TRAVEL EXPRESS USER MANUAL.. 1

TRAVEL EXPRESS REQUEST AND VOUCHER PROCESS OVERVIEW.. 1

TRAVEL EXPRESS PROCESS OVERVIEW..1

USING THE TRAVEL EXPRESS MENUS..2

RETURN A REQUEST OR VOUCHER..3

TRAVEL EXPRESS USER MANUAL

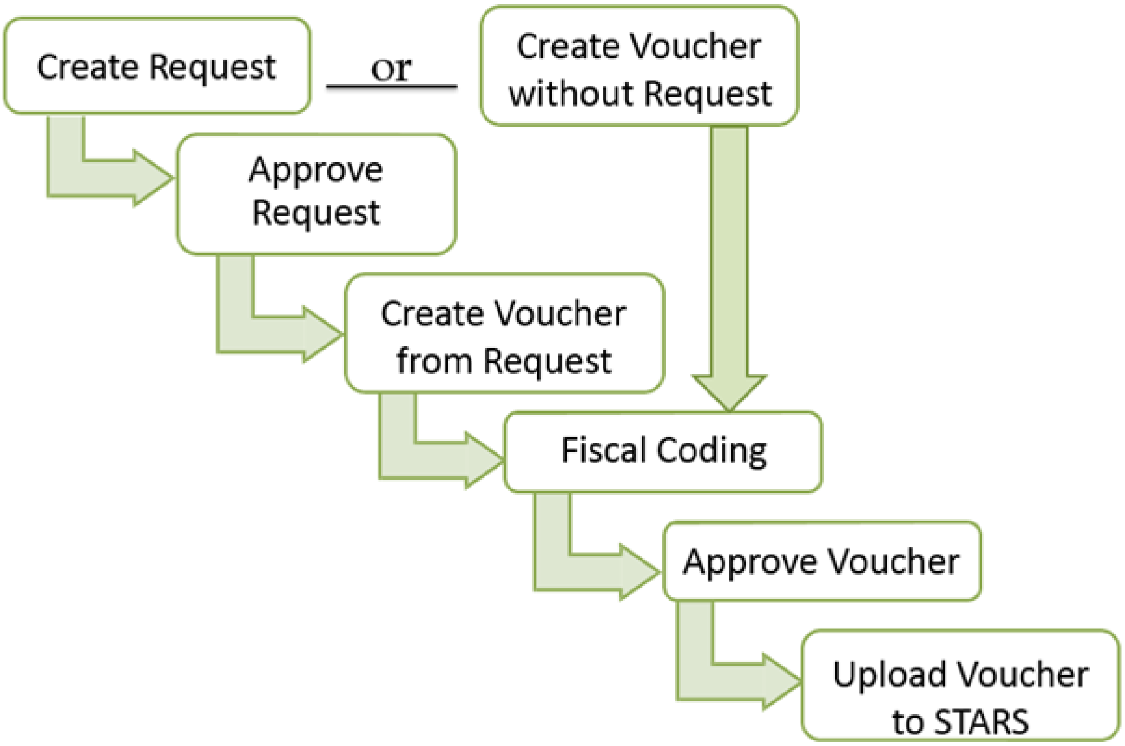
TRAVEL EXPRESS REQUEST AND VOUCHER PROCESS OVERVIEW

TRAVEL EXPRESS PROCESS OVERVIEW

The Travel Express process is described below. The process is not limited to travel reimbursements – the application can be used for other expense reimbursements. Scanned receipts or documents can also be added to requests or vouchers, but this is not a required part of the process.

1. **Create Request**. A request can be created for travel or non-travel events (such as a local conference or training seminar) that provide the description, dates, and expenses of the event. A request is not required by the application. It may be required by your agency's policies. Users can create a voucher without a request (step 3). After a request is completed, it is routed to an approver.
2. **Approve Request**. The approver reviews the request and approves or disapproves it, or returns it to the originator for more information. The agency's Travel Express administrator sets up the number of approval levels (up to three) and the users who will be Approvers. Approval levels are organized in a hierarchy, so that a request must be approved by the first level before it can be approved by the second. After a request is approved, a voucher can be created from it.
3. **Create Voucher**
    a. **Create Voucher from Approved Request**. A voucher is created from an approved request. Expenses can be updated from the original request. Scanned receipts and other documents can be attached to the voucher. After the voucher is created, it is routed to a fiscal coder.
    b. **Create Voucher without Request**. If a request is not required by the agency, the traveler/user can simply create a voucher and enter the description of the event, dates, and expenses. A voucher may be created by a "proxy" on behalf of the traveler. After the voucher is completed, it is routed to a fiscal coder.
4. **Fiscal Coding**. The Fiscal Coder will add or update the fiscal coding or split expenses to different funding sources. The fiscal coder then routes it to an approver.
5. **Approve Voucher**. The approver reviews the voucher and approves or disapproves it, or returns it to the fiscal coder or traveler. The agency's Travel Express administrator sets up the number of approval levels (up to three) and the users who will be Approvers. Approval levels are organized in a hierarchy.
6. **Final Approval and upload to STARS**. After the voucher is approved at the final level, it is scheduled to be uploaded to STARS at the end of the business day in a

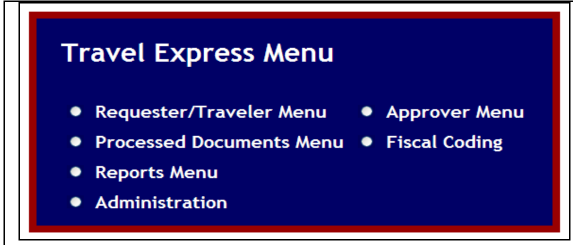
batch type 0 (zero). Vouchers released by 6:30 PM MST of the business day will be sent to STARS that night. Vouchers released after that time will be sent at the end of the next business day.


Create Request
or
Create Voucher without Request
Approve Request
Create Voucher from Request
Fiscal Coding
Approve Voucher
Upload Voucher to STARS

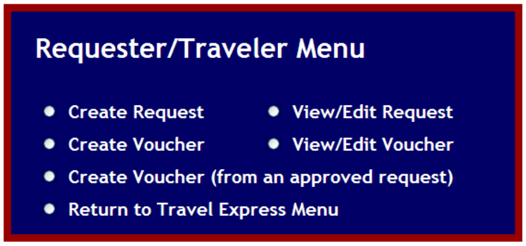
USING THE TRAVEL EXPRESS MENUS

Two important menus are the Travel Express Main Menu and the Requester/Travel Menu. Tasks associated with those menus are described below.

Travel Express Main Menu


Travel Express Menu
Requester/Traveler Menu
Approver Menu
Processed Documents Menu
Fiscal Coding
Reports Menu
Administration

Requester/Traveler Menu


Requester/Traveler Menu
Create Request
View/Edit Request
Create Voucher
View/Edit Voucher
Create Voucher (from an approved request)
Return to Travel Express Menu

Not all users will see all options of the Travel Express menu. For example, if a user is not an Approver, the Approver Menu will not be available.

To perform particular tasks, use the appropriate menu as described below.

Desired task	**Travel Express menu to use**
Create a request or voucher.	Requester/Traveler Menu > Create Request, Create Voucher, or Create Voucher (from an approved request)
Find current requests or vouchers by user's name, group, or destination or by status. (To edit a request, it must be in a status Draft or Pending Approval(s). To edit a voucher, the status must be Draft.)	Requester/Traveler Menu > View/Edit Request or View/Edit Voucher
Find and approve or disapprove a request or voucher.	Approver Menu
Enter fiscal coding on a voucher and/or distribute the expenses to pay from various sources.	Fiscal Coding
Add and set up users, set up agency approval levels, mileage rates, groups, etc.	Administration
Run request or voucher reports or auditor reports.	Reports Menu
Find documents (vouchers) that have been sent to STARS, or requests that have been approved and are in voucher creation process.	Processed Documents Menu

RETURN A REQUEST OR VOUCHER

Fiscal Coders and Approvers can return a request or voucher to be updated, changed, or corrected.

Once a request has been routed to an Approver (the status of the *request* is **Pending Approval**), the approver can select **Return for more info** if they want the traveler to add or update the request, or select **Disapprove** and the traveler cannot edit, update, or resubmit it.

After a request has been approved, it is available in the **Create Voucher from an Approved Request** menu. It can be removed (deleted) in the **View/Edit Request** menu before a voucher is created from it. It cannot be updated after it has been approved. Changes to the travel information are made when the voucher is created, using the comments and/or attachments as supporting documentation.

If a voucher is created from a request, but significant changes need to be made, it can be deleted - click **Remove** to delete the current voucher, the request will not be deleted. You can select it again to create a new voucher.

Both the voucher and request could be removed - remove the request from the **View/Edit Request** menu after the voucher is removed in the **Create Voucher from an Approved Request** menu. (See the View or Edit a Request or Voucher documentation.)

Once a voucher has been routed to a Fiscal Coder (the status of the *voucher* is **Pending Fiscal Coding**), the Fiscal Coder can select **Return to traveler**.

Once a voucher has been routed to an Approver (the status of the *voucher* is **Pending Approval**), the Approver can select **Return to traveler** or **Return to coder**. In order to cancel a voucher permanently, an Approver should select **Return to traveler** and the traveler must remove the document.