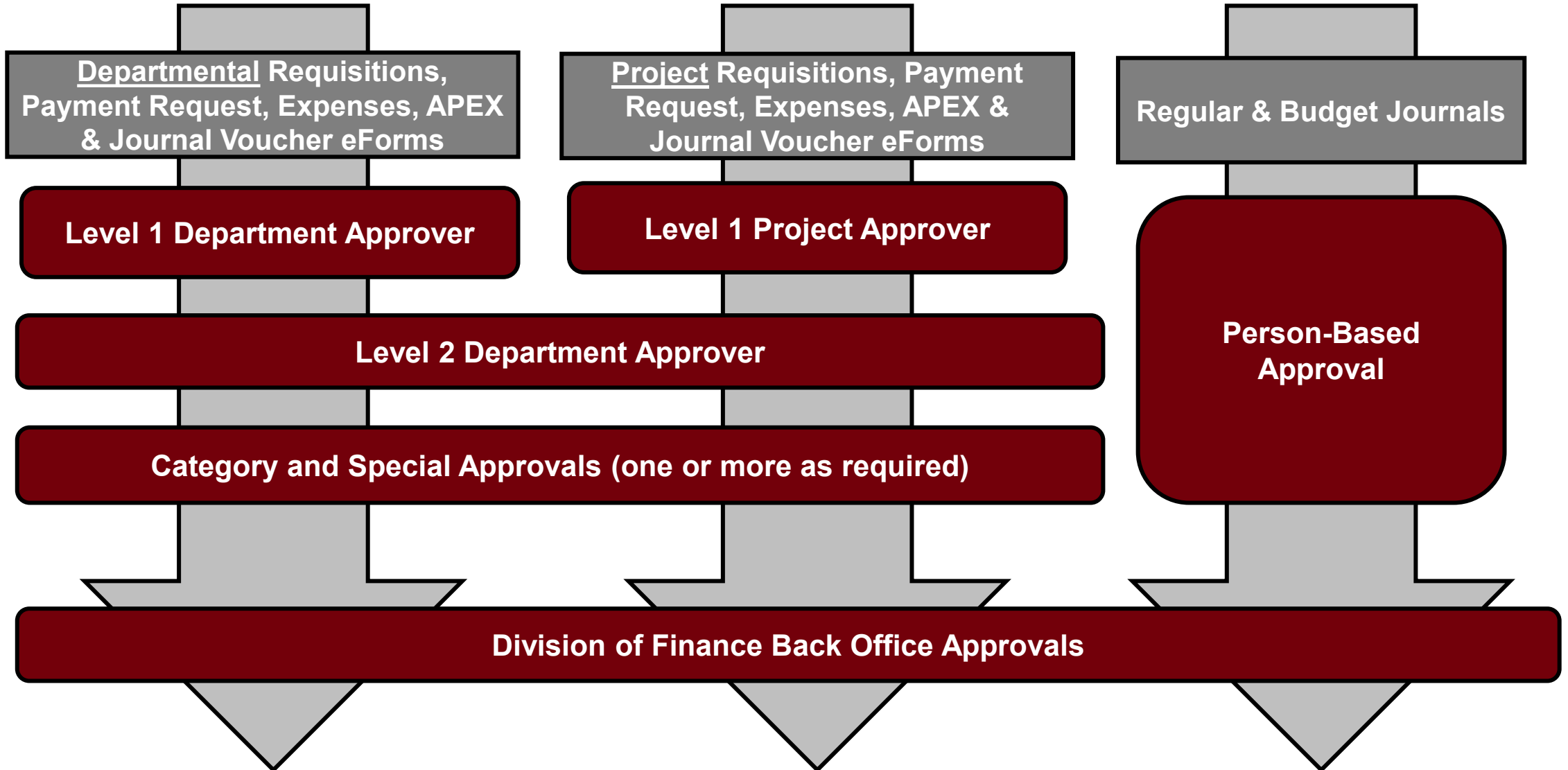
Transaction Corrections



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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

JE's 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

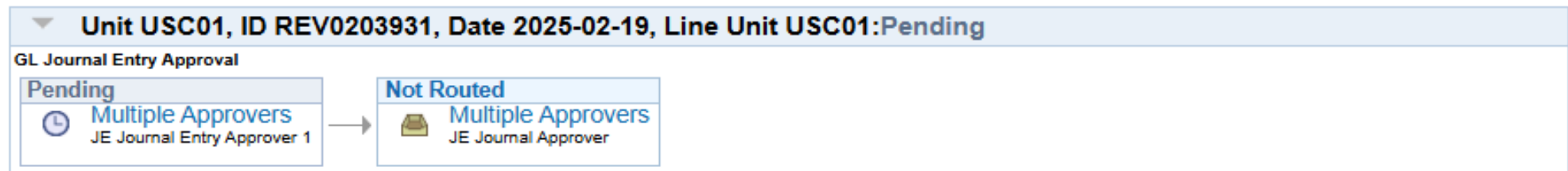
The JE has not yet been submitted for approval. Be sure both the Journal Status and Budget Status are both “V” and select the Submit button on the approval tab of the entry to start the workflow.

