Section 1. Signing into AXO and Coordinating with Other Approvers within your Travel Class (page 2)

- Unique Group Login ID
- Temporary Password
- New Shared Password
- Resetting the Password
- Identify a Primary Approver and Back-up Process
- Approver Login for Approving Only
- Add Approver to Travel Profiles

Section 2. Adding Users in AXO (page 3)

Section 3. Steps to Approve a Trip

- Trips Booked Online through AXO (page 4-7)
- Trips Booked through the Amex Traditional Travel Counselor (page 8)

Section 4. Pre-Trip Approval Guidelines and Required Documentation (page 9)

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Appendices

- University Required Trip Booking Information
- Saint Louis University Policy Exception Reason Codes
- Sponsored Program’s Checklist
- Approver’s Checklist
- My Travel Plans
Section 1. Signing into AXO and Coordinating with Other Approvers within your Travel Class

As a designated approver for your unit (Travel Class), you have an approver’s login, separate from the login assigned to you as a traveler, or travel arranger. This login is shared with the other designated approvers within your Travel Class. Use the following information to access AXO as an approver only. When booking travel for yourself or arranging travel for another University employee or guest, you must login using your personal AXO login and password.

- LOGIN: The full name of the Travel Class followed by @slu.edu
  Example (Travel Class – ATD208, Internal Medicine .... in this example your login would be internalmedicine@slu.edu)
- TEMPORARY PASSWORD: sluedu (first time login temporary password)
- NEW SHARED PASSWORD - The first approver to log in (for each Travel Class) will be prompted to replace the temporary password. The group should select an agreed upon password, or the first user is required to communicate the new password selected with all other approvers within their Travel Class.

Resetting the Password: If your Travel Class group has not reset the temporary password, do this immediately to ensure that appropriate controls are in place for booking trips. Also, the shared password should be reset periodically. To reset the password, login to AXO, click on Profile, Change Password and follow the instructions on the screen.

Primary Approver: Each individual Travel Class group will determine the primary approver for their Travel Class and the process for back-up approvers. This includes determining a process for last minute travel arrangements booked less than 24 hours before departure, and travel booked on a Friday afternoon through Sunday or the day proceeding a University holiday.

Travel Class Login for Approving Only: Approvers agree to utilize this sign in and password for the sole purpose of pre-trip authorization for the travelers assigned to them for approval. Travel arrangements should be made utilizing the travelers/arrangers personal AXO login and password. Approvers may not approve their own travel.

Consider Having Travelers Add Approver(s) as an Arranger in Their Profile: Arrangers are able to access the traveler’s profile and all trip information and relating documentation for both upcoming and past trips. This information may be helpful to you during your review of the subsequent expense report and provides easy access to supporting documentation.
Section 2. Adding Users in AXO

In order to maintain the accuracy of reporting information and ensure appropriate pre-trip authorizations, this information will only be accepted by an authorized approver, not by an individual traveler.

Adding a New User to AXO for Your Travel Class

To add a new user to the AXO interactive booking tool, send a request, with subject line Add New AXO User, to the University Travel Department at univtravel@slu.edu with the following information:

a. Traveler’s Legal Name (listed on driver’s license or state ID)
b. Traveler’s email address
c. Traveler’s Executive Code, Division Code, and Department Code
d. Supervisor’s email address
e. Travel Class
f. Whether this user is being added because they are transferring from another unit

In turn, the University Travel Department will create a login and temporary password for the traveler and email you this information.
Section 3. Steps to Approve a Trip

3a. For Trips Booked Online through AXO

Step 1:
Travel Class Approver receives notification via email that a trip is awaiting approval. Please note the following:

1. The e-mail is addressed to the Travel Class Code (ex. ATD208@slu.edu)
2. Subject Line will identify the Traveler’s name (ex. Travel approval required for traveler: John Smith)
3. The e-mail will be from Cliqbook
4. Included upon opening the e-mail notification is the trip approval deadline, trip details and complete itinerary, including appropriate reason codes and explanation/comments for policy violations related to pending air, car, or hotel reservations awaiting approval

Step 2:
The URL to access the AXO/Cliqbook site is [http://app2.outtask.com](http://app2.outtask.com)
The Travel Class Approver logs into AXO/Cliqbook using the unique Travel Class login ID provided to your individual Travel Class. (See Section 1 for complete details on Login ID’s and passwords.)

Step 3:
Travel Class Approver clicks on the Trips Awaiting Approval tab located on the Travel Center page.

