

## TRAVEL APPROVAL – ELECTRONIC PROCESS

### Pre-Travel Authorization -TA

Travel authorizations are still a two-part process. The first email you receive from “[TravelOffice@usu.edu](mailto:TravelOffice@usu.edu)” is to approve the trip/traveler/funding/**estimated expense** and the document number will begin with “TA” Travel Authorization.

### Travel Final Expense Report - TR

Once the trip has been completed, a travel expense report will be processed by one of your staff members. This will include fund dollar amounts and any receipts necessary will be attached. After the travel expense report is completed, you will receive a second email to approve the final amounts and the document number will now start with “TR” Travel Reimbursement. Once the TR is approved, the process is complete and a reimbursement will be issued to the traveler.

### How to View and Approve

The email approval requests you receive will have a summary of the trip information in the body of the email. The email will contain two links one for [Travel and Expense](#); where you can view details about the travel and one for [Workflow](#); where you will approve the TR or TA electronically. Use your Employee A#, as the user name, and Banner password when logging into both [Travel and Expense](#) or [Workflow](#). You will have a choice to Approve, Disapprove, or Return for correction.

- If you choose to **return for correction**, please make comments so your traveler/initiator will know what needs to be changed.
- If you choose to **disapprove**, it will terminate the document from the system. *It cannot be reactivated at any time.* Please also add a comment as to why it is disapproved.
- If you **approve** the document it will advance through the system.

Once you have made your selection you need to click on the “**Complete**” button. If you click on the “Save & Close” or the “Cancel” button, the TA will not advance to completion.

### Items to Watch for before approving

- Check the dates of travel, make sure all dates are not after the fact. If they are, you may want to make comments in the comment section or take the opportunity to contact your traveler about the travel policy
- Check the index being used, is it appropriate
- Is the traveler with your department or do you authorize this traveler to travel for your department
- Are the reimbursements being requested in the TR what you agreed to
- Are there items in the TR that are inappropriate

**Setting up a Proxy to approve:** At times you might need a proxy to approve while you are out of the office. The proxy needs to have the appropriate authority to approve.

- Log in to Workflow: <https://workflow.banner.usu.edu/zprod/logon.jsp> using your A# and Banner Password
- Click on *User Information* under the User Profile Tab
  - In the Box named *My Roles* click on Add Proxy
  - Type A# in User Box or find A# in drop down box ( make sure you have typed the correct A#)
  - Enter the Effective From and To dates
  - Click Non-confidential
  - Click Save

If you want the emails to go into a separate folder instead of your inbox:

- Right click on email from [TravelOffice@usu.edu](mailto:TravelOffice@usu.edu)
- Scroll down to *Rules*
- Click on *Create Rule*
  - Check the box: From [TravelOffice@usu.edu](mailto:TravelOffice@usu.edu)
  - And Move the item to folder: (select the folder which you would like to place these emails you receive)

