

How to Approve or Send Back a Travel Authorization or Expense Report

These steps work for both Travel Authorizations and Expense Reports.

STEP 1

Navigate to the Pending Approvals page and select the Travel Authorization or Expense Report, whichever is applicable.

The screenshot shows the 'Employee Self Service' interface with the 'Pending Approvals' section. On the left, a navigation menu lists 'All', 'Purchase Order', and 'Travel Authorization' (which is selected and has a '2' next to it). The main content area is titled 'Travel Authorization' and shows a list of two items. The second item is highlighted in yellow and circled in red. It is a 'Travel Authorization' for 650.00 USD with authorization ID 0000013124, submitted on 12/08/2022. The status is 'Routed'. Above the list are buttons for 'Approve', 'Sendback', and 'Hold'. Below the list is a text area for 'Approver Comments'.

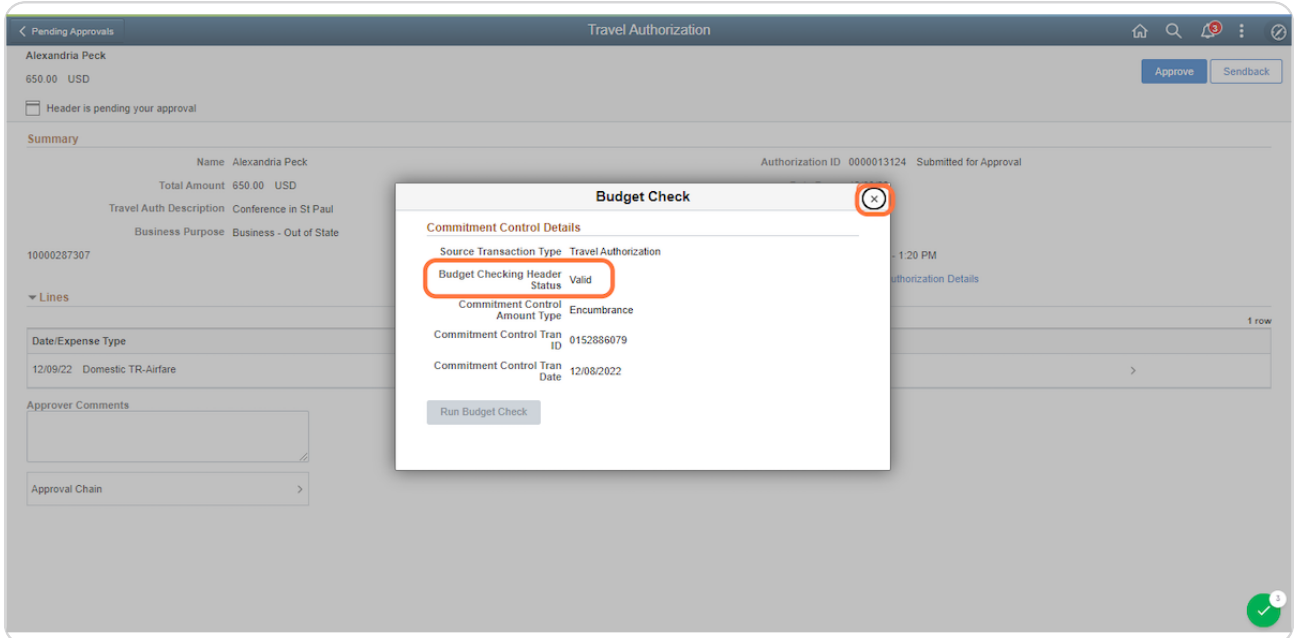
STEP 2

To approve the report, click on the Approve button in the upper right hand corner.

The screenshot shows the details of a 'Travel Authorization' for 650.00 USD. The 'Approve' button in the top right corner is circled in red. The page includes a 'Summary' section with the following details: Name, Authorization ID 0000013124, Submitted for Approval, Total Amount 650.00 USD, Date From 12/09/22, Date To 12/14/22, Travel Auth Description Conference in St Paul, Submission Date 12/08/22, Business Purpose Business - Out of State, and Updated on 12/08/22 - 1:20 PM. Below the summary is a 'Lines' table with one row: 12/09/22 Domestic TR-Airfare for 650.00 USD. There are also text areas for 'Approver Comments' and 'Approval Chain'.

