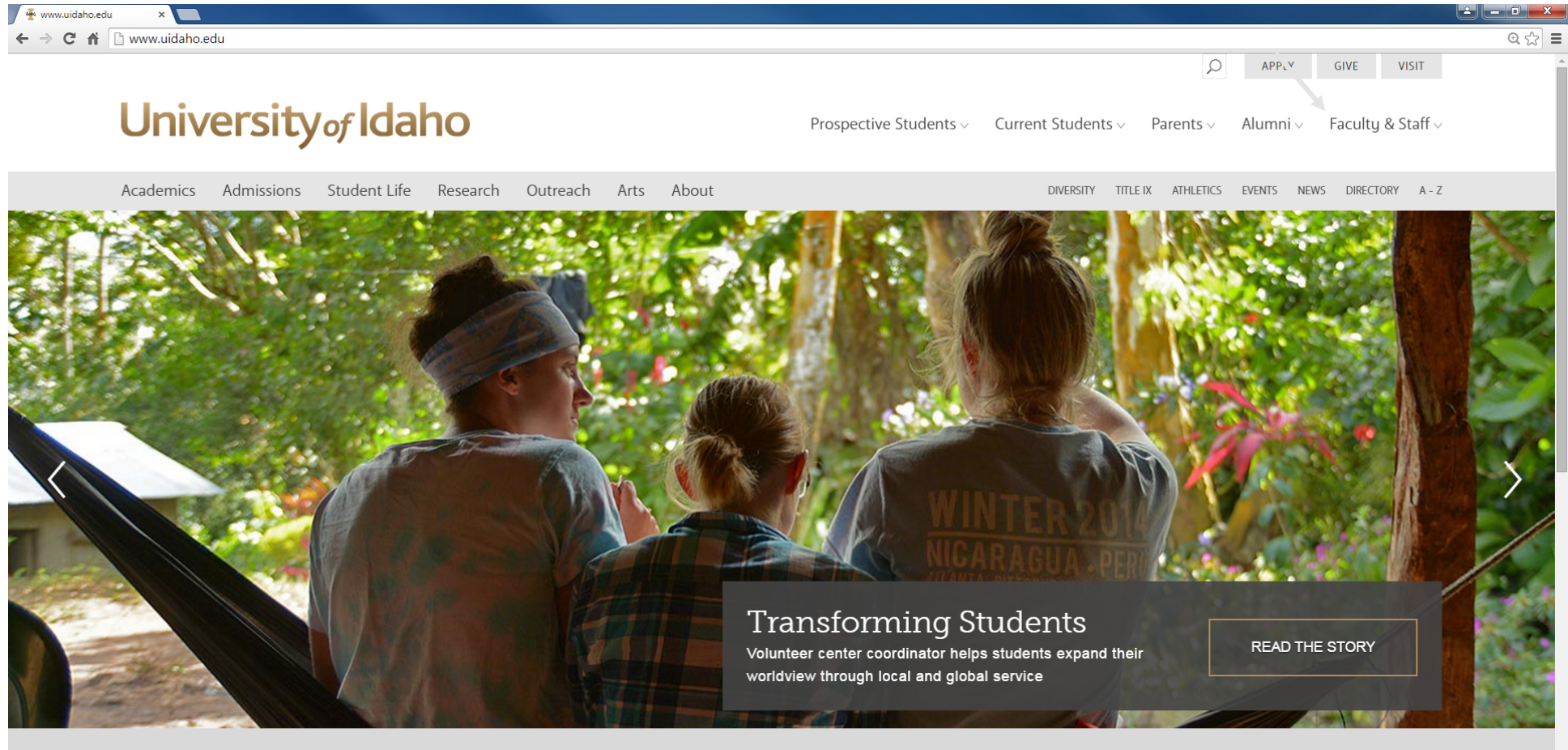


# How to complete: VandalWeb Travel Training

**University of Idaho**  
College of Natural Resources

To start:  
Go to [www.uidaho.edu](http://www.uidaho.edu)  
Locate the **Faculty & Staff** tab on the top of the page.  
\*Be sure to click the tab, not apply the drop down menu.



