

Mississippi State University

Travel Module

Approver Manual

Workflow Approvals

Workflow Approvals will show you how to respond to an email that a document is awaiting approval, log into Workflow and view an Authorization or Expense Report plus approve, deny, return for correction, or send for additional approval.

Receiving Email Notification to Approve

Introduction

If you are the Approver for an Authorization or Expense Report, you will receive an email similar to the example below indicating you have something to Approve.

From: workflow@sungardhe.com
Subject: Travel & Expense Document Approval Requested by Mark Delfino for TR114630
Date: Thu, 20 Jan 2011 10:51:37 -0500

Dear Sandy Taylor,

You are listed as the approver for the following Travel and Expense Reimbursement Report for Mark Delfino. Please log into [Workflow](#) to view and approve.

Document Code: TR114630
Entered by: Mark Delfino
Document Purpose: Conference
Document Description: PA Banner User Group Conference
Document Comments: None
Expense Reimbursable Amount: 406.34 USD
Cleared Advance Amount: 0.00 USD
Pay Amount: 406.34 USD
Pay By: Check/Direct Deposit

The following comments were entered by Previous Approver(s):
N/A

Steps

1. Click on the [Workflow](#) link in the email to take you to the Workflow Login Page.
2. Log into Workflow.

BANNER WORKFLOW LOGIN

The screenshot shows a web browser window with the URL <https://cfm-workflow01.it.msstate.edu:4443>. The page features a light beige header with the text **BANNER WORKFLOW**. Below the header is a dark blue footer containing the **ellucian** logo and a login form. The login form includes the following elements:

- Username:
- Password:
- Remember my Username
-
-

Username: MSU Net Id

Password: Novell Password

Click “Submit”

Viewing your Worklist

Introduction

Your Worklist shows all the items for your attention.

The screenshot shows a web interface for a Worklist. On the left, there are two vertical navigation menus. The top menu, titled 'Home', contains 'Worklist', 'Workflow Status Search', and 'Workflow Alerts'. The bottom menu, titled 'User Profile', contains 'My Processes', 'User Information', and 'Change Password'. The main content area is titled 'Worklist' and features a table with the following data:

Organization	Workflow	Activity	Priority	Created
Root	Expense Approval for Mark Delfino TR114630	ReimbursementApproval	Normal	20-Jan-2011 10:51:32 AM
	Performing			

Below the table, there is a pagination control showing '1 - 1 of 1' and navigation buttons for 'First', 'Previous', 'Next', and 'Last'. A 'Go to page:' dropdown is set to '1'. A link for 'Show Reserved Items' is located to the right of the pagination. In the bottom right corner, there is a logo for 'SUNGARD HIGHER EDUCATION' with the text 'powered by' and 'Top' above it.

Step

1. Click on the appropriate item in the Workflow column.

ADMINISTRATIVE BANNER/MY STATE LOGIN

You can also access Travel and Expense Documents in your Administrative Banner as well. Click on the “Workflow Tab.” You will see all the Travel and Expense Documents waiting for your approval. **If you don’t want to approve your Travel and Expense Documents via email, you can approve them under your “Workflow Tab” in Administrative Banner.**

The screenshot shows a web browser window with the URL <https://my.msstate.edu/faq.b66cb07f3c74d0c>. The browser tabs include SunGard Hig..., PROD-Admin B..., Banner Workflo..., Travel and Expe..., Initiatives - Offi..., and Banner Workflo... The browser address bar shows a search engine and various coupon codes like Save by the Bell, JCPenney | 15% Off, Groupon, Online Coupons, ShopGold Rewards, Coupon Codes, and Grocery Coupons.

The page header features the My STATE logo and the MISSISSIPPI STATE UNIVERSITY logo. Below the header, there is a navigation bar with tabs: Main, Classroom, Office, Banner, and Workflow (which is highlighted). The user is logged in as Sharon Carr, and the date is August 21, 2015.

The main content area is titled "Worklist" and includes a "Workflow Help" link. A table displays the worklist items:

Organization	Workflow	Activity	Priority	Created
MSU	Expense Approval for Roy Seale TR000373	ReimbursementApproval	Normal	21-Aug-2015 09:40:25 AM

Below the table, there is a pagination control showing "1 - 1 of 1" and buttons for "First", "Previous", "Next", and "Last". A "Go to page:" dropdown menu is set to "1". A "Show Reserved Items" link is also present.

The left sidebar contains a "Home" section with links for "Worklist", "Workflow Status Search", and "Workflow Alerts". Below that is a "User Profile" section with links for "My Processes", "User Information", and "Change Password".

