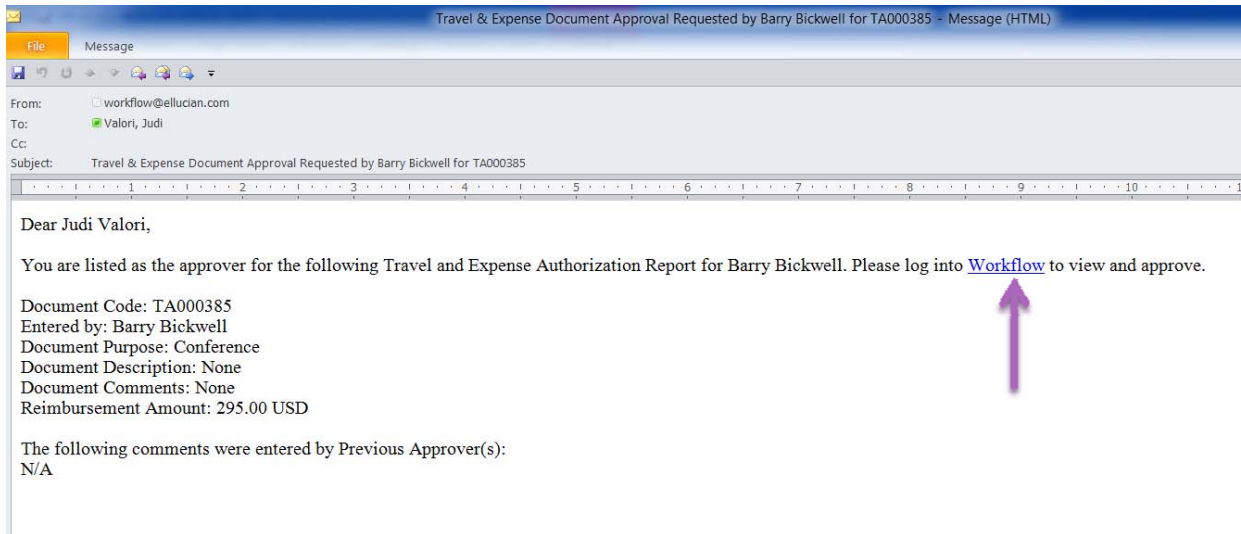




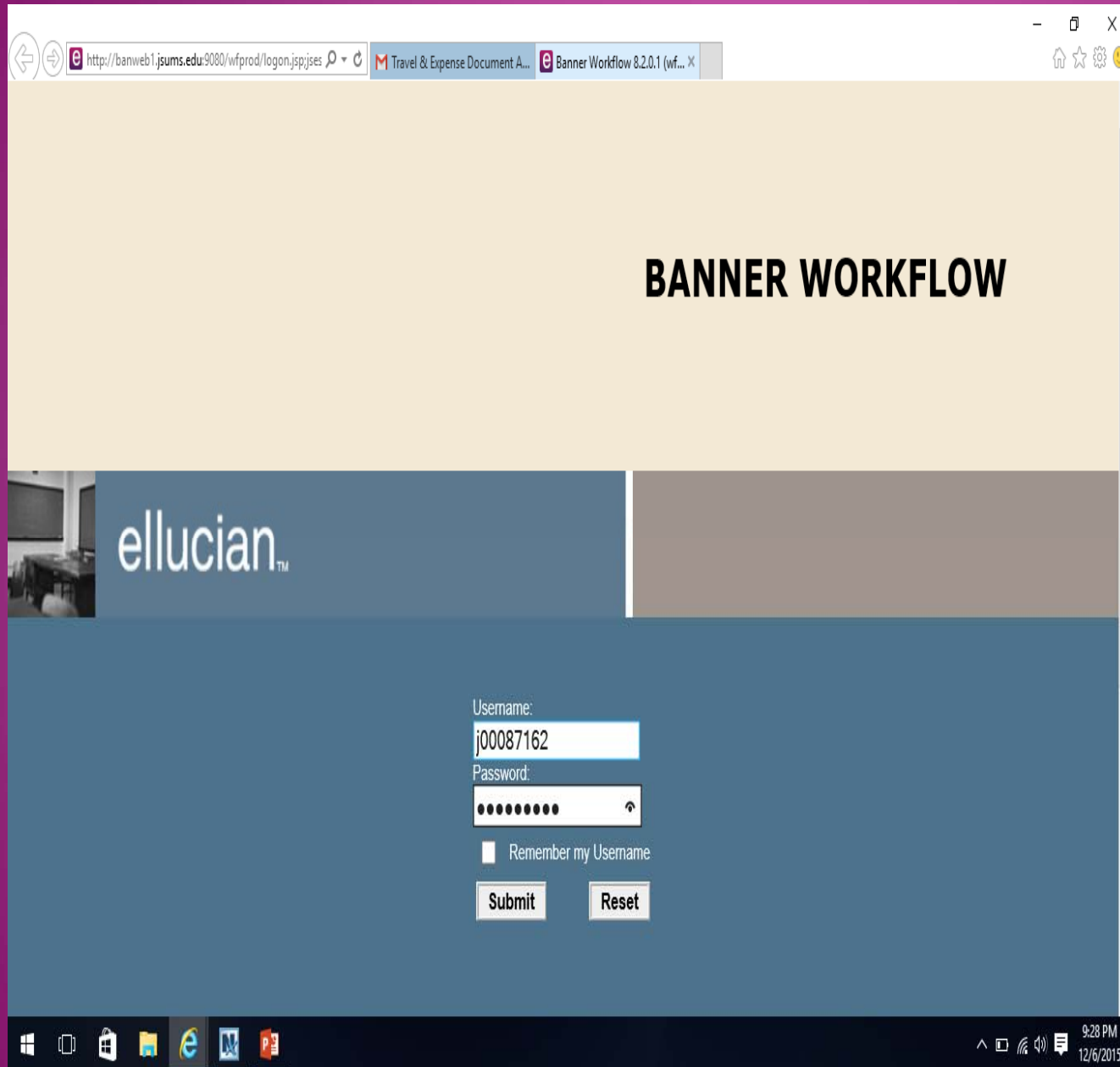
TRAVEL AND EXPENSE APPROVAL PROCESS

Jackson State University



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

- Click on the Workflow link in the email to take you to the Workflow Login Page.
- Log into Workflow and you will be taken directly to the approval page.



LOG INTO BANNER WORKFLOW

- Username: J#
- Password:
received from
bannerpaws

WORK LIST APPEARS



http://banweb1.jsu.edu:9080/wfprod/home/worklist

Travel & Expense Document A...

Banner Workflow 8.2.0.1 (wf... x



Home

[Worklist](#)

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User Profile

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Worklist

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| Organization | Workflow | Activity | Priority | Created | |
|--------------|--|-----------------------|----------|-------------------------|--|
| Root | Authorization Approval for Camille Ross TA001153 Performing | AuthorizationApproval | Normal | 04-Dec-2015 02:05:33 PM | |
| Root | Expense Approval for Dean Joseph TR000758 Ready | ReimbursementApproval | Normal | 03-Dec-2015 03:19:49 PM | |
| Root | Expense Approval for Lois Alexis TR000755 Ready | ReimbursementApproval | Normal | 03-Dec-2015 03:18:25 PM | |
| Root | Expense Approval for Rosemarie Pryce Washington TR000732 Performing | ReimbursementApproval | Normal | 03-Dec-2015 11:08:57 AM | |
