Travel Activities

Approving Travel Actions

Overview:

Understanding the Process to Approve Travel Actions

In this topic, you will learn how to approve travel actions for an employee, such as Travel Authorizations, Expense Reports, and Cash Advances.

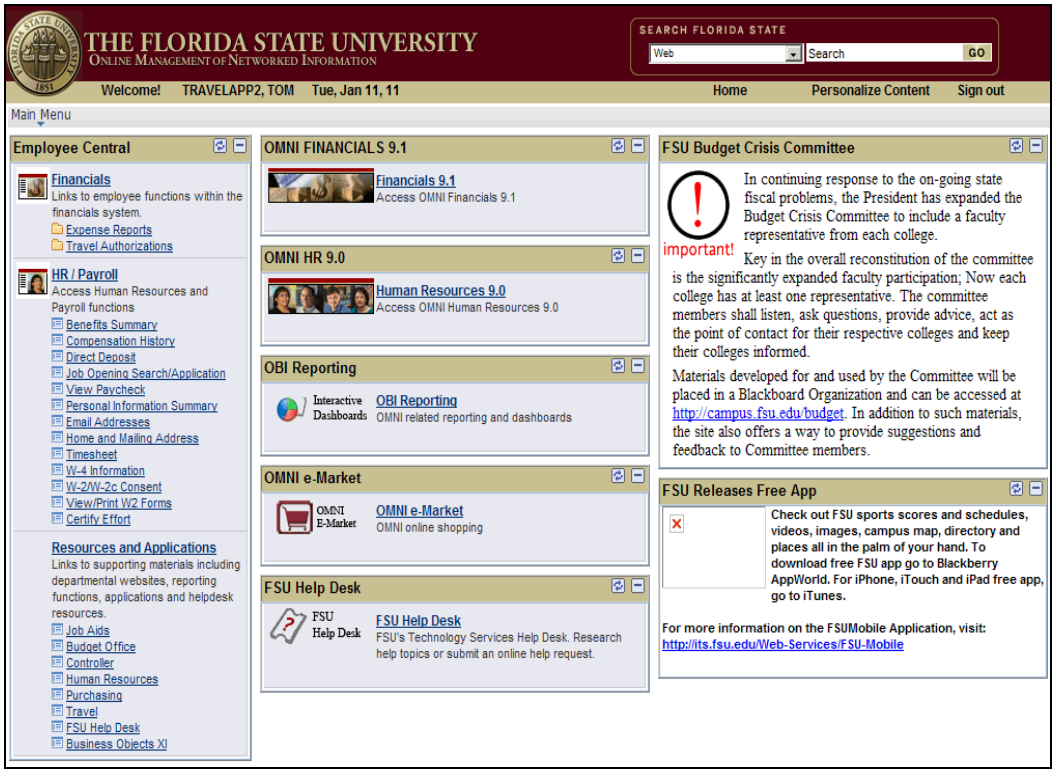
In order to approve travel for a traveler, you must hold the FSU_TE_APPROVER role. This role can be requested through eORR (Online Role Request).

If the traveler is not an FSU employee, a non-employee traveler profile has to be entered by the Accounts Payable office prior to this step. Please contact Accounts Payable for additional information regarding setup for non FSU employee travelers.