Scroll down until you see an “Employee Resources” heading or follow this link:  
<http://www.uidaho.edu/human-resources/pdl>.

## Employee Resources

---

[Human Resources >](#)

[Employee Benefits >](#)

[Professional Development and Learning >](#)

[Faculty Staff Handbook >](#)

[Administrative Procedures >](#)

[University Policy >](#)



### New Employee Resources

Welcome to the Vandal family!  
Visit the new employees website to get up to speed. We are glad you are here.

[VISIT THE SITE >](#)



### Employee Compensation

Read about the steps the University of Idaho is taking to make sure its employees are fairly compensated.

[LEARN MORE >](#)

Click “Professional Development and Learning.”

You will be taken to the PDL Training Portal.  
From here click the link “Banner Training.”



The screenshot shows the University of Idaho Professional Development and Learning (PDL) website. The browser address bar displays <http://www.uidaho.edu/human-resources/pdl>. The page features a navigation menu with links for Prospective Students, Current Students, Parents, Alumni, and Faculty & Staff. Below this is a secondary menu with links for Academics, Admissions, Student Life, Research, Outreach, About, and Arts. The main header reads "Professional Development and Learning".

In the left sidebar, a red arrow points to the "Banner Training" link, which is highlighted. Other links in the sidebar include Learning Opportunity Calendar, Work-Related Training, Supervisory Excellence Program, Computer Technology Training, Professional and Personal Development, New Employee Resources, How Can PDL Help You, and About Us.

The main content area displays the breadcrumb "HUMAN RESOURCES > PROFESSIONAL DEVELOPMENT & LEARNING" and the page title "Professional Development and Learning". A welcome message reads: "Welcome to Professional Development and Learning! We provide high quality learning opportunities for University of Idaho faculty and staff." Below this, a paragraph states: "Professional Development and Learning, a unit in the Office of Human Resources, partners with University of Idaho faculty, staff and administrators to enhance employee excellence and engage in the strategic mission of the university." Another paragraph explains: "PDL collaborates with providers of training from across the University of Idaho in support of employee learning and development. PDL serves as a central resource, coordinating training, providing ease in access for the learners and assisting instructors by automating many of the administrative functions associated with training and reporting and responding to employee development."

On the right side of the page, there are social media sharing buttons for Facebook (Share) and Twitter (Tweet). Below these is a "Tweets by @UIdahoPDL" section. The top tweet is from @UIdahoPDL and reads: "Deadline to complete all UI Work-Related Training extended to April 30 [uidaho.edu/human-resource...](http://uidaho.edu/human-resource...)". Below the tweet is a blue banner with white text that says: "Deadline for Completion of 2016 Work-Related Training Extended to April 30, 2016". The banner text continues: "In order to enhance UI employee opportunities to improve performance and effectiveness, President Chuck Stabben has made the completion of several online training modules a 2016 requirement for all faculty, staff and student employees." The tweet is dated "05 Apr".



# Select Classes and Contacts



The screenshot shows a web browser window with the URL <https://www.uidaho.edu/human-resources/pdl/banner-training>. The page title is "Banner Training" and the breadcrumb trail is "HUMAN RESOURCES > PROFESSIONAL DEVELOPMENT & LEARNING > BANNER TRAINING". A prominent button in the top right corner says "TAKE BANNER NAVIGATION TRAINING".

