

# Basic User Manual – Supervisors.



## ProMaster URL

<http://www.csu.edu.au/division/finserv/staff/promaster/promaster-home>

## Contact details:

[purchasecard@csu.edu.au](mailto:purchasecard@csu.edu.au)

For any issues related to the CSU Purchase Card and ProMaster please contact ext 32268.

[travelcard@csu.edu.au](mailto:travelcard@csu.edu.au)

For any issues related to the CSU Travel Card and ProMaster please contact ext 34488.

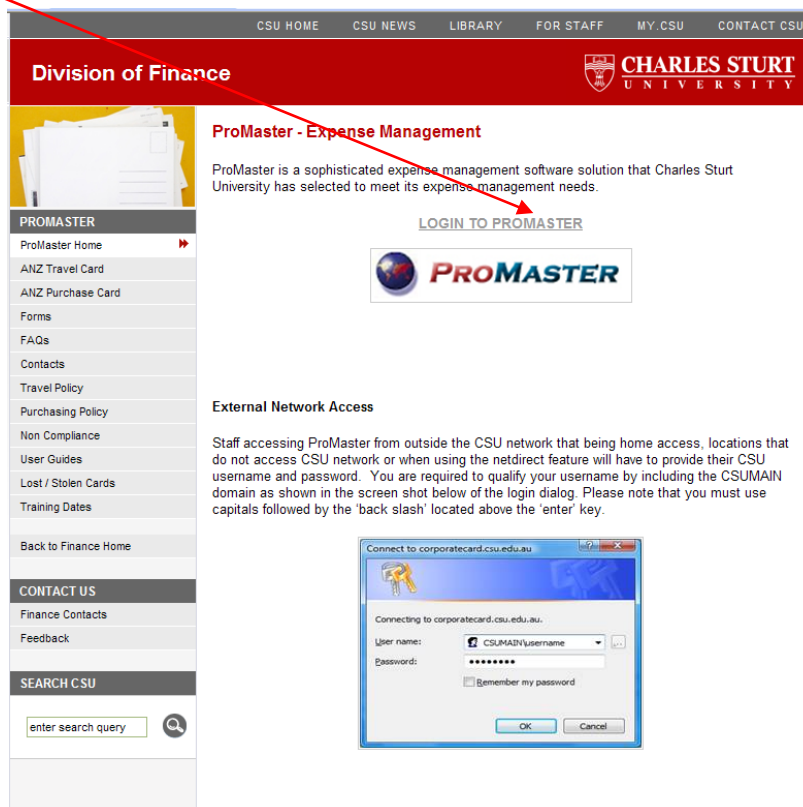
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# Basic User Training - Supervisors

## How do I log into ProMaster?

Your ProMaster Log on and password is synchronised to your CSU Log on – that is; it is the same.

Click on the hyperlink <http://www.csu.edu.au/division/finserv/staff/promaster/promaster-home> you will be taken directly into ProMaster logon screen. Once you are on this screen click on the link and it will take you directly to ProMaster (you may have to type in your CSU log in and password again – if required)



If you are trying to connect on another network {at home, motel, etc} you may need to add "CSUMAIN\" before your log in/username in the User name field E.g. CSUMAIN\xmsmith [see below]. Your password will be the same as you use to log into the CSU Network.