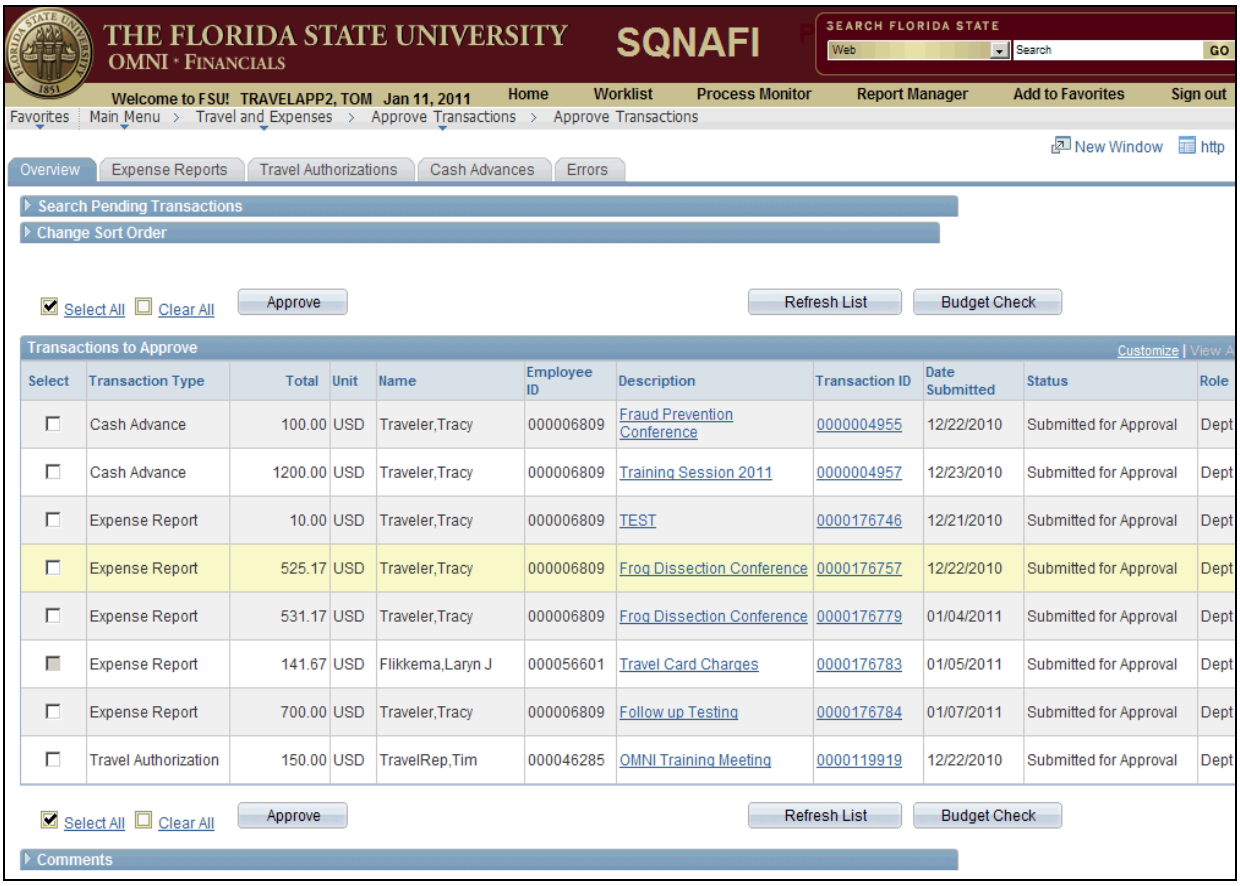
Procedure

Scenario:
In this topic, you will learn the steps to approve Travel actions (i.e. Travel Authorizations, Cash Advances, and Expense Reports).

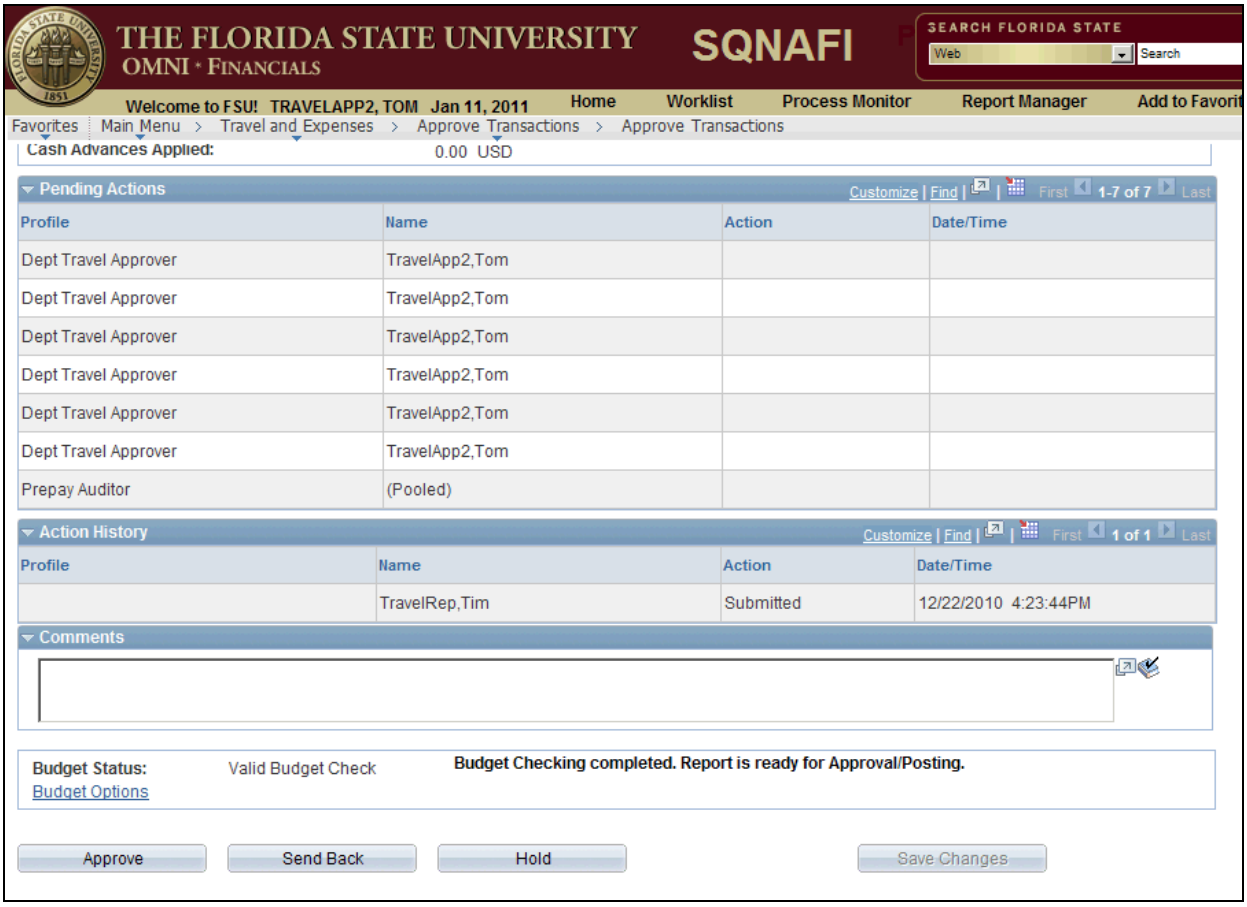
Key Information:
Travel Action Information