The left sidebar contains several menu items:

- Learning Opportunity Calendar +
- New Employee Resources
- Banner Training**
  - Getting Started
  - Classes and Contacts** + (indicated by a red arrow)
  - Forms and Instructions
  - Training and Authorization Policy
  - FAQs
- Work-Related Training +
- Supervisory Excellence Program
- About Us +

The main content area features a large image of a laptop displaying a software interface, with a glass of water on the desk next to it. Below the image, the text reads: "Professional Development and Learning works together with UI's Banner trainers to offer employees a successful and efficient Banner training experience. If you have comments or suggestions on your training experience, please contact us. Get started with your training by reading the information below."

# Select "Online Banner Training"

The screenshot shows a web browser window with the URL [www.uidaho.edu/human-resources/pdl/banner-training/classes](http://www.uidaho.edu/human-resources/pdl/banner-training/classes). The page is titled "Classes and Contacts" under the "Professional Development and Learning" section. A red arrow points to the "Online Banner Training" link in the left sidebar menu. The sidebar menu includes sections like "Learning Opportunity Calendar", "New Employee Resources", "Banner Training", "Getting Started", "Classes and Contacts", "Forms and Instructions", "Training and Authorization Policy", "FAQs", and "Work-Related Training". The "Classes and Contacts" section is expanded, showing "Online Banner Training" as the first item. The main content area features a breadcrumb trail: "HUMAN RESOURCES > PROFESSIONAL DEVELOPMENT & LEARNING > BANNER TRAINING > CLASSES AND CONTACTS". Below the breadcrumb is a large image of a keyboard with a prominent blue key that says "Professional Development". A "TAKE BANNER NAVIGATION TRAINING" button is visible in the top right corner of the page content.

Scroll down and select “Purchasing Card, Travel Expense, & Claim Vouchers”. Then select “Take Training Now”

The screenshot shows a web browser window with the URL <http://www.uidaho.edu/human-resources/pdf/banner-training/training>. The page is titled "Human Resource Query" and contains the following content:

**PROFESSIONAL DEVELOPMENT & LEARNING**

Physical Address:  
Administrative Building  
Room 216 - 220

Mailing Address:  
875 Perimeter Drive MS 3169  
Moscow, ID 83844-3169

**Training Coordination:**  
208-885-2323  
Email

**Training Records/LMS:**  
Phone: 208-885-2323

Map

Twitter

**Journal Document Training**

**Purchasing Card, Travel Expense & Claim Vouchers**

**Prerequisite to become a card holder or record keeper**

**\*Please note that users must have completed Banner Navigation training and have an active Banner account before proceeding with training.\***

