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# TRAVEL EXPRESS USER MANUAL

## APPROVE OR RETURN A REQUEST

### INTRODUCTION

The agency's Travel Express administrator sets up the approval levels as well as assign users as Approvers. Approval levels are organized in a hierarchy, so that a request must be approved by at the first level before it can be approved at the second level. Unlike vouchers, request approvers are not assigned specific PCAs or Indexes to approve. However, an approver cannot approve their own request. Approval is not restricted by the Group (if used), i.e., approvers can approve any request in any Group. An Approver can return a request to the user/traveler for more information, or to a Fiscal Coder to correct fiscal coding.

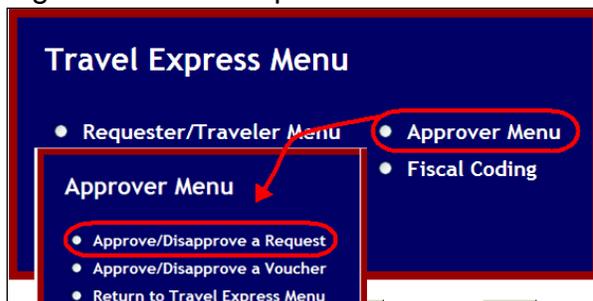
After a request is approved, a voucher can be created from it. See [Create a Voucher from an Approved Request](#). After the voucher is completed, it is routed to a fiscal coder who then routes it to an approver. After the voucher is approved at the final level, it is automatically scheduled to be uploaded to STARS at the end of the business day (approximately 6:30 PM MST).

Refer to the [State Travel Policy](#) for more information regarding allowable expenses.

### APPROVE A REQUEST

1. From the Travel Express menu, click **Approver Menu**, and then click **Approve/Disapprove a Request**.

Figure 1 - Travel Express menu



1. If needed, you can search for requests by the traveler's name (click **Browse** next to **Traveler**), or by **Destination**, **Group**, **Status**, or departure dates. Select or enter any of these criteria and click **Find**. Click **Reset** to reset the view to all users available.

Figure 2 - Request Approver Queue

**Request Approver Queue**

Traveler:  Browse Destination:  Group:

Status:  Departed Between:  And:  Find Reset

**Results:**

Select	Atch Note	Requester	Status	Level	Origin	Destination	Depart	Return	Create Date	Group
Select		ROBERT	Pending Approval(s)	1	BOISE, ID	HONOLULU, HI	05/01/2010	05/02/2010	03/09/2010	Group1
Select		CAROLYN	Pending Approval(s)	1	BOISE, ID	HONOLULU, HI	06/20/2010	06/27/2010	05/06/2010	ADMIN
Select		JAMES	Pending Approval(s)	1	BOISE, ID	BILLINGS, MT	05/05/2010	05/07/2010	04/29/2010	
Select		JAMES	Pending Approval(s)	1	BOISE, ID	BURLEY, ID	05/19/2010	05/21/2010	04/27/2010	
Select		JOSE	Pending Approval(s)	1	BOISE, ID	JACKSON, WY	08/25/2010	08/27/2010	07/06/2010	CAROLYN

2. If there are any **attachments** or **notes** for a request, icons will be displayed next to the requester's name. Click the icons to view the attachment or the note.
3. From the **Request Approver Queue**, click **Select** next to the appropriate request to view the expense details.
4. A summary of the expenses and the destination of travel will be displayed at the top of the screen. A list of line item expenses will be also displayed. If there are more than 15 line items, a link to additional pages of expense details will be displayed at the bottom of the list.
5. When reviewing expenses, note that expenses paid with a P-Card should be entered, but P-Card transactions still need to be verified and approved in the P-Card application. Expenses that are part of the official travel, but not paid by the traveler should be entered. Refer to the [State Travel Policy](#) for more information regarding allowable expenses. If all expenses entered are not paid by the traveler, the voucher created from request the will have a zero amount balance.
6. Click the **Attachment** tab to view any attached documents (receipts, invoices, etc.).

