CNR TRAVEL AUTHORIZATION TRAINING

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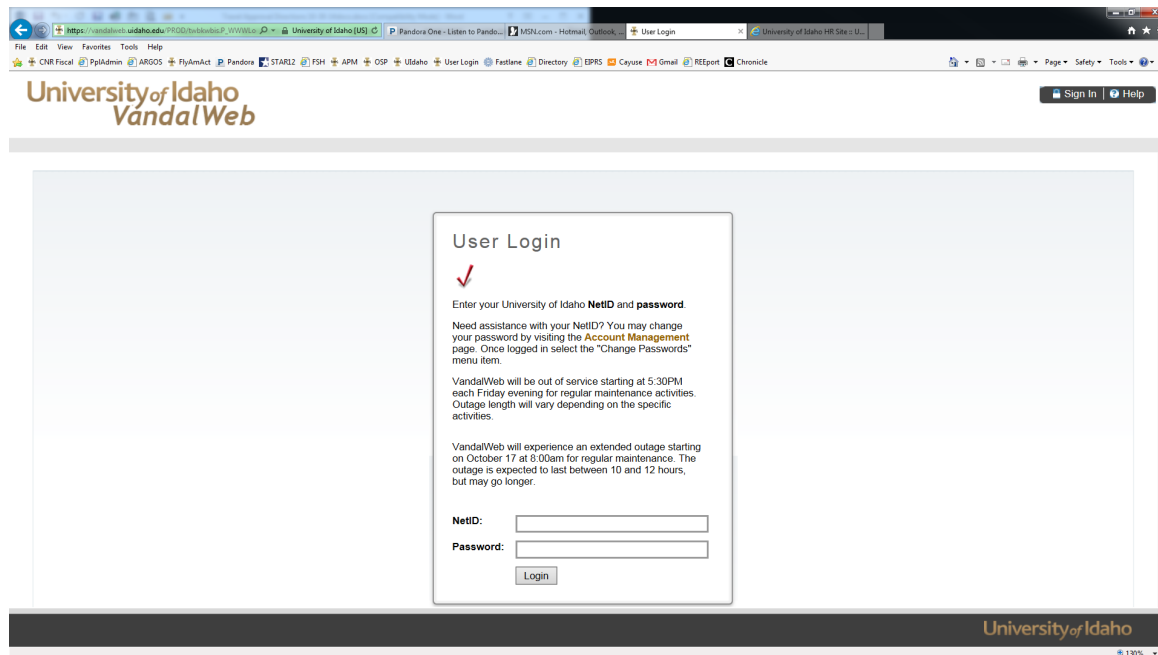College *of* Natural Resources

PROCESS A TRAVEL AUTHORIZATION

- You must complete the Purchase Card and Travel Training before you can process your own travel authorization requests. Please refer to the PowerPoint training "TravelWeb Training" found on the CNR Fiscal website http://www.uidaho.edu/cnr/forms-resources/fiscal-hr-services for this training.

- Once you complete the above training you will be ready to submit a travel authorization request.

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LOG IN TO VANDALWEB

Log in using your VandalWeb NetID and Password

Select Employees Tab

Select Financial Tasks

Select the Travel Web link. Your link may be in a different spot on this cascade view because we all have differing access levels and options.

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Select Create New Trip option on the left

ENTER TRIP INFORMATION

Trip Title: Enter your Last Name and a brief description of the trip (Knock-Attending SRA Conference)

Destination: List all sites, locations, cities, and states

Department: Select the correct dept. from the drop-down. It defaults to CNR Administration so you will have to change it.

Per Diem Type: Select correct type, in state, out of state, international

Depart/Return Dates & Times: Choose dates from calendar or type in dates. Enter time using HH:MI AM/PM format

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Estimated Cost: Enter the estimated guess of the costs for the trip including per diem, hotel, airfare, mileage, etc. This does not have to be exact.

Budget: Enter the UI budget number which will pay for the travel expenses. If paid by a third-party please list their name here.

There are special rules for third-party funded travel. Remember: All travel for business requires an authorization even if not paid with UI funds.

