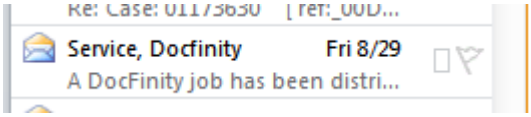
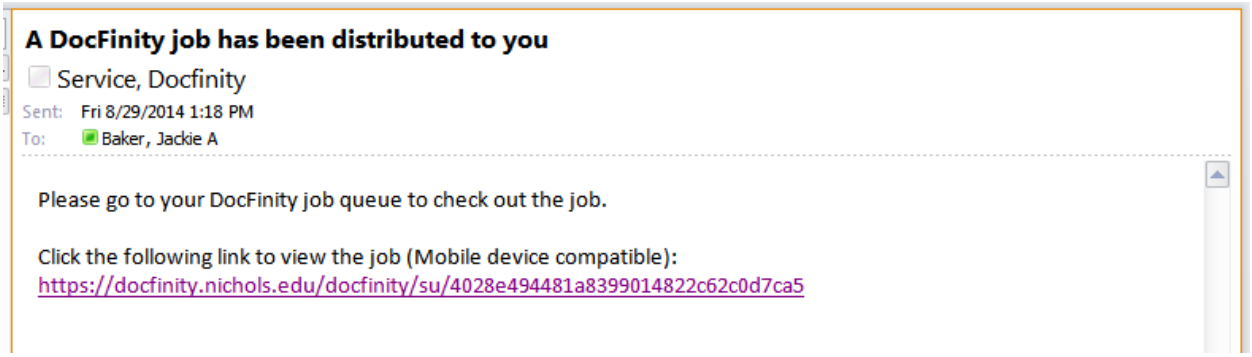
Travel Reimbursement Approval

- Turn off pop-up blockers for DocFinity
- Use Internet Explorer

You will receive an email notification that you have a job pending.

