

# Travel & Expense Management System (TEM)

## Travel Approval (TA) Process

After providing information to your ISE travel delegate regarding your upcoming travel plans (a form is available for communicating these details), the delegate will initiate the travel approval process by preparing and submitting your TA in the TEM system.

TA approvals will be prompted by email notifications (From: [pleasedonotreply@vt.edu](mailto:pleasedonotreply@vt.edu), Subject: TAE Authorization Traveler/Supervisor Approval Requested by.....) with web links to the workflow requiring attention. Approvers will be given the options to approve, deny or return for correction. They will ensure that travel expenses are necessary to conduct business for the university. Approvals will occur as follows:

1. System check for traveler affiliation with VT and adequate funding,
2. Traveler will certify accuracy, then designate the PID (not email) of their supervisor,
3. Supervisor will certify funding used and purpose of travel,
4. Department will certify necessity of travel for business,
5. If TA is for foreign travel,
  - a. Office of Export & Secure Research Compliance (OESRC) will review,
  - b. and, is charged to a sponsored fund, Office of Sponsored Programs (OSP) project administrator will review,
6. Second System check for adequate funding.

Travelers will receive an email message when all TA approvals are complete (approved travel documents can be accessed from the TEM home screen under **My Travel**).

Travelers and approvers can also log directly into the TEM system at [www.workflow.dmsvt.edu](http://www.workflow.dmsvt.edu), or:

- > Log into **Hokie SPA** (under quick links on VT homepage) using PID and CAS password
- > Select **Hokie Team**
- > Select **TEM Application**, to go to the TEM home screen
- > Select **Approve Travel**, to go to the Worklist to see the status of documents pending approval
- > Click on the document you wish to open.

Once in the workflow document pending approval, you will see a summary of the TA. To see the full four pages of the Travel & Expense document, use the link "**Travel & Expense Page**". There is also a link to "**review the document in Travel and Expense**" in the email notifications. This information will open in a separate browser tab. At the bottom of the screen in this view there are page numbers (1-4) that allow you to navigate to the following information:

- Page 1 – General Information – dates of travel, purpose, amount estimated to be paid, comments
- Page 2 – Reimbursable Expenses – lists estimated travel expenses
- Page 3 – Funding Summary – estimate of total charged to fund(s)
- Page 4 – Non-Reimbursable Expenses – other travel expenses not reimbursable to traveler (paid with a university credit card, fleet vehicle, dis-allowed expenses)

When finished reviewing, close the "Travel and Expense – Review" browser tab to return to the workflow. Select the **Approval Status** (Approve, Deny, or Return for Correction) and enter any necessary **comments**. Then click **Complete**. You will be returned to the Worklist where you can select additional TAs/TRs for approval.

# Travel & Expense Management System (TEM)

## Travel Reimbursement (TR) Process

After providing information to your ISE travel delegate regarding your travel expenses, the delegate will initiate the travel reimbursement process by preparing and submitting your TR in the TEM system.

Similar to TAs, TR approvals will be prompted by email notifications (From: [pleasedonotreply@vt.edu](mailto:pleasedonotreply@vt.edu), Subject: TRE Authorization Traveler/Supervisor Approval Requested by.....) with web links to the workflow requiring attention. Approvers will be given the options to approve, deny or return for correction. They will ensure that travel expenses are accurate and necessary to conduct business for the university.

Approvals will occur as follows:

1. System check for traveler affiliation with VT and adequate funding,
2. Traveler will certify accuracy, then designate the PID (not email) of their supervisor,
3. Supervisor will certify funding used and purpose of travel,
4. Department will certify necessity of travel for business,
5. Accounts Payable Travel Team will audit for accuracy
6. Second System check for adequate funding.

Travelers will receive an email message when all TR approvals are complete indicating the amount of reimbursement and the date of direct deposit.

Travelers and approvers can also log directly into the TEM system at [www.workflow.dmsvt.edu](http://www.workflow.dmsvt.edu), or:

- > Log into **Hokie SPA** (under quick links on VT homepage) using PID and CAS password
- > Select **Hokie Team**
- > Select **TEM Application**, to go to the TEM home screen
- > Select **Approve Travel**, to go to the Worklist to see the status of documents pending approval
- > Click on the document you wish to open.

Once in the workflow document pending approval, you will see a summary of the TR. To see the full four pages of the Travel & Expense document, use the link “**Travel & Expense Page**”. There is also a link to “**review the document in Travel and Expense**” in the email notifications. This information will open in a separate browser tab. At the bottom of the screen in this view there are page numbers (1-4) that allow you to navigate to the following information:

- Page 1 – General Information – dates of travel, purpose, amount to be paid, comments
- Page 2 – Reimbursable Expenses – lists actual travel expenses
- Page 3 – Funding Summary – total to be charged to fund(s)
- Page 4 – Non-Reimbursable Expenses – other travel expenses not reimbursable to traveler (paid with a university credit card, fleet vehicle, dis-allowed expenses)

When finished reviewing, close the “Travel and Expense – Review” browser tab to return to the workflow. Select the **Approval Status** (Approve, Deny, or Return for Correction) and enter any necessary **comments**. Then click **Complete**. You will be returned to the Worklist where you can select additional TAs/TRs for approval.