EX.080.013 - Placing a Travel Authorization on Hold

Purpose	• To identify the purpose of placing a travel authorization on hold. • To identify what the employee sees when one of their travel authorizations is placed on hold. • To place a travel authorization on hold via the Worklist.
Description	By putting a travel authorization on hold, the approver can have additional time to gather more information to make a decision. Placing a travel authorization on hold changes the status from "Submitted for Approval" to "Approval in Process," because an approval action has been taken on the transaction. After an item has been placed on hold, it will continue to show in an approver's Worklist so that the approver can make a future decision (send back, deny or approve). The initiating employee sees that their travel authorization has a status of "Approval in Process" when it has been placed on hold. A travel authorization placed on hold will remain in the approver's Worklist, with the updated status of "On Hold." There are three methods which can be used to review and approve expenses transactions: • Email Notification • Worklist, and the • Summary Approval page. Each of these methods provides the approver with the same set of options: • Approve • Deny • Send Back • Hold • Budget Check.

Description	The main difference is the navigation used to reach these approval options. Additionally, when an approver places a travel authorization on hold, it updates the status to "On Hold" on the travel authorization entry form. In the event that the initiating employee, or others with delegated access, wanted to check on the status of the travel authorization, the employee would be able to see that the transaction was put on hold by a specific approver. See business process EX.020.300, Understanding Approval Methods, for additional information.
Security Role	**BOR_EX_APPROVAL**
Dependencies/ Constraints	A Travel Authorization should be created first.
Additional Information	None.

Procedure

Below are instructions on how to place a travel authorization on hold.

Step	Action
1.	Click the **NavBar** icon.
2.	Click the **Menu** link.
3.	Click the **Worklist** link in the top right corner of the page.
4.	View worklist details by clicking the **Detail View** link. Particularly, this will display the exact time each report was submitted (rather than just the date).
5.	The **Worklist** appearance can be customized by clicking the **Customize** button.
6.	Transactions which need attention are displayed in the **Worklist** and can be selected by clicking on an item in the **Link** column. The following naming convention is used: TAApproval - Travel Authorizations ERApproval - Expense Reports CAApproval - Cash Advances
7.	Click a travel authorization entry (TAApproval) in the **Link** column.

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8.	The Travel Authorization Summary will appear and should be reviewed by the approver for accuracy and compliance to the institution's set rules and regulations.
9.	Click the **vertical** scrollbar to navigate to the bottom of the page.
10.	After a travel authorization has been placed On Hold, the text "**On Hold**" will appear in the **Action** column of the travel authorization.
11.	If the institution uses encumbrance accounting for travel authorizations, a transaction is required to be budget checked before it can be approved. A transaction is **NOT** required to be budget checked if it is to be **Sent Back**, **Denied**, or **Placed on Hold**. Thus, it is okay to proceed with placing the transaction **On Hold** if the **Budget Status** is **Not Chk'd**.
12.	To see the **Details** of the Travel Authorization, can click the **Travel Authorization Detail** link.
13.	Click the **Hold** button to place the travel authorization on Hold.
14.	Click the **OK** button.
15.	Click the **Worklist** link at the top right corner of the page.
16.	Notice that the transaction continues to be displayed in the **Worklist** after it is placed **On Hold**.
17.	Click the same travel authorization entry in the **Link** column to verify the **On Hold** status.
18.	Click the **vertical** scrollbar to navigate to the bottom of the page.
19.	Notice that the text **On Hold** appears in the Action column.