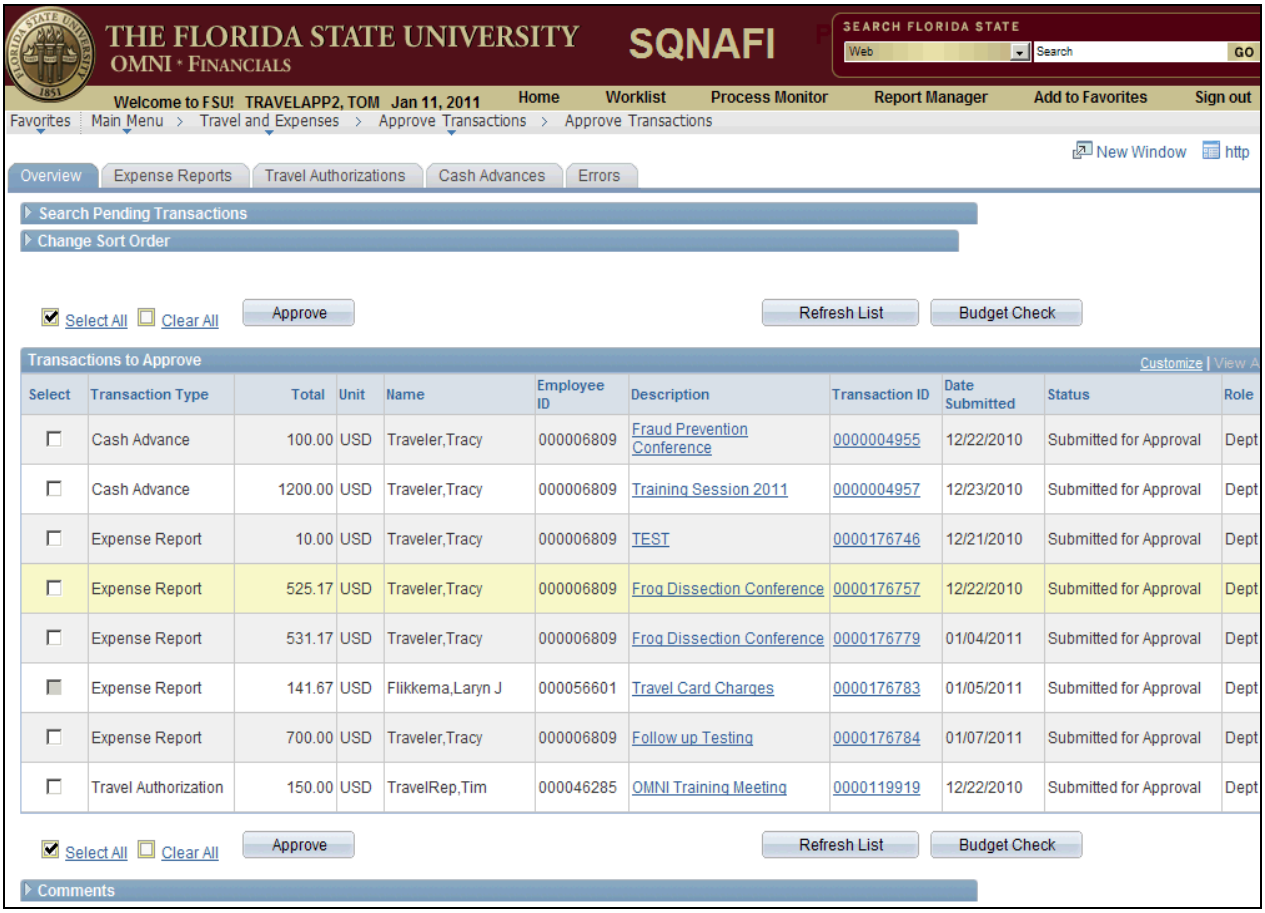
Step	Action
1.	Click the **Financials 9.1** link. Financials 9.1
2.	Click the **Main Menu** button. Main Menu
3.	Hover over Travel and Expenses, then Approve Transactions, and click the **Approve Transactions** menu. Approve Transactions
4.	Approvers will have greater functionality using the **Approve Transactions** interface than by using the **Worklist**.
5.	Tabs at the top of the screen can be used to organize all the transaction types you have to approve.
6.	The **Overview** tab allows you to view all Travel actions that need your approval.
7.	The **Expense Reports** tab allows you to view only Expense Reports that need your approval.
8.	The **Travel Authorizations** tab allows you to view only T-Auths that need your approval.
9.	The **Cash Advances** tab allows you to view only Cash Advances that need your approval.
10.	The **Errors** tab allows you to view only Travel actions that have errors.



