Banner Workflow Reference Guide

Banner Workflow is the software the university uses to obtain electronic signatures. In order to approve the travel document that was created in Travel & Expense Management (TEM) the approver has to click the link from the email or copy and paste it into a web browser. The following steps will have to be followed to approve the travel authorization or travel reimbursement. The travel document can be viewed in TEM by clicking on ‘Travel & Expense Document Details’ at the top of the page.

Travel Approval Process

Approving Travel Authorizations (TA) and Travel Reimbursements (TR)

1. Click the Authorization Approval or Expense Approval
1. Click the radial button next to approve
2. Click complete at the bottom (the page does time out and will not record the responses selected)
Travel Return for Correction Process

Returning a TA or TR for correction

1. Click radial button Return for Correction
2. Click in the box next to Approver Comments and add a comment for the return
3. Click Complete at the bottom of the page (the page does time out and will not record the responses selected)
Travel Document Details

Document Details
1. Click Travel & Expense Document Details in Banner Workflow at the top of the page
2. Close the browser window when done.
3. Process the Approval or Return for Correction.

There are two locations to view the document information:
- Links on the left (Preview Report, Attachments, Status History and Related Documents)
- Numbers at the bottom (to view expense funding information)

Approval Path
- Travel Services Department
- Research (if applicable)
- Traveler (if applicable)
- Budget Officer
- Travel Services Department