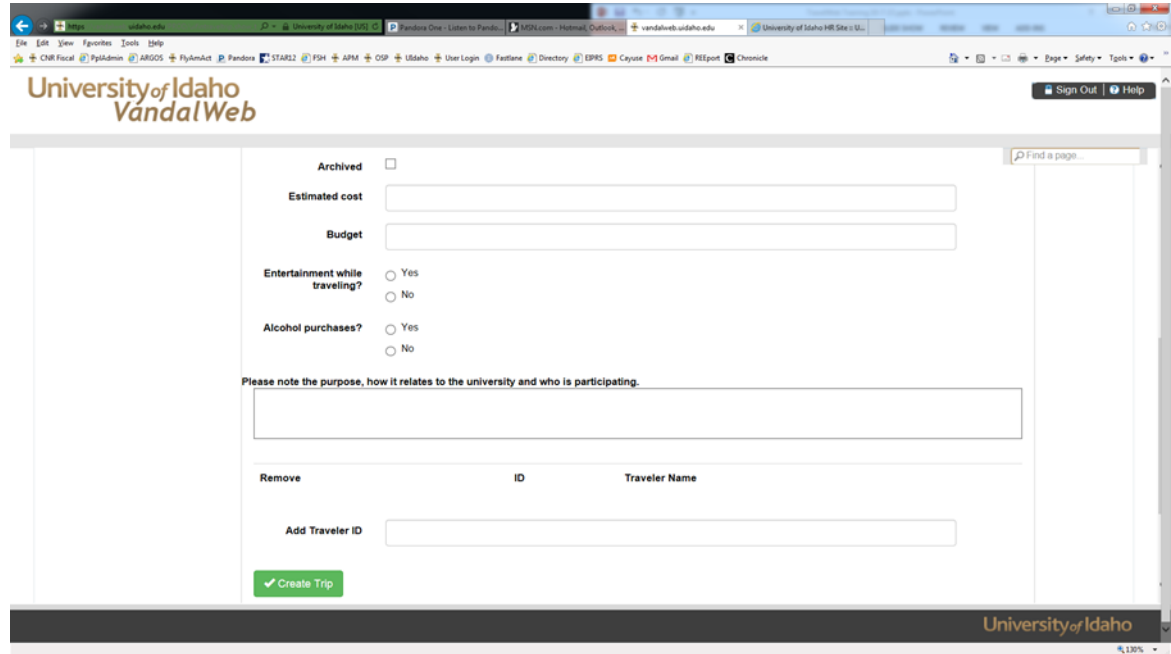**Purpose of Trip:** Please describe the purpose of the trip, how it relates to the University, and who is participating. This is your justification for the trip.

Traveler ID: Enter the V# of the Primary traveler.

Travelers outside CNR should submit their own travel requests following their department/college policies. * See last slide for special circumstances such as class field trips, etc.
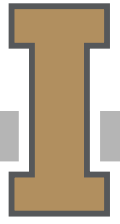
Create Trip: Select the Create Trip button at the bottom.

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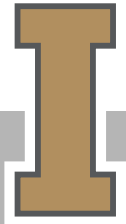**The next screen will look like this at the top** – It will show a Trip Summary of the information you just entered.

You will see a series of buttons at the bottom. We will discuss these on the next slide.

Trip Comments: Please add any additional CNR travelers in the trip comments unless they have submitted their own travel request (recommended if they will have expenses to claim for reimbursement or clearing from their P-cards). * See last slide for class field trips and other special circumstances.