Note – Must Approve By column*
Example: Must Approve By
Tuesday, November 29, 2005
10:55 pm Central Time

*Important Note: If this deadline expires the traveler/travel arranger must cancel the trip and begin the process again.

This approval deadline is based on individual airline rules pertaining to the fare type booked and in most cases will be at 10:55 pm the day after the booking date. However, in some instances, if the traveler has booked exactly 7, 14, or 21 days in advance of their departure, the approval deadline will be the same as the booking date, in order to successfully meet the advance purchase requirement.

Travel Class Approver then clicks appropriate trip located in the Trip Name column and underlined.
Step 4

Travel Class Approver reviews the trip details to determine approval. Review both the Request Status/History tab and the Travel Itinerary tab.

The Travel Class Approver is responsible to ensure following criteria is met.

- Policy Compliance and proper documentation (when traveler is asking for policy exceptions)
- Fund Availability
- Obtaining any / all necessary additional approvals
  - Direct supervisor approval
  - VP / Provost approval for international travel
  - Sponsored Program’s approval if applicable

See Section 4, Pre-Trip Approval Guidelines and Required Documentation for additional information.
Step 5:

Travel Class Approver has three options:

1) Approve Trip Request - Indicates that traveler is approved for requested trip
   When you click on Approve a comment box pops up. You must include the following:
   • Your full name, indicating you are the designated approver from your Travel Class group for this trip
   • Any notes to the traveler indicating special conditions or limitations
     Examples:
     o Only approved for a maximum reimbursement of $700 for this trip
     o Incremental cost for business class fare will be paid by traveler
     o Upon approval, the following will occur
     o A message is sent to traveler via email
     o The reservation is sent to American Express Travel for ticketing
     o The trip is removed from Trips waiting Approval tab
     o No further action is required by Travel Class Approver
2) **Reject Trip Request** - Indicates that the traveler is not approved for requested trip or additional documentation is required to approve the trip

When you click on **Reject** a comment box pops up. You must include the following:
- Your full name, indicating you are the designated approver from your Travel Class group for this trip
- Any notes to the traveler indicating why this trip is rejected or what additional documentation/explanation is required

Examples:
- No funding available for this trip; cancel trip
- You are required to book the lowest available fare and a hotel at the SLU per diem; cancel trip and resubmit within University policy guidelines
- **Trip Information Page** did indicate why you didn’t book a hotel with this trip and an appropriate trip number; resubmit with this additional information
- Upon rejection, the following will occur
- Traveler receives **Rejection Notification** Email
- Traveler can view notes added by Travel Class Approver
- Trip is removed from **Trips waiting Approval** tab
- No further action required by Travel Class Approver until the trip is resubmitted by the traveler

3) **Close Trip Request**
- Travel Class Approver closes out of screen
- Trip still listed in **Trips waiting Approval** tab
- Action still required by Travel Class Approver

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**Travel Request Requiring Your Approval**
**This trip must be approved by:** Wednesday, October 26, 2005 10:55PM Central time.

<table>
<thead>
<tr>
<th>Approve</th>
<th>Reject</th>
<th>Close</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Request Status/History</strong></td>
<td><strong>Travel Itinerary</strong></td>
<td></td>
</tr>
</tbody>
</table>

- Item Name: Trip from St Louis to Denver 12/06/05-12/08/05
- Trip Description: Trip from St. Louis to Denver 12/06/05-12/08/05
- Submitted By: John Smith
- Submitted on: Tuesday, October 25, 2005 9:54AM Central Time
- Approval Status/History: Requires Approval by Internal Medicine Group

**History/Notes:**
Request Created on Tuesday, October 25, 2005 at 9:53AM Central time by John Smith.

**Flight segment Air Segment added on Tuesday, October 25, 2005 at 9:53AM Central time.**

This itinerary violates one or more minor rules. A copy of this itinerary will be forwarded to the travel approver. The Itinerary has still been reserved. The travel approver must approve the trip, or the traveler must withdraw the trip request to cancel the reservation or risk hotel no-show fees.
3b. For Trips Booked through the Amex Traditional Travel Counselor

These should be limited to Group Travel or Complex International itineraries. The below process has been developed to mirror the AXO approval process, however, please note that the notification e-mail, trip information and itinerary will be in a different format.

