Introduction

The role of the Super User is to define the routing and approval structure for their respective areas, identifying Reviewers, Approvers, Backups, and Alternate Approvers for each department. Super User access is obtained by completing the System Access Request form and must be approved by your division Finance Advisory Council Representative.

Super Users should:

- Have an in-depth understanding of the SJSU Travel Guidelines, rules for reimbursements, and the approval requirements for In-State, Out-of-State, and International travel. Please refer to the table below. For detailed information, the SJSU Travel Guide is available on the Finance and Business Services website.

Table 1. Approval for Travel Authorizations and Reimbursements

Approval Type	Type of Travel	Approval Process	Level of Approval
Request for Approval of Travel	Domestic **In-State**	Approved in FTS	Approving Official and Associate Vice President (except Academic Affairs, where Deans are the highest level required)
Request for Approval of Travel	Domestic **Out-of-State**	Approved in FTS	Approving Official and Vice President (except Academic Affairs, where Deans are the highest level required)
Request for Approval of Travel	International	Approved in FTS	Approving Official, Vice President, and President (for Academic Affairs: Approving Official, Dean, Provost, and President or his/her designee)
Travel Reimbursement Requests	Domestic **and** International	Submitted and approved in FTS	Approving Official

- Have an in-depth understanding of the review/approval process of requests for authorization to travel and travel reimbursement requests for each department you are responsible for.
- Know who, in each department, is identified as an Approving Official. For details on who can be an Approving Official, please see the [Delegation of Authority for the Approval of Financial Expenditures Guidelines](#).
- **Remember:** When establishing/updating department approval structures, Approving Officials *may not* approve transactions that involve reimbursements for themselves, an immediate supervisor, or any upper management in their reporting structure. This applies to both primary and backup approvers.

Setting Up Approval Structures

For each department assigned, the Super User must set up and maintain structures for both Travel Authorizations and Travel Reimbursement. Additionally, Super Users designate Alternate Approvers for individuals in their approval structures.

Roles Defined

- **Reviewer -** This role is optional. An individual set up as a Reviewer can:
  - Review and upload supporting documents, verifying compliance with both SJSU travel policy as well as department specific rules.
  - View the status of travel authorizations/reimbursements to determine their location in the approval process.
  - Return a travel authorization/reimbursement request if there is insufficient supporting documentation.
- **Approver –** An individual set up as an Approver can:
  - Approve, pend for clarification, return, or not authorize travel authorization/ reimbursement requests.
  - Review and upload supporting documents.
  - View the status of travel authorizations/reimbursements to determine their location in the approval process.
- **Backup –** This is an optional role that can be designated for both Reviewers and Approvers. This role has the same access as the primary Reviewer/Approver. Backups would be responsible if the primary Reviewer/Approver does not take action on travel authorization/reimbursement requests after 4 calendar days, or whenever necessary.
- **Alternate Approver –** Designated for each individual in an Approver role, the Alternate Approver approves travel authorization/reimbursement requests when the traveler is the designated Approver for a specific Dept ID. Alternate Approvers must:
  - Be an MPP Manager.
  - Not report directly to the traveler (Approver).
  - Follow the hierarchy of the organization.

A Note on Approvers

In order for a Super User to designate individuals as Approvers in travel, they have to be eligible approvers (must have completed the necessary training). If the individual is not eligible, they will not show up in a search for potential approvers. Additionally, the individuals must have an Alternate Approver designated before they can be put in a travel structure.

Menus

In FTS, under Setup Data, the following menus are used to maintain approval structures:

Approval Structure – This page is where approval structures for Travel Authorizations and Reimbursements are set up and maintained.

Alternate Approvers – This page displays all Primary Approvers and their designated Alternate. Users highlighted in yellow are no longer valid approvers and need updating. This information will display in the Approval Structure Errors page.

Approval Structure Errors – This page provides a list of instances where approval structures are invalid. The list only includes errors for Dept IDs the Super User is granted.
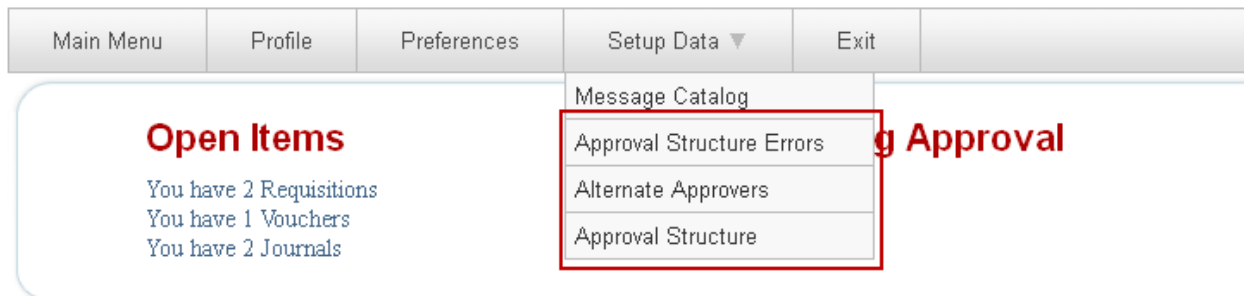
Modifying Approval Structures

When modifying Dept ID approval structures, Super Users should keep in mind:

- Any travel authorization/reimbursement requests that are in the approval process (status of Pending Approval) are sent back to Open status and prior approvals are lost. Once sent to Open status, the traveler will need to log in to FTS to re-submit the request. No email notification is sent to the traveler to inform them of the change.
- If the structure you are trying to modify has requests Pending Approval, a warning message will display indicating the trip number(s) that will be impacted. It is highly recommended to review any items pending approval before making the change to the approval structure and make note of the trip numbers so the traveler(s) can be identified and notified.