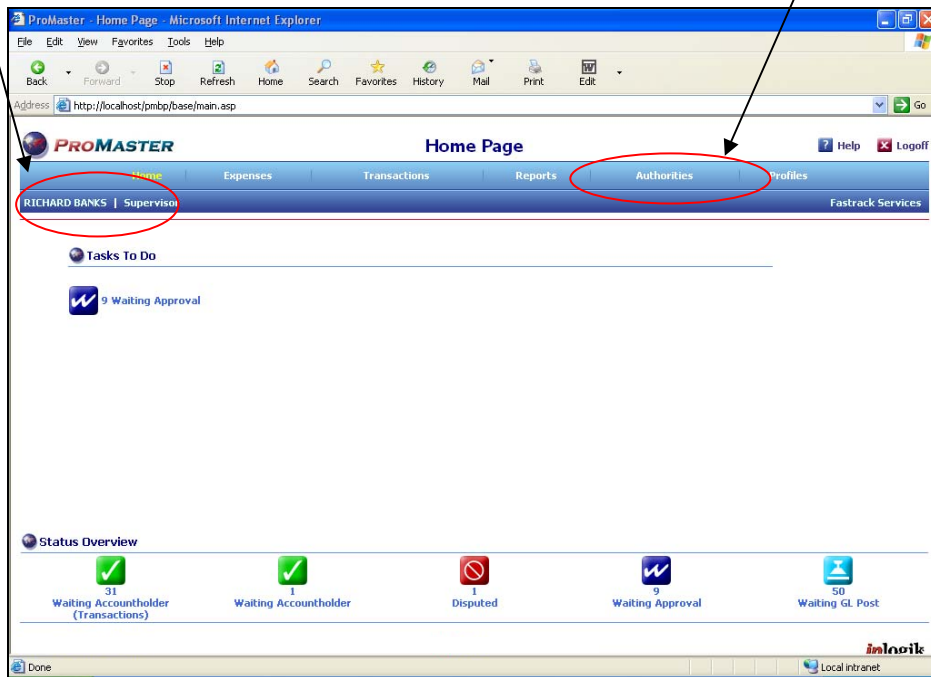


## How do I know when Transactions & Travel Plans need Reviewing & Approving?

ProMaster will send an email to Supervisors indicating Transactions and Travel Plans are awaiting Approval. The email will be formatted with information about the transactions and Travel Plans.

NOTE: These emails will not be received if there are no outstanding transactions to process.

The Supervisor Logs on to ProMaster. To be in "Supervisor" mode, check that next to your Login Name is displayed the access level of "Supervisor". If not, click the "Authorities" menu and choose "Supervisor".

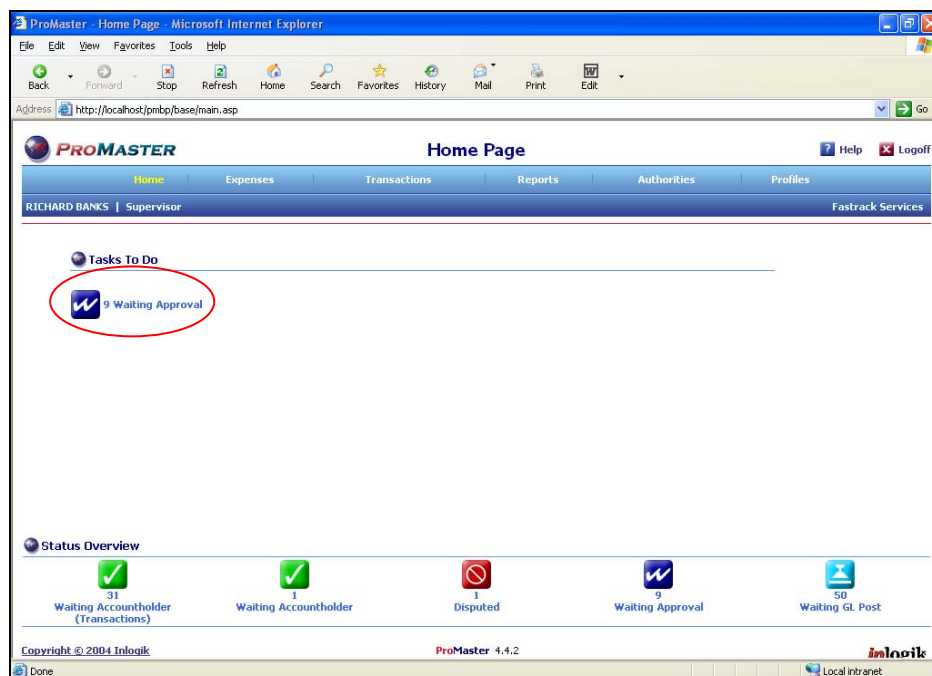


As a Supervisor, you will be presented with your ProMaster home page displaying an action icon indicating there are Transactions and Travel Plans waiting to be Approved.

