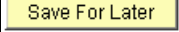


Modify Travel Authorization Request

Overview:



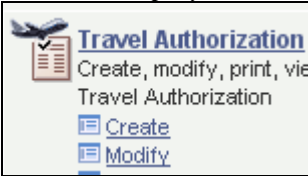
You can modify your own travel authorization request (or one created on behalf of a prospective traveler) during the following conditions:

1. The status of the Travel Authorization request is **Pending** because you clicked on  during the data entry process. In other words, the travel authorization request is not yet completed nor was it submitted for approval. (See Steps 1-10).

2. The Travel Authorization request was sent back to you for revision by the travel approver, after you submitted it for approval. You received notification via email. (See Steps 11-22).

The following steps describe how to locate the travel authorization request to make modifications to it.





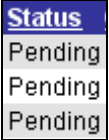
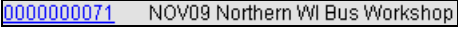
We will also demonstrate an example of a travel authorization request that was sent back to the employee traveler for revision.

1.	<p><u>Example 1: Modify Travel Authorization with Status of Pending (Follow Steps 1-10)</u></p> <p>From the main Menu, click the Employee Self-Service link.</p> 
2.	<p>From the Employee Self-Service menu, click the Travel and Expense Center link.</p> 
3.	<p>From the <i>Employee Travel and Expense Center</i>, Travel Authorization section:</p>  <p>Click the Modify link.</p>


Job Aid

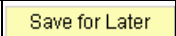
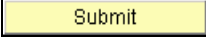
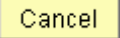

Modify Travel Authorization Request




4.	<p>In the Travel Authorization window, Find an Existing Value tab, the Search by field defaults to Authorization ID.</p>  <p>If you know the Authorization ID number, enter it in the begins with field.</p> <p>If the Authorization ID is unknown, leave the begins with field blank, and click the Search button. </p> <p>For our example, we will assume that the travel authorization ID number is unknown.</p>
5.	<p>To search for a list of existing travel authorization requests by Authorization ID number:</p> <p>Click the Search button. </p>
6.	<p>The Search Results screen displays a list of travel authorization requests by Authorization ID number, in descending order.</p>  <p>The Status column shows Pending because the system only allows you to make changes to a travel authorization request when it is in Pending status.</p>  <p>Note: If no results display, you may not have any travel authorization requests in a Pending status.</p>
7.	<p>In the Authorization ID column, click on the hyperlink of the travel authorization request you wish to modify.</p>  <p>In our example, we will choose Authorization ID 0000000071, described as <i>NOV09 Northern WI Bus Workshop</i>.</p>

8.	<p>In the Travel Authorization Entry screen, make updates to the travel authorization request, as needed.</p> <div style="border: 1px solid black; padding: 5px; margin: 5px 0;"> <p style="margin: 0;">Travel Authorization Entry</p> <p style="margin: 0;">TERESA TRAVELER</p> </div> <p>Note: For details on adding/deleting expenses and/or copying them, refer to the topic, <i>Create Travel Authorization Request for Yourself</i>.</p> <p>For example, to add a new expense, click the Add button. New Expense Add</p>
9.	<p>To save any changes made to the travel authorization request, click the Save for Later button.</p> <div style="border: 1px solid gray; padding: 2px; margin: 5px 0; display: inline-block;">Save for Later</div>
10.	<p>If you wish to submit the travel authorization request for approval, click the Submit button.</p> <div style="border: 1px solid gray; padding: 2px; margin: 5px 0; display: inline-block;">Submit</div> Then, skip to Step 21.
11.	<p><u>Example 2: Email Notification-Sent Back for Revision (Follow Steps 11-21)</u></p> <p>If a travel authorization request was submitted for approval, but sent back to the employee for revision, the employee traveler receives an email notification.</p> <div style="border: 1px solid gray; padding: 5px; margin: 5px 0;"> <p style="margin: 0;">Subject Travel authorization request 0000000073 for 8140 has been sent back for revision.</p> <p style="margin: 0;">The following travel authorization request has been SENT BACK for revision:</p> <p style="margin: 0;">Employee ID: TRAVEL19</p> <p style="margin: 0;">Employee Name: TRAVELER, TERESA</p> <p style="margin: 0;">Submission Date: 2009-05-19</p> <p style="margin: 0;">Travel Auth Description: Teaching & Learning Symposium</p> <p style="margin: 0;">Travel Auth ID: 0000000073</p> <p style="margin: 0;">Business Purpose: Conference</p> <p style="margin: 0;">Reimbursement Amount: 8140 USD</p> </div> <p>The Subject line will identify the Travel Authorization request number (<i>e.g.</i> 0000000073) and the dollar amount (<i>e.g.</i> 8140).</p> <p>If you are already logged into e-Reimbursement, you may click on the hyperlink at the bottom of the email to go directly to the specified travel authorization request.</p> <p>Otherwise, the hyperlink will display a system login screen for e-Reimbursement; then, you can navigate to the travel authorization request.</p>