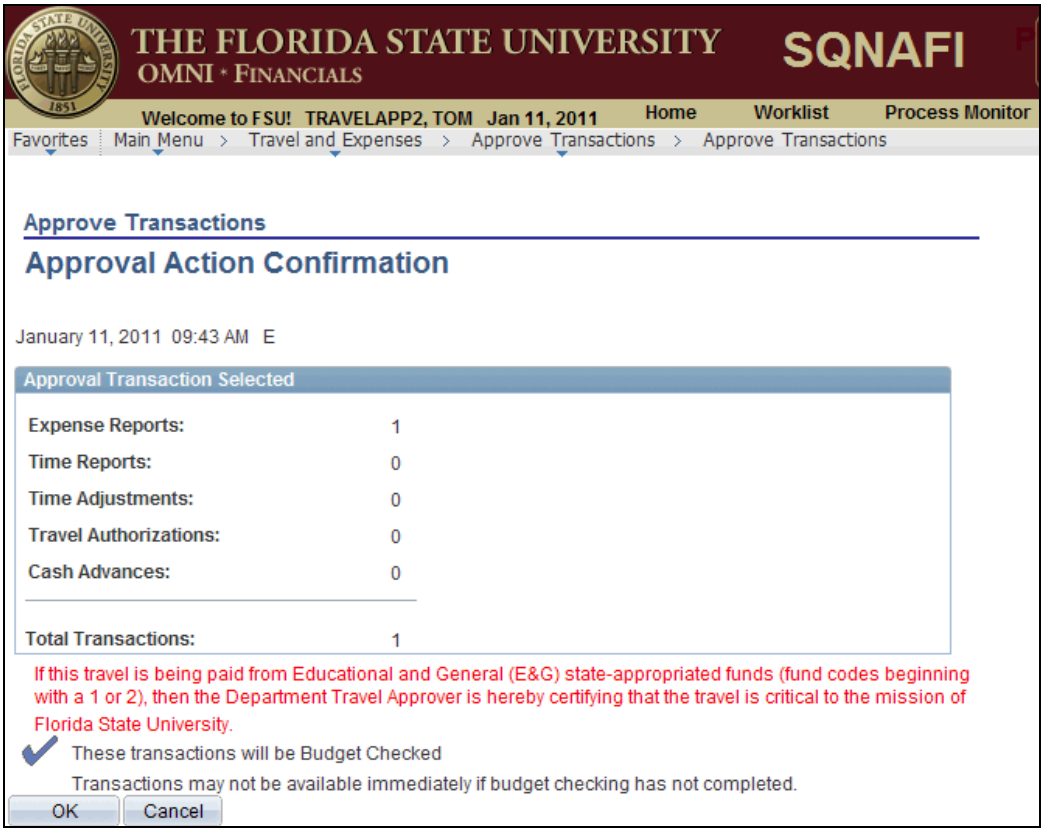
Step	Action
11.	To view a Travel action's details, click either the **Description** or the **Transaction ID** links.
12.	The **Expense Report Summary** screen of the Travel action will now appear. This screen allows you to review all details related to the action, including the Report Description, Comments, Business Purpose, Expense Line details, and the list of approvers.
13.	Use the Budget Check button to Budget Check the report.
14.	The report can be Approved, Sent Back to the traveler, or put on Hold from this screen. Travel actions can only be approved on the summary screens.