Figure 3 - View details

Status: Pending Approval(s) Requester: MARY Home Station: BOISE

Allowed Amount: \$2,066.85 P-Card Charges: \$1,596.45 Advances: \$0.00 Paid by Other Means: \$0.00 Due Traveler: \$470.40

Destination: PORTLAND, ME (04/01/2010 5:20 AM - 04/09/2010 8:00 PM)  
Purpose: training for misc projects  
Comments:

I want to:  Comments:  Submit

From	Thru	Expense	Allowed	P-Card	Advances	Paid by Other Means	Miles	B	L	D	Comments
04/06/2010	04/06/2010	Meals	\$50.40	\$0.00	\$0.00	\$0.00	\$50.40	0	✓	✓	off site meetings breakfast provided
04/07/2010	04/07/2010	Meals	56.00	0.00	0.00	0.00	56.00	0	✓	✓	
04/08/2010	04/08/2010	Meals	56.00	0.00	0.00	0.00	56.00	0	✓	✓	
04/09/2010	04/09/2010	Meals	56.00	0.00	0.00	0.00	56.00	0	✓	✓	
04/01/2010	04/01/2010	Meals	56.00	0.00	0.00	0.00	56.00	0	✓	✓	
04/02/2010	04/02/2010	Meals	56.00	0.00	0.00	0.00	56.00	0	✓	✓	
04/03/2010	04/03/2010	Meals	56.00	0.00	0.00	0.00	56.00	0	✓	✓	
04/04/2010	04/04/2010	Meals	50.40	0.00	0.00	0.00	50.40	0	✓	✓	off site meetings breakfast provided
04/05/2010	04/05/2010	Meals	33.60	0.00	0.00	0.00	33.60	0	✓	✓	Dinner meeting - meal provided
04/06/2010	04/06/2010	Lodging	128.50	128.50	0.00	0.00	0.00	0			off site meetings breakfast provided
04/07/2010	04/07/2010	Lodging	128.50	128.50	0.00	0.00	0.00	0			
04/08/2010	04/08/2010	Lodging	128.50	128.50	0.00	0.00	0.00	0			
04/09/2010	04/09/2010	Lodging	0.00	0.00	0.00	0.00	0.00	0			
04/01/2010	04/01/2010	Lodging	128.50	128.50	0.00	0.00	0.00	0			
04/02/2010	04/02/2010	Lodging	128.50	128.50	0.00	0.00	0.00	0			
			\$2,066.85	\$1,596.45	\$0.00	\$0.00	\$470.40	0			

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7. If you are not a final approver and need to route the voucher to the next level of approver, select **Route to approver** from the **Choose One** drop down menu.
8. Click the **Select Approver** drop down menu, and then click the name of the approver. Enter any comments if needed, and then click **Submit**. If the administrator has enabled e-mail notification, an e-mail will be sent to the next approver.

Figure 4 - Route to approver

Status: Pending Initial Approval(s) Requester: JAMES Home Station: BOISE

Allowed Amount	P-Card Charges	Advances	Paid by Other Means	Due Traveler
\$90.50	\$0.00	\$0.00	\$0.00	\$90.50

Destination: HAILEY, ID (02/27/2010 5:45 AM - 03/01/2010 2:00 PM)  
Purpose: Audit Meeting  
Comments:

I want to: **Choose One** Comments:

From	Return for more info	Disapprove	Route to approver	Choose One
02/27/2010	Return for more info	Disapprove	Route to approver	Choose One
02/28/2010	02/28/2010	03/01/2010	03/01/2010	02/27/2010

From	Allowed	P-Card	Advances	Paid by Other Due	Miles B	L	D	Comments
02/27/2010	\$30.00	\$0.00	\$0.00	\$0.00	\$30.00	0	✓	✓
02/28/2010	30.00	0.00	0.00	0.00	30.00	0	✓	✓
03/01/2010	18.00	0.00	0.00	0.00	18.00	0	✓	✓
02/27/2010	12.50	0.00	0.00	0.00	12.50	0	✓	Taxi
	\$90.50	\$0.00	\$0.00	\$0.00	\$90.50	0		

Pages: 1

9. If you are the final approver, click the **Choose One** drop down and then click **Approve**. Enter comments if needed, and then click **Submit**. If the administrator has enabled e-mail notification, an e-mail will be sent to the creator of the document (actual traveler or proxy) when a request is approved, disapproved, or routed to back for further action.

