Traveler Approval Process

This document will take you through the steps to approve a travel request generated by your delegate (the person responsible for arranging your travel).
Traveler Approval Process - Login

Email sent to the Traveler for review

1. You received an email from your delegate (person arranging your travel) asking you to approve the travel arrangements they have entered for you.

   To approve the travel arrangements CLICK > on the Travel & Expenses Page link within the email you received.

2. Login to the Travel & Expense Management System.

Log into Travel & Expense system

1. Enter the Travel & Expense Management system using your BSU user name and password (without the @bsu.edu extension).

   Example: vmorris instead of vmorris@bsu.edu

   (This is the same user name and password you use for Outlook)
Traveler Approval Process - Check travel arrangements

3. SELECT > the Expense Manager tab.

4. SELECT > the Authorization Reports in the left navigation menu.

5. Make sure your name is displayed in the blue header box.

6. Double CLICK> on the appropriate travel report in the list to approve.

7. Review the multiple screens to make sure the travel information is correct.
Traveler Approval Process - Add comments

If corrections are needed, SELECT > the Comments button in the left navigation menu, click the Pencil icon to the right and indicate the changes that need to be made in the text box.

CLICK > the Save button.

CLICK > the View or Submit Report button.

CLICK > the Submit button. An email is generated and sent back to the delegate (person arranging travel) notifying them of your approval or if changes need to be made based on the information you put in the comments section.

If you made changes to the travel request, a new email will be sent to you after the corrections are made. This gives you another opportunity to view the travel arrangements and make sure they are correct.
Traveler Approval Process - Check status of approval

11. If you want to see the status of your request, (where it’s at in the approval process)

CLICK > on the Status History link in the left menu panel.

12. SELECT > the Workflow Approvals tab.

13. Sign Out to exit the program.
Traveler Approval Workflow
November 2011

Delegate
Completes Travel Reimbursement

Traveler
Reviews and submits the reimbursement (May add additional cost)

Delegate
Makes necessary corrections, signs off (approves) and forwards to next approver

Next approver is
Chair
Approves & Forwards

Dean
Approves & Forwards

V.P.
Approves & Forwards (if necessary)

Grants
Approves & Forwards (if necessary)

Last Approver
Approves & Forwards to the Travel Dept.
Forward the approval to travel@bsu.edu

Travel Department
FINAL Approval and sends document to posting