At the bottom right, there is a copyright notice: © 1999-2013 Ellucian Company L.P. and its affiliates.

Completing your Workflow item

Introduction

The Travel and Expense Approval Workflow lets you view the Authorization or Expense Report as well as grant or deny approval.

Worklist

Travel and Expense Approval

Hide Menu Logoff Help

Your approval is being requested for the following Travel & Expense Reimbursement Report.

Traveler:	Mark Delfino
Affiliation:	Faculty member
Entered by:	Mark Delfino
Relocation:	No
Report Type:	TRAVEL
Document Code:	TR114630
Report Date:	20-JAN-2011
Document Purpose:	Conference
Document Description:	PA Banner User Group Conference
Document Comments:	None
Expense Reimbursable Amount:	406.34 USD
Non-Reimbursable Amount:	0.00 USD
Total Amount:	406.34 USD
Budget Available for Reimbursable Expenses:	No
Cleared Advance Amount:	0.00 USD
Pay Amount:	406.34 USD
Pay By:	Check/Direct Deposit
Previous Approver Comments:	N/A

Please select an approval status and enter any appropriate comments.

* Approval Status

- Approve (Final)
- Approve & Add Approver (Enter the approver's Workflow Login ID in the Additional Approver field below.)
- Deny
- Return for Correction

Steps

2. Click on the [Travel and Expense Page](#) link on the Workflow page to take you to the report in Travel and Expense Management.

The screenshot displays the 'Expense Manager' application interface. At the top, there is a navigation bar with 'Expense Manager' on the left and 'Sign Out' and a 'Help' icon on the right. Below this is a toolbar with actions like 'New', 'Refresh', 'Open', 'Save', 'Copy', 'Delete', 'More Actions', and 'Close'. The main content area is titled 'Expense Report' and features a sidebar on the left with options: 'Preview Report', 'Status History', 'Related Documents', and 'Open Items'. The central pane shows a report for 'JC - PA BUG FEB 11 (TR114630 - Submitted)' by 'Mark Delfino (ID: JCDEL)'. The report is divided into several sections: 'General Information' (Report Type: TRAVEL, Report Date: Jan 20, 2011, Pay Amount: 406.34 USD, Purpose: Conference, Relocation: No, Affiliation: Faculty member, Description: PA Banner User Group Conference, Eligible for Rebate: Yes), 'User Activity History' (Initiated By: Mark Delfino (ID:JCDEL), Submitted by: Mark Delfino (ID:JCDEL)), 'Remittance Address' (Business: PO Box 99, Boulder, CO 99887, Pay Source: Check to Business), 'E-Mail Address' (jcdel@mo39079.sungardhe.com), 'Itinerary' (From: Feb 14, 2011 9:00 AM Malvern, Pennsylvania; To: Feb 18, 2011 4:59 PM Pittsburgh, Pennsylvania), and 'Attachments'. At the bottom of the report, there are navigation arrows and page numbers 1, 2, 3, 4. The footer includes 'SUNGARD HIGHER EDUCATION' on the left and 'Travel and Expense Management (Release 8.4)' on the right.

You can page through this report just like the creator but you cannot modify it. Use the arrow keys or numbers at the bottom of the page to view the report.

3. Exit back to your Workflow page.
4. Choose one of the following responses:
 - Approve (Final)
 - Approve and Add Approver (enter approver's Workflow ID)
 - Deny – This option will cancel the Authorization or Expense Report.
 - Return for correction

5. Add Comments if desired.

Note: If the report is returned for correction, you must enter a comment to let the traveler know what needs to be changed.

6. Click the **Complete** button to complete your approval process.

Receiving Email Notification Regarding Approval Status

Introduction

Secondary Approvers will get an email similar to the Primary Approvers email but adding the Prior Approvers comments.

Through each approval process the Creator will receive an email such as those below indicating the change in status. If the document is created by a Delegate, both the Delegate and the Traveler will get these emails.

Email Indicating Document Has Been Forwarded to Another Approver

Dear Gary,

The following Travel & Expense document has been forwarded for an additional approval.

Document Code: TA000025

Document Purpose: Conference

Document Description: None

Document Comments:

Reimbursement Amount: 631.25

The following comments were entered:

This is okay by me, how about you?

Regards,
John Miller

Email Indicating Document Had Final Approval

Dear Gary,

The following Travel & Expense document has been approved by Mark Sanders.

Document Code: TA000025

Document Purpose: city sight

Document Description: None

Document Comments:

Reimbursement Amount: 631.25

The following comments were entered:

Good to Go!

Regards,
Mark Smith