

Approver Guide – Approving Transactions

1. Log into the PNC Visa Intellilink Website
2. Select the Approvals drop down:



3. Select Items Requiring Attention:



4. You will see your employee's listed that have approvals required

Items Requiring Attention

Statement & Transactions requiring approval

Approver Summary View

Employee	Period	Information Required	Information Provided	Approval Required
[REDACTED]	PNC Bank 4940	08/21/2017	-	3

5. Select the employee's name to see the transaction(s) needing approval

Transaction Approval [Back](#)
Statement & transactions requiring approval
[Redacted]

[Previous](#) [Next](#)

[Expand All](#) [Collapse All](#)

PNC 4940 - Corporate (8803) [Approve Selected Items](#) [Approve All](#)

Information Required

Information Provided

Approval Required (3)

> 0

					Linked to	Receipt	Image(s)	Amount	Allocation			
08/01/2017	Adobe *photogphy Plan				July Statement	Yes	Yes	119.88	View			<input type="checkbox"/>
	MR - software for BIO 61	[Redacted]	None	0.00	119.88							

6. The red exclamation mark to the very right means review/approval is needed.

7. You can select the exclamation mark to review the transaction and make any updates if needed.

8. Reviewing the transaction (see visuals following instructions):

- Select the exclamation mark next to the transaction

Amount	Allocation			
30.00	View			<input type="checkbox"/>
6.37	View			<input type="checkbox"/>
205.64	View			<input type="checkbox"/>

- Select the Coding tab

Transaction: Details

Purchase: 08/22/2017
 Amount: \$30.00 USD
 Amazon Mktplace Pmts, Amzn.Com/bill

Summary **Coding** Approval

	* FUND	* ORG	* PROGRAM	ACTIVITY	* ACCOUNT	Amount Incl	Tax Code
Line 1	100000	2052	201		70000	30.00	
Line 2							
Line 3							
Line 4							

More.. Balance 0.00

Description: Receipt

- Review the FOAPAL information is correct, the Narrative is updated and the narrative includes the business purpose
- Ensure the receipt attached is applicable to the transaction by viewing the receipt.
- If information needs corrected or a receipt needs attached you can send it back to the employee or update the information yourself on the Coding tab. Note, an approver does not have access to the cardholder's document library.
 - To send the transaction back to the employee, select the Approval tab

Transaction: Details

Purchase: 08/22/2017
Amount: \$30.00 USD
Amazon Mktplace Pmts, Amzn.Com/bill

Summary Coding **Approval**

Approval Required > 0

Approval Process History

Cardholder Comments

Approver Comments

Information Required
Approval Required
Approved

Close Save

- Select the Information Required option at the bottom
- Input any applicable comments in the Approver Comments box
- Select Save, by selecting Save you will direct the transaction back to the employee

9. If no updates are needed to the coding and all information is updated and correct and a receipt is attached, you have three options for approval:
- You can select the individual exclamation mark from the initial screen, opening the transaction, select the Approval tab, then select the Approve button at the bottom, then select Save

Amount	Allocation		
30.00	View	 	<input type="checkbox"/>
6.37	View	 	<input type="checkbox"/>
205.64	View	 	<input type="checkbox"/>

Transaction: Details

Purchase: 08/22/2017
Amount: \$30.00 USD
Amazon Mktplace Pmts, Amzn.Com/bill

Summary Coding **Approval**

Approval Required > 0

Cardholder Comments

Approver Comments

Information Required
 Approval Required
 Approved

Close Save

- You can check the box next to each transaction you would like to approve (this will not open the transactions) and then select the Approve Selected Items at the top.



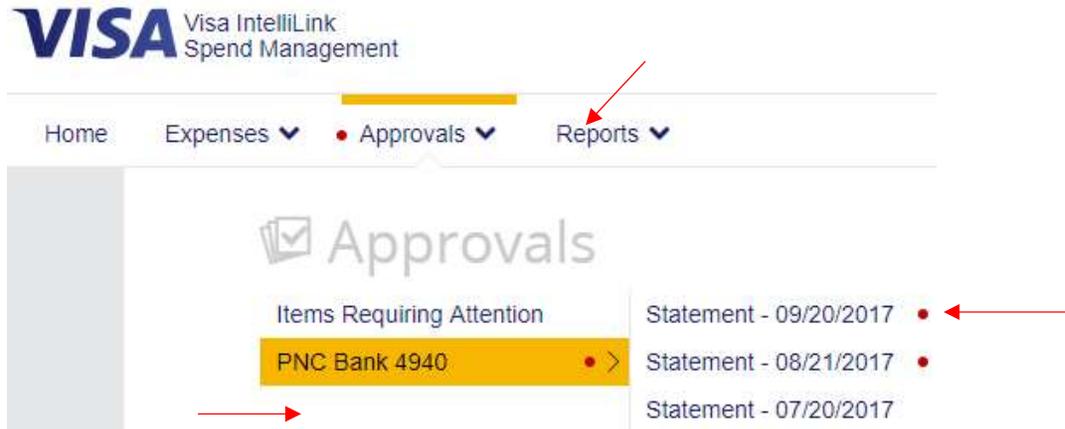
Amount	Allocation			
30.00	View			<input type="checkbox"/>
6.37	View			<input type="checkbox"/>
05.64	View			<input type="checkbox"/>

- Or you can select the Approve All option at the top to approve all the listed transactions at once.

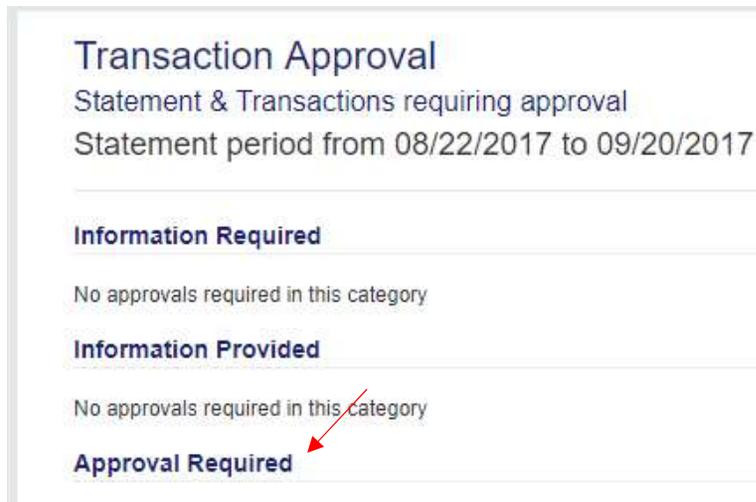


Amount	Allocation			
30.00	View			<input type="checkbox"/>
6.37	View			<input type="checkbox"/>

10. You can also reach the same steps above by selecting PNC Bank 4940 under the Approvals Drop down then selecting the statement period you want to view.



You will see your employees needing approval under the Approval required section



Select the employee you would like to view, then go back to step 4 and follow the remaining instructions as they will be the same from this point.