

# Configuring approval processes



Expense Management.  
Simplified. For you.

## Configuring approval processes - For Administrators

In Findity Expense, administrators configure processes for how expense reports are approved in an organization. This guide explains how you as an administrator can configure approval processes based on how your organization works.

### All reports are approved by the same person

Select **My Organization** and click the **Attestation** tab.

Enable **Attestation** and scroll down to select the **Default Approver**.

All reports will now go to this person.

### There are multiple approvers

Your company can choose to set up an approval process: based on your organization's structure and specify approvers for each department's expense reports, or based on cost center or other dimensions.

To do this, select **My organization** and click the **Attestation** tab.

Enable **Attestation** and from the **Type** drop-down list select one of the following: **By organization structure** or **By cost center**.

Use the **Number of authorized approvers required** drop-down list to specify how many approvers are required.



OVERVIEW   INFORMATION   ORGANIZATION STRUCTURE   **APPROVAL**   DESIGN

Approval

Type  
By organization structure

Number of authorized approvers required  
1

Approval can be done by a particular person (default approver) or according to the organization structure. At departmental level it is possible to set amount limits per person. It is also possible to require approval from more than one person. Default approvals are always mandatory in case a person is missing department or the user has been removed.

Scroll down and select the **Default Approver**.

For processes based on your organization's structure, the default approver will receive all reports from users who are *not* members of a department.

For processes based on cost center or another dimension, the default approver will receive reports from users who have not been assigned a cost center or dimension.

In all cases, the default approver receives reports that exceed the amount an approver can approve.

## Configuring approval processes based on organizational structure

Click the **Organization structure** tab and start to add the different departments that comprise your organization by clicking on the plus sign and entering the department's details.

Enter the department you want to add, for example, Marketing. To add another department, click the plus sign by your organization's name again, and enter the department's name, for example, Sales. Click **Save**.

OVERVIEW   INFORMATION   ORGANIZATION STRUCTURE   APPROVAL   DESIGN

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Set up your organisation's department structure.

Findity Expense AB		
Sales		
Marketing		

[SAVE](#)

To add a subdepartment to a department, click the plus sign beside the department's name and enter the subdepartment's name. For example, if you want to create two sub departments under Sales as there are two sales teams, click the plus sign next to Sales. Name the first subdepartment, for example, Product A and click **Save**. Repeat this step to create the Product B subdepartment and click **Save**.

OVERVIEW   INFORMATION   ORGANIZATION STRUCTURE

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Set up your organisation's department structure.

Findity Expense AB		
Sales		
Product B		
Product A		
Marketing		

When you have configured your organization's structure, return to the **Attestation** tab to determine who the approver for each department is.

For each department, click on its Approver list to access a list of users who can approve reports. Select the user(s) to approve reports for the department.

## BY ORGANIZATION STRUCTURE

	Approver	Max amount		
Findity Expense AB	Alicia Sandell	None		
Marketing	Elin Ivarsson	None		
Sales	Niclas Gunnarsson	None		
Product A	Add approver	None	⊖	⊕
Product B	<i>Approved on the next higher level.</i>			

If you don't specify an approver, the department's reports will be sent for approval to whoever is set as the approver on the next level up.

Note that if you specify multiple approvers in the same field for a department, all of them will be notified that they have a report to approve. However, if, for the same department, the number of authorized approvers required is set to 1, only one person can approve a report. So, it is a case of first come, first served and whoever gets there first, gets to approve the report.

Now you must check that each user belongs to the correct department. Under Users, click on each user to add them to the correct department.

Elin Ivarsson

E-mail address  
elin.ivarsson@findity.com

Employee ID

Department  
Findity Expense AB

4 sista i kortnummret

Title

External source id

License  
Normal

Administrator

Allow user to register expenses for others

Company card

CANCEL SAVE

## More than one approver per report

If your company wants reports to be approved by more than one person, you can set this up with a few simple settings.

In My **organization**, on the **Attestation** tab, select the number of authorized approvers required.

OVERVIEW INFORMATION ORGANIZATION STRUCTURE APPROVAL DESIGN

Approval

Type  
By organization structure

Number of authorized approvers required  
2

Approval can be done by a particular person (default approver) or according to the organization structure. At departmental level it is possible to set amount limits per person. It is also possible to require approval from more than one person. Default approvals are always mandatory in case a person is missing department or the user has been removed.

For each existing approver, click the plus sign to the right of the approver, and click **Add approver**. Specify the second approver and click **OK**.