On the left hand side of the Home Page is an "Outstanding Tasks" count of the Transactions and Travel Plans from your subordinates. This shows a count of the transactions and Travel Plans.

The same information is replicated in the Workflow buttons at the bottom of the screen.

- **Waiting Approval** means transactions are ready for your review & approval.
- **Unapproved Travel** means Travel Plans are waiting your review & approval.
- **Waiting Clearance** means transactions are awaiting approval as a "Second Approver"
- **Management Approval** means Travel Plans are awaiting approval as a "Second Approver"



## What is the Role of the Supervisor?

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The supervisor is required to validate the transaction or Travel Plan:

- Complies with the Travel Policy & Credit Card Policy;
- Review the Travel Plan to ensure that the travel is relevant, appropriate and valid.
- The Account Codes are correct.
- The expenditure estimates are as expected.
- Is there any funding from other sources, e.g. the traveller or third parties.
- Are Meal Allowances calculated correctly and are meals included at Conferences deducted or any meals that are provided.
- Should the traveller be travelling on 'Actuals'?
- If the travel is a "Field Trip" then is a Risk Assessment attached.
- Uses the Credit Card correctly and for Business Purposes only;
- Is providing correct and relevant information for the financial system.
- That supporting documentation such as Tax Invoices and Receipts are attached to transactions for Purchase Cards.

The Supervisor will:

- Have a list of the Transactions and Travel Plans waiting to be **Approved**;
- **Review** each Transaction and Travel Plan on-line at their discretion.
- **Query** Transactions that appear to be incomplete or inaccurate;
- **Approve** Transactions so they may be uploaded to the Company Financial System (Banner).
- Draw reports, both current and historically, of their entire Subordinates' Transactions.

A Supervisor does not need to be a Card Holder, but needs to be registered as a user to be able to process Transactions on-line.

## How does a Supervisor Review Transactions?

On the Home Page, the Supervisor clicks the **relevant outstanding task** icon under **“Outstanding Tasks”**. This will open the **Approval Tasks** window.

The Approval Tasks window is divided into three main areas:

- Search Criteria fields.
- Action Buttons.
- Transaction or Travel Plan List Display.









The **Approval Tasks** window has many ways of filtering the Transactions:

















































































































- **List**; the Transactions and Travel Plans Waiting Approval are displayed based on the criteria in the search windows. This criteria includes:
- **Document ID** – search for a specific (transaction)
- **Activity** – Select transactions for a different status (usually **Waiting Approval**).
- **UserName** – check this box to sort in user order.

Document Id	Account Type	Description	Merchant	Date	Amount	Waiting Since
Un Documented	VISA	attd NAFEA conference Ryding and Goddard	NATIONAL ASSOCIATION	23-09-2011	730.00	04-10-2011
Un Documented	VISA	Timetable Project Workshop	BATHURST HERITAGE MTR INN	23-09-2011	390.00	05-10-2011
Un Documented	VISA		SOCIETY FOR CONSERVATION	26-07-2011	450.44	06-10-2011
Un Documented	VISA		AUCKLAND CITY OAKS	01-08-2011	775.40	06-10-2011
Un Documented	VISA	Taxi T317541	SWAN TAXIS 13 13 30	22-09-2011	13.76	05-10-2011
Un Documented	VISA	Taxi T317541	SWAN TAXIS 13 13 30	22-09-2011	13.32	05-10-2011
Un Documented	VISA	Taxi T317541	GM CABS AUSTRALIA	23-09-2011	10.87	05-10-2011
Un Documented	VISA	Accommodation T317541	Stamford Plaza-Sydney AP	24-09-2011	168.49	05-10-2011
Un Documented	VISA	Taxi T317549	GM CABS AUSTRALIA	26-09-2011	71.37	05-10-2011
Un Documented	VISA	Taxi T317549	WAGGACABS 69214242	26-09-2011	31.08	05-10-2011
Un Documented	VISA	Table cloth for DEEWIR Festival Attached approval invoice and travel order	CEDUNA HOMESCENE	16-09-2011	16.99	06-10-2011
Un Documented	VISA	Tamika Moore Accommodation	ATMIG PTY LTD	19-07-2011	157.00	06-10-2011
Un Documented	VISA	Tamika Moore Accommodation ISSO Goulburn	ATMIG PTY LTD	03-08-2011	314.00	06-10-2011
Un Documented	VISA	Taxi Chrg Ray Eldridge	TAXI COMBINED 133300	18-08-2011	84.36	06-10-2011
Un Documented	VISA	Road Toll	ROAM EXPRESS 137626	22-09-2011	7.74	06-10-2011
Un Documented	VISA	Accommodation Ray Eldridge	BATHURST HERITAGE MTR INN	25-08-2011	450.00	06-10-2011