**Step 1:**

Travel Class Approver receives notification via email that a trip is awaiting approval. Please note the following:

- The e-mail is addressed to the Travel Class Code (ex. ATD208@slu.edu)
- Subject Line will identify the Traveler’s name (ex. Travel approval for traveler: John Smith)
- The e-mail will be from *slu travel* [AmexESP@service.americanexpress.com]
- Included upon opening the e-mail notification is the approval deadline, trip details (consistent with the information required on the Trip Booking Information page on AXO), including appropriate reason codes and explanation/comments for policy violations related to pending air, car, or hotel reservations awaiting approval, and a separate complete itinerary

**Step 2:**

Travel Class Approver reviews the trip details in the e-mail from *slu travel* to determine approval.

The Travel Class Approver is responsible to ensure following criteria is met.
- Policy Compliance and proper documentation (when traveler is asking for policy exceptions)
- Fund Availability
- Obtaining any / all necessary additional approvals
  - Direct supervisor approval
  - VP / Provost approval for international travel
  - Sponsored Program’s approval if applicable

**Step 3:**

Travel Class Approver replies to *slu travel*, with a copy to the traveler, indicating whether the trip is approved or rejected. If approved, American Express issues the ticket. If rejected, the reservation is canceled.
Section 4. Pre-Trip Approval Guidelines and Required Documentation

The Travel Class Approver is responsible to ensure:

1. the Trip Booking Information Page is complete based on University and applicable unit requirements and that the information is valid. (See University Required Trip Booking Information)

2. there are sufficient funds in the identified funding source for the full cost of this trip

3. the pre-trip travel request is in compliance with the University Travel Policy and includes all required explanations and documentation when exceptions are approved. The Saint Louis University Policy Exception Reason Codes should be used to determine the appropriate reason code and related required explanation for exception to University policy when booking airfare, hotel and car rental.

   Note: All pre-approved exceptions to the University travel policy for airfare, hotel, and car rental will be tracked in management reports provided to Deans, Directors, Vice Presidents and the President. Trends by departments and individual travelers will be noted.

4. that all necessary additional approvals have been obtained.
   o Direct supervisor approval
   o VP / Provost approval for international travel
     1. Process for divisions reporting to the Provost (excluding the Medical School) – Forward the email you receive as the travel approver for any proposed trip involving foreign travel directly to, Maureen Burkhardt burkhams@slu.edu. She will return the email to you with the authorization noted. The trip may not be approved on AXO until this authorization is received. Enter "Provost email authorization" and the date of the return email in the comments box when you approve the trip.
     2. Process for the Medical School – complete an International Travel Form and submit it to the HSC Finance Office. The form will be returned to you with the authorization noted. The trip may not be approved on AXO until this authorization is received. Enter "HSC authorization" and the date authorized in the comments box when you approve the trip.
     3. Other divisions – contact your vice president for the pre-approval process to follow. Enter "VP authorization" and the date authorized in the comments box when you approve the trip.
   o Sponsored Program’s approval if applicable (See Sponsored Program Checklist)

An Approver’s Checklist is provided as a guide to ensure that all of the criteria for appropriate pre-approval have been met.
Section 5. Communication with Travelers and Arrangers

The University Travel Department will primarily be communicating directly with Travel Class Approvers for all matters relating to the New Travel Program including revisions to policies, procedures and guidelines. The Travel Class Approvers are responsible for passing on these communications to their unit travelers and arrangers including any specific requirements required by the unit. It is recommended that all units consider communicating the following to their travelers and arrangers to facilitate the trip booking process.

1. The names of the approvers for the unit Travel Class

2. The primary approver/contact person for the unit Travel Class, and the person to whom to direct questions within your unit if this is not the same person

3. The pre-trip approval process requirements, incorporating your unit requirements with the University requirements including a detail explanation of information to include on the Trip Booking Information Page

4. Directions regarding timing of booking for your unit, for example, do not make any reservations on a Friday afternoon through Sunday.

5. Instruct travelers to include as least your primary approver as an arranger in their profile so you may access their trip library for future reference

6. Provide to your travelers your process for handling last minute, including less than 24 hours, travel arrangements or emergency arrangements on the weekends. (Traveler can booked/approved as close as 12 hours prior to flight time on AXO)

7. Provide instructions on “walking through” bookings to meet the approval deadline for 7, 14, 21-day advance purchase requirements.

8. If a unit outside of the travel class is funding a trip, the trip should be booked using the guest feature to ensure proper approvals.

9. Explain the purpose of the My Travel Plans tool for itinerary/invoice data via the Internet