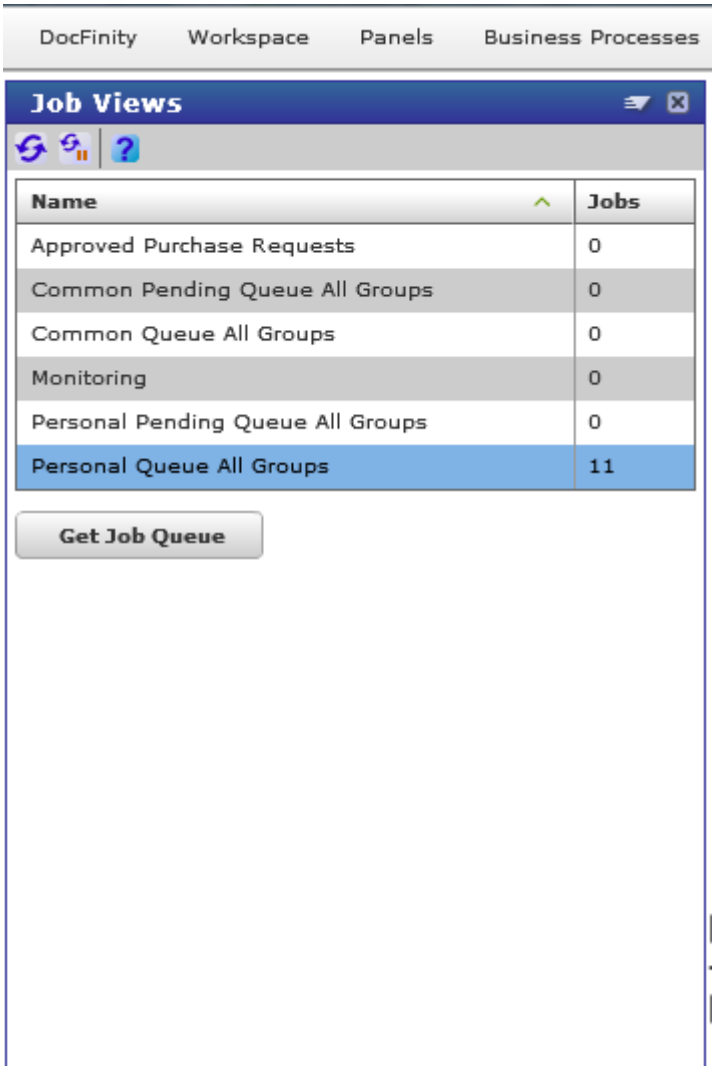




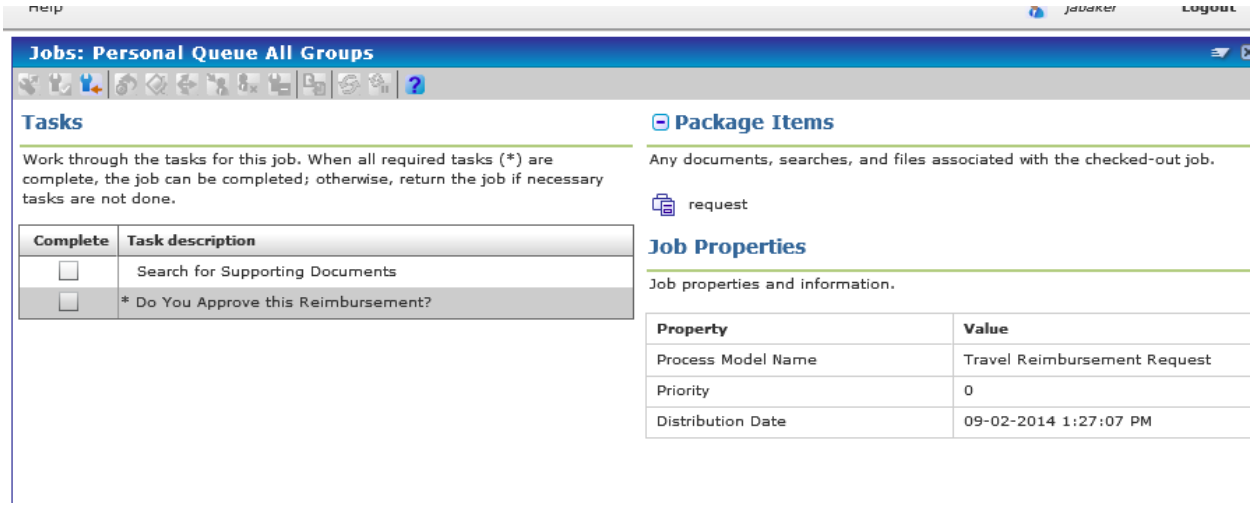
Click on the link in the email.

Login to Docfinity using your Nichols College username and password.

Two panels will appear on the Docfinity screen: the Job Views and Jobs.

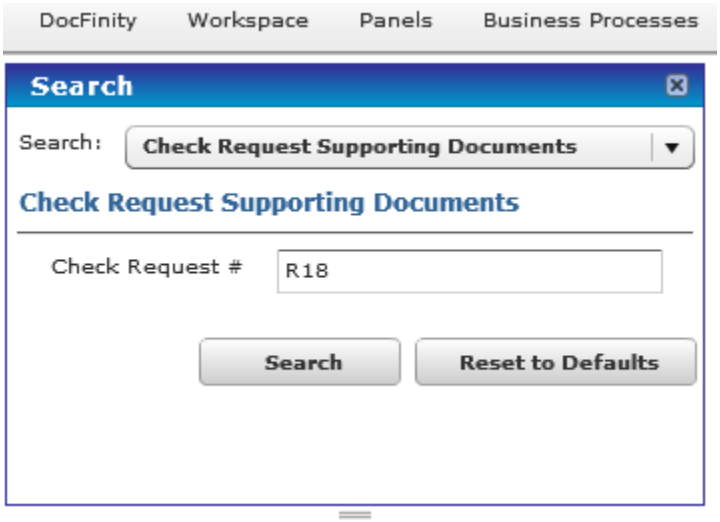


You will only see the queues that you have access to.

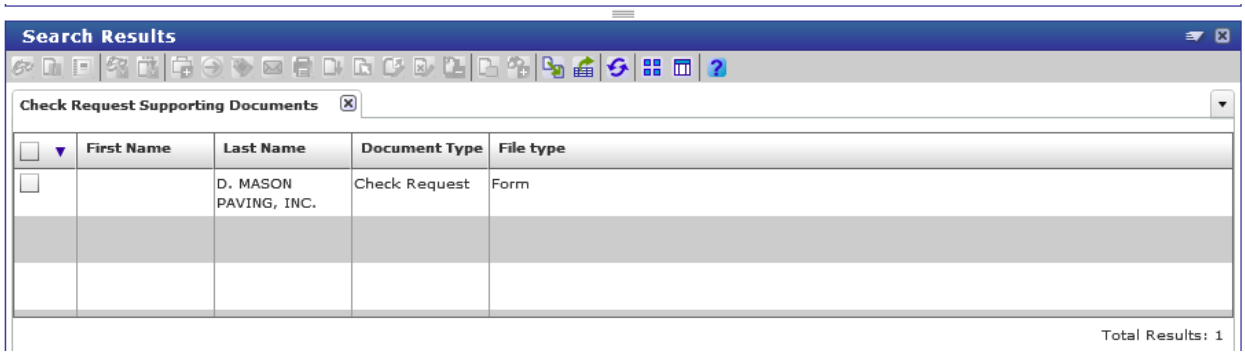


This shows the tasks that need to be taken to approve or deny the submitted check request. All tasks that are preceded by an * must be completed. You MUST click on the "words" under the task description, NOT check the complete box to perform the task.

