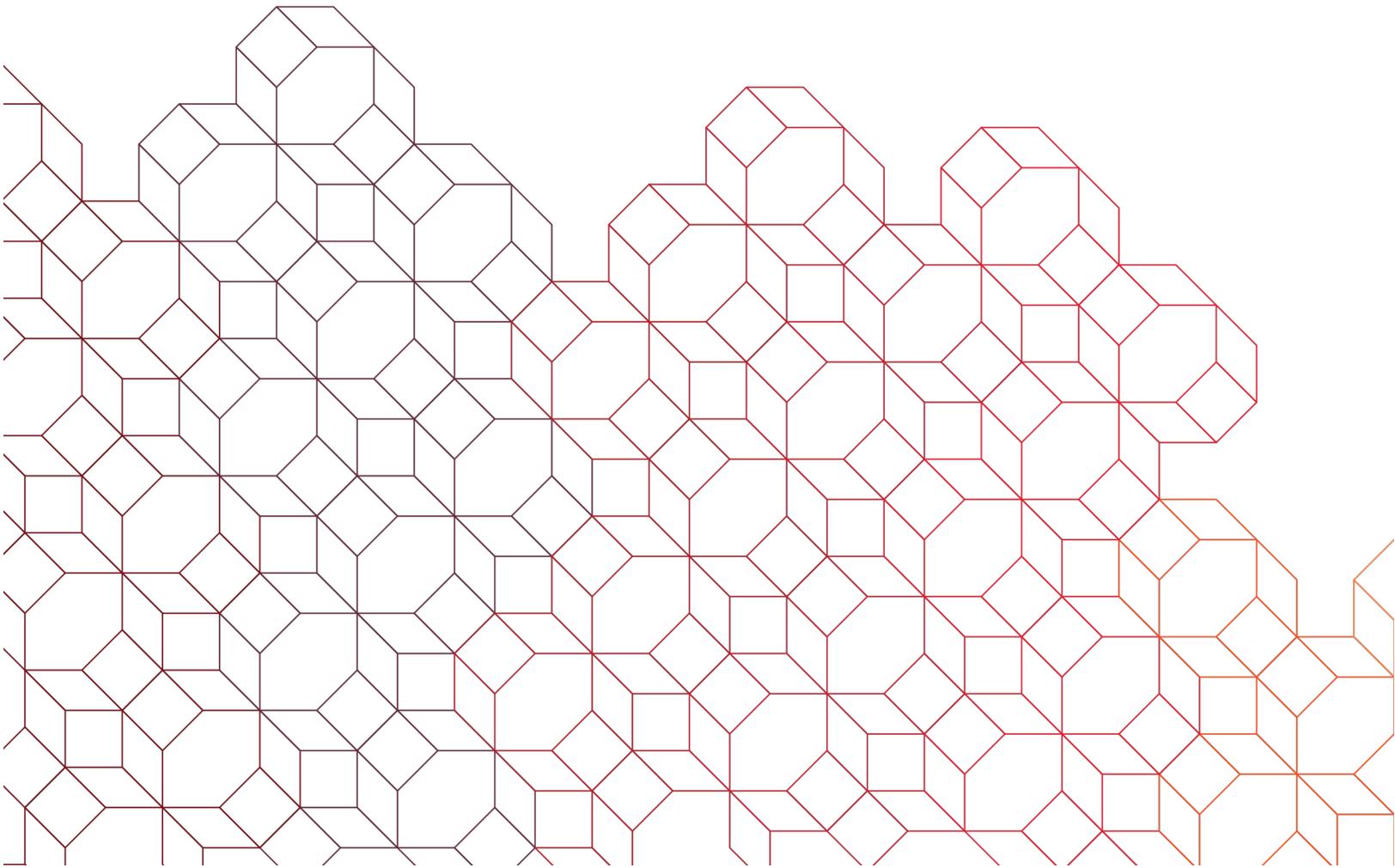




Spend Control

Expense Management & ERM
Approval Workflow Setup and Maintenance



Administrators

Managing your cost allocation approval structure is a multi-step process. Below are instructions in order of completion; however, you can skip steps if not applicable.

Adding New Cardholder Users

Once you have issued a new card, it may take a day or 2 for the new cardholder to appear in Spend Control. At that time, you can assign that new cardholder to their appropriate Org Point and to create a user profile.

