Travel & Expenses Workflow – After Travel

Workflow is the electronic approval process used for Travel & Expense transactions. When a transaction is submitted, the system routes it through predefined electronic workflow levels based on the Department ID used on the transaction. If a Project ID is used, an additional approval level is added. The approver assignments are maintained by the institutional Expense Administrator.

Is there an APPROVED Travel Authorization and/or Cash Advance for this travel?

No

Choose one of the following:
- EX.020.100 - Creating an Expense Report from Scratch
- EX.020.101 – Creating an Expense Report from a Template
- EX.020.103 – Copying an Existing Expense Report
- EX.020.104 – Creating a Fluid Expense Report

Yes

Choose the following that apply:
- EX.020.102 – Creating an Expense Report from a Travel Authorization
- EX.020.109 – Applying a Cash Advance to an Expense Report
- EX.020.108 – Applying a Cash Advance & Travel Authorization to an Expense Report
- EX.020.105 – Creating a Fluid Expense Report from a Travel Authorization

Does the transaction need to be withdrawn to edit or delete?

Yes

EX.020.114 – Withdrawing an Expense Report

No

EX.070.012 – Printing an Expense Report

Does the transaction need to be deleted?

Yes

EX.020.112 – Deleting an Expense Report

No

EX.020.111 – Modifying an Expense Report

Email Notification Sent to Approver

Traveler

Email Notification Sent to Traveler

Transaction Denied

Expense Report Approved for Payment

Approver

Denied

Department Manager 1 Reviews

Approved

Department Manager 2 Reviews (Optional)

Project/Grant Reviews (Optional)

Reviewer Reviews (Optional)

Accounts Payables Auditor Reviews

Approved

Need to Print?

No

Yes

EX.020.114 – Withdrawing an Expense Report

Does the transaction need to be deleted?

Yes

EX.020.112 – Deleting an Expense Report

No

EX.020.111 – Modifying an Expense Report
Open or create a BPMN diagram

Open an existing BPMN diagram or create a new one using the BPMN stencil.

To access the BPMN stencil, go to Shapes > More Shapes > Flowchart > BPMN Basic Shapes.

Prepare to export

When you’re ready, select Prepare to Export under the Process tab. Next, configure the gateways under the Flow pane settings tab. Finally, select the placeholders on the canvas and choose the appropriate trigger or action from the Flow pane.

Export your diagram to Microsoft Flow

Under the Process tab, select Export to publish the diagram to Microsoft Flow.