## BY ORGANIZATION STRUCTURE

	Approver	Max amount	
Findity Expense AB	Alicia Sandell	None	<div style="border: 2px solid red; padding: 2px; display: inline-block;">Add approver</div> <div style="border: 2px solid red; padding: 2px; display: inline-block;">+</div>
Marketing	Elin Ivarsson	None	
Sales	Niclas Gunnarsson	None	
Product A	<i>Approved on the next higher level.</i>		
Product B	<i>Approved on the next higher level.</i>		

## BY ORGANIZATION STRUCTURE

	Approver 1	Max amount	Approver 2	Max amount
Findity Expense AB	Alicia Sandell	None		
Marketing	Elin Ivarsson	None	John Eriksson	None
Sales	Niclas Gunnarsson	None		
Product A	<i>Approved on the next higher level.</i>			
Product B	<i>Approved on the next higher level.</i>			

In the example above, we can see that expense reports from users in the Marketing department will first go to Elin (Approver 1) for approval. When Elin has approved a report, it goes to John (Approver 2) for her approval.

If you don't add Approver 2 but have set the Number of authorized approvers required to 2, then after Approver 1 approves the report, it will be sent to the approver on the next level up in your organizational structure.

## Approvals up to certain amount

The following is an example of how to set up an approval process where Elin approves reports from users in the Sales department. Elin receives reports for expenses up to SEK 5000. Reports for more than that amount go to Approver 2, John.

### BY ORGANIZATION STRUCTURE

	Approver 1	Max amount	Approver 2	Max amount
Findity Expense AB	Alicia Sandell	None		
Marketing	Elin Ivarsson	5000	John Eriksson	None
Sales	Niclas Gunnarsson	None		
Product A	Approved on the next higher level.			
Product B	Approved on the next higher level.			

If **Include unauthorized approvers** is selected, reports for more than SEK 5000 will go to Elin first for review, but then go to John for final approval.

Approval

Type  
By organization structure

Number of authorized approvers required  
2

Include unauthorized approvers ?

Approval can be done by a particular person (default approver) or according to the organization structure. At departmental level it is possible to set amount limits per person. It is also possible to require approval from more than one person. Default approvals are always mandatory in case a person is missing department or the user has been removed.

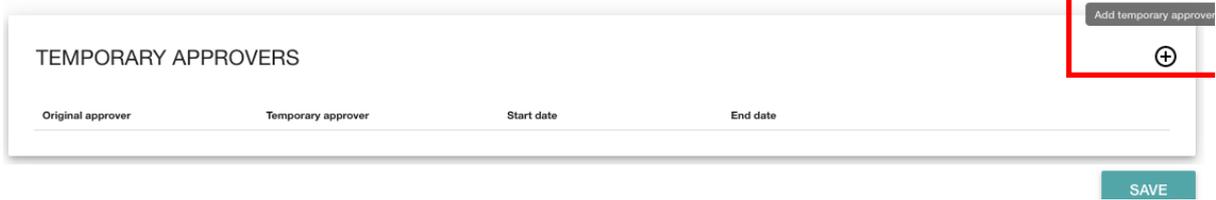
### BY ORGANIZATION STRUCTURE

	Approver 1	Max amount	Approver 2	Max amount
Findity Expense AB	Alicia Sandell	None		
Marketing	Elin Ivarsson	5000	John Eriksson	None
Sales	Niclas Gunnarsson	None		
Product A	Approved on the next higher level.			
Product B	Approved on the next higher level.			

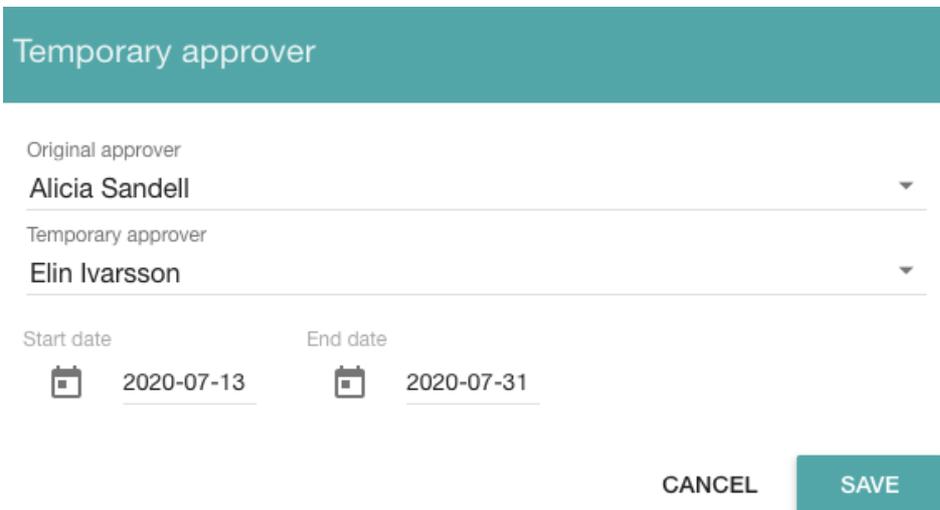
## Temporary approvers

If an approver won't be available to approve reports for a certain length of time, you can set up a temporary approver to cover for them.

