Online Approvals Update

In February 2018, SFU began the transition from paper based approvals to online approvals for Cash Advances, Travel and Expense Claims and Requisitions.

The advantages of online approvals are:

- Eliminates the risk of losing paper forms and backup documentation such as receipts or quotes.
- Scanned copies of all the backup documents to the transaction are electronically attached and sent with the approval (for example, receipts or vendor quotes).
- Accelerates processing time; as all information to approve the transaction is online so there is no need to move the paper between departments or campuses.
- Minimizes the risk of processing requests inappropriately approved by individuals without the appropriate financial authority.
- Enables everyone who has submitted a Requisition, Cash Advance or Expense Claim to view who has reviewed, approved and processed their specific transaction.

We have been rolling out the transition to online approvals – one department/faculty at a time since March 2018. As of June 21, the following areas have successfully moved to online approvals:

- President's Office
- Vice President Academic Office
- Associate VP Academic Office
- Beedie School of Business
- Graduate Studies
- Scholarship, Bursaries and Awards
- Lifelong Learning
- University Advancement
- Ceremonies and Events
- Alumni Relations
- Library
- External Relations, Surrey and Vancouver Campuses
- Associate VP of Student Services
- Vice President of Research
- VP Finance Admin Office Services
- Finance
- Safety and Risk Services
- Ancillaries
- IT Services
- HR and BC Campus
Finance thanks the above areas for partnering with the Online Approvals Project Team to rollout this change within their areas. You were all so helpful and provided us with valuable suggestions on how to improve the rollout process.

The following departments and faculties are in progress of reviewing their Signing Authority setup used to route approvals to the appropriate people or training staff in preparation for moving to online approvals:

- Facilities
- Faculty of Health Sciences
- Faculty of Environment
- Faculty of Education
- Faculty of Communication Arts and Technology
- Faculty of Arts and Social Sciences.

Work to onboard Faculty of Applied Sciences and Faculty of Science will begin once the Faculty of Health Science has successfully moved to online approvals.

We just wanted to share a few of the comments we have received from the areas that have completed their transition.

Our staff love the speedy reimbursement on their claims – here is a quote from one of our team.

“It’s my first electronic claim reimbursement story. Submitted my claim Monday using the new process. Claim was approved Tuesday and deposited into my account Wednesday. WhooHoo!”

(Note: no paper forms had to be couriered to the Burnaby campus)

The daily email is a handy reminder and it makes it easy to see how many approvals are in the queue in a single snapshot.

Overall we’re very happy with the new process...now if we could just get folks to input the correct dates to match their receipts we’d be laughing!

Mirjam van Hasselt
BC Campus

We, the staff at Lifelong Learning, are very appreciative of the time you have taken to bring your presentation on this new process, to our three locations. All the presenters did an excellent job and we thank you for the hard work and long hours that have gone into this project.

From the questions asked during the presentations and afterwards, you can imagine the interest that our staff have. Our department is looking forward to the rollout of Online Approvals of Advances, Expenses and Requisitions.

Linus Anandaraj,
Lifelong Learning

I’m very impressed with how adaptive the project team was in setting up all the training sessions for our units and how quickly the project team responds to questions we have had since we went live. A big thank you to the team.

Claudia Wang
Vancouver Campus, Executive Director’s Office

Leslie, Jennifer and Ida were great to work with as we set up our department on this new workflow. They were available to answer questions, help when problems arose and quickly solved any issues we had.”

Gloria Ingram
For info on online approvals, please email FPInfo@sfu.ca