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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

Travel - Request [Return](#)

My Travel Requests A

Traveler: Parks, Gregory W |
 Fiscal Year: 2012 |
 Action: B Create Request C

n	Travel ID	Absences				Reimbursement			Dates			Section	Traveler	Supervisor	Status			Action	
		University Travel	Consulting	Personal	Furlough	University	Non-University	Cash Advance	Departure Date	Return Date	Submit Date				Account	Academic	Approved		Completed
1	Pending	✓				✓			1/11/2013	3/5/2013		absence	Initiated				Pending		[Continue] [Delete]
2	201200002	✓						✓	12/15/2012	12/17/2012	4/13/2012	complete	Submitted			NA	Pending		View
3	201200001	✓						✓	1/12/2012	1/13/2012	4/13/2012	complete	Submitted				Pending		View

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.

Travel - Request

My Travel Requests

1 Personal Information > 2 Absence > 3 Teaching Assignments > 4 Review & Submit > 5 Completed >

Type	<input checked="" type="radio"/> University Personnel <input type="radio"/> University Consultant/Vendor <input type="radio"/> Non University Personnel	
Traveler Information	Traveler	Phone
	<input type="text" value="gparks"/>	<input type="text"/>
Supervisor (netID)	<input type="text" value="butlerb"/>	

- 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.
 - 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.

Travel - Request

My Travel Requests

1 Personal Information > 2 Absence > 3 Teaching Assignments > 4 Review & Submit > 5 Completed >

Type	<input checked="" type="radio"/> University Personnel <input type="radio"/> University Consultant/Vendor <input type="radio"/> Non University Personnel	
Traveler Information	Traveler <input type="text" value=""/>	Phone <input type="text" value=""/>
Supervisor (netID)	<input type="text" value=""/>	

Continue Proxy Request Form

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 > 3 Destination(s) > 4 Reimbursement > 5 Accounts > 6 Teaching Assignments > 7 Review & Submit > 8 Completed >

Category of Absence	<input checked="" type="checkbox"/> University Travel <input type="checkbox"/> Consulting <input type="checkbox"/> Personal
Begin Date	<input type="text" value="8/15/2013"/>
End Date	<input type="text" value="8/20/2013"/>
Description of Absence/Purpose of Travel	<input type="text" value="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.

Travel - Request

[Travel Requests](#) [My Travel Requests](#)

1 Personal Information > 2 Absence > **3 Destination(s)** > 4 Reimbursement > 5 Accounts > 6 Teaching Assignments > 7 Review & Submit > 8 Completed

Destination

Place
Eiffel Tower

City
Paris

State/Province

Country
France

Do you require travel or lodging purchased by your Office Support Staff and/or a Travel Advanced?
☐ Yes ☒ No

[Continue](#)

Please Note: The following can be purchased for you.

Airfare: You will make the arrangements and your Support Staff will pay with the Departmental Travel Card

Hotels: You will make the arrangements and your Support Staff will pay with the Departmental Travel Card

Registration: Please contact your Support Staff

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 Type	Destination	Transportation Type	From To	City	State	Country	Departure	Details	Action
				To	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.

Travel Details [Add Travel Detail](#)

n	Detail Type	Destination	Transportation Type	From To	City	State	Country	Departure	Details	Action
				To	City	State	Country	Arrival	Travel	Lodging
<p>Type: <input checked="" type="radio"/> Business <input type="radio"/> Personal</p> <p>Destination: <input type="text"/></p> <p>Mode of Transportation: <input type="text"/></p> <p>From:</p> <p>City: <input type="text"/> State: <input type="text"/> Country: <input type="text"/> Departure Date: <input type="text"/></p> <p>To:</p> <p>City: <input type="text"/> State: <input type="text"/> Country: <input type="text"/> Arrival Date: <input type="text"/></p> <p>Please Note: Confirmation number(s) are required if Business Office is going to purchase on your behalf.</p> <p><input type="checkbox"/> Travel Confirmation Number: <input type="text"/> Agent: <input type="text"/></p> <p><input type="checkbox"/> Lodging Confirmation Number: <input type="text"/> Hotel Phone: <input type="text"/></p> <p>Add Detail Cancel</p>										

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.