## How does a Supervisor Approve a Transaction?

The Supervisor can take various actions:

-  **Approve** – Approve a selected Transaction or Travel Plan
-  **Edit** – Edit any of the details in the transaction or Travel Plan
-  **Review** – Opens a more detailed view of the transaction or travel Plan
-  **Query** – Query note is returned to the Account Holder/ Traveller seeking further information
-  **Reverse** – Reverses a Transaction or Travel Plan to the Account Holder/ Traveller with no questions asked – (not recommended).
-  **Actions** **Select All** and **Unselect All** – the ability to select all records, or clear the selection checkboxes. Tick the box to select all or unselect all
-  **Notes** – Notes can be stored against a transaction or Travel Plan.
-  **Hover & Review** – Allows the Approver to hover over transactions and Travel Plans and be provided with a summary which can be sufficient to continue with the Approval.

Home Expenses Transactions Travel Reports Authorities Profiles Document Control Admin						
Paul McLeod   Enterprise Controller						Charles Sturt University
Activity: <span>Waiting Approval</span>   Username: <input type="text"/>   Document Id: <input type="text"/>   Search						
Reverse Approve Document Scan						
Actions	Account Type	Description	Merchant	Date	Amount	Waiting Since
Document Id: Un Documented						
<input type="checkbox"/>       	VISA	attd NAFEA conference Ryding and Goddard	NATIONAL ASSOCIATION	23-09-2011	730.00	04-10-2011
Document Id: Un Documented						
<input type="checkbox"/>       	VISA	Timetable Project Workshop	BATHURST HERITAGE MTR INN	23-09-2011	390.00	05-10-2011
Document Id: Un Documented						
<input type="checkbox"/>       	VISA		SOCIETY FOR CONSERVATION	26-07-2011	450.44	06-10-2011
<input type="checkbox"/>       	VISA		AUCKLAND CITY OAKS	01-08-2011	775.40	06-10-2011
Document Id: Un Documented						
<input type="checkbox"/>       	VISA	Taxi T317541	SWAN TAXIS 13 13 30	22-09-2011	13.76	05-10-2011
<input type="checkbox"/>       	VISA	Taxi T317541	SWAN TAXIS 13 13 30	22-09-2011	13.32	05-10-2011
<input type="checkbox"/>       	VISA	Taxi T317541	GM CABS AUSTRALIA	23-09-2011	10.87	05-10-2011
<input type="checkbox"/>       	VISA	Accommodation T317541	Stamford Plaza-Sydney AP	24-09-2011	168.49	05-10-2011
<input type="checkbox"/>       	VISA	Taxi T317549	GM CABS AUSTRALIA	26-09-2011	71.37	05-10-2011
<input type="checkbox"/>       	VISA	Taxi T317549	WAGGACABS 69214242	26-09-2011	31.08	05-10-2011
Document Id: Un Documented						
<input type="checkbox"/>       	VISA	Table cloth for DEEWIR Festival Attached approval invoice and travel order	CEDUNA HOMESCENE	16-09-2011	16.99	06-10-2011
<input type="checkbox"/>       	VISA	Tamika Moore Accommodation	ATMIG PTY LTD	19-07-2011	157.00	06-10-2011
<input type="checkbox"/>       	VISA	Tamika Moore Accommodation ISSO Goulburn	ATMIG PTY LTD	03-08-2011	314.00	06-10-2011
<input type="checkbox"/>       	VISA	Taxi Chрге Ray Eldridge	TAXI COMBINED 133300	18-08-2011	84.36	06-10-2011
<input type="checkbox"/>       	VISA		ROAM EXPRESS 137626	22-09-2011	7.74	06-10-2011
<input type="checkbox"/>       	VISA	Accommodation Kay Eldridge	BATHURST HERITAGE MTR INN	25-08-2011	450.00	06-10-2011