On the **Attestation** tab, scroll to **Temporary approvers** and click the plus sign.

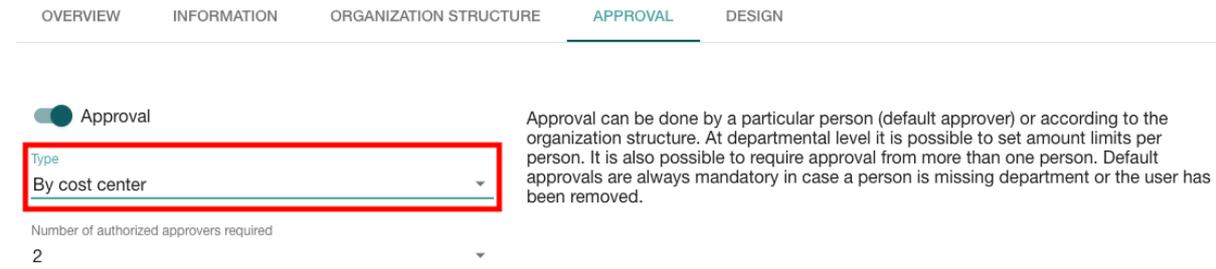


Specify the **original approver**, the **temporary approver**, and **start** and **end** dates and click Save.



## Approvals according to cost center or other dimension

You configure approval processes based on cost center by going to **My organization** and clicking the **Attestation** tab.



OVERVIEW INFORMATION ORGANIZATION STRUCTURE **APPROVAL** DESIGN

Approval

Type  
By cost center

Number of authorized approvers required  
2

Approval can be done by a particular person (default approver) or according to the organization structure. At departmental level it is possible to set amount limits per person. It is also possible to require approval from more than one person. Default approvals are always mandatory in case a person is missing department or the user has been removed.

To set up cost centers, go to **Settings** and scroll to **Cost centers Projects & Dimensions**. Click **Cost Centers**. This is where you can create, change, or delete the cost centers your organization requires.

Create and save the cost centers to be used in the approval processes. When you've created the cost centers, click the drop-down list beside them and select if cost centers are set per report or per expense included in the report.



Cost centers, Projects & Dimensions ⓘ +

Cost Centers (2 activated)  
R&D, Finance Report level

Projects (0 activated) Not used

Go back to **My organization** and on the **Attestation** tab, you can now select the approvers for each cost center. Click **Add approver** and select the person who will approve expense reports for the cost center.

Approval

Type

By cost center

Number of authorized approvers required

2

Include unauthorized approvers ?

Approval can be done by a particular organization structure. At department level, it is also possible to require that approvals are always mandatory in case of a particular person. It is also possible to require that approvals are always mandatory in case of a particular person. It is also possible to require that approvals are always mandatory in case of a particular person. It is also possible to require that approvals are always mandatory in case of a particular person.

## BY COST CENTER

	Approver	Max amount
111 - R&D	<b>Add approver</b>	None
112 - Finance		<i>Approved on the next higher level.</i>

## Default cost centers

If the cost center is set per expense on a report, you can configure the default cost center for a user or an entire department. You can also **Allow users to change the cost center**. Select this option if you want users to be able to do this.

### Cost centers, Projects & Dimensions ⓘ +

Cost Centers (2 activated)  
R&D, Finance

Expense level

Default cost center  
Default value is set on user or department level

Användaren

Allow user to change cost center

For a user to be assigned a default cost center, they must be able to change the cost center and the cost center must be associated with their account.

Go to **Users** and select the user you want to assign a cost center. Select the cost center from the drop-down list. Click **Save**.

Emilio Ekonom

E-mail address  
emilioekonom012@findity.com

Employee ID

Department  
Not selected

4 sista i kortnummret

Title

Default cost center  
112 - Finance

External source id

License  
Inherited

Administrator

Allow user to register expenses for others

CANCEL SAVE

To set a default cost center for everyone in a department, you must first create the department and then assign users to it as explained above.

Go to **My organization** and create it in the department on the **Organization structure** tab. Then go to **Users** to assign the users to the department.