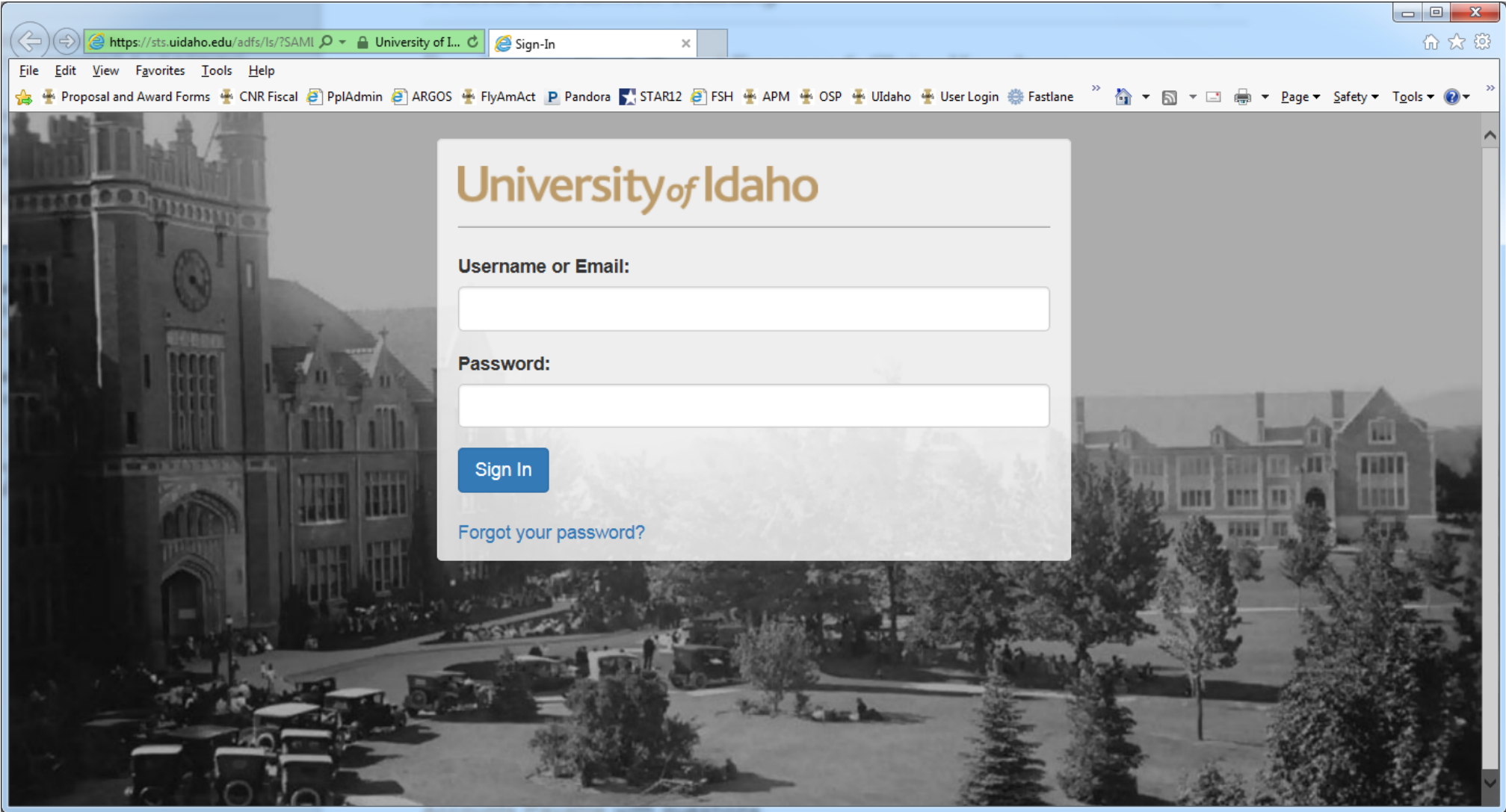
Familiarize yourself with the Accounts Payable website by locating and downloading these materials for the training:

- Purchasing Card Manual, Web Travel Entry Instructions, Web Travel Approval Instructions
- Download Training Slides (Optional)
- **Take Training Now**
- Claim Voucher Entry
- Claim Voucher Approval

Overview of the purchasing card program policies and procedures, opportunity to practice making decisions as a traveler and as a person who will be processing travel documents and claim vouchers online. [Email Accounts Payable](#) with questions.

**Student Query**

You will be taken to a page that prompts you to log in with your UI username and password. You may need to enable popups.





Log in and you will be taken to this page, click the link for “Purchasing Card, Travel Expense & Claim Vouchers.”  
Click “Take Training Now”

University of Idaho

Prospective Students ▾ Current Students ▾ Parents ▾ Alumni ▾ Faculty & Staff ▾

Academics Admissions Student Life Research Outreach About Arts

DIVERSITY TITLE IX ATHLETICS EVENTS NEWS DIRECTORY A - Z

Professional Development and Learning

TAKE BANNER NAVIGATION TRAINING

Learning Opportunity Calendar +

New Employee Resources

Banner Training

- Getting Started
- Classes and Contacts +
- Forms and Instructions
- Training and Authorization Policy
- FAQs

Work-Related Training +

Supervisory Excellence Program

About Us +

Home > HUMAN RESOURCES > PROFESSIONAL DEVELOPMENT & LEARNING > BANNER TRAINING > BANNER TRAINING

## Banner Training

### Banner Navigation

**Prerequisite for all Banner training except Purchasing Card & Travel Expense**

- [Banner Navigation Transcript](#)
- [Download Navigation Keys and Icons](#)
- [Banner Terminology](#)
- [Take Banner Navigation Training Now](#)

Introductory training highlights responsibilities, policies, Banner terms and basic navigation. A Banner account is initiated after the employee passes the required quiz. [Email PDL](#) with questions.

