

Travel Manager Tip: How to Check the Status of a Document

Every user in Travel Manager has the ability to check the status of a document. To check the status of a document, the user must first log into Travel Manager.

Once logged in, Click the Open Existing Document link, on the document tool bar, from the left hand side of the page. Those users that only have access to themselves, will see their name on the left hand side of the page. Users that have access to multiple travelers will have to enter the last name of the traveler in the "Last Name" field, and click the Search button to retrieve that travelers documents. To view a list of all the traveler's documents, Click on the Traveler's Name, the documents will appear on the right side of the page. Then click on the Open Document Icon, the piece of paper icon, next to the document you wish to view.

The next page presented is the Open Document Signature page. In the upper right hand side of the page, in the gray box, Click on the Get button to see the Document as View only. (You do not have to enter the signature pin to see the document status.)

The Document Summary page will be displayed. Click on the "Document Status" link, on the document tool bar, to see the status of your document. From the Document Status page, the user will be able to see the document history and if the document is still in the routing. The Document Routing block, in the middle of the page, shows where your document is going. The approvers who need to still review the document will be listed here. The level Column will identify the Reviewers/Approvers position in the routing list.

The Document History section of the Document Summary page, will show the user where a document has been. The Travel Manager routing process is driven by a series of status codes. Reviewers, will use status codes, Reviewed, or Mgt. Reviewed, when signing off on a document. The final approver of a document will use always use Mgt. Approved. Once a document has been stamped Mgt. Approved that document will be routed to the RFO Travel Office. The Travel Office, when completing the review process, will stamp Approved on authorizations, and Disburse on vouchers. Be sure to review the remarks column in the document history block for your Reviewer/Approver comments.

To avoid edit locking your document, the user must properly close the document prior to exiting out of Travel Manager. To properly close a document, Click on Close Document from the document tool bar on the left.

Thank you,
Travel Manager Support Team