

Table of Contents

How to Start Using a System	2
Pagia Information	2
Basic Information	
Levels of Access	2
Data	2
Logging In	2
Submitter View - My Travel Requests	3
Travel Wizard	
Personal Information	5
Absence	5
Destinations	6
Reimbursement	7
Accounts	7
Teaching Assignments	8
Review and Submit	9
Approvals	11
Accessing Submitted Requests	11

How to Start Using a System

If you are interested in using this application and do not currently have access, simply send an email to engrit-apps@illinois.edu. Please take a look at the application costs located at http://it.engineering.illinois.edu/services/portal-applications-engineering

A CFOP will be required before access can be granted. If you would like to test the application before purchasing, please indicate such in your email.

Basic Information

The Travel application is available to help track travel requests for Staff and Faculty. The functions are to input and track requests for travel (for personal or financial reimbursement, which varies by unit), as well as the approval processes, and maintaining travel records.

Levels of Access

There are at least 2 levels of access; request submitters, approvers (typically a supervisor or Manager). Additionally, approval may be required from Academic, Accounting Office Approvers, and Department Head approvals.

Data

Employee data is pulled from EDW.

Logging In

You can access the application by going to your portal (https://my.yourportal.illinois.edu) and logging in with NetID and your Active Directory password. If there is a Travel link, click on it to go to the application.

If there is no link listed, go directly to the application by typing the following URL into a browser http://my.yourportal.illinois.edu/travel.

Submitter View - My Travel Requests



A. Navigation Menu Bar:

• You can navigate to other areas of the application. **Note:** Tabs/Links will only appear if you have permission to navigate to an area.

B. Tool Bar:

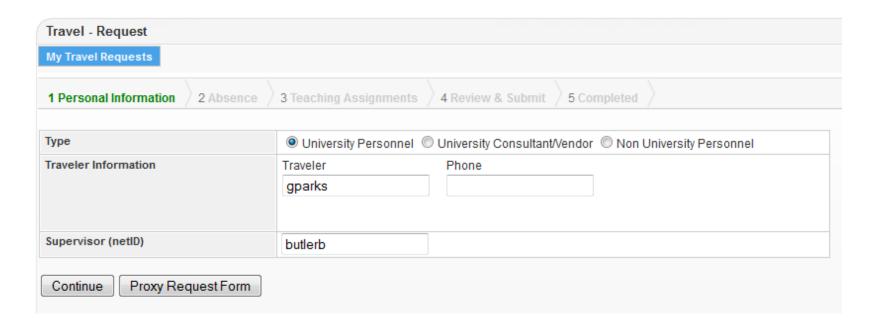
- Traveler A drop list filter that contain a list of users. These users include anyone you have permission to proxy along with yourself.
- Fiscal Year A drop list filter that contains that fiscal year found in the Travel ID Number and all Initiated request that have not been submitted and therefore have no Travel ID Number. **Note:** this will be based on the fiscal year you return from your trip.
- Create Request An action button that you can select to create a new travel request. Note: it will populate the traveler with the person selected in the Traveler drop list, but can be modified once you are in the record.

C. Travel Request List:

- This is a list of travel request.
- Contains all basic information of the request such as Types of Absences, Types of Reimbursements, Dates, and Statuses.
- The Action link (to the right of the screen) will allow you to continue any record that has yet to be submitted or view a record that has already been submitted.

Travel Wizard

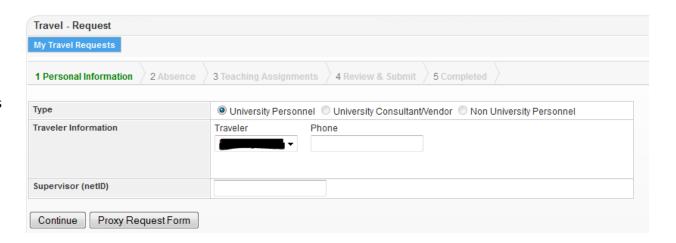
- This is a wizard style application that allows you to fill in relevant information, broken down by sections, about your trip.
- To fill and send such a request, click the Create Request on the front page of your requests.



- Type radio button options to select the type of person will be traveling.
- Traveler Information an open text box that allows user to input a valid netID. User can search by Last Name, First Name and select a netID that show below the field.
 - Note: the system will not allow you to enter a netID of either a student or an employee you have permission to proxy. To proxy a user, you must request permission, by clicking the Proxy Request Form button at the bottom.
- Supervisor an open text box that allows user to input a valid netID.
 - o User can search by Last Name, First Name and select a netID that show below the field.