Scroll down to Purchasing Card, Travel Expense & Claim Vouchers

Joostentravelclaim.pdf

Show all downloads...

This should be what you see..  
Please note: you will need speakers or headphones.


The screenshot shows a web browser window with the URL <https://webpages.uidaho.edu/pdl-training/Bannerrefresh2016/Purchasingandtravel/>. The page title is "Purchasing Card Program & Travel Expense Training (00:01 / 13:26)".

**Menu**   **Notes**   **Resources**


- 1. About This Training
- 2. Welcome
- 3. Overview
- 4. Guidance and Requirements
- 5. IRS
- 6. Having a PCard
- 7. University Vehicles
- 8. Travel
- 9. Plan Ahead
- 10. International Travel
- 11. Review
- 12. Specifics
- 13. Review
- 14. What Now?
- 15. Review
- 16. Course Completion

## ABOUT THIS TRAINING

You will need...



**Menu**   **Notes**   **Resources**

 For disability support, please contact:  
Professional Development and Learning  
Ph: (208) 885-2323  
Email: [pdl@uidaho.edu](mailto:pdl@uidaho.edu)

**I**

University of Idaho  
Professional Development and Learning

Speaker icon   Pause icon   Progress bar   Refresh icon   < PREVIOUS   NEXT >

Pay attention to the slides, as you will be quizzed throughout.

The screenshot shows a web browser window with the URL <https://webpages.uidaho.edu/pdf-training/Bannerrefresh2016/Purchasingandtravel/>. The page title is "Purchasing Card Program & Travel Expense Training (11:01 / 13:26)". On the left, there is a "Menu" sidebar with 16 items, where "11. Review" is highlighted. The main content area displays a slide with the following text:

Your conference is 3 days long. Since it is in Florida, near Disney World, you decided to take the family and stay an extra 2 days.

Which of the following expenses can you claim?

- Tips for personal baggage handling
- Suntan lotion and aloe for sunburn
- Rental car for 5 days
- Per Diem for 1 person for 4 days
- Disney World souvenirs for your co-workers
- Lodging for 1 person for 4 nights
- Motion sickness medication for the flight and rides
- In-flight movie

At the bottom right of the slide area, there is a "SUBMIT" button. A speaker icon is visible at the bottom left of the slide area.

When you are finished with the training you will see this screen. Use the scroll bar on the right and answer the questions. OR you may click the “here” link to complete the training. , click the **Submit Training Confirmation** button.

The screenshot displays a web browser window with the URL <https://webpages.uidaho.edu/pdl-training/Bannerrefresh2016/Purchasingandtravel/>. The page title is "Purchasing Card Program & Travel Expense Training (13:26 / 13:26)".

**Menu**

1. About This Training
2. Welcome
3. Overview
4. Guidance and Requirements
5. IRS
6. Having a PCard
7. University Vehicles
8. Travel
9. Plan Ahead
10. International Travel
11. Review
12. Specifics
13. Review
14. What Now?
15. Review
16. Course Completion

**COURSE COMPLETION**

To complete this training you **must** submit the survey provided on this screen.

You may also [access the completion survey here](#).

After the survey is complete you will receive a course completion confirmation email.

**University of Idaho**

**Purchasing Card & Record Keeper Training Confirmation**

By completing the information on this form, I confirm that I have taken this Purchasing Card Program training and am an active employee who is eligible

Professional Development and Learning » [pd@uidaho.edu](mailto:pd@uidaho.edu) » (208) 885-2323

Navigation controls: < PREV, NEXT >



You're not done yet!  
Confirm that you have completed the training by clicking the **Yes** bubble, followed by  
the **next button**.



