

PERCEPTIVE CONTENT – REQUEST FOR TRAVEL AND TRAVEL REIMBURSEMENT DOCUMENTS

FOR BUDGET LINE MANAGERS

PROCESS: For both documents, the requestor will submit the form on-line and it will automatically be forwarded to the Budget Line Manager listed under “Budget Lines to be Charged”. There can be more than one budget line entry on the document which will require each budget line manager to approve or deny the request. Request for Travel - Assuming the budget line managers have approved the form, it then goes to a Vice President for approval or denial. Assuming the VP approves the request, it then goes to the President for approval or denial *only if the travel is outside of New England.*

REQUEST FOR TRAVEL FORM:


You will be notified that a document is awaiting your attention via an email alert like this:

“Hello, There are 1 in queue Anderson, John (PRO Budget Line Approval) that are awaiting attention.”

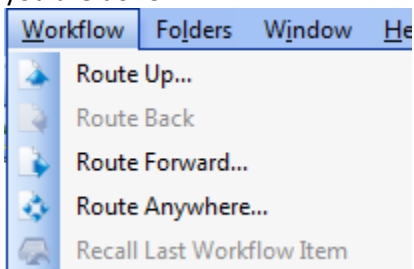
Open Perceptive Content and enter your network User Name and Password.

Click on “Workflow”, then your own named queue under PRO Travel Request (Anderson, John PRO Budget Line Approval)

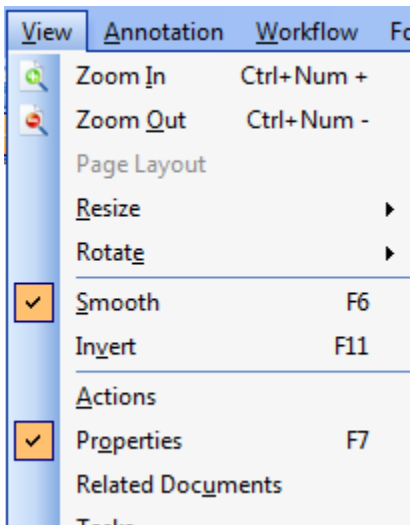
Here you will see the document(s) awaiting action from you. You can either approve or deny the request. Double click on the document to open it. To view it full-screen click View/Resize/Fit Image.

To **APPROVE** the request, **right click** the stamp icon  on the toolbar, and select **PRO Procurement Travel Approval Stamp**. Then click in the Budget Manager area of the document. **Travel Reimbursement** - continue to page 2.

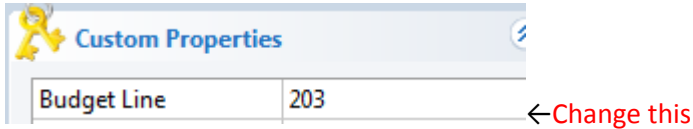
Request for Travel form continue here: If there are multiple budget line items, all will need to be approved so keep this in mind when applying your approval stamp. Look at entries under “Budget Lines to be Charged”. If there is only one entry (see below for more than one entry), select Workflow/Route Forward. Select PRO VP Approval/Route button and you are done.




→→If there is more than one budget line to be charged, be sure your toolbar view has “Properties” checked.

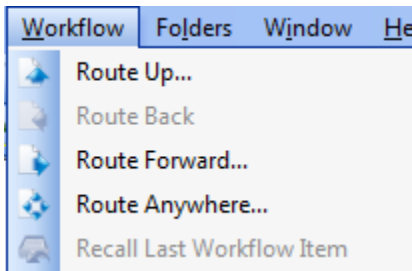


On the right panel (to the right of the document), under “Custom Properties”, change the Budget Line field to the next budget line number shown.



Then select Workflow/Route Forward/PRO Approval Sort/Route button and the form will now go to the Budget Line manager of the next entry. You are done.

To **DENY** the request, **right click** the stamp icon  on the toolbar and select **PRO ProcurementTravel Denial Stamp**. Then click in the Budget Manager area of the document. Then select Workflow/Route Forward. Select PRO Denied/Route button and you are done.



TRAVEL REIMBURSEMENT FORM:

Budget Line Manager: Use the same steps as above to approve or deny the request using the approval or denial stamp only. (The approval routing for Request for Travel is different from Travel Reimbursement.)

→Then, select Workflow/Route Forward/PRO Approval Review/Route button. You are done.

All forms will remain in the PRO Approval Review queue until Procurement forwards them to the PRO Complete queue for permanent storage.