

## Instructions for Travel Coordinators to review Power BI Reports

Travel Coordinators should review the Power BI Travel Reports listed below and work with your approvers to ensure all actions on pending transactions are taken immediately. For help with running the reports, you can access the [Quick Start Guide to Archivum Travel Reports](#) and the [User Guide to Archivum Travel Reports](#) from the Travel Training webpage.

### ➤ **Travel - Pending Status Expense Report**

- For all Expense Reports with status in first column **'Submission in Progress'** – Select a line, right click and select 'Drill through > Details' – scroll to the right and check column 'Last Action Description'.
- If 'Budget Check Failed' – follow-up with the departmental budget contact to resolve budget error prior to resubmitting.
- If 'Sent back by Prepay Auditor' – make the necessary adjustments and resubmit.
- If 'Coversheet sent to' – follow-up with Traveler to sign the coversheet in DocuSign.
- For Expense Reports with status in first column **'Fiscal Review'** – remind the Fiscal Approver to approve or deny.
- For Expense Reports with status in first column **'Supervisor Review'** – remind the Supervisor to approve or deny.

### ➤ **Travel - Pending Status Travel Requests**

- For all Travel Requests with status in first column **'Submission in Progress'** – if this transaction is still needed submit it to move through approval workflow. If not needed, delete.
- For Travel Requests with status in first column **'Fiscal Review'** – remind the Fiscal Approver to approve. If Travel Request is no longer needed, request the Fiscal Approver to send it back and delete.
- For Travel Requests with status in first column **'Supervisor Review'** – remind the Supervisor to approve. If Travel Request is no longer needed, request the Supervisor to send it back, then delete it.

### ➤ **Travel - TRs Approved with No ER**

- If the Travel Request is for international travel, for insurance purposes only and the trip has ended, the Travel Request should be cancelled.
- If the trip was cancelled and no expenses incurred or if the Travel Request is a duplicate, the Travel Request should be cancelled.
- For all other Travel Requests where expenses were incurred, an Expense Report should be submitted and approved through the approval workflow as soon as possible.

For any questions or concerns on any transactions contact the Travel Help Desk [travelhelp@usf.edu](mailto:travelhelp@usf.edu).