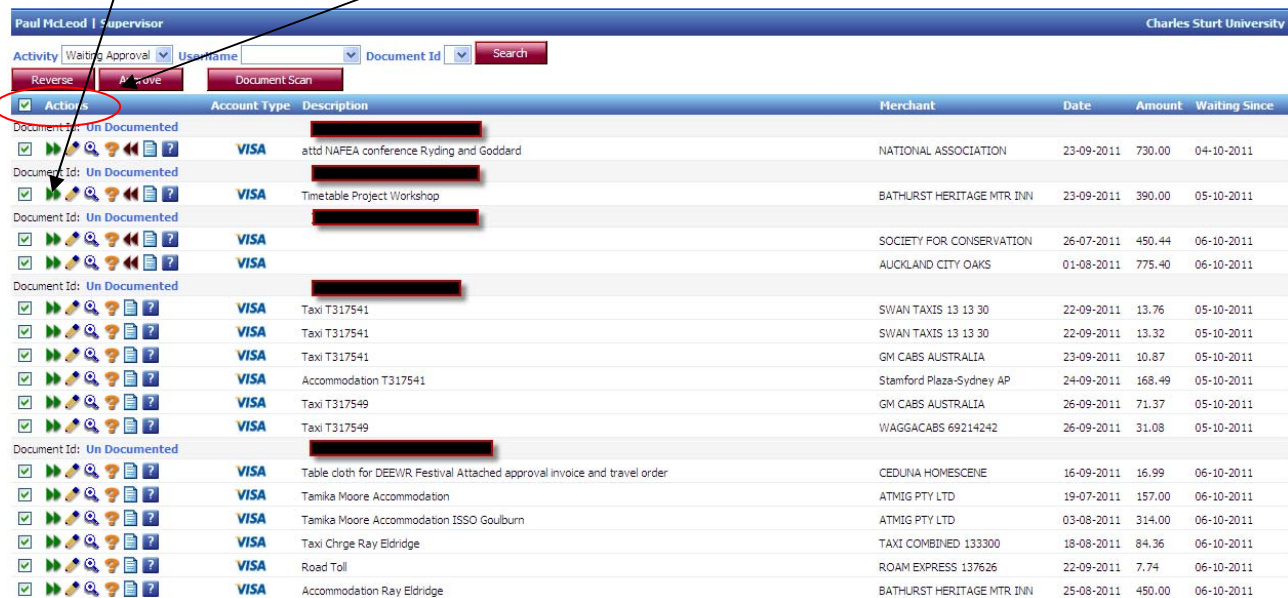
## How does a Supervisor Approve a Transaction?

In most cases, the Supervisor will Approve the Transaction. For one Transaction:

- Click the  **Green >> Double Arrow** next to the Transaction to **"Approve"**.

The window will automatically refresh and the remaining Transactions (as per the **Search** fields) will be displayed. For several Transactions:

- Or select the Transactions by ticking the checkbox next to each one, OR
- If you wish to Approve all transactions tick the "Actions" box  **Actions**
- Click the **"Approve"** button.