If you want to see any supporting documentation or the check request click on the "Search for Supporting Documents". You can use the % to perform a wildcard search.

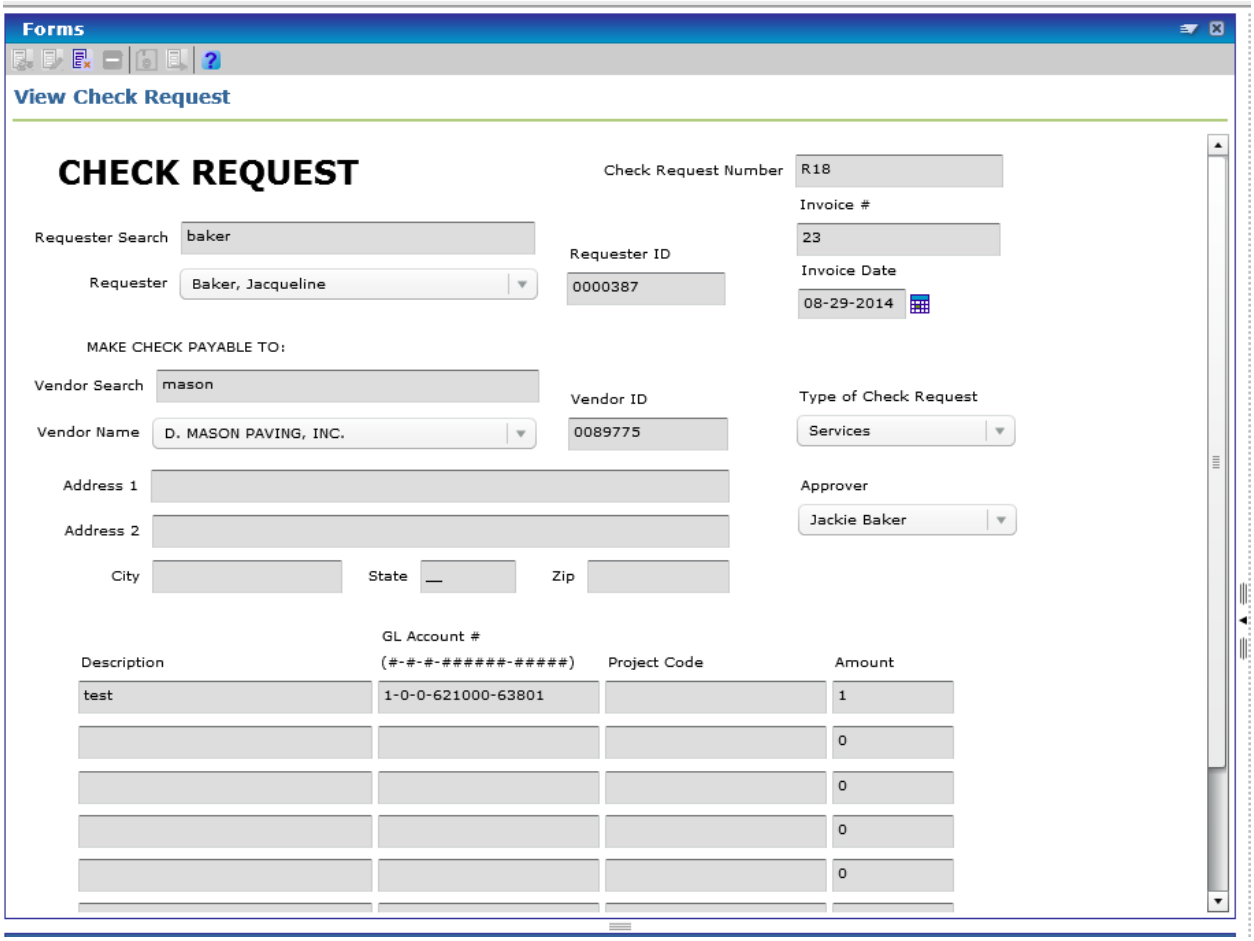


The Search panel will now appear on the left, click on the Search button.



