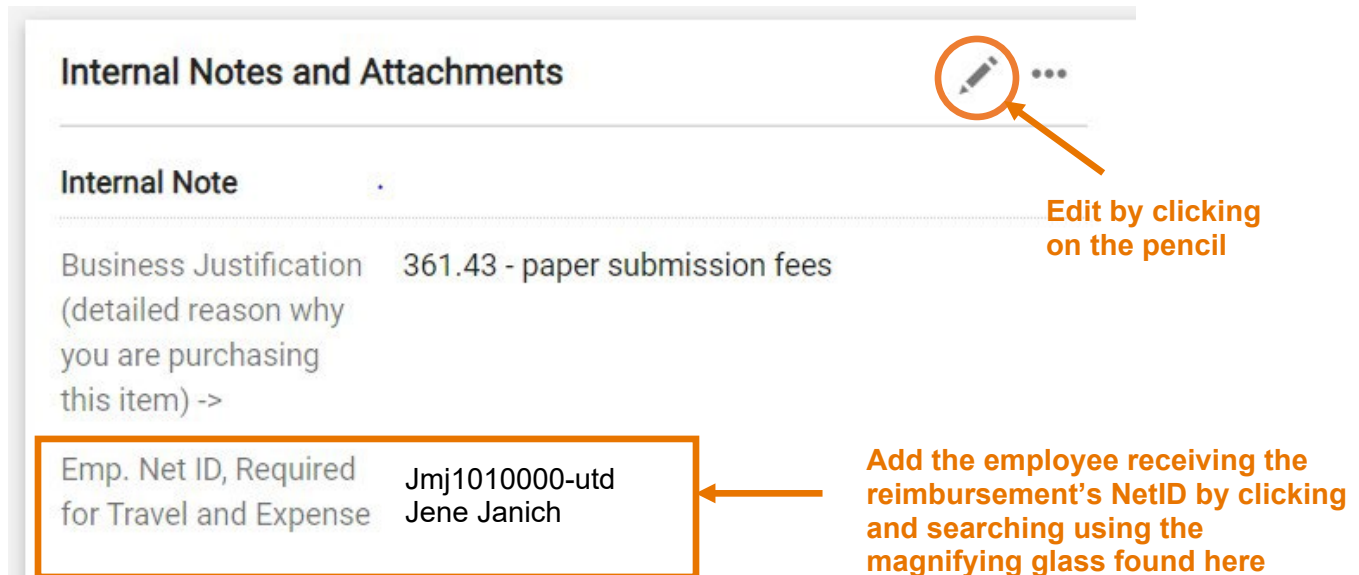


## Supervisory Approvals for Travel and Expenses / Business Expense Reimbursements – Quick Guide

To align eProcurement Workflow with University Policy, the Travel and Expense team will be implementing a new Requisition Workflow Step called Supervisor Review. This step will allow an employee's supervisor to review and approve their Travel

- It will be active on all Employee Travel Vouchers and Employee non-Travel Reimbursement vouchers
- The new workflow will be immediately before the cost center approval. If the same people are in both steps, both approvals are required.
- Supervisors have been pre-loaded. In order to make the connection between the supervisor and the employee, the employee unique id must be added to each Travel and non-Travel Reimbursement vouchers. Not doing the following will cause a workflow error.



**Internal Notes and Attachments**

Internal Note	
Business Justification	361.43 - paper submission fees (detailed reason why you are purchasing this item) ->
Emp. Net ID, Required for Travel and Expense	Jmj1010000-utd Jene Janich

**Edit by clicking on the pencil**

**Add the employee receiving the reimbursement's NetID by clicking and searching using the magnifying glass found here**

- If you have any updates who the supervisor is or who the employees report to, we have a Peoplesoft form available: Employee Self-Service>Forms>Travel and Expense Supervisor. Your Fiscal or Administrative Officer will have to approve it when you submit it. The instructions for filling out this form follow.

### Travel & Expense Supervisor Change Request for eProcurement

The form must be filled out and submitted for all new or changes in employee supervision.

This is a workflow role in eProcurement. The two forms that it effects are the Employee Travel Voucher and the Employee Non-Travel Reimbursement Voucher. This form does not affect anything in the HR module.