Travel - Request

Travel Requests My Travel Requests

1 Personal Information 2 Absence 3 Destination(s) 4 Reimbursement 5 Accounts 6 Teaching Assignments 7 Review & Submit 8 Completed

Are you expecting to be reimbursed by the University? ☒ Yes ☐ No
Total Estimated Cost of Trip 1000

Do you expect reimbursement from a Non-University of Illinois source? ☐ Yes ☒ No
Source Amount Add

Is cash advance required? ☐ Yes ☒ No
Desired Amount Circumstance that warrants a cash advance

Continue

If your absence will involve costs to the University, you must complete this section.

Note: Step 5: Accounts sections, will be skipped if 'No' is selected for:

- Are you expecting to be reimbursed by the University?

Accounts

Travel - Request

Travel Requests My Travel Requests

1 Personal Information 2 Absence 3 Destination(s) 4 Reimbursement 5 Accounts 6 Teaching Assignments 7 Review & Submit

Index	Chart	Fund	Organization	Program	Activity	Valid	Designate Amount	Comment	Action
									Add
	1	200250	220001	220050	C14	Active	700		X

Continue View Accounts

Reimbursement Amount	Total Designated Amount
\$1,000.00	\$700.00

- 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

Travel - Request

Travel Requests My Travel Requests

1 Personal Information 2 Absence 3 Destination(s) 4 Reimbursement 5 Accounts 6 Teaching Assignments 7 Review & Submit 8 Completed

Below is a list of classes you will miss while away according to your teaching assignments recorded in Banner. You must provide for make-up classes, substitute lecturers, or account for the class time in some way.

n	CRN	Subject	Course	Section	Type	Date	Start Time	End Time	Arrangements
Text entered in this field can be applied to each arrangement field below. Note: When you are done entering in this field you made individually edit each as needed.									<input type="text"/>
									<input type="button" value="Apply to All Fields"/>
1	38329	PHYS	214	A1	LEC	1/16/2013	9:00a	9:50a	<input type="text"/>
2	38329	PHYS	214	A1	LEC	1/18/2013	9:00a	9:50a	<input type="text"/>
3	38330	PHYS	214	A2	LEC	1/16/2013	10:00a	10:50a	<input type="text"/>
4	38330	PHYS	214	A2	LEC	1/18/2013	10:00a	10:50a	<input type="text"/>
5	38331	PHYS	214	A3	LEC	1/16/2013	11:00a	11:50a	<input type="text"/>
6	38331	PHYS	214	A3	LEC	1/18/2013	11:00a	11:50a	<input type="text"/>

Please detail any further conflict that are not listed above.

Continue

- 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.

Review and Submit

1 Personal Information 2 Absence 3 Destination(s) 4 Reimbursement 5 Accounts 6 Teaching Assignments 7 **Review & Submit** 8 Complete

This Travel Request will be Processed by the **Materials Research Lab** Business Office

Personal Information [Revisit](#)

Personnel Type: University Personal
Kwiat, Paul G (*kwiat*)

Supervisor:
Van Harlingen, Dale J (*dvh*)

Absence [Revisit](#)

Absences Include: University Travel

Begin Date: 1/15/2013 **End Date:** 1/16/2013
I am traveling

Reimbursement [Revisit](#)

- Are you expecting to be reimbursed by the University? **Yes**
Total Estimated Cost of Trip: **\$1,000.00**
- Do you expect reimbursement from a Non-University of Illinois source?
No
- Is cash advance required? **No**

Destination [Revisit](#)

n	Place	Transportation	From			To			Dates		Details
			City	State	Country	City	State	Country	Departure	Arrival	

Accounts [Revisit](#)

n	Index	Chart	Fund	Organization	Program	Activity	Valid	Designate Amount	Comment
1		1	200250	220001	220050	C14	Active	\$700.00	

Teaching Assignments [Revisit](#)

n	CRN	Subject	Course	Section	Type	Date	Start Time	End Time	Arrangements
1	38329	PHYS	214	A1	LEC	1/16/2013	9:00a	9:50a	This is covered
2	38330	PHYS	214	A2	LEC	1/16/2013	10:00a	10:50a	This is covered
3	38331	PHYS	214	A3	LEC	1/16/2013	11:00a	11:50a	This is covered

Further conflicts (Not listed in Teaching Assignments) [Revisit](#)

No Records Found

[Submit Request](#)

- 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.