Mixed Personal and Business Travel: Please use the comments to provide details about any mixed business and personal travel. Keep in mind that mixed expenses must be paid out-of-pocket and submitted for reimbursement.
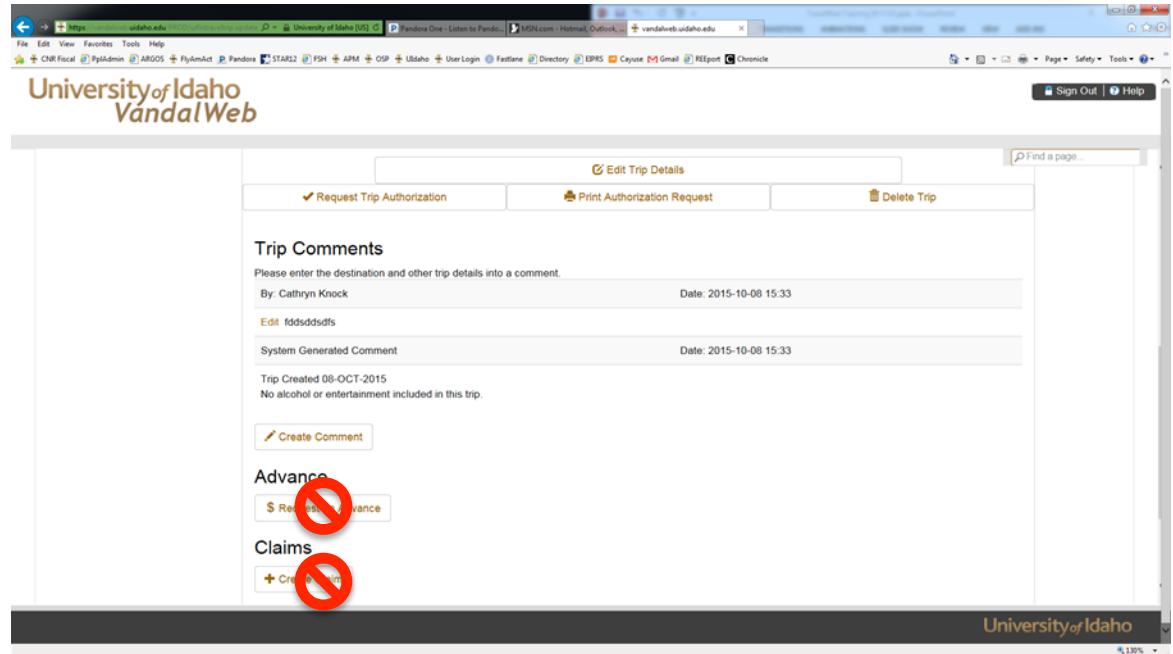
DO NOT – Request an Advance or Create a Claim – CNR policy is that only CNR Fiscal employees may process advance requests or submit claims. You should only use the system for submitting travel authorization requests. Work with your CNR Fiscal Specialist if you need a travel advance or need to file a travel claim.

REQUEST AUTHORIZATION

Request Trip Authorization: If everything is the way you want it you can select the Request Trip Authorization Button to move to the next step.

OR

Edit Trip Details: If you found a mistake (like my typo on the Trip Title) or need to make a change you can select the Edit Trip Details button to go back to the previous screen and make changes.

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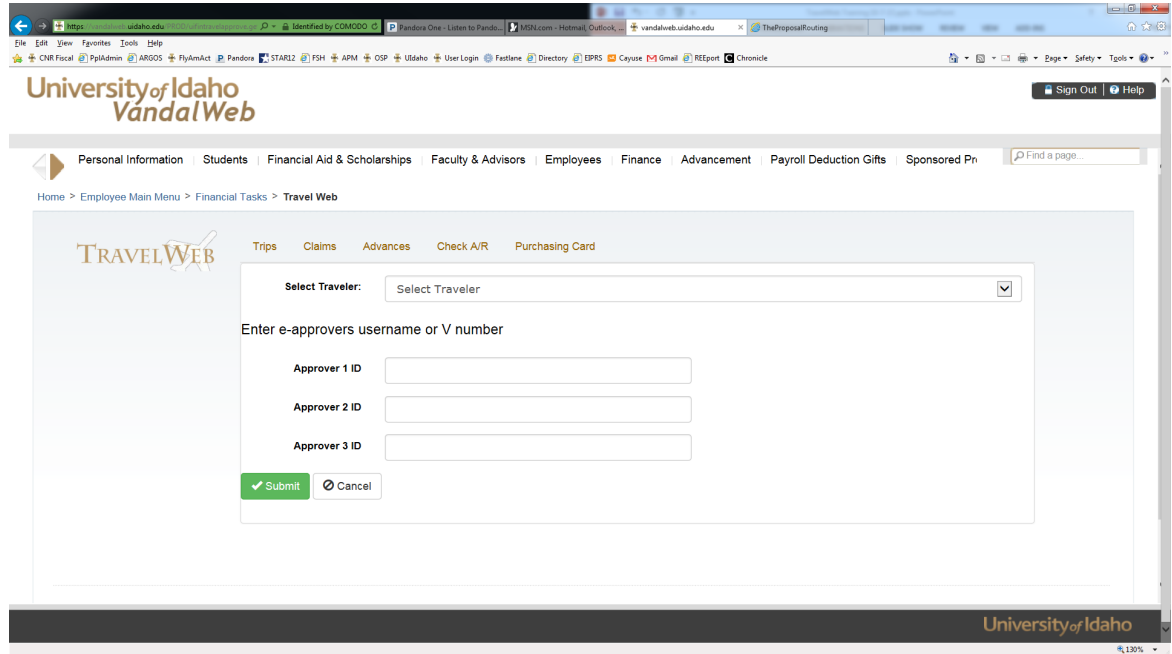College _of_ Natural Resources

ADD APPROVERS

Select Traveler: Select the name of the traveler in the drop-down menu. This should be your name if you are processing your own authorization.