Personal Information

- Type an option to select the type of person will be traveling.
- Travel Information is a drop list of users that you can proxy and yourself.
- Supervisor an open text box that allows user to input a netID. User can search by Last Name, First Name and select a netID that show below the field.



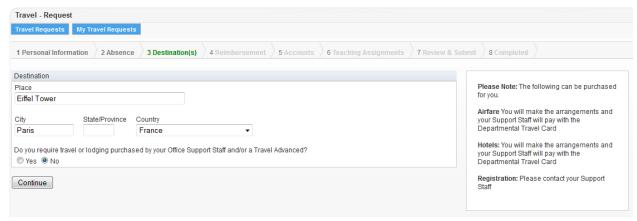
Absence

- Category of Absence checkboxes of different categories such as University Travel, Consulting, and Personal. Note: the section that will appear in the status bar will be affected by the categories that are selected.
- Begin and End Dates dates of your trip.
- Description of Absence/Purpose of Trip why will you be absent.

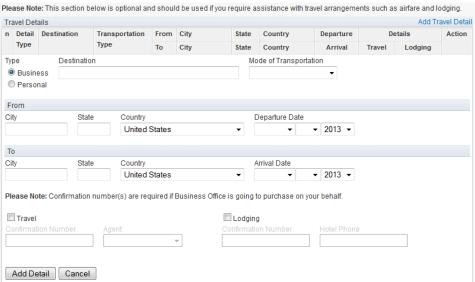
Travel - Request			
Travel Requests My Travel Requests			
1 Personal Information 2 Absence	ce 3 Destination(s) 4 Reimbursement 5 Accounts 6 Teaching Assignments 7 Review & Submit 8 Completed		
Category of Absence	☑ University Travel ☐ Consulting ☐ Personal		
Begin Date	8/15/2013		
End Date	8/20/2013		
Description of Absence/Purpose of Travel	I am traveling		
Continue			

Destinations

- Destination of the trip will be a place you plan to travel
- Do you require travel or lodging purchased by your Office Support Staff and/or a Travel Advanced? – If yes, you will be required to add different steps of the trip. Note: the section below will appear so you can add these steps.
- Click the Add Travel Detail link at the top
 of this section for each step of the trip you
 need to add. A screen list the following will
 appear requesting details information
 about that step in the trip.



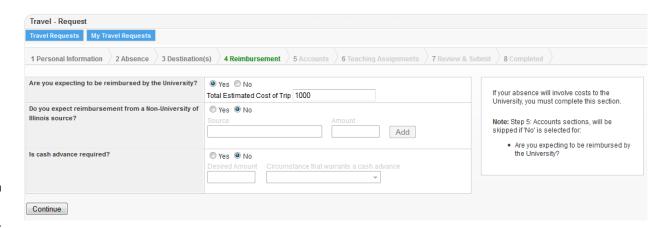
Please Note: This section below is optional and should be used if you require assistance with travel arrangements such as airfare and lodging. Travel Details Add Travel Detail n Detail Destination Transportation From City State Country Departure Details Action Type Type City State Country Arrival Travel Lodging No Records Found Please Note: This section below is optional and should be used if you require assistance with travel arrangements such as airfare and lodging.



7 it.engineering.illinois.edu

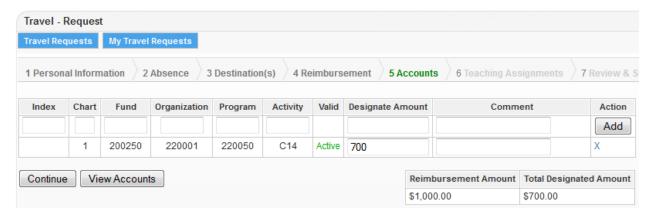
Reimbursement

- Are you expecting to be reimbursed by the University? – Radio buttons of yes or no. If yes, the Total Estimated Cost of Trip will unlock for you to input a dollar amount. Note: you will required to input CFOP(A) information if this is set to Yes.
- Do you expect reimbursement from a Non-University of Illinois source? – Radio button of yes or no. If yes, the Sources will unlock for you to input as many sources and dollar amounts needed.



Is cash advance required? – Radio buttons of yes or no. If yes, desired amount and circumstances will unlock.

