Approving an Expense Report

TR Intro and Login
As an approver, when a document is ready for your approval, you will receive an email from workflow@astate.edu. The email will contain a summary of the ‘TR’ needing approval, and a link to ‘Workflow’. Click on the Workflow link. When logging in to Workflow, the username will be your ASU user name and the password will be your ASU password.

TR Document Review
You will now see a summary of the expense report information. If an advance was paid off from this ‘TR’, the summary will include the cleared advance amount, and the amount which will actually be paid out.

At the bottom of the page is a link to Travel and Expense, where detailed information about the reimbursement may be viewed. When logging into Travel and Expense, the username is your 8 digit campus wide ID number and the password is your 6 digit PIN.

A summary of the expense report will now be displayed. There are 4 page numbers at the bottom of the screen which may be used to review the travel document. Page 1 displays General Information. Page 2 displays ‘Reimbursable’ expense information. Clicking the down arrow beside each expense item will display additional information about the expense. Page 3 displays the ‘funding summary’. On this page, check for proper funding sources. Page 4 displays ‘Non-reimbursable expenses’.

Status history and related documents links are available at the left side of the screen. Status history will show the status of the expense report and workflow approval status. Related documents will show the authorization report and if an advance is related to this reimbursement.

TR Imaging
At this time, ‘backup’ documents (such as memos documenting the purpose of the trip, programs and agenda; Vice Chancellor and Export Controls approval memos or vetting documentation, etc.) will need to be scanned for the ‘TA’. For further information on attaching the travel documents, please see the section ‘Scanning and Attaching Travel Documents’ at http://www.astate.edu/a/banner-support/files/tem-travel-imaging.pdf.

TR Approving
If the expense report is ready to be approved, 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. Enter ‘travel’ in lower case in the ‘Add Approver’ field.

If the expense document needs to be corrected by the traveler, choose ‘Return for Correction’. A comment must be entered as to why the document is being returned. The traveler will be notified via email that corrections are needed on the TR. The traveler can then make the corrections and resubmit the expense report for approval.

If the expense 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 Expense Report will route through the Workflow Approvals process. The Traveler will receive emails as the document routes through the approval process.