Figure 5 - Final approval

Status: Pending Approval(s) Requester: MARY Home Station: BOISE

Allowed Amount	P-Card Charges	Advances	Paid by Other Means	Due Traveler
\$2,066.85	\$1,596.45	\$0.00	\$0.00	\$470.40

Destination: PORTLAND, ME (04/01/2010 5:20 AM - 04/09/2010 8:00 PM)  
Purpose: training for misc projects  
Comments:

I want to: **Choose One** Comments:

From	Return for more info	Disapprove	Approve	Choose One
4/08/2010	Return for more info	Disapprove	Approve	Choose One
04/07/2010	04/07/2010	04/08/2010	04/09/2010	04/01/2010

From	Allowed	P-Card	Advances	Paid by Other Due	Miles B	L	D	Comments
4/08/2010	\$50.40	\$0.00	\$0.00	\$0.00	\$50.40	0	✓	✓
04/07/2010	56.00	0.00	0.00	0.00	56.00	0	✓	off site meetings breakfast provided
04/08/2010	56.00	0.00	0.00	0.00	56.00	0	✓	✓
04/09/2010	56.00	0.00	0.00	0.00	56.00	0	✓	✓
04/01/2010	56.00	0.00	0.00	0.00	56.00	0	✓	✓

10. Click **Return to Menu** to return to the main menu of Travel Express.

## DISAPPROVE OR RETURN A REQUEST

1. Click **Select** next to a request.
2. Click the **Choose One** drop down menu.
3. Select **Return for more info** if you want the traveler to add or update the request. Select **Disapprove**, enter a comment for the reason, and the request will be moved to the Processed Documents Menu. There it can be viewed, but cannot be routed any further.
4. Enter comments in the **Comments** field to explain the reason for the action.

5. Click **Submit**. If the administrator has enabled e-mail notification, automatic e-mails will be sent to the creator of the document (actual traveler or proxy) when a request is approved, disapproved, or routed to back for further action.

## CHECK THE APPROVAL AUDIT TRAIL

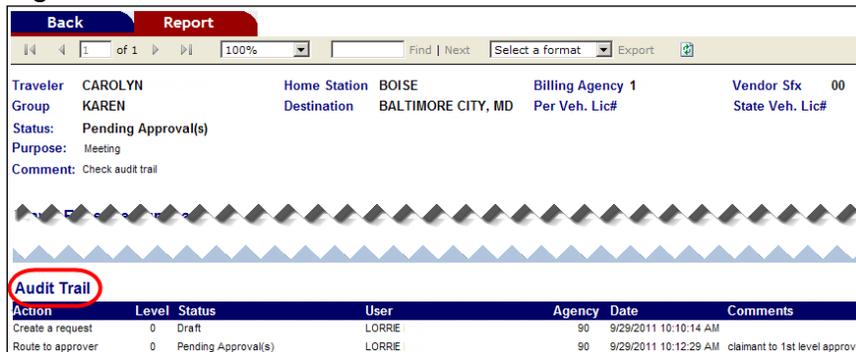
To see when a request was approved and by whom, click the **Report** tab. At the bottom of the report is the **Audit Trail** section.

Figure 6 - Report tab



Status	Request	Attachment	Report
Status	Pending Approval(s)		Requester CAROLYN
			Destination BALTIMORE CITY, MD (10/24/2011)
Allowed Amount	P-Card Charges	Advances	Paid by Other
\$1,793.06	\$409.16	\$0.00	\$75

Figure 7 - Audit trail



Action	Level	Status	User	Agency	Date	Comments
Create a request	0	Draft	LORRIE	90	9/29/2011 10:10:14 AM	
Route to approver	0	Pending Approval(s)	LORRIE	90	9/29/2011 10:12:29 AM	claimant to 1st level approver

## UNAUTHORIZED TO APPROVE A REQUEST

If the message, “You are not authorized to access this item” is displayed when an approver selects a request, it could be:

- a. The request requires a higher level of approval than what is assigned to the approver.
- b. The request has already been approved at the highest level.
- c. The request was created by the approver. An approver cannot approve their own request.

You should contact another approver who is authorized to approve the request. You could use the Reports menu to view details about the request.