1. Q- How are T&E users added to the system?
   A- A process runs nightly to add new employees to the T&E System. If you are a delegate trying to add
   travel for a new employee and can’t find the traveler on your list of travelers, first make sure the
   new employee has completed the travel setup and assigned you as their delegate. If they are
   unable to access the T&E system please contact the Travel Office for assistance. Student and
   Temporary employees are not added automatically. Departments will need to contact the travel
   office to have them added.

2. Q- What is the role of a delegate, traveler and approver in the T&E System?
   A- The delegate is responsible for entering the information into the travel system for the traveler, the
   traveler must verify and approve the data that has been entered by the delegate and request a
   travel advance if needed, and the approver must approve all travel authorizations and
   reimbursements submitted by the traveler.

3. Q- What is workflow?
   A- Workflow is an electronic process that routes the travel documents through an approval process.

4. Q- Who are the approvers on travel authorizations and reimbursements?
   A- The first approver is the travel office, the second is the travelers time card approver, the third is the
   account director on the index being charged for the travel and the fourth is the UBO for the
   department or grant accounting.

5. Q- Can I assess T&E or Workflow from off-campus?
   A- T&E and Workflow can only be accessed from off-campus if you have VPN setup on your computer.
   Contact the helpdesk if you need VPN access.

6. Q- Can I use my Ipad or Iphone to access T&E or Workflow?
   A- T&E requires a flash player for access - IPads and IPhones do not have this capability.

7. Q- How do I know who the delegates are for my department?
   A- You can find a list of delegates by department on the travel website.

8. Q- What internet applications should be used for T&E?
   A- T&E functions best when using Chrome or Mozilla.

9. Q- How do I change my address in the T&E System?
   A- To change your address in T&E click on the profile tab, to the right of your current address click on
   the pencil. You can choose any of the addresses listed. If the address you wish to use is not on the
   list you can add that address through the employee tab under personal information in Bengalweb.
   If you wish to add a campus address you will need to contact HR.

10. Q- How will I know if a travel document is waiting my approval?
    A- Once a travel document enters your approval queue an email will be generated letting you know.
    Also you will be able to view the document in the “My Worklist” channel in Bengalweb.

11. Q- My travel authorization or reimbursement was denied by one of my approvers and returned to
    me, what do I do now?
    A- Once a travel document has been denied it is dead and cannot be used. Your delegate will have to
    create a new document for you.

12. Q- How do I remove a delegate and assign a new delegate?
A-To remove a delegate click on the assign a delegate in your profile, mark the remove box next to the name of the delegate you want to remove, then hit save. To add a delegate click on the assign a delegate in your profile, click on add delegate at the bottom of the screen, enter the last name of the individual you wish to add, click on the arrow at the right of the name you have entered, once the name is brought up highlight the name and click select. The name of the new delegate should appear in your delegate list.

13. Q-I am an approver and forgot to set a proxy for T&E before I left on vacation, what can be done while I am on vacation?
A- As an approver you will need to contact the Travel Department and request we add your proxy for you. Remember only another approver can be a proxy for you.

14. Q-Once my travel authorization has been approved can I make changes to the document?
A- Once a travel authorization makes it completely through the approval process changes cannot be made. When completing the reimbursement things can be changed or added.

15. Q-If I need to add information to clarify something unusual or out of the ordinary where do I put this information?
A- Your delegate can add some information by the description of the expenses, or when you are reviewing your authorization or reimbursement you can add more information in the comments section. When making comments limit the punctuation you use, many forms of punctuation cause problems with workflow and cause the document to error. To be safe only use periods and commas.

16. Q-Can a reimbursement be submitted without an authorization?
A- The system will let you complete a reimbursement without an authorization, but once it is completed and forwarded to workflow it will be returned to the traveler letting them know they need to complete an authorization first. The returned reimbursement is dead. It cannot be attached to a future created authorization.

17. Q-Do reimbursements go through the same approval process as authorizations?
A-Reimbursements do not go to the timecard approver, as the time away from the normal work location was approved with the authorization.

18. Q-How can I tell where my authorization or reimbursement is in the approval process?
A- Double click on the travel document you are checking on, and then click on status history along the left side of the tab. Then click on the workflow approvals tab at the top, this will tell you who’s approval the document is waiting on.

19. Q-If I am an approver in workflow how do I view the travelers travel information?
A- Open the T&E System, then return to bengalweb and then double click on the document number in “My Worklist”. Once you are in the document to approve, click on Use the Travel and Expense page (in blue) at the bottom of the document you are approving. This will allow you to view the travelers travel information.

20. Q-How do I attach scanned documents to a travel document?
A- Scanned documents can be attached to both authorizations and reimbursements. Double click on the document you want to attach to. Once the travel document is open click “Attachment” on the left hand side of the page. Then click “More Actions” at the top of the page, next click “Add Attachment”. A window will pop up, click on “browse” and locate where you have the scanned
documents saved. Click on the file, and then click open. The name of the file you are trying to attach should appear next to the word browse, click attach. Once attached you should get the message “Attachment Uploaded Successfully. Click on the document you have attached to make sure all pages are visible and the scanned documents are facing the right direction and can be read.

21. **Q-When can scanned documents be attached?**
   
   **A-** Scanned documents can be attached to both authorizations and reimbursements when they are in one of three statuses: in process, pending review, or returned for correction. Once the travel document is in the approval queue documents can’t be scanned.

22. **Q-What documents need to be scanned?**
   
   **A-** If you are requesting an advance earlier than 60 days before the departure date, a scanned copy of the paid receipts must be attached to the travel authorization and advance request. On the reimbursement only attach receipts and documents that pertain to the travel. Example: Conference Itinerary only needs the section that shows when the conference started and ended and what was provided. Usually the first few pages, not the whole document. When scanning airfare receipt only need the pages that show the cost and flight itinerary, the pages that follow usually do not have pertinent information for the reimbursement.