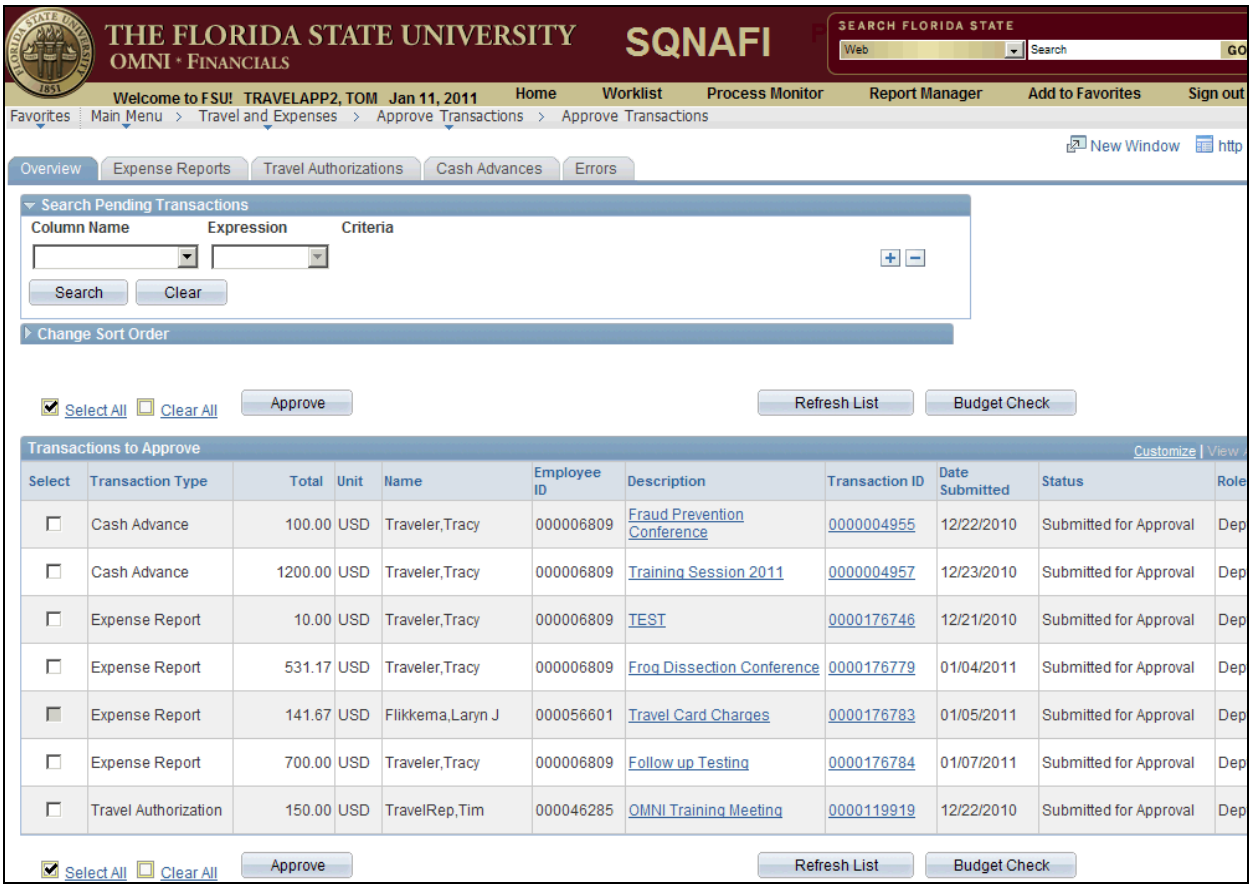
Step	Action
15.	Click the **Return to Approval List** link. Return to Approval List



