This document details the steps required to Create a Request for Travel/Trip in the web based application - ProTrav@UNI.

A trip should be created for anyone traveling on behalf of the University of Northern Iowa, regardless if the University is funding the trip or a 3rd party is paying the expense. The travel/trip request should be created in the ProTrav@UNI web application.

To Create a Trip Request, click Create new trip on the sidebar to the left. You may create a trip for any UNI employee, student or non-uni employee without them being listed under your “my Travelers” section.

The process to Create new Trip includes 3 Steps;
1) Trip Basics
2) Funding Details
3) Review/Summary/Submit
Step One – Trip Basics-Entering the Travel Information

Principal Traveler- Enter who is Traveling:
Indicate whether the trip is for you, (User logged into the application), or for Someone Else.
If you select someone else, you may search for UNI Faculty/Staff/Student or Non-University Traveler.
If searching for UNI employee or student, you may search by their CATID.

Click “Add traveler”, a list of all who match the criteria you listed will be returned.
If there is only one result, the name will automatically populate.
If more than one result, select the appropriate traveler by clicking on the radio button to the left of their name.
Trip Essentials – Provide details about the reason for Travel.

- Purpose of Travel
- Select Type of Travel; Individual or Group travel
  - If a UNI traveler is taking a group of students to an event and will be incurring all of the expenses, then group travel should be selected when creating the trip. If group travel is selected a list of participants must be included as an attachment or provided in the comments section.
  - If a UNI traveler is taking a group of students to an event and personal reimbursement is going to be needed for each person, then individual trips should be created.
- Trip Description
- Comments may be added but are not required

*Based upon selection for Purpose of Travel additional, justification for business travel may be required. For example, when selecting Conference/Professional Development or Presentation you will need to select the capacity which you are representing the University.

![Justification for Business Travel](image)
Anticipated Expenses – OPTIONAL
These are details used to help evaluate available funds for trips.

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Airfare</td>
<td>0.00</td>
</tr>
<tr>
<td>Hotel</td>
<td>0.00</td>
</tr>
<tr>
<td>Meals</td>
<td>0.00</td>
</tr>
<tr>
<td>Mileage</td>
<td>0.00</td>
</tr>
<tr>
<td>Registration</td>
<td>0.00</td>
</tr>
<tr>
<td>Other</td>
<td>0.00</td>
</tr>
<tr>
<td>Total</td>
<td>0.00</td>
</tr>
</tbody>
</table>
Trip Destination – Identify where and when travel will take place.
Enter the traveler’s departure and return dates.
Enter the destination country, state and city. If the desired city is not listed, select other and type the city name in City (Other) box.

Click Save Destination.

To add additional destinations to this trip, select Add a destination.

Be sure not to use the same travel dates as already saved.

***INTERNATIONAL Trip Destinations — State Department Issued Alert/Warning***
If a trip is created to a destination that has an active warning or alert issued by the US State Department, a link will appear that the user may click on to review the details provided by the State Department detailing the travel warning or alert.
Once the user clicks on the link, a window will open with the complete text of the advisory which includes additional links to the US State Department website.

The advisory may also be accessed through the trip summary after the trip has been created.

If a new advisory is issued after a trip has been created, an e-mail notification will be sent to the traveler and workflow approvers announcing details of the new advisory.
### Personal Travel

This information is used when reviewing travel expenses. This information helps determine the business dates of travel.

<table>
<thead>
<tr>
<th>Personal Travel</th>
<th>help</th>
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</thead>
<tbody>
<tr>
<td>Does the departure date and return date defined include any portion of personal travel?</td>
<td></td>
</tr>
<tr>
<td>☐ Yes</td>
<td></td>
</tr>
<tr>
<td>☐ No</td>
<td></td>
</tr>
</tbody>
</table>
**Originating Location** – This section is required for UNI employee travel to Cedar Falls, IA.

Once the destination of Cedar Falls, IA has been entered for a UNI employee, this section appears which requires additional information.

Once the information has been entered, select Save Location.
Destination Address – This section is used to provide lodging details for the Traveler.

**THIS SECTION IS REQUIRED IF TRAVELER IS A STUDENT.**

If it is known at the time the trip is being created, it is requested you enter where the traveler will be staying. This information will only be used in the case of an emergency as a means to provide safe keep to the traveler.

Associated Destination defaults based upon Destination provided above.

Select Destination Type from options below.

Enter Address details and click Save Address.

If the traveler is staying multiple places, you may enter additional addresses. Click Add an address.
**Traveler Contact Information** – This section is used to provide direct contact information for the traveler and/or other designated contact on behalf of the traveler. **THIS SECTION IS REQUIRED IF TRAVELER IS A STUDENT.**

This information is being requested so that, in case of an emergency, departments may get a hold of the traveler quickly. Information includes traveler’s cell phone, e-mail, hotel phone number or other means of contact.

Click Add contact

The screen will open to an editable state. Enter the traveler contact information. Click Save contact.

Click Add contact if there are multiple points of contact for the traveler.
**Passport** - This information is only requested for UNI faculty/Staff or Students traveling internationally.

Click Add passport to provide the Issuing Country, Passport number, and date of issue. ProTrav will default the expiration date to 10 years past the date of issue.

Once this information has been entered, it will default into future trips up to the expiration date of the passport. If the traveler has passports for multiple countries, they may all be added to the traveler profile. Click save passport.

If you need to add another passport, click Add passport.
**Additional Considerations** – Select whether the trip is being funded by University of Northern Iowa. If yes is selected the user clicks Continue and will be taken to the Funding screen to enter the funding Account and Cash Advance information if one is needed. If no is selected, the user will be taken to the trip summary screen to review the trip information entered in Step 1.
**Step 2 - Funding Information and Cash Advances**

**Funding Account -- Enter the funding information for this trip.**

You may only enter one funding Account during trip set up. If multiple sources are funding this trip, you may add them at the time you are claiming out of pocket reimbursement to the traveler. You may add the funding Accounts by utilizing your favorites, enter a funding Account, and add it to your favorites, or manually type the funding Account into the spaces provided. Once the Account is populated, click Save Account.
Cash Advance – This section is used to request a Cash Advance. If a traveler meets certain eligibility requirements or is traveling internationally, a cash advance may be requested.

Click + Add Cash Advance

A cash advance is intended to cover minor daily expenditures that will be incurred while in travel status (taxi, meals, tips etc.) A standard advance is limited to $60 the first day in travel status and $20 for each additional day. Cash Advances in general are limited. The Standard amount will default in based on the trip dates.

If traveling internationally, the user will type in the amount requested and provide justification. If you do not wish to request a cash advance, skip this step.
Click, add cash advance. The advance amount will populate below the request box.

Click continue to move to step 3

<table>
<thead>
<tr>
<th>Amount</th>
<th>Payment Method</th>
<th>Justification (if required)</th>
</tr>
</thead>
<tbody>
<tr>
<td>120.00</td>
<td>Direct deposit</td>
<td>test</td>
</tr>
</tbody>
</table>
Step 3 - Review Trip Details and Submit

This is a summary view of the trip information entered in steps 1 and 2. If all the information is correct, click Submit Trip. If any corrections need to be made click “Prev” to the screen in which the change needs to be made. Edit or delete and re-enter the information and then click Continue until you are back to the Review Trip Details panel.

There is also a link so the user may print the itinerary of the trip.

Submit Trip - Creates the Trip ID # and then the user must click ‘CONTINUE TO WORKFLOW’ and then ‘Start Workflow’ so the Trip Request is fully submitted to UNI Workflow for review/approval.