<p>12.</p>	<p><u>Example of Travel Authorization Request Sent Back for Revision (continued)</u></p> <p>Near the top of the Travel Authorization Entry screen, the system identifies that the travel authorization is Sent Back For Revision, as well as the name of the person who sent it back (e.g. Teresa TravelApprover).</p> <div data-bbox="565 415 1304 579" style="border: 1px solid black; padding: 5px; margin: 10px auto; width: fit-content;"> <p style="text-align: center;">Travel Authorization Entry</p> <p>TERESA TRAVELER User Defaults</p> <p>Sent Back For Revision By: TRAVELAPPROVER,TERESA</p> </div> <p>If the Travel Approver denied an expense due to a policy issue, the <i>Details</i> section displays an Issue column and the reason the expense was denied (e.g. Out of Policy).</p> <div data-bbox="891 678 976 783" style="border: 1px solid black; padding: 2px; margin: 10px auto; width: fit-content;"> <p style="text-align: center;">Issue</p> <p style="text-align: center;">Out of Policy</p> </div>
<p>13.</p>	<p><u>Example of Travel Authorization Request Sent Back for Revision (continued)</u></p> <p>To gain more viewing area on the screen, you can collapse the main Menu on the left.</p> <div data-bbox="370 936 643 968" style="border: 1px solid black; padding: 2px; margin: 10px auto; width: fit-content;"> <p style="text-align: center;">Menu ▢</p> </div> <p>Click the Collapse Menu button ▢ or press (Ctrl+Y).</p>
<p>14.</p>	<p><u>Example of Travel Authorization Request Sent Back for Revision (continued)</u></p> <p>When the main Menu is collapsed, it displays as a computer icon. </p> <p>To display the menu again, click on the icon.</p> <p>For our example, we will not show the main Menu.</p>
<p>15.</p>	<p><u>Example of Travel Authorization Request Sent Back for Revision (continued)</u></p> <p>The comments entered by the Travel Approver will display as a hyperlink below the Authorization ID number.</p> <div data-bbox="370 1434 1049 1545" style="border: 1px solid black; padding: 5px; margin: 10px auto; width: fit-content;"> <p>Authorization ID: 0000000073</p> <p>Please use the Lodging-Group expense instead of Lodging.</p> </div> <p>To view the comments in their entirety, click anywhere on the comments' hyperlink.</p>
<p>16.</p>	<p><u>Example of Travel Authorization Request Sent Back for Revision (continued)</u></p> <p>In the View Approver Comments window, read the approver's comments.</p> <div data-bbox="370 1766 740 1808" style="border: 1px solid black; padding: 2px; margin: 10px auto; width: fit-content;"> <p style="text-align: center;">View Approver Comments</p> </div> <p>When finished viewing, click the Return button. Return</p>