Paul McLeod | Supervisor Charles Sturt University

Activity: Waiting Approval | User Name: [ ] | Document Id: [ ] | Search

Reverse Approve Document Scan

**Actions**

Account Type	Description	Merchant	Date	Amount	Waiting Since
VISA	attd NAFEA conference Ryding and Goddard	NATIONAL ASSOCIATION	23-09-2011	730.00	04-10-2011
VISA	Timetable Project Workshop	BATHURST HERITAGE MTR INN	23-09-2011	390.00	05-10-2011
VISA		SOCIETY FOR CONSERVATION	26-07-2011	450.44	06-10-2011
VISA		AUCKLAND CITY OAKS	01-08-2011	775.40	06-10-2011
VISA	Taxi T317541	SWAN TAXIS 13 13 30	22-09-2011	13.76	05-10-2011
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VISA	Taxi T317541	GM CABS AUSTRALIA	23-09-2011	10.87	05-10-2011
VISA	Accommodation T317541	Stamford Plaza-Sydney AP	24-09-2011	168.49	05-10-2011
VISA	Taxi T317549	GM CABS AUSTRALIA	26-09-2011	71.37	05-10-2011
VISA	Taxi T317549	WAGGACABS 69214242	26-09-2011	31.08	05-10-2011
VISA	Table cloth for DEEWIR Festival Attached approval invoice and travel order	CEDUNA HOMESCENE	16-09-2011	16.99	06-10-2011
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VISA	Tamika Moore Accommodation ISSO Goulburn	ATMIG PTY LTD	03-08-2011	314.00	06-10-2011
VISA	Taxi Chrgs Ray Eldridge	TAXI COMBINED 133300	18-08-2011	84.36	06-10-2011
VISA	Road Toll	ROAM EXPRESS 137626	22-09-2011	7.74	06-10-2011
VISA	Accommodation Ray Eldridge	BATHURST HERITAGE MTR INN	25-08-2011	450.00	06-10-2011

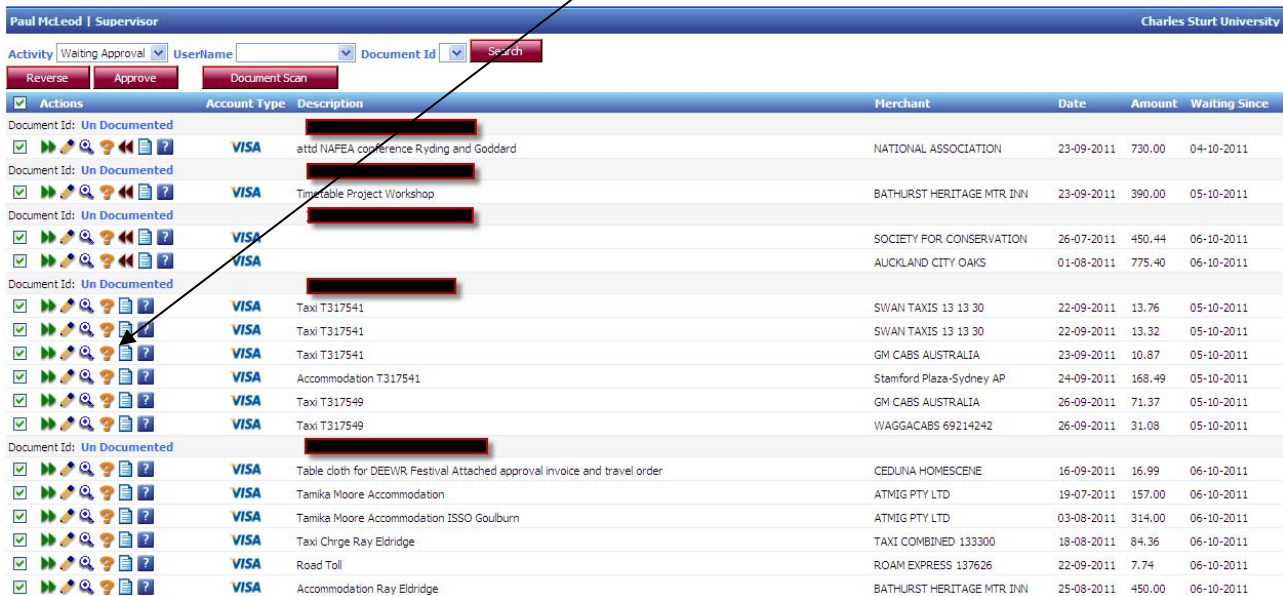


## How does a Supervisor Query a Transaction?

Where a Supervisor is not satisfied with the details provided with a Transaction or Travel Plan, they can **Query** the Transaction.