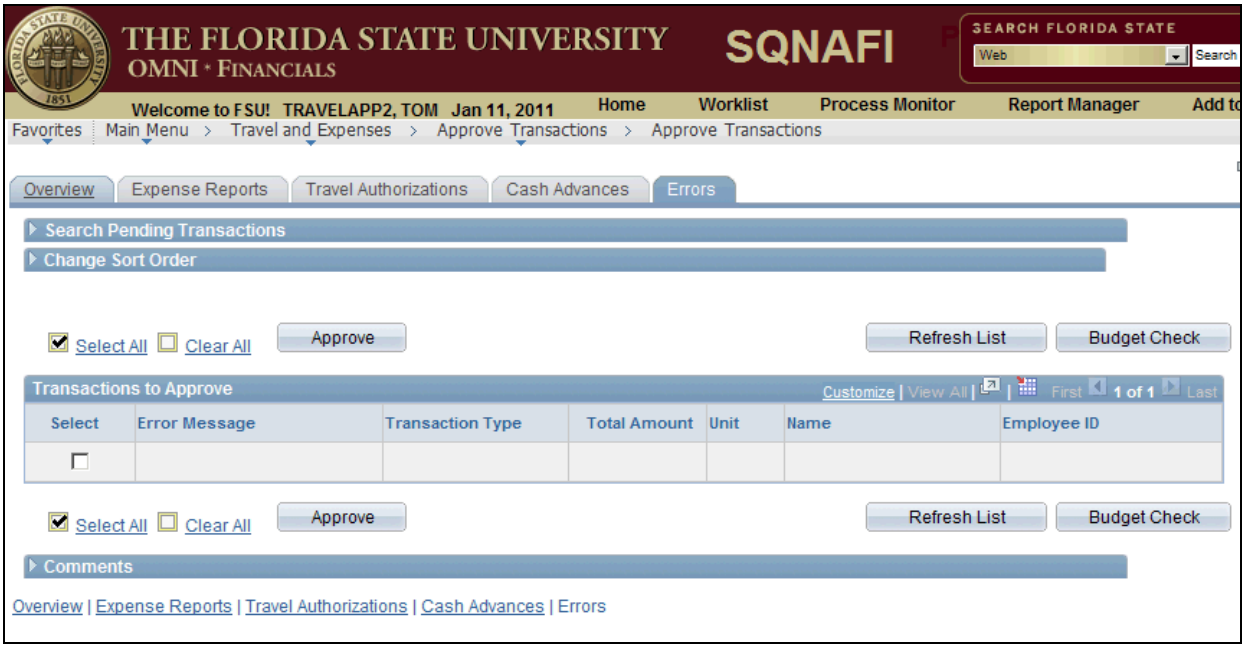
Step	Action
16.	Select an action by clicking the check box under the **Select** column.
17.	If the action has not yet been Budget Checked, click the **Budget Check** button. Budget Check

