This document is designed for Approvers as a Quick Guide to navigate through the Travel & Expense Management (TEM) system. There are two types of processes for approvers. The first process discussed is the role of the **Traveler**. This occurs when a delegate submits a Travel Authorization or Expense Report on behalf of the approver, i.e. your travel. The second process discussed is the role of **Approver**. This occurs when employees that report to you need approval for their Travel Authorizations or Expense Reports in Workflow. For further details about either TEM or Workflow, please review additional User Documentation available on the University of Alaska Travel Website (www.alaska.edu/travel).

**TEM - Traveler**

*Logging into TEM*

A1. TEM is used when a delegate submits either a Travel Authorization or an Expense Report on the behalf of the traveler. By clicking on <Submit> the approval process will begin through Workflow.

A2. An email will be sent to the traveler to notify them that a document is waiting to be processed. An email asking for approval in TEM will look like this:

Dear Queen Traveler,

A new Travel and Expense document has been entered in your behalf. Please check the link below or log into the Travel and Expense Management System to review and submit the document.

Use the **Travel & Expense Page** to review more detail of the expense

Document Code: AT000616
Entered by: Samantha Banner
Document Purpose: Conference
Document Description: Conference on Sea Turtles
Document Comments: Reimbursement Amount: 270.00 USD
Pay By: N/A
Pay Amount: N/A

The link will direct you to the TEM log in screen.

After clicking on the link, a browser will open and the Welcome Sign In box for TEM will display.

Log into TEM using your University ID number.

Example: User Name: 32929239
Password: 111111

The password can only be six characters long.
Processing TEM Documents
B1. Once logged into TEM, click on the Expense Manager tab. If you have a document waiting for you to submit, the details of that travel will automatically display. Verify the document number is the same number as listed in the email.

B2. Review the travel details.

B3. General Information: Contains the general information associated with the travel.

B4. Itinerary: Detailed information on dates, departure and arrival of travel.

B5. Estimated Expenses: Contains both the reimbursable and non-reimbursable expenses.

B6. Attachments: The University does not use attachments at this time.

B7. Comments: View any comments that may have been entered with regard to this travel.

B8. Related Documents: Related documents such as AT’s or AV’s associated with ER’s.

B9. Status History: Shows the history of the document. Details those that have approved the document and the status of each approval request.

B10. After reviewing the document, click on <Submit> to begin the approval process. If changes need to be made, log out of TEM and inform the delegate of the necessary changes. The delegate has the ability to update the document and resubmit it to the traveler.
Workflow - Approver

Logging into Workflow

C1. Workflow is used when approving either a Travel Authorization or Expense Report for another employee. Several options exist for the approver. They may Approve (Final), Approve and Add Approver, Deny or Return for Correction. When selecting Deny or Return for Correction, the approver is required to add APPROVER COMMENTS to the document.

C2. An email will be sent to the approver to notify them that a document is waiting to be processed. A Workflow email will look like this:

Dear Queen Traveler,

You are listed as the approver for the following Travel and Expense Authorization Report for Samantha Banner. Please log into Workflow to view and approve.

Document Code: A1000617
Entered by: Samantha Banner
Document Purpose: Conference
Document Description: Conference on Orca pod socialization.
Destination: 01-MAY-2014 to 05-MAY-2014, Fairbanks, AK to Anchorage, AK

The link will direct you to the Workflow log in screen.

After clicking on the link, a browser will open and the Sungard Higher Education log in box for Workflow will display.

Log into Workflow using your Banner ID and password. Example: SNAAA (JN, FN, AN, etc.)
**Processing Workflow Documents**

D1. The Approval screen will open with some document details. The options available are: Approve (Final), Approve & Add Approver, Deny or Return for Correction.

D2. Review the travel details.

D3. Any comments by previous approvers will be listed under: Previous Approver Comments. Instructions on the next approval required may be listed here.

D4. Select the appropriate radio button for the Approval Status. Deny and Return for Correction require APPROVER COMMENTS to be added.

D5. For the Approve & Add Approver option, add the Banner ID of the next approver in the Additional Approver field.

D6. For additional information about the travel, click on the Travel & Expense Page link. This will open a new browser window with the TEM Log in page. Follow the TEM instructions listed on page 1 and 2. After reviewing, return to the document in Workflow and choose the appropriate Approval Status.

D7. Click <Complete> to complete the approval for this document.

D8. NOTE: If the above screen shot does not automatically display when logging in, click on the document listed in your Worklist that matches the Document Code listed in the email.