> [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

Unit USC01, ID 0000204079, Date 2025-02-20, Line Unit USC01:Pending

View/Hide Comments

GL Journal Entry Approval

Approved

✓ Katherine Blackburn

JE Journal Entry Approver 1

02/21/25 - 1:03 PM

Skipped

⚠ Jason W. Bashore

JE Journal Approver

02/21/25 - 1:03 PM

Pending

🕒 Multiple Approvers

JE Journal Approver

▶ Comments

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

Approved

✓

Rebecca Denisi

JE Journal Entry Approver 1

02/06/25 - 8:30 AM

→

Approved

✓

Jason W. Bashore

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 and they will assist you in getting approvers set up.


GL JE Journal Approval

▼ Unit USC01, ID 0000203994, Date 2025-02-19, Line Unit USC01:Pending

View/Hide Comments


GL Journal Entry Approval

Skipped

 No approvers found
JE Journal Entry Approver 1

→

Pending

 Multiple Approvers
JE Journal Approver

▶ Comments



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.

GL JE Journal Approval
▼ Unit USC01, ID 0000202758, Date 2025-02-03, Line Unit USC01: **Terminated**
GL Journal Entry Approval
Terminated
✖ Multiple Approvers
JE Journal Entry Approver 1
02/03/25 - 11:43 AM
→
Terminated
✖ Multiple Approvers
JE Journal Approver



JE Approval Statuses

Status	Descriptions
No Status	The JE hasn't been submitted yet. Both Journal and Budget must be "V" before hitting submit.
Pending for Level 1	The JE has been submitted but waiting on departmental approval; it is still editable, but changes mean you'll need to resubmit.
Pending for Level 2	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.
Approved at Both Levels	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.
Skipped at Level 1	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.
Denied (Level 1 or 2)	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.
Terminated (Level 1 or 2)	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.

The screenshot displays the 'Manage Request Approval' interface. At the top, there's a navigation bar with 'Favorites', 'Main Menu', 'Worklist', 'Home', and 'Sign Out'. The page title is 'Manage Request Approval'. Below this, a section titled 'Registration Details' contains the following information:

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

Below the registration details, there are sections for 'Identification & Classification' (showing U.S. Tax Identification Number 600000000), 'Profile Questions', 'Self Categorization', and 'Review / Edit Approvers'. At the bottom, there are three buttons: 'Approve', 'Deny', and 'Request More Information'.

Demonstration

How to approve a
Supplier



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Resources & Contacts



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Office of the Controller

Office of the Controller

General Accounting

Grants and Funds
ManagementCompliance and Tax
Management

Payroll Department

Operational Management
and ReportingExternal Financial Reporting
and TransparencyResource 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

AP Uploads

Business Expense Prepaid Cards

Cash Advances

Cost Transfer

Departmental Deposits

Employee Reimbursement (Non-travel)

Endowments

Finance Intranet

Expand all



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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Questions



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Controller's Office Contact List

General Accounting (JEs, JVs, Apex, GL issues/Questions)	Email Address
General Email Address	genacctg@mailbox.sc.edu
Cash Advance Settlement	cashadvsc@mailbox.sc.edu
Payroll Retro Journal Entries	retroje@mailbox.sc.edu
Chartfield Maintenance	cfmaint@mailbox.sc.edu
Moving & Relocation Mailbox	moving@mailbox.sc.edu
PeopleSoft Finance Security Requests	pssecure@mailbox.sc.edu
Accounts Payable	Email Address
General Email Address	ap@mailbox.sc.edu
AP Uploads	apupload@mailbox.sc.edu
Supplier Maintenance	apsupplr@mailbox.sc.edu
Travel Office	Email Address
General Email Address	teoffice@mailbox.sc.edu
Student/Non-employee Travel Authorizations and Travel Reimbursement Vouchers	tesubmit@mailbox.sc.edu

Controller's Office Contact List

Capital Assets	Email Address
Physical Inventory	physinv@mailbox.sc.edu
Capital Leases	lease@sc.edu
Cash Management and Treasury	Email Address
General Treasury Email Address	treasury@mailbox.sc.edu
Program Expense Card	cards@mailbox.sc.edu
Team Card	teamcard@mailbox.sc.edu
Travel Card	travelcard@sc.edu
Compliance and Tax	Email Address
General Compliance Email Address	controllercompliance@sc.edu
General Tax Email Address	tax@mailbox.sc.edu
Research/Development Sales/Use Tax Exemptions	rdequip@mailbox.sc.edu
Time and Effort Reporting	timeandeffort@sc.edu

Controller's Office Contact List

Grants and Funds Management	Email Address
Sponsored Award Specific Questions	Contact your Post Award Accountant (PAA)
Payroll	Email Address
General Email Account	payroll@mailbox.sc.edu

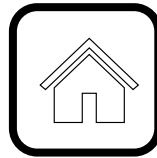


THANK YOU!

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



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