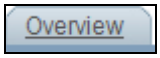


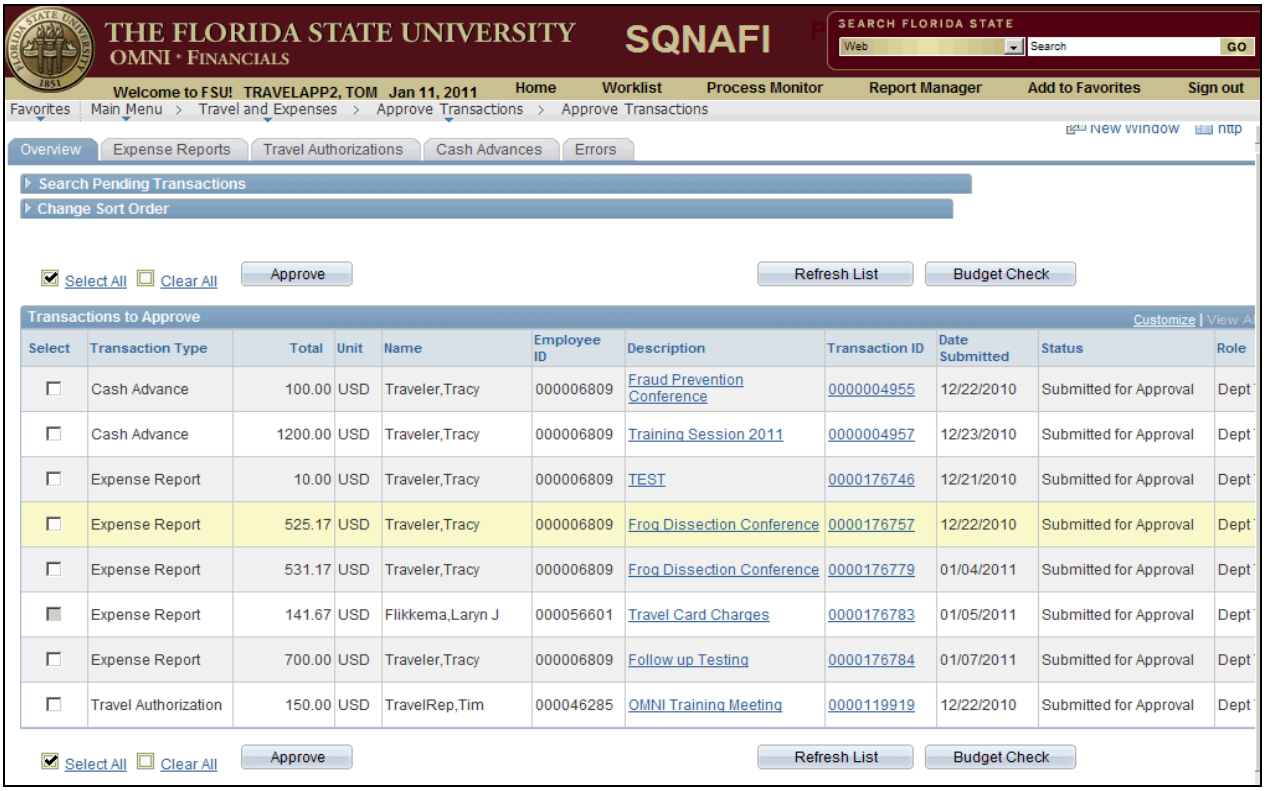
Step	Action
18.	Carefully read the note and then click the **OK** button. OK
19.	The report being budget checked will temporarily disapper from the screen.



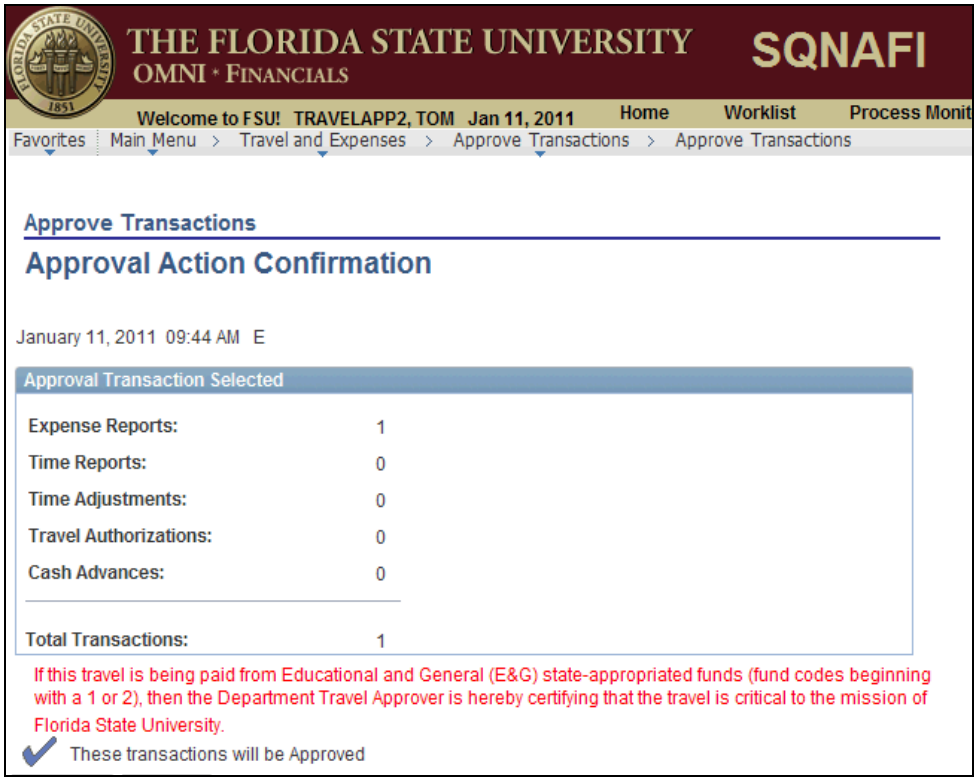
Step	Action
20.	Click the **Refresh List** button and the report should reappear if the budget check process is complete. Refresh List
21.	Before approving, click the **Errors** tab to ensure the report does not have any transactions that have been red-flagged. Errors