| Root | Authorization Approval for Loria Gordon TA001067 Ready | AuthorizationApproval | Normal | 03-Dec-2015 09:58:30 AM | |

[Show Reserved Items](#)

1 - 5 of 5 [First](#) [Previous](#) [Next](#) [Last](#) Go to page: 1

[Top](#)

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9:37 PM
12/6/2015

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

| | |
|---|---------------------|
| Traveler: | Harry Kim |
| Affiliation: | Administration |
| Entered by: | Gary Rindone |
| Relocation: | No |
| Report Type: | Out of State Travel |
| Document Code: | TA000320 |
| Report Date: | 25-OCT-2013 |
| Document Purpose: | Conference |
| Document Description: | None |
| Document Comments: | None |
| Expense Amount: | 1,617.00 USD |
| Per Diem Amount: | 298.00 USD |
| Reimbursable Amount: | 1,915.00 USD |
| Non-Reimbursable Amount: | 564.65 USD |
| Total Amount: | 2,479.65 USD |
| Budget Available for Reimbursable Expenses: | No |
| 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

Approver Comments:

Additional Approver:

- ◉ Click on the Travel and Expense Page link on the Workflow page to take you to the report in Travel and Expense Management. You can navigate through this report just like the creator but you cannot modify it except to add attachments and comments. Exit back to your Workflow page to select your approval decision.

Welcome

Sign in to Travel and Expense Reporting

Please enter your User Name and Password.