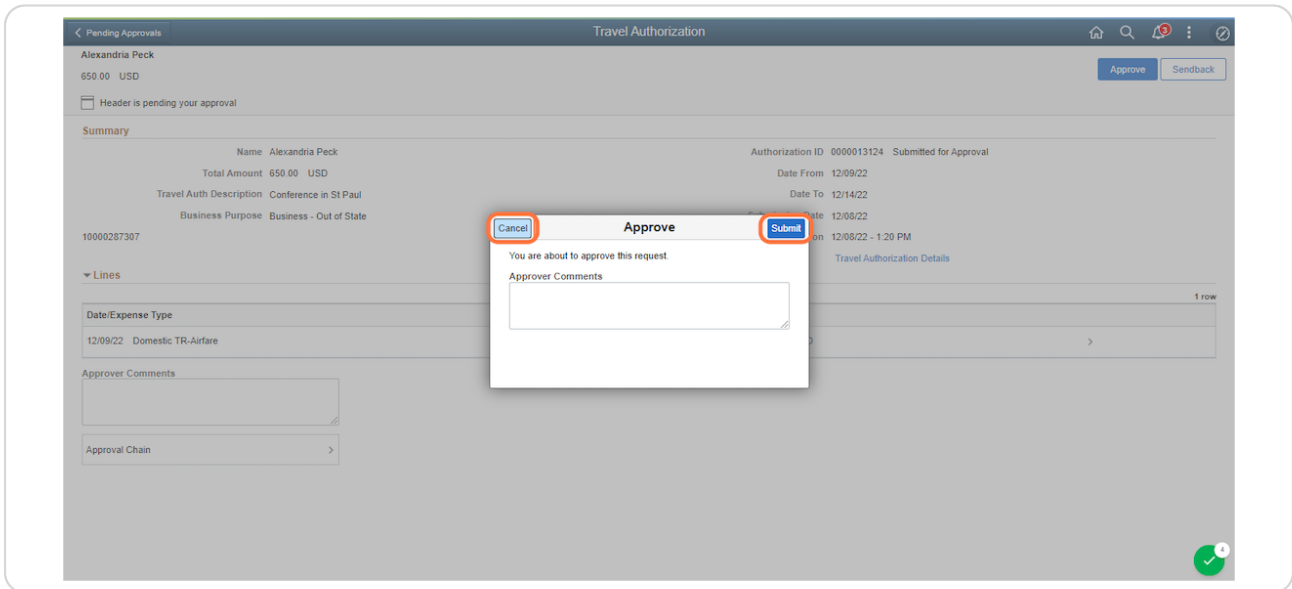
STEP 3

The Budget Check window will appear. If the budget check has already been run, the Budget Checking Header Status will read Valid. If not, you will need to run the budget check. Click on the X in upper right hand corner to proceed with the approval.



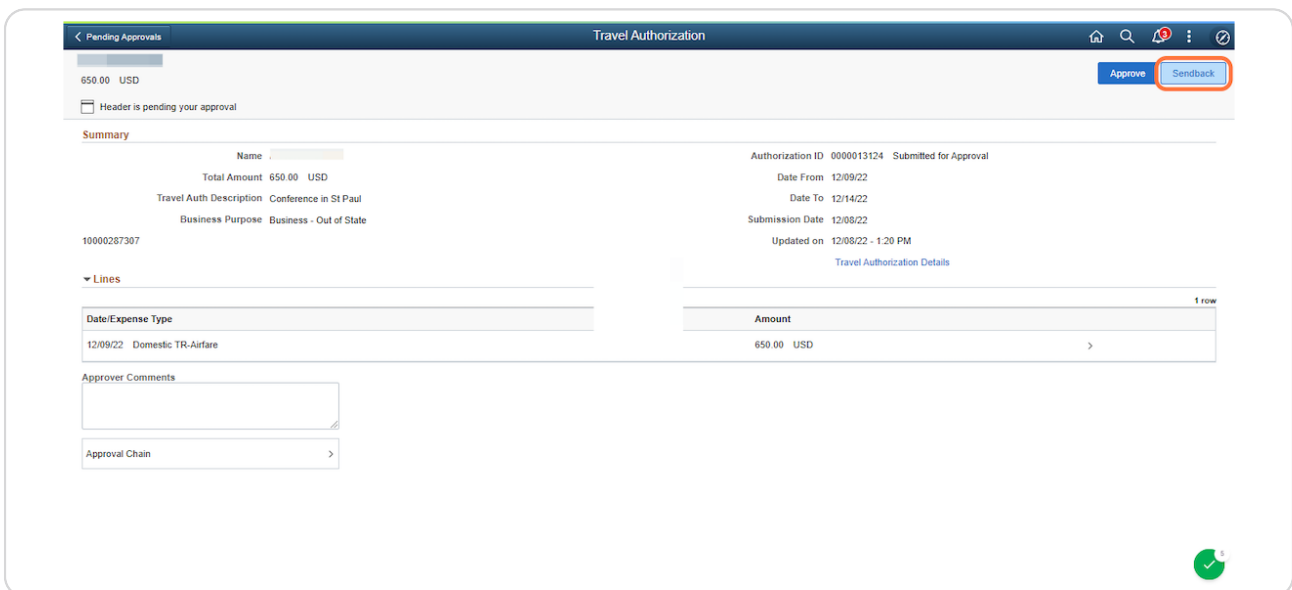
STEP 4

The Approve window will appear. If needed, enter comments in the Approver Comments field. Comments are optional if approving a report. Click the Submit button to approve the report. Click the Cancel button to cancel and return to the header page.



STEP 5

If you do not wish to approve the report and need to send it back to the submitter, click the Sendback button in the upper right hand corner.



STEP 6

The Sendback window will appear. Enter your reason for sending the report back to the submitter. Comments are REQUIRED if sending back a report.- Click the Submit button to send back to the submitter. Click the Cancel button to return to the header page.

