Approving Travel Authorizations

Purpose: Use this document as a reference for budget checking and approving travel authorizations in ctcLink.

Audience: Finance and Business Office staff

- You must have at least one of these local college managed security roles:
- ZZ Expenses Approval <this is a dynamic role that is automatically applied to the user profiles of Supervisors and Travel & Expenses Assigned Approvers>
- ZZ Expenses Manager
- ZZ Expenses Processing

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

Approving Travel Authorizations

Navigation: Travel and Expenses > Approve Transactions > Approve Expense Transactions

1. On the **Approve Expense Transactions** page, select the **Travel Authorizations** tab to review and approve multiple Travel Authorizations. The **Travel Authorizations** tab will display.

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2. On the **Travel Authorizations** tab, select the **Description** link or **Transaction ID** link to navigate to the **Travel Authorization Summary** page. The **Travel Authorization Summary** page will display.

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Use the Travel Authorization Summary page to review a summary of travel authorization expenses. Managers and project managers who have authority to approve travel authorizations use this page. 3. On the **Travel Authorization Summary** page, select the **Expense Type** link to access the **Expense Detail** page to view information about each expense line. The **Expense Detail** page will display.

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- 1 If you have finished reviewing the information on the Travel Authorization and are ready to make an approval action, you may need to **Budget Check** the transaction first. Whether budget checking is needed depends on local BU configuration and the stage of approvals the Travel Authorization is in.
- 5. On the **Travel Authorization Summary** page, select the **Budget Options** link. The **Commitment Control Details** pagelet will display.

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6. On the **Commitment Control Details** pagelet, select **Budget Check** to initiate the Travel Authorization budget check.

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- 7. On the **Commitment Control Details** pagelet, note that the **Budget Checking Header Status** has changed and additional fields are displayed.
- 8. Select **OK** after the budget check has completed to close the **Commitment Control Details** pagelet.

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- 9. If you are ready to make an approval action for the Travel Authorization, select the desired approval action button at the bottom of the screen. In this example, **Approve** was selected. The **Save Confirmation** pagelet will display.
- 10. Select the **Return to Travel Authorization Summary** link to return to the summary page.

The buttons available depend on local BU configuration and the stage of approvals the Travel Authorization is in.

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11. On the **Save Confirmation** pagelet, select **OK**. The Travel Authorization has been successfully approved.

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- If you received an error message and are not able to approve the report, go to the **Comments** section, add the following comments "Error in approving report please review errors and resubmit once fixed". Select the **Send Back** button to sent a report back to the employee to review the error. Once fixed, the employee can submit the report back into the approval list.
- 12. Process complete.