

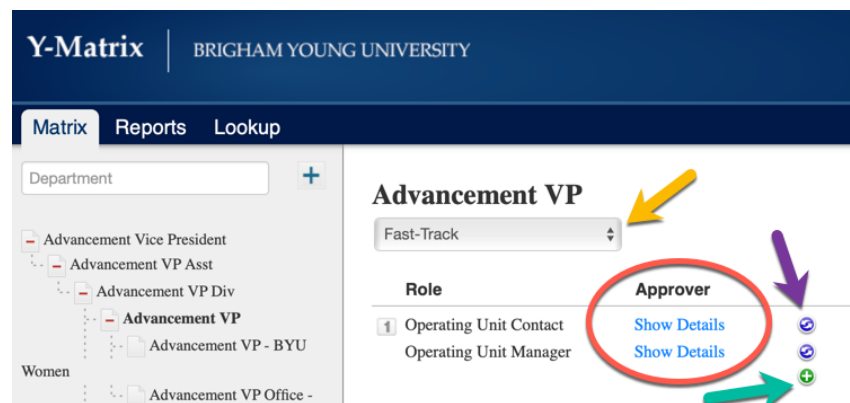
Y-Matrix Help Doc



(Updated November 2020)

PeopleSoft identifies Manager and Contact persons assigned to operating units and their parent departments. Those assignments flow automatically to Y-Matrix, a system designed to allow controllers to see approval assignments, or to make alternate approval assignments, either permanently or temporarily. Only College/Division Controllers have access to Y-Matrix.

Approval assignments for several transaction types (systems) are controlled within Y-Matrix. Selection of the system is at the dropdown noted at the **gold arrow** noted below, including:

- **Fast Track** (within Y-Marketplace, payment request for low dollar goods, and services within defined categories)
 - **Y-Marketplace** (Purchase request from approved vendors, and Purchase Order requests)
 - **Chrome River Purchasing Expense** (Reporting of purchasing card expenditures, etc.)
 - **Chrome River Pre-Approvals** (Pre-trip approval to travel)
 - **Chrome River Travel Expense** (Post-trip reporting of expenditures)
- Click “Show Details” to see the contact or manager fed from PeopleSoft to Y-Matrix.
 - The **red circle** shows the standard approvers identified from PeopleSoft.
 - In the example below, the operating contact person will be the approver unless the contact is the transaction requester (or in the case of a purchasing card transaction the contact was the steward of or used the card in the transaction.)
 - In either of those cases, the approval would escalate to the operating unit manager unless that person too was disqualified, in which case the transaction would escalate to the University Controller if all other approvers are disqualified because they are the transaction requester or card user.



- Clicking the “replace” icon  (**purple arrow**) allows the college/division controller to replace an approval assignment.
- Clicking the “add” icon  (**green arrow**) allows the addition of eligible approver(s).
 - Adding approvers for Fast Track has no affect; this was planned functionality that has not been implemented. However, default approvers may be replaced.

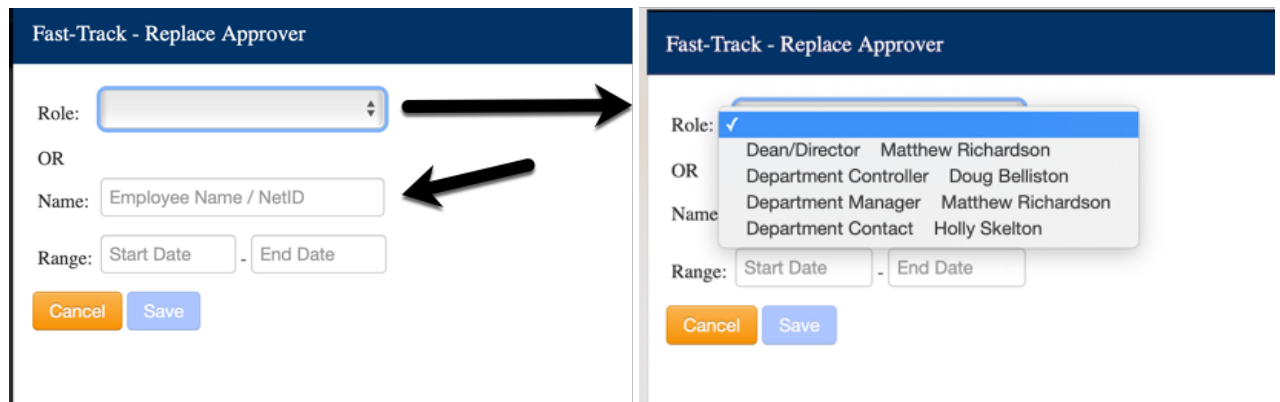
(Continued)

- Adding approvers for Y-Marketplace allows an optional Threshold amount above which BOTH the added approver AND the primary approver are to approve the transaction. Multiple threshold approvers could be added under the same paradigm. In the example below, Operating Unit Contact and Department Controller are approvers of a \$15,000 Y-Marketplace transaction. For a \$275,000 transaction the approvers are Operating Unit Contact and Department Manager. If thresholds are not entered the primary approver and all added approvers must approve the transaction.

Advancement VP

Y-Marketplace		
Role	Approver	
1 Operating Unit Contact	Show Details	
Operating Unit Manager	Show Details	
Department Controller	Doug Belliston	Threshold: \$10,000.00
Department Manager	Matthew Richardson	Threshold: \$250,000.00

- Approvers for Chrome River expense document types are sent to the first approver in the list. If the first approver is the document owner then the approval is sent to the second approver.
- Clicking the “replace” or “add” icons displays this page to enter replacement or added approvers.
 - The College/Division controller may choose a role-based approver, or designate a specific person’s name, and provide an optional date range for the replacement approver to approve transactions. As noted above, YMarketplace also allows a Threshold beyond which approvals are required.



- Pre-Approval approvers by default are the employee’s supervisor. Controllers may replace the supervisor with a Dean/Director, Department Controller, Department Manager or Department Contact or a specific individual approver for each employee.