



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

The screenshot displays the Banner Workflow Worklist interface. On the left is a navigation menu with sections: Home (Worklist, Workflow Status Search, Workflow Alerts), User Profile (My Processes, User Information, Change Password), and Administration (User Management, Role Management). The main area shows a 'Worklist' header with 'Logoff' and 'Help' links. Below is a table with columns: Organize (Root), Workflow (Authorization Approval for TA18, Performing), Activity (AuthorizationApproval), Priority (Normal), and Created (02-Apr-2018 01:29:11 PM). A pagination bar shows '31 - 31 of 31' with 'First', 'Previous', 'Next', and 'Last' buttons, and a 'Go to page: 4' dropdown. A 'Search' section contains a search form with fields for Workflow Organization, Workflow Specifics Name, Activity Name, Created (with calendar icons), Priority (radio buttons for Urgent, High, Normal, Low, None), and State (radio buttons for Overdue, Lagging). Search, Clear Search, and Reset buttons are at the bottom of the form. A 'Show Reserved Items' link is on the right. The footer includes a 'Top' link and copyright text: '© 1999-2017 Ellucian Company L.P. and its affiliates.'

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)

Your approval is being requested for the following Travel & Expense Authorization Report.
Click this link, [Travel & Expense Document Details](#) to view document details.

Report Name: [REDACTED] 06/06/18 to 07/23/18 Pau France
Traveler: [REDACTED]
Entered by: [REDACTED]
Document Code: TA18 [REDACTED]
Report Date: 17-FEB-2018
Document Purpose: Other
Document Description: Faculty Exchange (Ecole Supérieure de Commerce de Pau)
Document Comments: None
Affiliation: None
Reimbursable Amount: 0.00 USD
Non-Reimbursable Amount: 2,100.00 USD
Total Amount: 2,100.00 USD

Please select 'Return for Correction' or 'Approve.' Then choose 'Complete' at the bottom of the page to finalize this approval.

1 TRAVELER OR BUDGET OFFICER APPROVAL

Return for Correction - Enter reason for return in 'Approver Comments' box below: REQUIRED
 Approve

Approver Comments:

----- FOR TRAVEL OFFICE ONLY -----

Approval Requirements and Comments: N/A

Approve and send to NEXT Approver
 Travel Office Approval

NEXT approver (myWSU ID):

----- END OF TRAVEL OFFICE SECTION -----

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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)

Your approval is being requested for the following Travel & Expense Authorization Report.
Click this link, [Travel & Expense Document Details](#) to view document details.

Report Name: [REDACTED] 06/06/18 to 07/23/18 Pau France
Traveler: [REDACTED]
Entered by: [REDACTED]
Document Code: TA18 [REDACTED]
Report Date: 17-FEB-2018
Document Purpose: Other
Document Description: Faculty Exchange (Ecole Supérieure de Commerce de Pau)
Document Comments: None
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Reimbursable Amount: 0.00 USD
Non-Reimbursable Amount: 2,100.00 USD
Total Amount: 2,100.00 USD

Please select 'Return for Correction' or 'Approve.' Then choose 'Complete' at the bottom of the page to finalize this approval.

1 TRAVELER OR BUDGET OFFICER APPROVAL

Return for Correction - Enter reason for return in 'Approver Comments' box below: REQUIRED
 Approve

Approver Comments: **2** [REDACTED]

----- **FOR TRAVEL OFFICE ONLY** -----

Approval Requirements and Comments: N/A [REDACTED]

Approve and send to NEXT Approver
 Travel Office Approval

NEXT approver (myWSU ID): [REDACTED] D323F324

----- **END OF TRAVEL OFFICE SECTION** -----

3

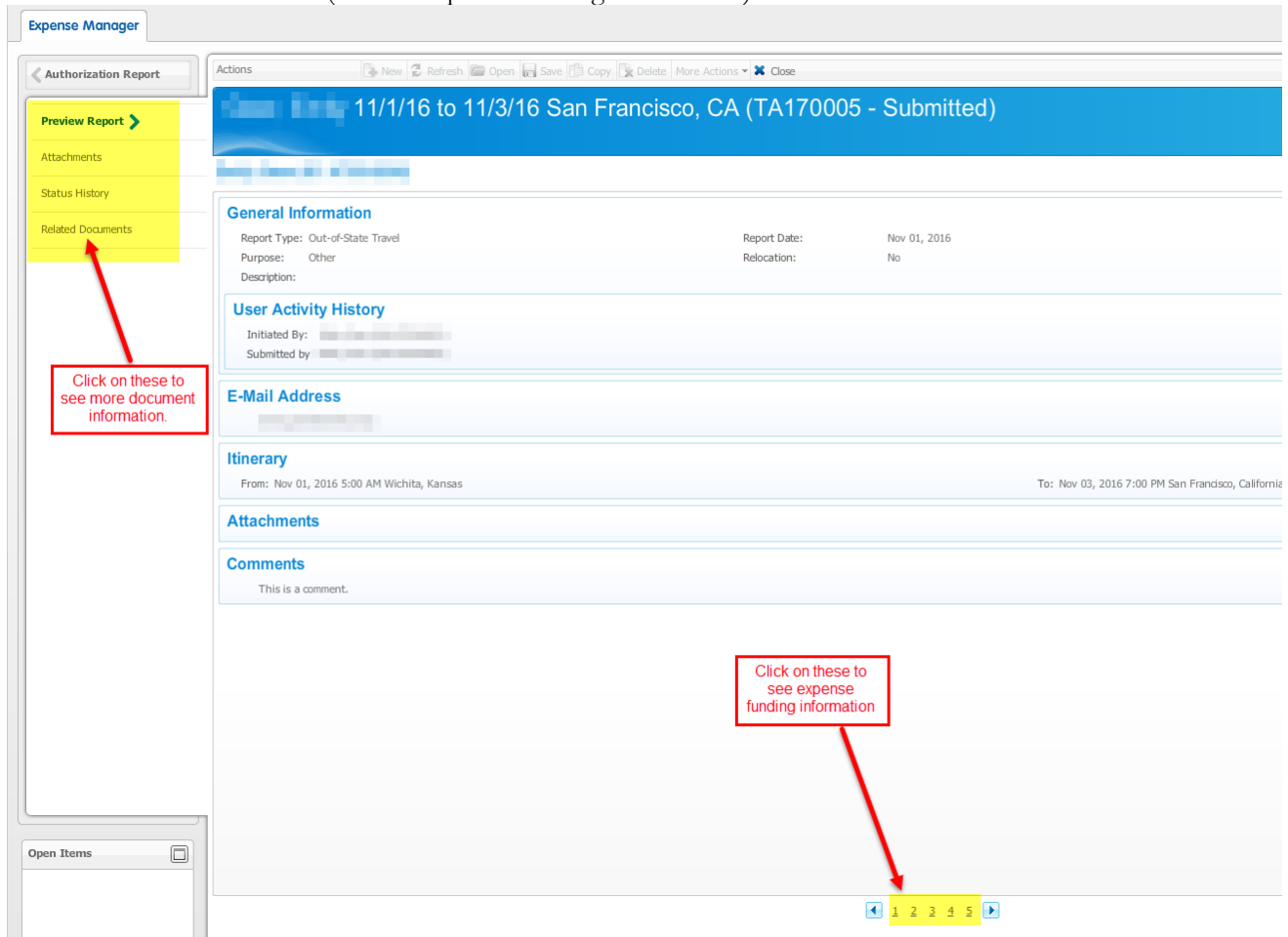
Travel Document Details

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