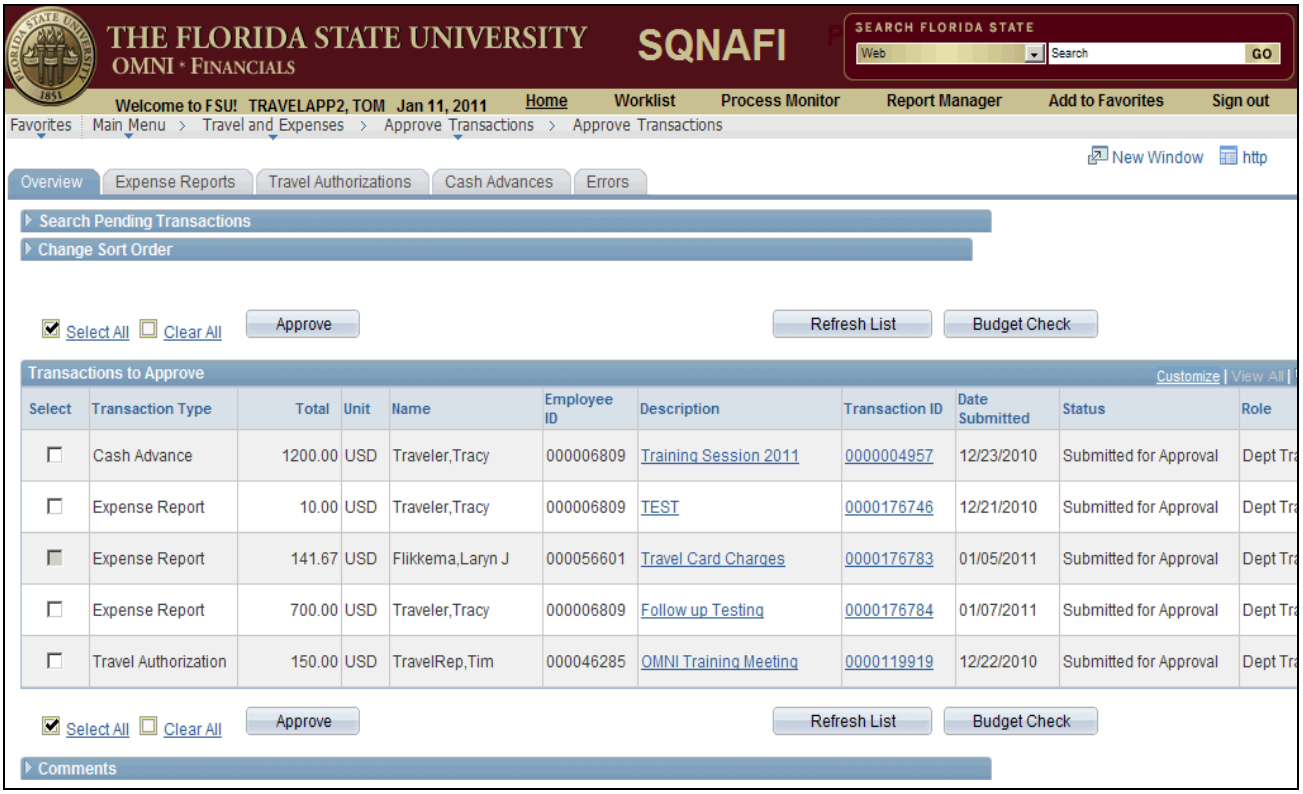
Step	Action
22.	Once you have confirmed that there are no transactions in the **Errors** tab, click the **Overview** tab to return to the list of Travel actions. 



Step	Action
23.	Select the Travel action you wish to approve.
24.	Multiple Travel actions can be approved or budget checked by selecting more than one box in the **Select** column.
25.	Click the **Approve** button. Approve



Step	Action
26.	Click the **OK** button. OK
27.	The approved report no longer appears on the **Approve Transaction Overview** screen.



Step	Action
28.	Click the **Home** link. Home
29.	**Congratulations!** You have completed the topic. **End of Procedure.**