To add new cardholder account to an existing Org Point:

1. Company > User-Defined Reporting Structure > Assign Reporting Entities

The system will ask you to select 'Parent Entity'... the Parent Entity will be the Org Point that you want to assign your cardholder(s) to.

2. Search by: "All (Org Point)" > Search
3. Click on the Org Point name in mind (blue hyperlink).
4. Next, the system will ask you to select the 'Child Entities'. The child entities will be accounts/cardholders you will be assigning to the Org Point you selected in step 3.
5. Search by: "All (Account)" > Search
6. Check the box to the left of each cardholder you would like to add to this Org Point > click "Assign" button.

To create Cardholder User profile (optional):

1. Go to User > User Setup
2. Search by: "(All Account)" > Search
3. Select the new cardholder listed below (blue hyperlink).
4. Complete all required (*) fields > Save.
5. You will receive confirmation in green that your new user has been added. At the time your cardholder should receive two emails from MasterCard containing login credentials. Please have User check junk mail/firewall settings if not received.

Adding an Org Point

1. Go to Company > User Defined Reporting Structure > Org Point Setup
2. Under Quick Link section, click on your company name (blue hyperlink).
3. In the 'Reporting Level Number' field, indicate the next Org Point number in your sequence...e.g. 1,2,3.

****NOTE: if you are not sure, of next number, input a higher number you know has not been reached***

4. In the 'Reporting Level Name' field, indicate the name of the new Org Point.
5. Click "Save".

To add cardholders to Org Point, return to top of page.



Adding a Level Manager Profile

Does this person already have **existing** Spend Control User/Admin access? If so, follow steps below:

Since this new Level Manager already has a Username established, you will maintain that existing access.

1. First, ensure the Org Point for this new Level Manger has already been added. If not, see Adding Org Point instructions on page 1.
2. Go to User > User Summary and Search > then click on Username of the individual in mind (blue hyperlink).
3. Click on “Add Role” button then Search by: “All Org Point” to select the Org Point to which they should be assigned.
4. Lastly, make sure to update the Level Manager template from (Default) to Level Manager + VP – Approver > Save.
5. The next time the Level Manger logs into Spend Control, they will be able to toggle to and from various profile types from homepage under User Role.

Is this person **new** to Spend Control? If so, follow steps below:

1. To begin, ensure the Org Point for this new Level Manager has already been added. If not, see Adding Org Point instructions on page 1.
2. Go to User > User Setup
3. Search by: “All Org Point” > then select the Org Point they will be Level Manager for.
4. Complete all required (*) fields > make sure to update Template to Level Manager + VP – Approver > Save.
5. You will receive confirmation in green that your new user has been added. At that time, your cardholder should receive two emails from MasterCard containing login credentials. Please have the User check junk mail/firewall settings if not received.

Adding Approval Structure

*****NOTE: If you have Expense Management listed under Financial in your top, red navigation bar, IGNORE this section*****

These are the last and most important steps. By this point, your Org Points should be established, your cardholders assigned to that org point and your Level Manager has been added to Spend Control.

1. Go to Company > Expense Report Management > Approval and Workflow Maintenance
2. Skip to second tab called “Profile Assignment” > under Reporting Structure Control, click on your Company Name (grey hyperlink) > you should then see all of your Level Managers and Admins listed on right-hand of screen.

NOTE: Only users with the Approve Expense Report authority shows in the Approver Name column.

3. Locate your new Level Manager and assign the “Approval” profile and click “Save”.
4. Next, skip over to the fourth tab called “Approver and Policy Assignment”.
5. Here you will want to click on the name of the Org Point(s) or Accounts in mind then under “New”, select the new Level Manager name form drop-down list > Save.

NOTE: Click Save after each Org Point update

6. Lastly, after you click “Save”, confirm that the Current Routing adjusts from Default Closing Approver Profile to the name of your new Level Manager.

Troubleshooting

Expense Report was submitted for Approval but was routed to Default Closing Group Approver Profile rather than designated approver. Check the following and refer to instructions above to update if necessary.

1. Ensure Cardholder is linked to appropriate Org Point
2. Check to see if Level Manager Profile has been assigned for that Org Point
3. Review the Approval Structure to ensure the Level Manager is selected to be Approver for cardholders

***Check both the 2nd and 4th tab**