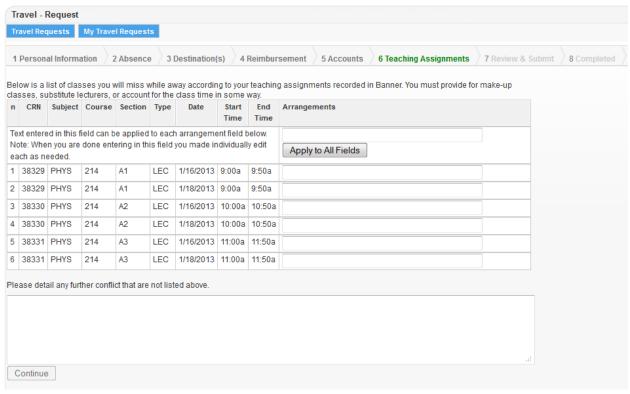
Accounts



If you are expecting to be reimbursed by the University, you will need to complete the Reimbursement section and add an account.

- You can key in any account CFOP(A). If you don't know your account number, click the View Accounts which will allow you to pick accounts you are mapped to in chart of account (a system that contains all mapping of accounts to users).
- The designated amount field will allow you to specify the amount for each account that is added.

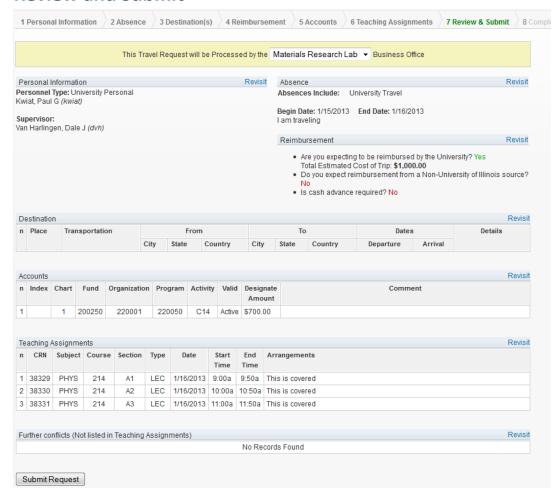
Teaching Assignments



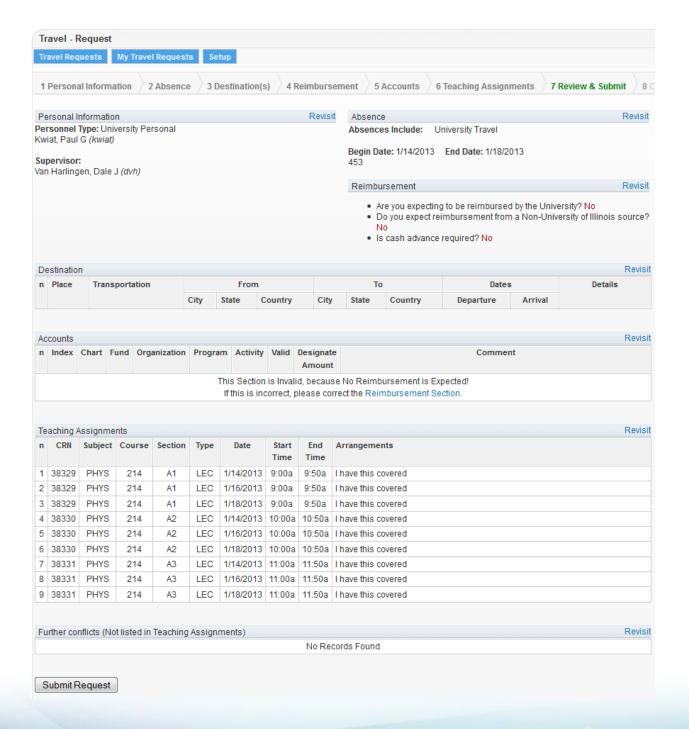
- The system will populate class you are going to miss while you are away and expect you to have covered.
- Input how you will have each class covered. Also, you may use the Field at the top and click 'Apply to All Fields' and it will populate all following fields to get you started and you can modify each one as needed.

9 it.engineering.illinois.edu

Review and Submit



- You will be able to review your request before you submit the request. If you have selected more than one CFOP(A) from more than one organization, you will be able to select and submit to the department you wish to process your reimbursements.
- Once the request has been submitted, the request will route based on departmental setup and account ownership for approval.
- If a travel request is declined, a note explaining the reason for rejection must be entered.



11 it.engineering.illinois.edu

Approvals

- Once the travel request is submitted, the system will generate emails asking the necessary approvers to approve the submitter's request:
 - o Approval email to the Submitter
 - o Approval email to the immediate supervisor or manager
 - Approval emails may also be sent to the Academic, Accounting, (or Business Office), as well as the Department Head.

Accessing Submitted Requests

- After travel requests are submitted and processed, Managers, Academic, Accounting and department head can login into the system to view travel request details as shown below.
 - o Simply click on the Travel ID and you can find all travel details available:

