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TRAVEL EXPRESS USER MANUAL

FIND AND EDIT A VOUCHER (VIEW/EDIT VOUCHER MENU)

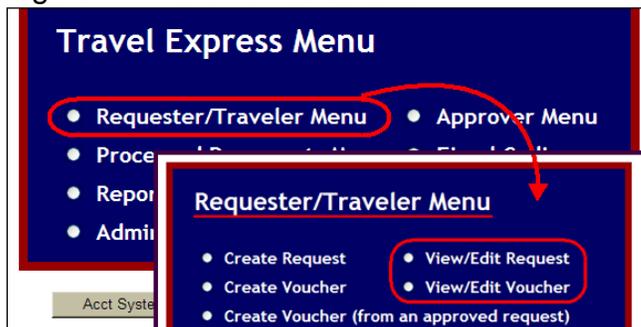
INTRODUCTION

Use the **View/Edit Voucher** menu to find vouchers that are in process – those that have been saved and are either in **Draft** status, waiting to be approved, or in Fiscal Coding. To find vouchers that have been processed, removed, sent to STARS, etc., use the [Reports](#) menu or the [Processed Documents](#) menu.

VIEW AND/OR EDIT A VOUCHER

At the Travel Express main menu, select the **Requester/Traveler Menu**, and then select **View/Edit Voucher**.

Figure 1 - View/Edit selections



1. Click **View/Edit Voucher**. Your vouchers will be displayed.
2. If the **Status** of the voucher is:
 - a. **Draft** – only the originator or proxy of the voucher can route and submit a voucher to a fiscal coder (although Administrators can make and save changes to a draft voucher). If changes are made to the **Destination**, or the **Departure** or **Return** dates, the **Per Diem** screen will be reset - any previously saved information in will be lost.
 - b. **Pending Approval(s)** - You can view, print, or remove it. Otherwise it must be opened in the Approver menu to approve a voucher.
 - c. **Pending Fiscal Coding** - You can view, print, or remove it. Otherwise must be opened in the Fiscal Coder menu to code a voucher.

- d. **Mileage Only** vouchers in **Draft** status may display **Destination, Depart,** and **Return** information that seems to be incorrect, but will be correct in the actual voucher.
3. You can select a voucher, or you can filter the list of vouchers by traveler, destination, status, or depart dates.
 - a. If you are an Administrator, Approver, Proxy, or Auditor, click **Browse** next to **Traveler**.
 - b. Select the name from the menu or type the first few letters of the first *or* last name of the traveler.
 - If you are not a Proxy or an Administrator, Approver, or an Auditor, only your name will be displayed.
 - If you are a Proxy, your name and the people for whom you are a Proxy will be displayed.
 - If you are an Administrator, an Approver, a Fiscal Coder, or an Auditor, all Travel Express users will be displayed.
 - c. Click the name of the user whose vouchers you want to find.
 - d. Select other criteria to search by:
 - **Destination** (by state)
 - **Group** name (if used)
 - **Status** of the voucher
 - A range of **Departed** dates.
 - e. Click **Find**. (Click **Reset** to reset the view to all users available.)

Figure 6 - Status

The screenshot shows the 'Voucher Search' interface. At the top, there are search criteria: 'Traveler' (set to '---ALL TRAVELERS---'), 'Destination' (dropdown), 'Group' (dropdown), 'Status' (dropdown, circled in red), and 'Departed' (Between and And date fields). 'Find' and 'Reset' buttons are also circled in red. Below the search criteria is a 'Results:' section with a table of vouchers.

Atch	Note	Traveler	Status	Origin	Destination	Depart	Return	Create Date	Group
Select		MARY	Pending STARS Upload	BOISE, ID	WHEREVER, ID	03/02/2010	03/02/2010	03/10/2010	
Select		JAMES	Draft	BOISE, ID	PARK CITY, UT	03/12/2010	03/15/2010	03/16/2010	
Select		MARY	Pending Fiscal Coding	BOISE, ID	DENVER, CO	03/01/2010	03/07/2010	03/18/2010	Group1
Select		MARY	Pending Approval(s)	BOISE, ID	IDAHO FALLS, ID	03/10/2010	03/13/2010	03/22/2010	
Select		CAROLYN	Pending STARS Upload	BOISE, ID	PORTLAND, OR	03/10/2010	03/10/2010	03/23/2010	Training
Select		PAMELA	Draft	BOISE, ID	SAN FRANCISCO, CA	03/15/2010	03/18/2010	03/23/2010	Training
Select		JAMES	Pending Fiscal Coding	BOISE, ID	TWIN FALLS, ID	03/24/2010	03/26/2010	03/26/2010	
Select		JAMES	Draft	BOISE, ID	TWIN FALLS, ID	03/24/2010	03/24/2010	03/26/2010	

4. Click **Select** next to the voucher.
5. Click the **Report** tab to view or print the voucher details.

Figure 7 - Report tab

6. Click the **Select a Format** drop down menu.

Figure 8- Report format

7. Select either **Excel** or **Acrobat (PDF)**.
8. Click **Export**.
9. Save or print the file from the Excel or Acrobat (or other PDF application) menu.

REMOVE A VOUCHER

1. Click **Select** next to the voucher.
2. Click **Remove** and then click **OK**.
3. If you remove a voucher that has been routed to **Fiscal Coding** or to an approver, it will be removed from the **Fiscal Coding** or **Approver** screen.

Figure 9 - Remove confirmation