Approver 1 ID: Your immediate Supervisor. If you are faculty this is your Department Chair. You can use their username (first part of their email) or V#.

Approver 2 ID: This is the Dean's Proxy Erika Crossland (V00549056 or crosslande).

Approver 3 ID: Additional approvers if necessary (for non-CNR budgets, etc.)
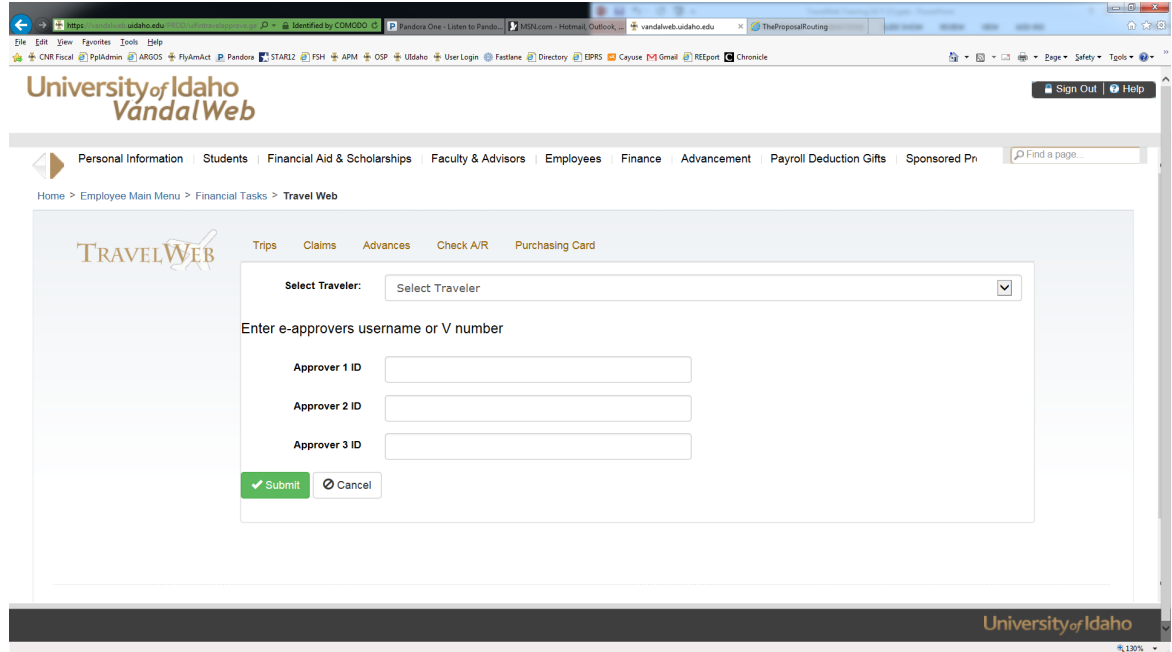
SUBMIT FOR APPROVALS

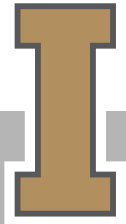**Submit:** Click submit button to begin the routing for approvals.

IMPORTANT: YOU ARE NOT DONE YET! You MUST Approve the travel authorization or it will not route for further approvals.

After you click submit there is one more step.

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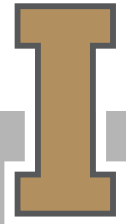College of Natural Resources

APPROVE YOUR AUTHORIZATION

To approve your authorization so it will route to your supervisor select the Employees Tab at the top again.

I made my screen view smaller so you could see the Electronic Approvals at the bottom where it shows it is pending my approval.

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Select **Financial Tasks** and now you should see a link that says **Travel Web Approvals.**

Again, these options may show up in a different order on your screen.

Travel Web Approvals: Select this link

You should now see the travel authorization (and any other documents that are awaiting your approval.)

Select the hyperlinked Trip ID to open the authorization.

You can now view the Travel Authorization with the button at the top.

To **Approve** and **route** to the next approver select the **Approve** radio button.

Then click the green Submit button on the bottom to route to the next person.

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IS MY TRAVEL APPROVED?

You will know you have approval when your receive an email from the system with the following:

Approved, KS Pregitzer, ec

If you have not received this email it can mean one of two things.