Travel - Request

Travel Requests
My Travel Requests
Setup

1 Personal Information
2 Absence
3 Destination(s)
4 Reimbursement
5 Accounts
6 Teaching Assignments
7 Review & Submit
8 C

Personal Information
Revisit

Personnel Type: University Personal
Kwiat, Paul G (*kwiat*)

Supervisor:
Van Harlingen, Dale J (*dvh*)

Absence
Revisit

Absences Include: University Travel

Begin Date: 1/14/2013 **End Date:** 1/18/2013
453

Reimbursement
Revisit

- Are you expecting to be reimbursed by the University? **No**
- Do you expect reimbursement from a Non-University of Illinois source? **No**
- Is cash advance required? **No**

Destination
Revisit

n	Place	Transportation	From			To			Dates		Details
			City	State	Country	City	State	Country	Departure	Arrival	

Accounts
Revisit

n	Index	Chart	Fund	Organization	Program	Activity	Valid	Designate Amount	Comment
This Section is Invalid, because No Reimbursement is Expected! If this is incorrect, please correct the Reimbursement Section .									

Teaching Assignments
Revisit

n	CRN	Subject	Course	Section	Type	Date	Start Time	End Time	Arrangements
1	38329	PHYS	214	A1	LEC	1/14/2013	9:00a	9:50a	I have this covered
2	38329	PHYS	214	A1	LEC	1/16/2013	9:00a	9:50a	I have this covered
3	38329	PHYS	214	A1	LEC	1/18/2013	9:00a	9:50a	I have this covered
4	38330	PHYS	214	A2	LEC	1/14/2013	10:00a	10:50a	I have this covered
5	38330	PHYS	214	A2	LEC	1/16/2013	10:00a	10:50a	I have this covered
6	38330	PHYS	214	A2	LEC	1/18/2013	10:00a	10:50a	I have this covered
7	38331	PHYS	214	A3	LEC	1/14/2013	11:00a	11:50a	I have this covered
8	38331	PHYS	214	A3	LEC	1/16/2013	11:00a	11:50a	I have this covered
9	38331	PHYS	214	A3	LEC	1/18/2013	11:00a	11:50a	I have this covered

Further conflicts (Not listed in Teaching Assignments)
Revisit

No Records Found

Submit Request

Approvals

- Once the travel request is submitted, the system will generate emails asking the necessary approvers to approve the submitter's request:
 - Approval email to the Submitter
 - 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.
 - Simply click on the Travel ID and you can find all travel details available:

Travel Requests

My Travel Requests

Proxy Request Form

Organization

Office

View

Fiscal Year

Search

Action

Physics

Academic Office

Pending Approvals

2016

X

Search

Create Request

☐ Search All Records (Excludes All Filters)

n	Travel ID	Traveler	Absences				Reimbursement			Dates			Status					
			University Travel	Consulting	Personal	Furlough	University	Non-University	Cash Advance	Departure Date	Return Date	Submit Date	Traveller	Supervisor	Account	Academic	Approved	Completed
1	201600564		x				x			9/23/2015	9/26/2015	9/11/2015	Submitted	Approved	Approved	Approved	Yes	Pending
2	201600547		x				x			10/25/2015	10/27/2015	9/9/2015	Submitted	Approved	Approved	Approved	Yes	Pending
3	201600506		x				x			9/27/2015	9/30/2015	9/3/2015	Submitted	Approved	Approved	Approved	Yes	Pending
4	201600474		x							10/21/2015	10/23/2015	8/28/2015	Submitted	Approved	NA	Approved	Yes	