TRAVPURCH5-22-13 Accounts Payable: Purch...

www.surveymoz.com/s3/1334008/Accounts-Payable-Purchasing-Card-and-Record-Keeper-Training-Confirmation-V2

**Confirmation**

By completing the information on this form, I confirm that I have taken this Purchasing Card Program training and am an active employee who is eligible to be a purchasing Card Holder or Record Keeper.

Yes  
 No

Next

This will be your next screen.  
Make sure to check the boxes as they appear below.

The screenshot shows a web browser window displaying a survey form. The browser's address bar shows the URL: [https://uidaho.co1.qualtrics.com/jfe1/form/SV\\_8CYGo](https://uidaho.co1.qualtrics.com/jfe1/form/SV_8CYGo). The browser's title bar reads "Online Survey Software | Q...". The browser's menu bar includes "File", "Edit", "View", "Favorites", "Tools", and "Help". The browser's toolbar shows various icons for navigation and utility. The survey form itself has a header with the "University of Idaho" logo. Below the logo, the form contains two sections:

**1. Are you going to be: (select all that apply)**

- Traveling Only (no purchasing card in your name; keeps receipts from travel to be reimbursed-no systems access needed)
- Using a Purchasing Card (authorized by Supervisor/Dept. Head to be issued a purchasing card, i.e.; Card Holder)
- Entering Travel Claims into VandalWeb
- Record Keeping (responsible for reconciliation, review, & retention of cardholder receipts & transactions)
- Other

**2. Please identify the department, unit or college for which you will be authorized as a Card Holder, Record Keeper, or Traveler.**

**Be sure to identify your college and department as one of the following:**

- CNR Administration
- CNR Fish & Wildlife Sciences
- CNR Forest, Rangeland, and Fire Sciences
- CNR Natural Resources and Society
- CNR Co-Op Unit
- CNR Environmental Science Program
- CNR Fish Ecology Research Lab

Next you will be asked to enter your contact information as well as your departmental record keeper's. This screen may look different but asks for the same information.

TRAVPURCHS-22-13 x Accounts Payable Purcha x

www.surveygizmo.com/s3/1334008/Accounts-Payable-Purchasing-Card-and-Record-Keeper-Training-Confirmation-V2

### Your Information

We need your information to grant systems access and/or record that you have taken this training.

First Name \* Last Name \* Vandal Number \* Work Email Address \*

Banner User ID \*

### Your Departmental Record Keeper's Information

You will need to identify your departmental Record Keeper so you may work together. Please list their information below.

Record Keeper First Name \* Record Keeper Last Name \* Record Keeper Vandal Number \* Record Keeper Work Email Address \*

Next

Record Keeper information is as follows:

