Approving a Travel Authorization with Advance (if applicable)

This section will show you how to approve a Travel Authorization. When a TA is ready for you to approve, you will receive an email from workflow@astate.edu. The email will summarize the travel document or documents that need approval. There will be a link to Workflow to login. When logging in to Workflow, use your myCampus user name and password.

You will automatically open to the ‘Workflow Approval Form’ for your review. Once logged in, you will see the ‘Workflow Approval form for the Authorization and Advance (if applicable). Review the information and if you need to view additional information before submitting the document for approval or returning it for correction, click on the link for the ‘Travel and Expense’ page. To login to ‘Travel and Expense’, the username will be your ‘8 digit Campus Wide ID’ and the password will be your ‘6 digit PIN’. This will show you a summary of the authorization and list the advance (if applicable).

When looking at a ‘Travel Authorization’ or ‘TA’, you can see the preview, the general information on the reports. There is a comments section to enter any comments related to the travel document. There will be 4 page options that you can hold your mouse on to see those pages. Page 2 is your Reimbursable Expense types. This allows you to look at ‘Reimbursable Expenses’ and to what is being reimbursed. Clicking the down arrow will shows additional information about that expense. The third page is the ‘Funding Summary’, where the money is going to be taken out or encumbered. Page 4 is ‘Non-Reimbursable’ items.

There are also two other options on the left of ‘Status History’ and ‘Related Documents’. Click on ‘Status History’, to see the status of the document in Travel and Expense. Click on ‘Workflow Approvals’, to see if it has been through some approvals. ‘Related Documents’ will show if there was a ‘Travel Advance’ also associated with this TA.

To see related document backup click ‘ALT-Q’. Enter the authorization report TA number in the invoice field and click ‘Search’. The ‘TA’ related documentation will be retrieved for review. The TA related documents may include memos documenting the purpose of the trip, programs and agenda; Vice Chancellor and Export Controls approval memos or vetting documentation, etc. When finished reviewing the scanned documents, select exit and cancel. Sign out of Travel and Expense and close the window to be returned to the Workflow Approval form.

Upon returning to the ‘Workflow Approval Form’, select the approval status. In the approval status field select ‘Approve and Add Approver’. Please note the ‘Add Approver’ field will contain ‘travel’, because the Travel Office serves as the final approver for all travel documents. If additional approvals are required before the Travel Office, remove ‘travel’ and, in lowercase, enter the additional approver’s username. Vice Chancellor approval is required for any of the following circumstances: All travel outside the continental United States; length of travel time exceeds seven days; projected cost of travel exceeds $2,500; or there are more than five members in the travel party who will seek reimbursement for expenses.
Once all appropriate approvals have been obtained, the Travel Office will serve as final approver.

If the authorization report needs to be corrected by the traveler, choose ‘Return for Correction’. A comment must be entered as to why the document is being returned. If an advance was requested, the advance will then automatically be cancelled. The traveler will be notified via email that corrections are needed on the TA. The traveler can then make the corrections and resubmit the authorization report for approval. If there was an advance cancelled with the return for correction, the traveler will also need to request a new advance.

If the authorization report is denied, the process flow will be completely canceled. The traveler will be notified by email that the document has been denied.

When the approval status has been selected, click ‘Complete’.

Once ‘Complete’ has been selected, the authorization report will route through the Workflow Approvals process. The Traveler will receive emails as the document routes through the approval process.