User Name: J000000000 (Your J#)

Password: 6 digit PAWS Pin

Sign In

Review Page

Expense ManagerSign Out

Authorization Report

Preview Report >

Attachments

Status History

Related Documents

Actions

NewRefreshOpenSaveCopyDeleteMore ActionsClose

New York 11-15-13 (TA000320 - Submitted)

Harry Kim (ID: A00010905)

General Information

| | | | | | |
|--------------|---------------------|--------------|--------------|--------------|----------------|
| Report Type: | Out of State Travel | Report Date: | Oct 25, 2013 | Pay Amount: | 1,915.00 USD |
| Purpose: | Conference | Relocation: | No | Affiliation: | Administration |
| Description: | | | | | |

User Activity History

| | |
|----------------------|-----------------------------|
| Initiated By: | Gary Rindone (ID:A00010704) |
| Sent to traveler by: | |
| Submitted by: | Gary Rindone (ID:A00010704) |

E-Mail Address

profilecomp@collegeboard.org

Itinerary

| | | | |
|-------|-----------------------------------|-----|-------------------------------|
| From: | Nov 15, 2013 7:00 AM West Chester | To: | Nov 22, 2013 2:00 PM New York |
|-------|-----------------------------------|-----|-------------------------------|

Attachments

Comments

Open Items

1234

APPROVAL DECISIONS

- ⦿ Approve (Final) – **NEVER select this option.**
- ⦿ Approve Authorization but Not Advance
- ⦿ Approve and Add Approver (enter approver's J00#)
- ⦿ Deny
- ⦿ Return for correction (If the report is returned for correction, you must enter a comment to let the traveler know what needs to be changed.)
- ⦿ Click the **Complete** button to complete your approval process.

EMAIL TO THE TRAVELER

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 TO THE TRAVELER

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 Sanders

ADDING A PROXY FOR WORKFLOW

The screenshot shows the Banner Workflow 8.2.0.1 user interface. The left sidebar contains a 'Home' menu with 'Worklist', 'Workflow Status Search', and 'Workflow Alerts'. Below it is a 'User Profile' menu with 'My Processes', 'User Information', and 'Change Password'. The 'User Information' page is displayed, showing user details: Logon ID: J00087162, Last Name: Weekly, First Name: Stephanie, Middle Name, Email: stephanie.weekly@jsums.edu, Effective From: 27-Mar-2015 09:27:36 AM, and Effective To. There are links for 'Notifications' and 'Launching'. At the bottom of the user information section are 'Save User Profile' and 'Reset' buttons. Below this is a 'My Roles' table with one row: Organization: Root, Role Name: Approver, Effective From: 27-Mar-2015 09:30:23 AM, Effective To, Type: Primary, and Proxy Assignment: Add Proxy. A 'My Proxies' section is visible at the bottom. The Windows taskbar is at the bottom of the screen.

Home

- Worklist
- Workflow Status Search
- Workflow Alerts

User Profile

- My Processes
- User Information
- Change Password

User Information

Logon ID: J00087162
Last Name: Weekly
First Name: Stephanie
Middle Name:
Email: stephanie.weekly@jsums.edu
Effective From: 27-Mar-2015 09:27:36 AM
Effective To:

[Notifications](#)
[Launching](#)

[Save User Profile](#) [Reset](#)

My Roles

| Organization | Role Name | Effective From | Effective To | Type | Proxy Assignment |
|--------------|-----------|-------------------------|--------------|---------|---------------------------|
| Root | Approver | 27-Mar-2015 09:30:23 AM | | Primary | Add Proxy |

My Proxies

SETTING PROXY DATES

Banner Workflow 8.2.0. x +

banweb1.jsums.edu:9080/wfprod/user/createProxy.do?authorizingUserPrimaryKey=1212401&organizationPrimaryKey

Home
Worklist
Workflow Status Search
Workflow Alerts

User Profile
My Processes
User Information
Change Password

Find user login:

[Advanced Search Options](#)

User Information
Proxy Details

Organization - RoleName: Root - Approver
User:
Effective From: ...
Effective To: ...
Confidential: ☐
Non-Confidential: ☒

[Logoff](#) [Help](#)

[Top](#)
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- CHOOSE THE PERSONS J00# FROM THE LIST
- SELECT DATES (FROM/TO)
- CLICK NON-CONFIDENTIAL
- CLICK SAVE

QUESTIONS/CONCERNS

- ◉ Stephanie Weekly, Travel Coordinator
 - 601-979-0699
- ◉ Kizmet Davis-Esco, Travel Coordinator
 - 601-979-0869
 - Email: travel@jsums.edu

**THIS CONCLUDES THE TRAVEL
APPROVALS TRAINING**

YOU MAY NOW CLICK