The Search Results panel will appear at the bottom of the screen.

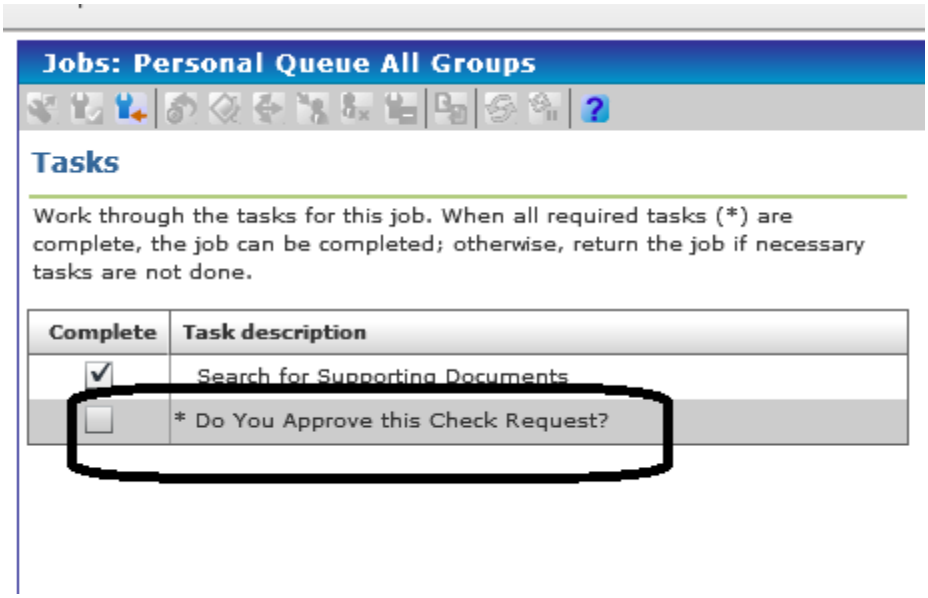
Double click on the document that you would like to view.



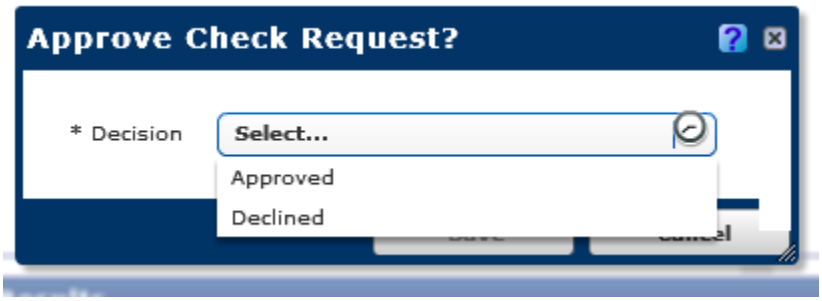
The Forms panel will appear with the form information displayed.

If the document was supporting documentation, the document previewer panel will display the document.

You must now decide to approve or decline the request.

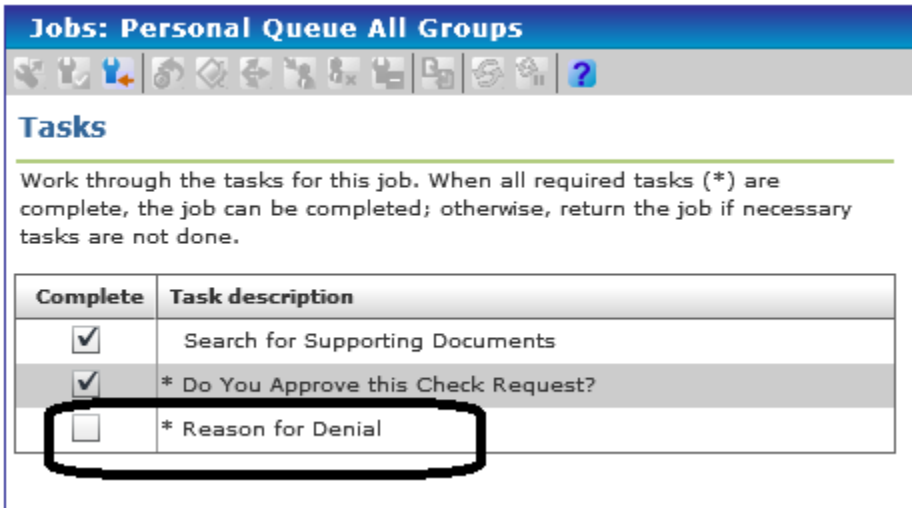


Double click on the "Do You Approve this Check Request?"