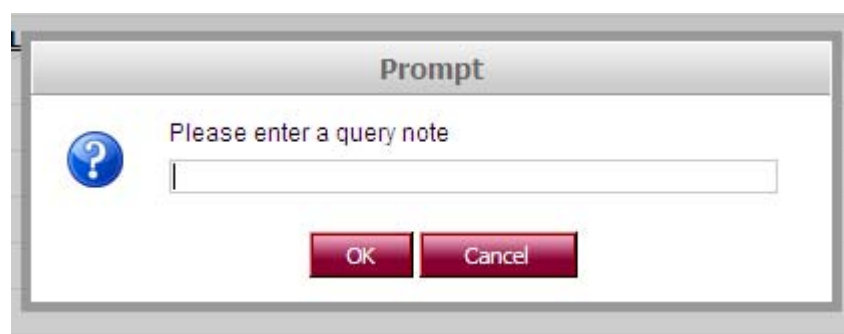
This action returns the Transaction to the Accountholder with a status of **"Waiting Accountholder"** and will require the Accountholder to review and re-submit.

To Query a Transaction or Travel Plan Click the **?** **Question Mark** icon next to the Transaction.



Actions	Account Type	Description	Merchant	Date	Amount	Waiting Since
Document Id: Un Documented [Check] [Refresh] [Print] [Question Mark] [Close]	VISA	attd NAFEA conference Ryding and Goddard	NATIONAL ASSOCIATION	23-09-2011	730.00	04-10-2011
Document Id: Un Documented [Check] [Refresh] [Print] [Question Mark] [Close]	VISA	Timetable Project Workshop	BATHURST HERITAGE MTR INN	23-09-2011	390.00	05-10-2011
Document Id: Un Documented [Check] [Refresh] [Print] [Question Mark] [Close]	VISA		SOCIETY FOR CONSERVATION	26-07-2011	450.44	06-10-2011
Document Id: Un Documented [Check] [Refresh] [Print] [Question Mark] [Close]	VISA		AUCKLAND CITY OAKS	01-08-2011	775.40	06-10-2011
Document Id: Un Documented [Check] [Refresh] [Print] [Question Mark] [Close]	VISA	Taxi T317541	SWAN TAXIS 13 13 30	22-09-2011	13.76	05-10-2011
Document Id: Un Documented [Check] [Refresh] [Print] [Question Mark] [Close]	VISA	Taxi T317541	SWAN TAXIS 13 13 30	22-09-2011	13.32	05-10-2011
Document Id: Un Documented [Check] [Refresh] [Print] [Question Mark] [Close]	VISA	Taxi T317541	GM CABS AUSTRALIA	23-09-2011	10.87	05-10-2011
Document Id: Un Documented [Check] [Refresh] [Print] [Question Mark] [Close]	VISA	Accommodation T317541	Stamford Plaza-Sydney AP	24-09-2011	168.49	05-10-2011
Document Id: Un Documented [Check] [Refresh] [Print] [Question Mark] [Close]	VISA	Taxi T317549	GM CABS AUSTRALIA	26-09-2011	71.37	05-10-2011
Document Id: Un Documented [Check] [Refresh] [Print] [Question Mark] [Close]	VISA	Taxi T317549	WAGGACABS 69214242	26-09-2011	31.08	05-10-2011
Document Id: Un Documented [Check] [Refresh] [Print] [Question Mark] [Close]	VISA	Table cloth for DEEWIR Festival Attached approval invoice and travel order	CEDUNA HOMESCENE	16-09-2011	16.99	06-10-2011
Document Id: Un Documented [Check] [Refresh] [Print] [Question Mark] [Close]	VISA	Tamika Moore Accommodation	ATMIG PTY LTD	19-07-2011	157.00	06-10-2011
Document Id: Un Documented [Check] [Refresh] [Print] [Question Mark] [Close]	VISA	Tamika Moore Accommodation ISSO Goulburn	ATMIG PTY LTD	03-08-2011	314.00	06-10-2011
Document Id: Un Documented [Check] [Refresh] [Print] [Question Mark] [Close]	VISA	Taxi Chrg Ray Eldridge	TAXI COMBINED 133300	18-08-2011	84.36	06-10-2011
Document Id: Un Documented [Check] [Refresh] [Print] [Question Mark] [Close]	VISA	Road Toll	ROAM EXPRESS 137626	22-09-2011	7.74	06-10-2011
Document Id: Un Documented [Check] [Refresh] [Print] [Question Mark] [Close]	VISA	Accommodation Ray Eldridge	BATHURST HERITAGE MTR INN	25-08-2011	450.00	06-10-2011

