

ASSIGNING AN EMPLOYEE'S PRIMARY EXPENSES SUPERVISOR

Summary

The Expenses Supervisor page is used to designate the primary individual who approves expense reports for an employee. More detail on the roles and responsibilities of the Expenses Supervisor is available at the Financial Operations website at www.northwestern.edu/financial-operations/policies-procedures/travel/planningexpensesreimbursements.html. Information about Expenses Supervisor Workflow is available at fra.northwestern.edu/announcements/expenses-supervisor.html.

Navigation



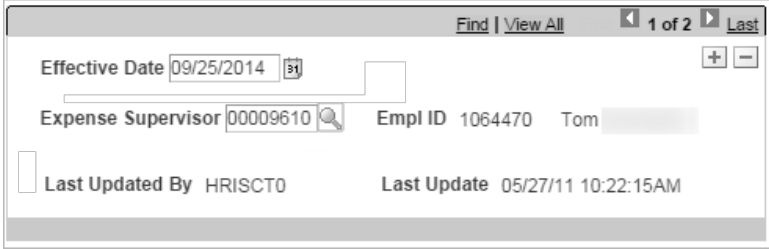

WORKFORCE ADMINISTRATION > JOB INFORMATION > MAINTAIN APPROVER INFORMATION > EXPENSES SUPERVISORS

Security Access

The Expenses Supervisor page is available to any user with a FASIS Administration login.

Assigning Expenses Supervisors

You must be logged into the FASIS Administration *Production* database to make entries on this page; changes cannot be entered in the Reporting database.

Procedure	
1.	Navigate to: WORKFORCE ADMINISTRATION > JOB INFORMATION > MAINTAIN APPROVER INFORMATION > EXPENSES SUPERVISORS
2.	Search for the employee whose Expenses Supervisor you wish to update.
3.	Click  to add a new row of information. <i>Note:</i> The Effective Date will change to the current date; this does not need to be modified.
4.	In the Expenses Supervisor box, enter the 8-digit position number for the new Expenses Supervisor. <i>Note:</i> If you do not know the position number of the individual you are assigning, click  to search by name. <div style="border: 1px solid #ccc; padding: 10px; margin: 10px 0; width: fit-content;">  </div>
5.	Click  Save.

For whom can you set an Expenses Supervisor in FASIS?

This page will allow you to set an expenses supervisor for these employees:

- Active and Terminated employees paid in the last 120 days in the following pay groups: MON (monthly staff), MOF (monthly faculty), BIR (biweekly staff), MGW (graduate students), and NMF (Northwestern Medical Group)
- Active and Terminated employees paid in the last 120 days in the BIT (temporary employee) pay group *only* in HR DeptID 8300xx (Traffic Institute)
- New hires in the MON, MGW, NMF, MOF and BIR pay groups with a status of A (Active), L (Unpaid Leave), or P (Paid Leave) – even if that new hire has not yet received a paycheck
- Active employees in the OTH (unpaid) pay group with a status of L (Unpaid Leave) or P (Paid Leave)

For any employee that satisfies one of these categories and holds an additional unpaid appointment (pay group OTH), an Expenses Supervisor may be assigned to that unpaid appointment *in addition to* the supervisor for the regular, paid record.

Note that temporary employees (except in the Traffic Institute) cannot have an Expenses Supervisor assigned.

Rules & Notes

- You will receive an error if you try to assign an Expenses Supervisor position that is currently empty (has no incumbent).
 - When a new employee is hired, the Expenses Supervisor will default to that employee's Department Administrator, unless otherwise noted on the hiring paperwork.
 - When an employee *transfers*, the Expenses Supervisor is *not* automatically updated; the change must be entered into this page by the new department.
 - Users are not allowed to update their own Expenses Supervisor.
 - Graduate students, temporary employees, and employees in a 1-to-Many position cannot be assigned as an Expenses Supervisor.
 - The "Last Updated Date" will indicate the last time *any* approver was updated for this employee; note that this may refer to a Kronos, Training, or Conflict of Interest Approver.
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ASSIGNING EXPENSES SUPERVISOR BACKUPS

Summary

The Expenses Supervisor Backups page is used to designate backup approvers to an Expenses Supervisor in that Supervisor’s department.

Navigation

WORKFORCE ADMINISTRATION > JOB INFORMATION > MAINTAIN APPROVER INFORMATION > EXPENSES SUPERVISOR BACKUPS

Security Access and Data Availability

Security Access: The Expenses Supervisor Backups page is available to any user with a FASIS Administration login.

Data Availability: You may enter backup approvers *only for* individuals in your access who are already assigned as a primary Expenses Supervisor for at least one person.