1. That the travel has not fully routed through all the approvals, or

2. That I may have forgotten to send the email (it is a manual process and I do miss it sometimes)

So, how do you know which it is? Follow the next steps to check on your authorization.
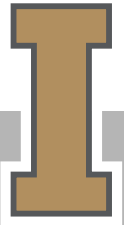
CHECK ON YOUR AUTHORIZATION

Log in to VandalWeb following the steps on slides 3-7. You can then search for your trip with any of the options shown on this page. Scroll to the bottom and click the search button.

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Find the trip you are looking for and click on the hyperlinked Trip ID #.

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Scroll down and you can see the Electronic Approvals status and determine if it is still pending in someone's queue. You can see in this case that Cathryn has approved this but it is still waiting for Lynne Kittner to approve.
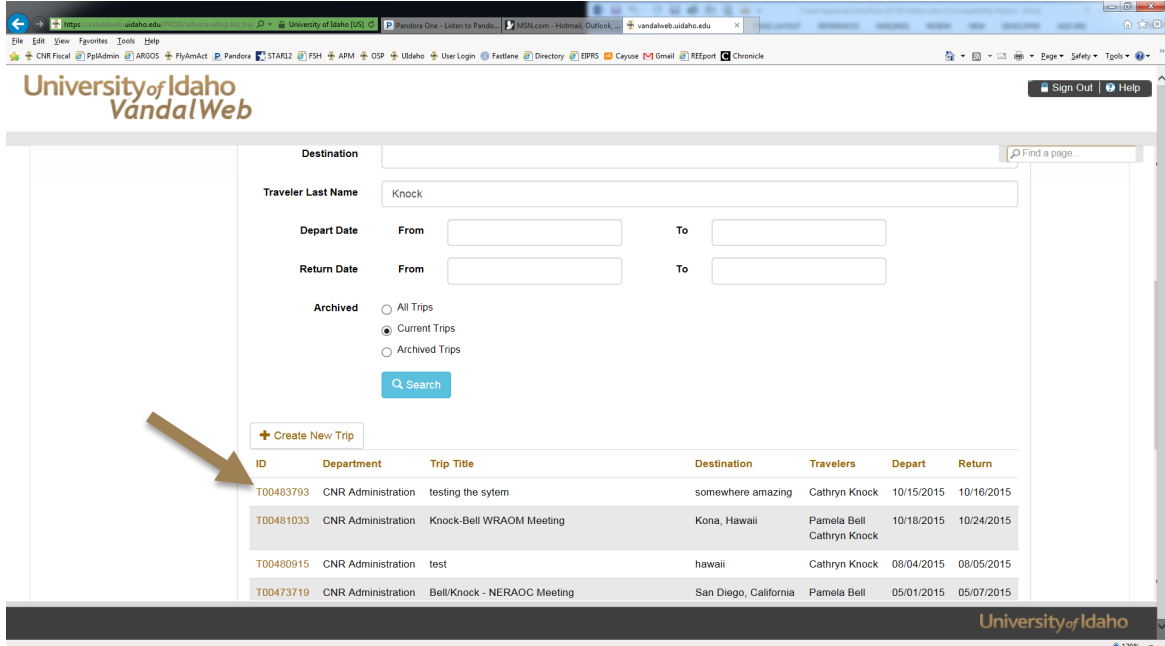
If all names have a date (and one of the names is Erika) then it means the conformation email was missed being sent.

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SPECIAL CIRCUMSTANCES

* Some special circumstances require special handling

- Class Field Trips

  - The leader of the trip should put the authorization on for the trip and list themselves as the primary traveler. They will then just include a comment that the class list will be kept on file in the department. There is no need to list all the students.
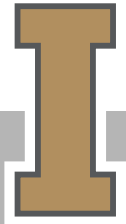
- Travel by CNR faculty/staff/students paid for on a non-CNR budget

  - Other departments may not authorize your right to travel. However, CNR does not have authority to authorize you to use their funds, either. The way to deal with this is to process your authorization through our college as normal and find out who their budgetary approver is and add them in the approvals. They should be listed either directly before or after Erika Crossland in the approvals.

- Travelers from different colleges

  - Travelers from different colleges should each process their own travel authorization requests following their college policies and within their college. This is the only way to ensure all college policies for travel are followed and to ensure that the college/dept. for each traveler will have access to the authorization for claims processing later. It is still a good idea to list the additional travelers in the comments in case our college ends up processing their reimbursement.

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PLEASE LET US KNOW IF YOU HAVE ANY QUESTIONS!

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