TEM Approvals "Quick Sheet"

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How to do a TEM approval, step by step:

Email: Open the "approval required" email.

- The subject line shows the traveler name and the document number(s) you're being asked to approve:
    - Doc# starts "TA" = travel authorization
    - Doc# starts "TV" = travel advance *(may be submitted with a TA)*
    - Doc# starts "TR" = travel reimbursement
- Review details in the email body: Purpose, Description, Comments, Reimbursable Amount, etc.
- Click on the "Workflow" link.

Workflow: Review details in Workflow.

- If a login screen appears, log in using your universal username and password.
- Workflow opens. Review the expense subtotals and other details.
- Scroll down to the bottom of the page, click on the "Travel and Expenses Page" link.

TEM: Review additional details in TEM.

- If a login screen appears, log in using your universal username and password.
- The TEM review screen opens. Note links on left: "Preview Report", "Status History", "Related Documents".
- You will start at "Preview Report", page 1. Review the traveler's Itinerary, plus other details.
- Go to page 2 by clicking on the "2" at the bottom of the screen. Reimbursable expense items are listed here. Click on the "Expand All" link. Review the details for each expense item.
- Click on "3" at the bottom of the screen. The Funding Summary for the reimbursable amount appears here.
- Click on "4" at the bottom of the screen. If non-reimbursable expense items were entered, they will be listed here. Review them by clicking on the "Expand All" link.
- *(optional)* To review a history of previous approvals, click on the "Status History" link.
- *(optional)* If you are approving a TR, you can compare it to the TA that preceded it by clicking on the "Related Documents" link. This will list the TA and all TR's submitted against it. To review details on any of those documents, double-click on that document number.

Nolij: Review attachments in Nolij.

- Open a 2nd browser window (to compare Nolij attachments to TEM details). In the 2nd window, log into myWestern, click on "Employee" - under "Technology Tools", click on "Nolijweb". Nolij will open.
- Select "Travel Documents – Travel" from the list in the top-right hand side of screen.
- Type the travel doc# into the "Report ID" field (uppercase). Hit <Enter>.
- A folder for that doc# will appear in the pane underneath. Click on that folder. Attachments copied into the folder will appear, listed in a pane to the right.
- To view any of those documents, single-click on it: a view opens in a pane to the right. Or...to open any of those documents, double-click on it.
- Review the attachments, comparing them to details on the TEM screen.
- ENSURE ATTACHMENTS ARE LEGIBLE. For example, if a scanned receipts image is hard to read, contact the traveler and ask them to rescan the receipts with a darker toner level.

Action: In Workflow, select "Approve", "Deny", or "Return for Correction", click "Complete".

- Return to Workflow to perform the approval action.
- Click either "Approve", "Deny", or "Return for Correction". *("Deny" stops any further processing of that document. "Return for Correction" allows the traveler to correct and resubmit the document.).*
- If you've selected "Deny" or "Return for Correction", you MUST enter Comments.
- Click on the "Complete" button at the bottom of the page.
- Your approval is complete. You can close Workflow, Nolij, and TEM.

*For more in-depth instructions with screen snapshots, see the **Approver & Proxy User Guide**, available on this page: www.wwu.edu/bservices/travel/tem/resources.shtml*

*For **Approver & Proxy Training classes**, click on "Financial Systems" on this page: http://west.wwu.edu/training/*