Assigning Backups

You must be logged into the FASIS Administration *Production* database to make entries on this page; changes cannot be entered in the Reporting database.

Procedure	
1.	Navigate to: WORKFORCE ADMINISTRATION > JOB INFORMATION > MAINTAIN APPROVER INFORMATION > EXPENSES SUPERVISOR BACKUPS
2.	Search for one of the following fields: <p>Department: enter a full or partial HR DeptID to see a list of all existing Expenses Supervisors in that department</p> <p>Expenses Supervisor: enter the 8-digit position number for an existing Expenses Supervisor</p> <p>Supervisor Name: the name of an existing Expenses Supervisor, in the format FirstName LastName</p> <p><i>Note:</i> If an Expenses Supervisor is assigned to multiple HR DeptIDs, you must set a backup for each 6-digit DeptID separately. For example, if Bonnie Smith approves expenses for employees in departments 267300, 267301, and 267393, the backup must be set for each of the three departments using the procedure below.</p>

NW Expense Supervisor Backups

Find an Existing Value

Limit the number of results to (up to 300):

Department:

Department Name:

Expense Supervisor:

Supervisor Name:

Case Sensitive


3. If there are multiple results, choose a DeptID/Expenses Supervisor combination for which you would like to set a backup:

Search Results

View All First ◀ 1-2 of 2 ▶ Last


Department	Department Name	Expense Supervisor	Supervisor Name
186101	Norris University Center Admin	00003808	Amy
187701	Office of Special Events	00003808	Amy

4. In the **Backup Supr Position** boxes, enter the 8-digit position number for the Backup. You may enter one or two backups; if you are replacing an existing backup, simply type over the existing data.


Note: If you do not know the position number of the individual you are assigning, click  to search by DeptID and obtain a list of all employees within a particular Department.

Expense Supervisor Backups

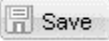
Department: 186101
 Expense Supervisor: 00003808
 Empl ID: 1066735

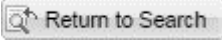
Backup Supr Position: 

Empl ID:

Backup Supr Position: 

Empl ID:

5. Click the  button.

6. If you need to assign backups for another DeptID, click  and repeat Steps 3-5.

Notes

- When using this procedure, you are assigning backups to the *primary* Expenses Supervisor. For example, setting Mark Kuban as a backup to Bonnie Smith in Department 399900 allows Mark access to expenses and approvals for any employee in Department 399900 for whom Bonnie is the primary.
- Backup supervisors receive email notifications from NUFinancials when an Expenses Supervisor approval is needed.

EXPENSES SUPERVISOR FIELDS IN FASIS QUERY

FASIS Administration users who have access to FASIS Query may run reports to view current Expenses Supervisor assignments. Note that access to FASIS Query requires an Admin ID, proper security authorization, and completion of required training as indicated below.

Navigation

REPORTING TOOLS > QUERY > QUERY VIEWER *(access run queries only; HRS106 training required)*

REPORTING TOOLS > QUERY > QUERY MANAGER *(access run and create queries; HRS104 training required)*

Public Queries

Users with proper authorization and training (HRS106 or HRS104) may view and run these queries in the FASIS Admin Reporting database:

Query Name	Description
PUB_EXPENSES_SUPERVISORS	Includes all employees in your department access, including their primary Expenses Supervisor and any backups (if assigned).
PUB_APPROVERS	Displays all employees in your access, including all primary approvers for those employees (Kronos, Training, Conflict of Interest, Performance, and Expenses). Backup supervisors are <i>not</i> displayed in this query.

Query Fields

Users with full query development access and training (HRS104) may use the following tables/fields to add expenses supervisors into their own custom queries:

Query Table	Field	Description/Note
NW_EMPLOYEES	NW_EXPENS_REPTS_TO	Primary Expenses Supervisor Position Number
	NW_EXPENS_RPT_EMAI	Primary Expenses Supervisor Email Address
	NW_EXPENS_RPT_EMPL	Primary Expenses Supervisor EmplID
	NW_EXPENS_RPT_NAME	Primary Expenses Supervisor Name
NW_REPORTS_TO	NW_EXPENS_REPTS_TO	Primary Expenses Supervisor Position Number
NW_EXP_BACKUP_V	DEPTID	The 6-digit HR Department ID
	NW_EXPENS_REPTS_TO	Position Number for an existing Primary Expenses Supervisor in the Department
	NW_BACKUP_POSN1 NW_BACKUP_POSN2	Position Numbers for the two backups; these backups are assigned to all the employees for the indicated Primary Expenses Approver in the indicated DeptID