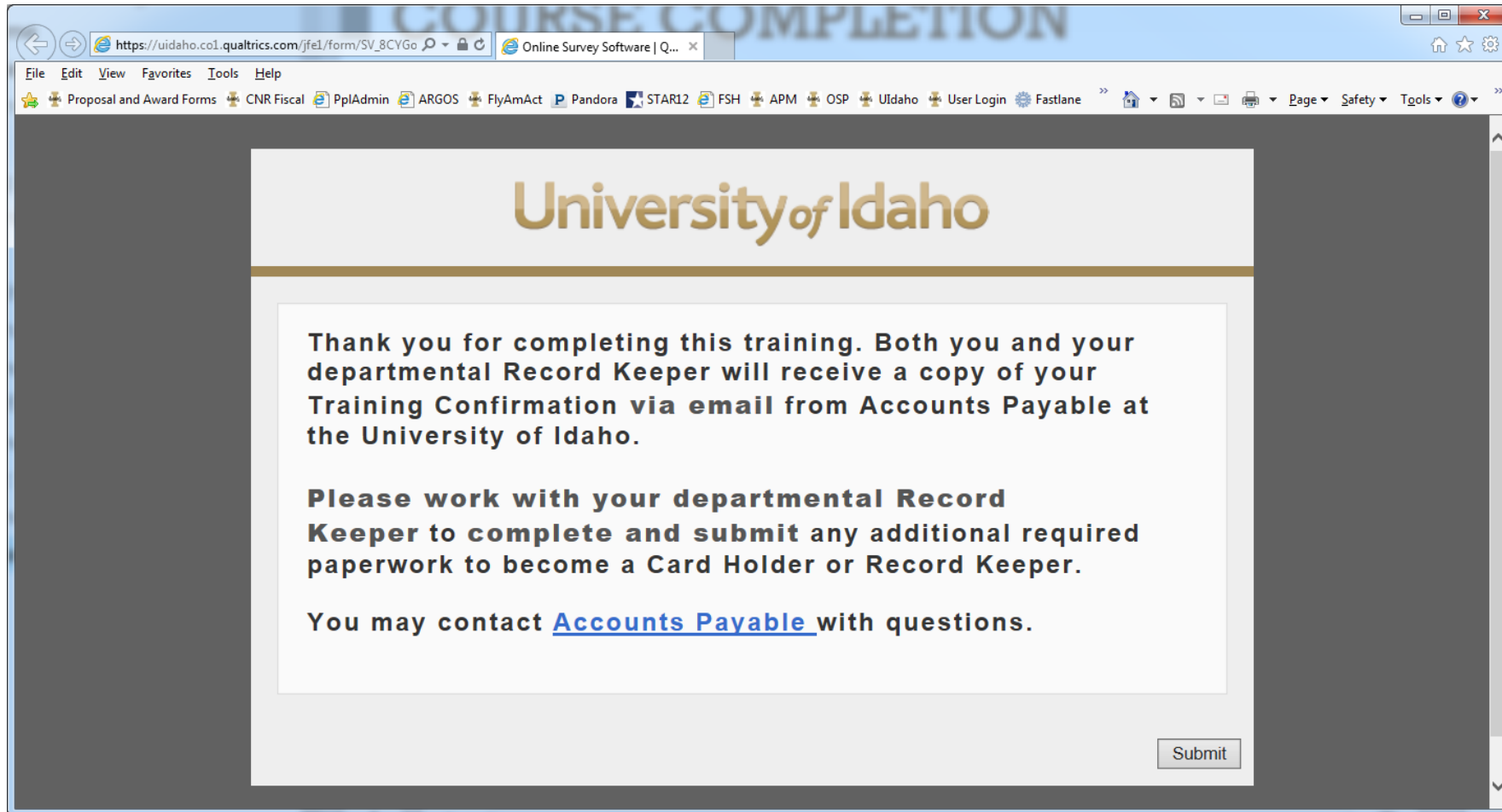
- Cheryl Chambers: V00938144, [cchamb@uidaho.edu](mailto:cchamb@uidaho.edu) – Fish & Wildlife Sciences, Fish Ecology Research Lab, Fire Science, Tree Nutrition Cooperative, Renewable Materials
- Karen (Kal) Johnson: V00580523, [kalj@uidaho.edu](mailto:kalj@uidaho.edu) – Natural Resources and Society, Environmental Science
- Erika Crossland: V005049056, [crosslande@uidaho.edu](mailto:crosslande@uidaho.edu) – Forest, Rangeland, and Fire Sciences (includes Forest Resources, Rangeland Ecology & Management, Excludes Fire Science, Tree Nutrition, and Renewable Materials), CNR Admin
- Elyse Bean: V00485200, [ebean@uidaho.edu](mailto:ebean@uidaho.edu) – CNR Fish & Wildlife Co-Op Unit

**Important:** Please note that your Vandal Number is **NOT** the same as your student ID#. If you do not know your Vandal Number, please contact CNR Fiscal.

