approval flow
audit trail
business liaison
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status descriptions
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travel allowance
approval flow

the details of where a submitted request/report is in the approval workflow, showing which approval steps are complete and which remain; part of the request/report timeline
**audit trail**

the details of all actions taken on a request/report from submission to approval

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<table>
<thead>
<tr>
<th>Report Level</th>
<th>DateTime</th>
<th>Updated By</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>11/21/2023 3:42 PM</td>
<td>Test, Christa</td>
<td>Approval Status Change</td>
</tr>
<tr>
<td></td>
<td>11/21/2023 3:42 PM</td>
<td>Test, Christa</td>
<td>Approval Status Change</td>
</tr>
<tr>
<td></td>
<td>11/21/2023 3:42 PM</td>
<td>Test, Christa</td>
<td>Confirmation Agreement Acceptance</td>
</tr>
</tbody>
</table>
business liaison

the staff member responsible for department accounting who assists in the expense management process, serving as a delegate for staff members to create requests and expense reports as well as a reviewer in the request and expense report workflow process to ensure accurate expense allocation and financial reporting

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delegate

a person with permission to create or approve a request/report for someone else; a person may be a delegate for others and have delegates for themselves
the summary details of the request/report that define it, including the request/report name, policy, & date(s)
itinerary

the portion of a travel request/report associated with the travel allowance that details the adjustments to reimbursable expenses due to meals and incidental expenses
over limit tracking

an element of a travel request/report associated with the travel allowance that monitors if a hotel’s nightly rate exceeds the limit allowed by university policy.

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print report

a printable record of the details of a request/report and its expenses

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1. the estimate of expected travel expenses submitted prior to travel to gain approval for the trip (travel request)
2. the application to obtain a university purchasing card (card request)
report (expense report)

the list of exact expenses/expense details associated with travel, non-travel, or purchase card spending
status

The current state of a request/report (see next page for status descriptions)

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### Status

The current state of a request/report.

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approved</td>
<td>Approved by all approvers in the approval workflow</td>
</tr>
<tr>
<td>Cancelled</td>
<td>Withdrawn by user because travel/expense is no longer necessary</td>
</tr>
<tr>
<td>Closed</td>
<td>Set to inactive by user because request/report is completely processed</td>
</tr>
<tr>
<td>Pending Approval</td>
<td>Approval(s) still required</td>
</tr>
<tr>
<td>Pending Accounts Payable</td>
<td>Approved and in process of payment</td>
</tr>
<tr>
<td>Not Submitted</td>
<td>Created but not submitted for approval</td>
</tr>
<tr>
<td>Recalled</td>
<td>Submitted but then pulled out of approval process by user</td>
</tr>
<tr>
<td>Sent Back to Employee</td>
<td>Unable to be approved as is, returned to user by approver with requests for</td>
</tr>
<tr>
<td></td>
<td>change(s)</td>
</tr>
</tbody>
</table>

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**timeline**

The details of where a submitted request/report is in the approval workflow, showing which approval steps are complete and which remain; also called *approval flow*.
travel allowance

the funds allowed in travel for meals and incidental expenses