17.	<p><u>Example of Travel Authorization Request Sent Back for Revision (continued)</u></p> <p>In the Travel Authorization Entry screen:</p> <p>Make changes to the Travel Authorization request, as needed.</p>												
18.	<p><u>Example of Travel Authorization Request Sent Back for Revision (continued)</u></p> <p>To move to the bottom of the screen, click the vertical scrollbar on the right side of the screen.</p> <p>The Action History section keeps track of the routing of the travel authorization request to date.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #4a7ebb; color: white;"> <th style="text-align: left;">Profile</th> <th style="text-align: left;">Name</th> <th style="text-align: left;">Action</th> <th style="text-align: left;">Date/Time</th> </tr> </thead> <tbody> <tr style="background-color: #e6e6e6;"> <td></td> <td>TRAVELER,TERESA</td> <td>Submitted</td> <td>05/19/2009 11:56:51AM</td> </tr> <tr> <td>Approver</td> <td>TRAVELAPPROVER,TERESA</td> <td>Sent Back For Revision</td> <td>05/19/2009 11:58:22AM</td> </tr> </tbody> </table>	Profile	Name	Action	Date/Time		TRAVELER,TERESA	Submitted	05/19/2009 11:56:51AM	Approver	TRAVELAPPROVER,TERESA	Sent Back For Revision	05/19/2009 11:58:22AM
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19.	<p><u>Example of Travel Authorization Request Sent Back for Revision (continued)</u></p> <p>To save your changes, click the Save for Later button. </p>												
20.	<p><u>Example of Travel Authorization Request Sent Back for Revision (continued)</u></p> <p>To resubmit your travel authorization request for approval, click the Submit button. </p>												
21.	<p>In the <i>Travel Authorization</i>, Submit Confirmation window, the Travel Authorization Totals are displayed.</p> <div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <p style="margin: 0;">Submit Confirmation</p> <p style="margin: 0;">TERESA TRAVELER</p> <p style="margin: 0; background-color: #d3d3d3; padding: 2px;">Travel Authorization Totals</p> </div> <p>Verify the estimated dollar amounts. If incorrect, click  to return to the travel authorization entry screen.</p> <p>Note: This is your <u>final opportunity</u> to cancel.</p>												
22.	<p>To OK the travel authorization request totals, and submit for approval, click the OK button. </p>												

<p>23.</p>	<p>After submission, the travel authorization reappears in <i>View</i> mode.</p> <p>In the <i>View Travel Authorization</i>, Travel Authorization Details screen:</p> <div data-bbox="370 310 889 457" style="border: 1px solid black; padding: 5px;"> <p>View Travel Authorization</p> <p>Travel Authorization Details</p> <p>TERESA TRAVELER</p> </div> <p>The Authorization ID number remains the same (e.g. 0000000073).</p> <p>The Status field reads, <i>Submission in Process</i>.</p> <p>Note: Now you will not be able to modify this travel authorization request unless the travel approver sends it back again for revision.</p>																														
<p>24.</p>	<p>Scroll down to the bottom of the screen. To return to the search screen:</p> <p>Click the Return to Search button. </p>																														
<p>25.</p>	<p>In the <i>Travel Authorization</i>, Search Results screen:</p> <div data-bbox="370 898 1484 1140" style="border: 1px solid black; padding: 5px;"> <p>Search Results</p> <p>View All First ◀ 1-4 of 4 ▶ Last</p> <table border="1"> <thead> <tr> <th>Authorization ID</th> <th>Description</th> <th>Name</th> <th>EmplID</th> <th>Status</th> <th>Creation Date</th> </tr> </thead> <tbody> <tr> <td>0000000073</td> <td>Teaching & Learning Symposium</td> <td>TRAVELER,TERESA</td> <td>TRAVEL19</td> <td>Submitted</td> <td>05/19/2009</td> </tr> <tr> <td>0000000072</td> <td>Field work at Elvers Creek</td> <td>TRAVELER,TERESA</td> <td>TRAVEL19</td> <td>Pending</td> <td>05/19/2009</td> </tr> <tr> <td>0000000071</td> <td>NOV09 Northern WI Bus Workshop</td> <td>TRAVELER,TERESA</td> <td>TRAVEL19</td> <td>Pending</td> <td>05/19/2009</td> </tr> <tr> <td>0000000067</td> <td>APR09 Training Conf in SC</td> <td>TRAVELER,TERESA</td> <td>TRAVEL19</td> <td>Approved</td> <td>04/21/2009</td> </tr> </tbody> </table> </div> <p>The Status indicates, <i>Submitted</i>, for the travel authorization request you resubmitted for approval.</p> <p>Reminder: You are only allowed to modify travel authorization requests that are in a <i>Pending</i> status.</p>	Authorization ID	Description	Name	EmplID	Status	Creation Date	0000000073	Teaching & Learning Symposium	TRAVELER,TERESA	TRAVEL19	Submitted	05/19/2009	0000000072	Field work at Elvers Creek	TRAVELER,TERESA	TRAVEL19	Pending	05/19/2009	0000000071	NOV09 Northern WI Bus Workshop	TRAVELER,TERESA	TRAVEL19	Pending	05/19/2009	0000000067	APR09 Training Conf in SC	TRAVELER,TERESA	TRAVEL19	Approved	04/21/2009
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<p>26.</p>	<p>To return to the main Menu, click the Home hyperlink, located at the top right portion of the screen. Home</p>																														
<p>27.</p>	<p>You have successfully modified a travel authorization request with a status of <i>Pending</i>, and submitted it for approval.</p> <p>End of Procedure.</p>																														