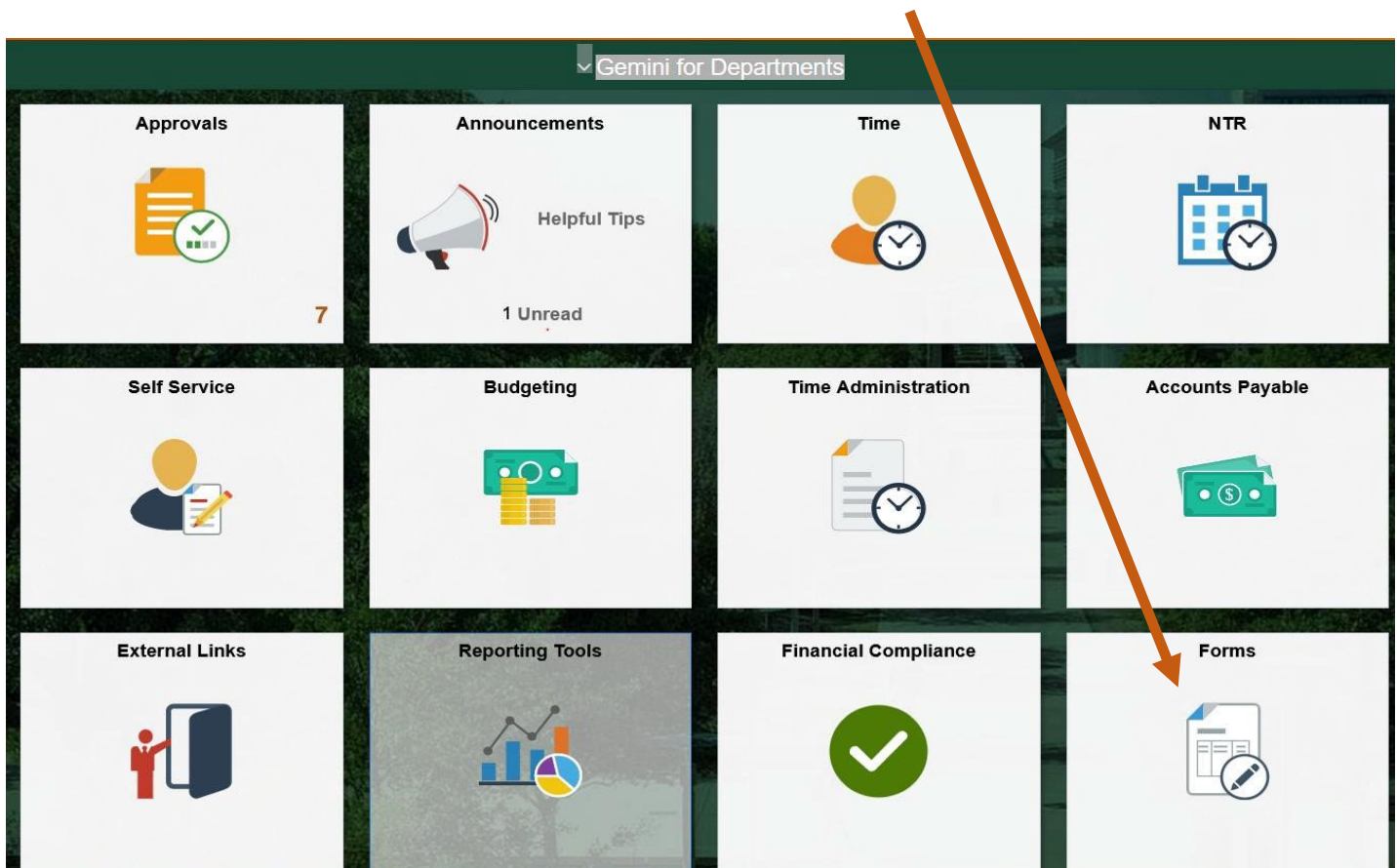
You can add bulk changes as attachments, but every employee must report to the same Fiscal or Administrative Officer. **Please be sure to include all net ids for every employee.**

1. In the subject field put “New Employee” or “Change in Supervision”. This is for the employee **not the supervisor**.
2. Add a due date.
3. Add the employee ID. There is a search button to easily search.
4. The employee department also has a search button. This is also a required field.
5. Employee supervisor field is required.
6. The effective date field is necessary so that we know when the change will be effective. You can add this form in advance.
7. The information area is an extra field in case you need to add any explanation.
8. The attachment tab is optional.

When the form is **saved**, a **submit button** will appear towards the top of the form. The form will then be automatically route to the Fiscal Officer for approval.

For questions regarding this form, please contact Systems administration  
([systemadministration@utdallas.edu](mailto:systemadministration@utdallas.edu)).

To find the form in Peoplesoft fluid, fo to Gemini for Departments and find the Forms tile. Click once.



This is a list of forms that are available. Select “One card and Travel” then “Travel & Expense Supervisor.”

The screenshot shows a mobile application interface. At the top is a dark green header with a back arrow and the text "Gemini for Departments". Below this is a grey bar with a folder icon, the text "Assets", and an upward arrow. A green bar with the text "Asset Trade-In Authorization" follows. Below that is the text "Assets Sale or Transfer Auth". The next section contains a list of items, each with a folder icon, text, and a downward arrow: "Cost Centers", "Budget & Accounting", "One Card and Travel", "Domestic Travel Authorization", "One Card Application Form", "Travel & Expense Supervisor", "Marketplace and Treasury", and "Search/Fill/Approve/Review". Two orange boxes highlight the "One Card and Travel" item and the "Travel & Expense Supervisor" item.

Item	Icon	Arrow
Assets	Folder	Up
Asset Trade-In Authorization		
Assets Sale or Transfer Auth		
Cost Centers	Folder	Down
Budget & Accounting	Folder	Down
One Card and Travel	Folder	Up
Domestic Travel Authorization		
One Card Application Form		
Travel & Expense Supervisor		
Marketplace and Treasury	Folder	Down
Search/Fill/Approve/Review	Folder	Down