- The Expense Query Comments window appears.  
Type in a question that specifically challenges the issue.  
(For example, "Why did you charge the item to this Cost Centre?" or "Is this the correct Account Code?")
- Click the OK button.



Prompt

Please enter a query note

OK Cancel

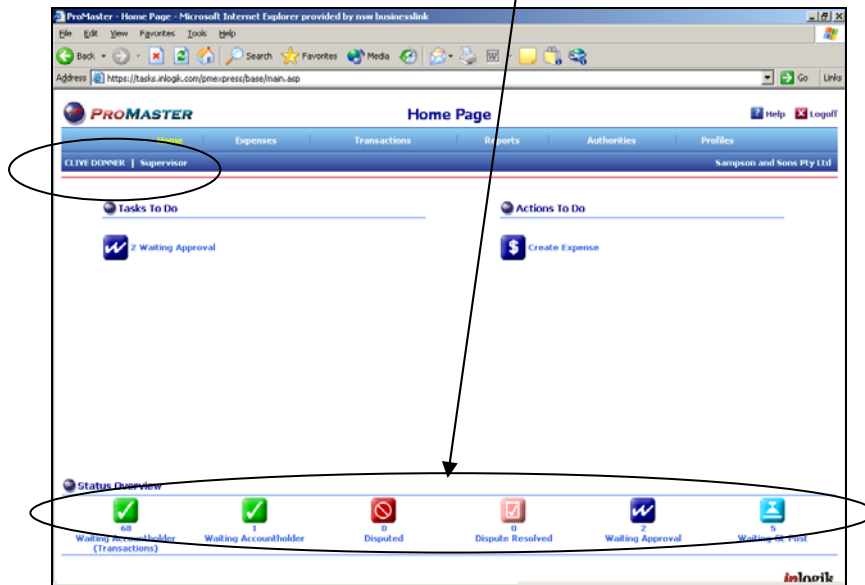
The **Approval Tasks** window will automatically refresh and the remaining Transactions will be displayed.

The Transaction will now be in the Accountholder's **"Waiting Accountholder"** queue.

## How does a Supervisor View all Subordinate Transactions?

As Supervisor, you can view all Transactions for all Accountholders who have you listed as their Supervisor in their ProMaster profile. To view Users' Transactions:

- Click the **"Waiting Accountholder"** icon at the bottom of the Home Page, (or the **"Disputed"** or the **"Waiting Approval"**, or **"Unapproved Travel"** icons).



- The **Transaction List** window is displayed. There are a number of filters to select specific transactions at different stages of progress.
  - Likewise you can use search fields to list transactions for a specific **User**, **Date Range**, **Date Type**, **Admin Centre**, and **Location**.
  - You can list the transactions in a number of **Sort** orders.
  - At the right of every transaction is a set of **Action** icons.
- As Supervisor, you will only be able to **"View"** a transaction of a user.

