

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, there is a navigation menu with 'Travel Authorization' selected. The main area displays a table of pending approvals. The second row is highlighted in yellow and circled in red. The table has the following data:

Item	Amount	Authorization ID	Status	Date
Travel Authorization	500.00 USD	0000013122	Routed	12/08/2022
Travel Authorization	650.00 USD	0000013124	Routed	12/08/2022

Below the table is an 'Approver Comments' text area. In the top right corner, there are buttons for 'Approve', 'Sendback', and 'Hold'. A green checkmark icon is visible in the bottom right corner.

STEP 2

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

The screenshot shows the 'Travel Authorization' details page. The 'Approve' button in the top right corner is circled in red. The page displays the following information:

Summary

Name	Authorization ID	0000013124	Submitted for Approval
Total Amount	Date From	12/09/22	
Travel Auth Description	Date To	12/14/22	
Business Purpose	Submission Date	12/08/22	
10000287307	Updated on	12/08/22 - 1:20 PM	

Lines

Date/Expense Type	Amount
12/09/22 Domestic TR-Airfare	650.00 USD

Below the lines table is an 'Approver Comments' text area and an 'Approval Chain' link. A green checkmark icon is visible in the bottom right corner.

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.

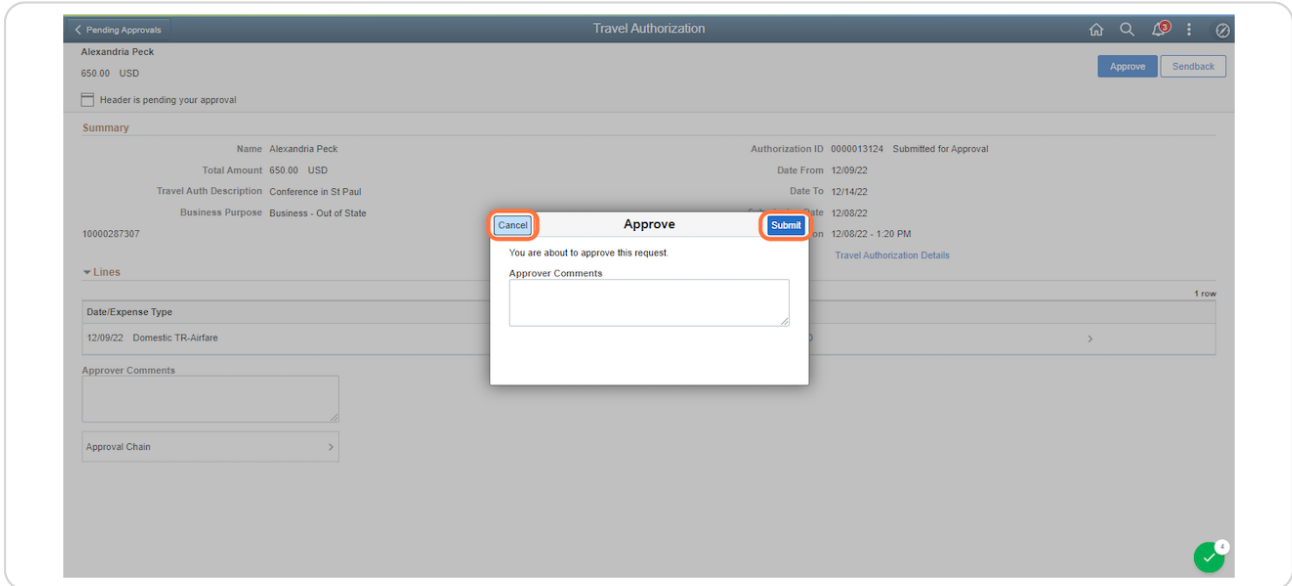
The screenshot displays a web application interface for 'Travel Authorization'. The main window shows a 'Pending Approvals' section for 'Alexandria Peck' with a total amount of 650.00 USD. A modal window titled 'Budget Check' is overlaid on the screen. This modal contains a 'Commitment Control Details' section with the following information:

Commitment Control Details	
Source Transaction Type	Travel Authorization
Budget Checking Header Status	Valid
Commitment Control Amount Type	Encumbrance
Commitment Control Tran ID	0152886079
Commitment Control Tran Date	12/08/2022

Below the details is a 'Run Budget Check' button. The modal also features a close button (an 'X' in a circle) in the top right corner, which is highlighted with a red circle in the image. The background interface includes a 'Summary' section with fields for Name, Total Amount, Travel Auth Description, and Business Purpose. There is also a 'Lines' section with a table for 'Date/Expense Type' and an 'Approver Comments' field.

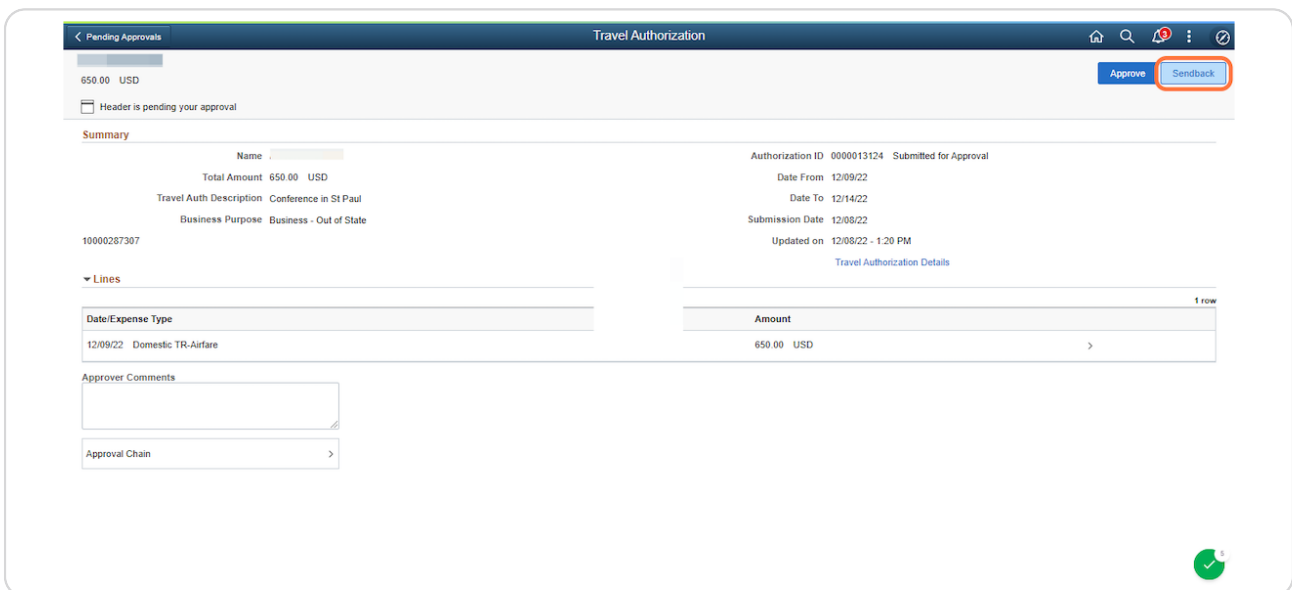
STEP 4

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.