Email [cnrfiscal@uidaho.edu](mailto:cnrfiscal@uidaho.edu) if you are unsure who your record keeper is.

You will now be asked to acknowledge that you understand and agree to the responsibilities, policies, and guidelines of a traveler Purchase Card holder.

**\*Please note:** it is CNR policy that if you continually fail to turn in receipts in a timely manner, your privileges of having a Purchasing Card may be suspended or terminated.



The screenshot shows a web browser window with the URL [https://uidaho.co1.qualtrics.com/jfe1/form/SV\\_8CYGo](https://uidaho.co1.qualtrics.com/jfe1/form/SV_8CYGo). The browser's address bar and menu bar are visible. The page content includes the University of Idaho logo at the top, followed by a message: "Thank you for completing this training. Both you and your departmental Record Keeper will receive a copy of your Training Confirmation via email from Accounts Payable at the University of Idaho." Below this, it says: "Please work with your departmental Record Keeper to complete and submit any additional required paperwork to become a Card Holder or Record Keeper." and "You may contact [Accounts Payable](#) with questions." A "Submit" button is located at the bottom right of the page.



It can take 24 hours or more for your changes to take place within your VandalWeb. At that time, you will have two new travel links under **Financial Tasks** on your **Employee Tab** within VandalWeb: **Travel Web** and **Travel Web Approvals**.

The screenshot shows the University of Idaho VandalWeb interface. The browser address bar displays 'https://uidaho.edu'. The page title is 'University of Idaho VandalWeb'. The navigation menu includes 'Personal Information', 'Students', 'Financial Aid & Scholarships', 'Faculty & Advisors', 'Employees', 'Finance', 'Advancement', 'Payroll Deduction Gifts', and 'Sponsored Programs'. The 'Employees' tab is selected. Below the navigation menu, there is a search bar and a 'Go' button. The main content area is titled 'Financial Tasks' and contains a list of links with descriptions:

- Claim Voucher Entry**: Used by the departments to request reimbursements or non procurement payments.
- Claim Voucher Approval**: Used to approve claim vouchers.
- Finance Self Service for Non-Banner Users**: Connect to Finance Self-Service for non-Banner users.
- Pending Approvals**: Central launch point for all web-based financial approvals.
- Recent Travel Documents**: View status of Travel Web trips or Purchasing card claims that you are listed as the traveler or cardholder
- Purchasing Card Statements**: Manage departmental purchasing cards and purchasing card expenses.
- Travel Web**: This is used by departments to enter travel claims on the web.
- Travel Web Approvals**: This is used to approve Travel Web trips, claims, and advances
- Journal Document Imaging**: Upload additional documentation to be loaded to Document Imaging
- Student Fee Payment and Student Resource Application Approvals Pending**: SFP and Resource Application Journals awaiting Approval
- Asset Change Requests**: Request transfer, description or status changes to Capital Assets.
- Restricted Funds Verification**

At the bottom of the page, it says 'RELEASE: 8.7' and '© 2016 Ellucian Company L.P. and its affiliates.' Two red arrows point to the 'Travel Web' and 'Travel Web Approvals' links in the list.

**\*Note:** If you do not receive access within 24 hours, please contact CNR Fiscal.

# What is next?

Once you have the Travel Web and Travel Web approvals links, you can enter Travel Authorization Requests using the Travel Web link.

Please see CNR Travel Authorization Processing Directions instructions at:

<http://www.uidaho.edu/cnr/forms-resources/fiscal-hr-services>

**\*Note: DO NOT SUBMIT YOUR OWN TRAVEL ADVANCE REQUESTS OR TRAVEL CLAIMS.** You will have access to enter full travel claims and request advances, however, CNR policy prohibits processing your own claims. For several procedural reasons, entering your own claims and advances may delay processing time, and your reimbursement.