Guide for the department head or approver

Guides by job role

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Guide for the department head or approver

Approve leave, expense claims, purchase orders and other documents waiting for you, and keep your team's work moving.

Beginner · About 15 minutes · Version 1.0 · Updated 17 November 2026

Your role

People in your team need your decision before they can continue. You approve fairly and quickly, and you check what you approve.

Where to find what is waiting

- **Notifications** (the bell) and **To Do** show items assigned to you. See To Do, assignments and mentions.
- In each list, filter by **Pending** status or **Assigned To me**.

Leave

1. Open the **Leave Application**.
2. Check the dates, the balance and who covers for them.
3. Set the status to **Approved** or **Rejected**, and submit. Write a reason when you reject.

See Leave types, allocations and applications.

Expense claims

1. Open the **Expense Claim** and check each line against the attached receipts.
2. Set **Approval Status** to *Approved* or *Rejected*, and submit.
3. Reject if there is no receipt or the expense is not business related.

See Expense claims.

Purchase orders and workflow documents

Where your business uses approvals, a document waits in a state such as *Pending Approval*. Open it, check the supplier, items, quantities and prices, and use the **Actions** button to approve or reject. See Workflows and notifications.

Attendance and timesheets

Check that your team's attendance is complete before payroll. See Attendance. Approve timesheets where required. See Timesheets.

Good habits

- Clear your approvals daily. A delay holds up pay and orders.
- Do not approve something you have not checked.
- Name a stand-in when you are away, so approvals are not stuck.
- Do not approve your own claims or orders.

Who to ask

HR about leave policy, finance about expense rules, and the administrator if an approval does not appear.

Related documentation

- Leave types, allocations and applications
- Expense claims
- Workflows and notifications
- To Do, assignments and mentions