

Approvers Guide for the Travel Request System (TRS)

Authorized Approvers/Supervisors, Fund/Org Approvers and Optional Approvers must review and monitor all travel authorization and reimbursement documents before electronically approving within the TRS. Approval certifies that the travel and expenses were necessary and incurred while on official Mason business.

1. Approvers will receive an email from travel@gmu.edu when a travel document is submitted.

Please [click here](#) to login into Banner Workflow with your Net ID and password to review/approve a travel document for trip: **hstrange-June-Maryland**.

After reviewing the travel document including any previous approvals you may:

1. Approve the document as submitted by selecting **Approve this document** and **Complete** to save your approval and send the document to the next approver.

OR

2. Not approve the document as submitted by selecting **Return to submitter with comments** and **Complete** to return to this document to the submitter. You will use this option to completely disapprove the travel authorization/reimbursement or to request corrections/adjustments to the travel document. Whenever this option is selected, you must use the **Reason** box to explain why you are returning the travel document. Examples include, "travel not approved, inadequate budget" or "this authorization not approved, please charge org xxxxxx instead of org yyyyyy.", or other appropriate comment.

2. Approvers may click on the Workflow link in the body of the email, which will open the Banner Workflow application and prompt the user to enter his/her username (NetID) and password.
3. Approvers will select the document and review the travel information and related expenses.
4. Attached documentation may be viewed by selecting the "Click here to view supporting..." link within the travel document. *Note: Off-campus approvers must use the [Mason Virtual Private Network \(VPN\)](#) in order to view trip documentation files. VPN may be required when connected via wireless on-campus locations.*

Home Worklist Workflow Status Search Workflow Alerts	Worklist  TRS - Document Approver
User Profile My Processes User Information Change Password	<p>Traveler: WORKFLOW TESTUSER Submitter: Workflow Testuser wfctest01@gmu.edu (703)993-4779</p> <p>Comments: [Resubmitted] gnickle testing VPN note 041117</p> <p>Authorized Approver: Geraldene Kirchner-Nickle gnickle@gmu.edu</p> <p>TRS Trip Name: wfctest01-April-2017-Sudan</p> <p style="text-align: right;">Click here to view supporting trip documentation/receipts in a new browser tab.</p>

5. Once reviewed, the approver will select one of the two options located in the "Action" box:
 - a. Approve to approve the document as submitted
 - b. Return to submitter with comments – to return the document to the traveler for corrections. Comments must be entered in the "Reason" box to inform the traveler of requested changes. Approver will use this option to **deny** the traveler's request in its entirety by entering "Trip request is denied" in the "Reason" box.
6. Next, approver must choose from the three options at the bottom of the page:

Approvers Guide for the Travel Request System (TRS)

- a. Complete – to save your selection and move document to next approver

 - b. Save & Close – to save your work and retain the document in your Workflow folder. The document will not move to the next approver or be processed further.
 - c. Cancel – to exit the document without making changes, saving or approving the document and return to the worklist
7. Once completed or returned, the traveler receives an email notification of the document status.
 8. If a trip is returned, the traveler will be able to review the comments, make requested changes and resubmit. If the traveler resubmits the document, the approval process will begin again.
 9. All electronic approvals/returns related to the original document will be date/time stamped at the end of document.

ELECTRONIC APPROVAL HISTORY:
 Geraldene Nickle (gnickle), Supervisor - Approved, 02-MAY-2016, 12:34:06 PM
 Cliff Shore (cshore), Fund/Org Appvr - Approved, 02-MAY-2016, 12:36:07 PM
]
 Trvl Offc-Intl - Notified, 02-MAY-2016, 12:38:12 PM

10. The “Approver Overview” option from the main menu allows Approvers to view related documentation and approval status for trips they have taken action on.

History for "mstrauch-August-2016-Delegate Test"

Activity Date	Performer	Performer Type	Performer Action	Performer Comments	Document	Receipts / Documentation
08/09/2016	hstrange	Initiator	Submitted	Test Only	View Document	Intl Per Diem Test.pdf
08/09/2016	mstrauch	Traveler	Approved			
08/09/2016	lkemp	Supervisor	Returned	Test Only		

back main menu
 