



My Travel

[+ Travel Authorization](#)

Phase	Location	Description	Start Date	End Date	Travel Auth Status	Travel Action
Travel Planning	Vancouver	Conference	12-May-2023	14-May-2023	Approved	Submit Travel Desk Request
Travel Approval	Vancouver	FN Finance meeting #3	12-Aug-2023	14-Aug-2023	Awaiting Director Approval	
Travel Approval	Edmonton	FN Finance meeting #4	12-Aug-2023	14-Aug-2023	Draft	
Travel Complete	Calgary	FN Finance meeting #1	12-Aug-2023	14-Aug-2023	Expense Claim	Submit Expense Claim
Travel Planning	Calgary	FN Finance meeting #1	12-Aug-2023	14-Aug-2023	Booked	View Itinerary
Travelling	Calgary	FN Finance meeting #1	12-Aug-2023	14-Aug-2023	Travelling	Add Expense
Travel Planning	Dawson	Field Work	12-Oct-2023	14-Oct-2023	Approved	Submit Pool Vehicle Request

Travel desks requests are only required for aircraft travel

Any YG user will have access to this

Assigned approvers need a dashboard showing actions assigned to them.

Approvers need to see assignees upcoming travel and current travel on dashboard.

End Date

June 7, 2022

- submit
- reassign
- reject
- approve (add note re: have proper signing authority)

Allow user to select pre-approved travel for their department only. Provide enough info so they can define what approval they are using.



http://



Travel - Larry Brown

Purpose:

Meeting re: Project X

Final Destination

Vancouver, BC, Canada

Start Date

June 5, 2022

Start Time

End Date

June 7, 2022

End Time

3PM

Details

Estimate

Request

Itinerary

Expense

Reporting

Add Estimate

ExpenseType	Description	Date	Amount	
Flights	Departure - Whitehorse - Vancouver	5-June-2022	\$350.00	Edit
Accommodations	Room Cost	5-June-2022	\$250.00	Edit
Meals & Incidentals	Full Day	5-June-2022	\$128.45	
Accommodations	Room Cost	6-June-2022	\$250.00	Edit
Meals & Incidentals	Full Day	6-June-2022	\$128.45	
Flights	Return - Vancouver - Whitehorse	7-June-2022	\$350.00	Edit
Meals & Incidentals	Breakfast/Lunch	7-June-2022	\$46.70	
		TOTAL	\$1503.65	

Automate calculations of travel items:

- Per diem as derived through travel dates and times. If no time assume full day rates
- If accommodation = Hotels based on \$250/night, if accommodation = private use accommodation allowance from api
- If travel method = aircraft based on number of segments 1 segment \$350. More than 1 segment \$1000
- if travel method = private vehicle calculate \$ using distance allowance from api and distance look-up api
- if travel method = pool write the line in the estimate no cost
- if travel method = rental write the line in the estimate no cost



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Add Information related to travel requests in here.



http://



Travel Details

Purpose:

Meeting re: Project X

Final Destination

Vancouver, BC, Canada

Start Date

June 5, 2022

Start Time

End Date

June 7, 2022

End Time

3PM

Approvals

Estimate

Request

Itinerary

Expense

Reporting

Write travel port itinerary and
other...to come later
OUT OF SCOPE



Travel - Larry Brown

Purpose: Meeting re: Project X Final Destination: Vancouver, BC, Canada Start Date: June 5, 2022 Start Time: End Date: June 7, 2022 End Time: 3PM

Details Estimate Itinerary Expense Reporting

Expense Tab should not be available until in travel state

Traveler Expenses

Add Expense

ExpenseType	Description	Date	Amount	Edit	Add Receipt
Accommodations	Room Cost	5-June-2022	\$245.00	Edit	view receipt
Transportation	Skytrain YVR - hotel	5-June-2022	\$7.00	Edit	Add Receipt
Transportation	Taxi: Hotel to meeting	6-June-2022	\$23.50	Edit	Add Receipt
Accommodations	Sutton Place	6-June-2022	\$245.00	Edit	Add Receipt

Copy items from the estimate sections for accommodations and personal vehicle, rental vehicle once travel has begun.

*Meals and Incidentals will be calculated by the system do not add these as an expense.

Meals and Incidentals

Date	Description	Amount
5-June-2023	Dinner	\$58.60
6-June-2023	All Day	\$123.40
7-June-2023	All Day	\$123.40
8-June-2023	Breakfast	\$23.60
	Total	\$329.00

Totals

Subtotal Claim: \$ 1178.50
Travel Advance: \$ 500.00
Total Claim \$ 678.50

Travel advance is identified in Travel Approval phase

Coding

Vote	Program	Object	Sub 1	Sub 2	Amount	Add Coding
552	507020	0260	1234	12345	\$400.00	
552	507020	0260	1234	41414	\$278.50	

Validate that coding is set and the amount matches the travel claim the authorizing person approves

Submit to: Robert Smith Action: Submit Submit

Status	Who	Assigned to	Date	Notes
Submitted	Larry Brown	Doug Jones	June-15-2022	
Approved	Doug Jones	Cash Money	June-16-2022	

Actions:

- submit
- reassign
- review
- verify (finance)
- approve
- pay

Expense Type:
Accommodations
Transportation

Travel

http://

Travel - Larry Brown

Purpose:

Final Destination

Start Date

Start Time

End Date

End Time

Meeting re: Project X

Vancouver, BC, Canada

June 5, 2022

June 7, 2022

3PM

Approvals

Estimate

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Reporting

Expense Total: \$0

Estimates Total: \$0

Cost Difference: \$0

Cost differences

Skills gained

Skill application timeframe

Benefits to your area (department/unit)

Benefits to YG

Future recommendations

- Reporting Tab should not be available until in travel state
- Cost difference requires the flight costs and expense claim.
- Copy from existing reporting sections change to align with look and feel.