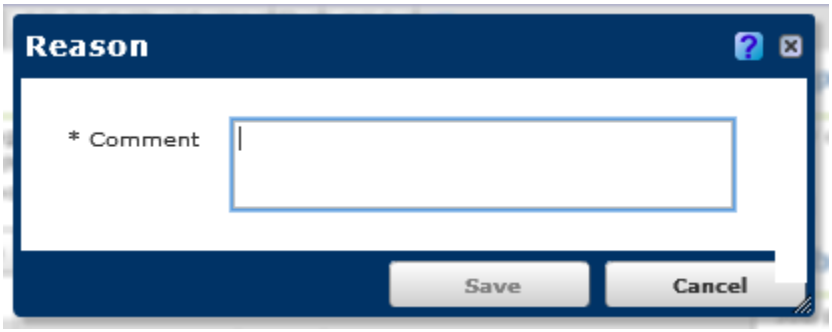


Select Approved or Declined.

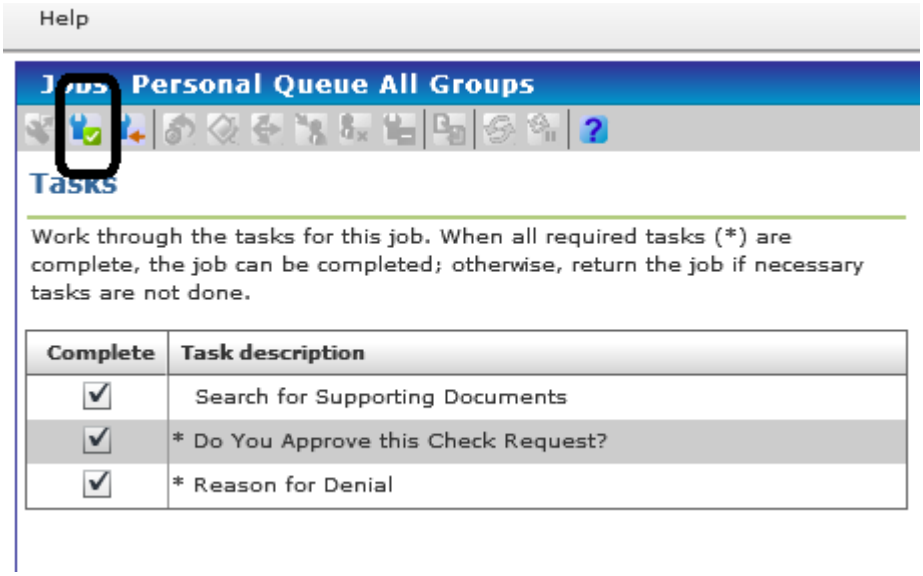
If you select Declined, you must enter a reason.



Double Click on “Reason for Denial”



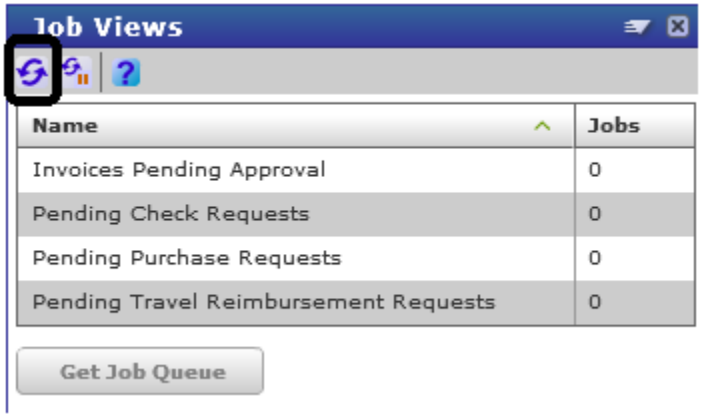
Click Save



Click on the Complete Job icon to remove the job from your queue.

You can complete any other jobs that may be pending in your queue. You will need to refresh the queue listing to see that the number of pending requests has changed.

Once you have completed all of your jobs, you can refresh your jobs queue by clicking on the first icon in the toolbar all the way to the left.


Job Views
Name
Jobs
Invoices Pending Approval
0
Pending Check Requests
0
Pending Purchase Requests
0
Pending Travel Reimbursement Requests
0
Get Job Queue