

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.

 Principal Traveler [help](#)

AMY KLIEGL SOMEONE ELSE

Find traveler by type and name | Find traveler by CatID

Traveler Type
Faculty/Staff/Student or

First name
AM
Last name
SMITH

Name | Department | Address

Please select the traveler for whom you wish to create a trip by clicking on the traveler name.

<input type="checkbox"/>	AMELIA SMITH TRANSPORTATION SERVICES
<input type="checkbox"/>	AMARI SMITH
<input type="checkbox"/>	AMY SMITH
<input type="checkbox"/>	AMELIA SMITH
<input type="checkbox"/>	AMIE SMITH

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

Trip Essentials [help](#)

Purpose of travel *
- select -

Type of travel *
Individual

Trip Description *

Trip comments

*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 *

Based on your purpose of travel, what capacity are you representing the University in your business travel?

- select -

- select -

Attendee/Participant

Presenter

Support

Other

Anticipated Expenses – OPTIONAL

These are details used to help evaluate available funds for trips.

Anticipated Expenses [help](#)

Airfare	<input type="text" value="0.00"/>
Hotel	<input type="text" value="0.00"/>
Meals	<input type="text" value="0.00"/>
Mileage	<input type="text" value="0.00"/>
Registration	<input type="text" value="0.00"/>
Other	<input type="text" value="0.00"/>
Total	0.00

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.

Trip Destinations [help](#)

*** Please enter at least one destination**

Departure date: 06/02/2015 Return date:

Country: United States

State: Iowa

City/Province: - select a city -

[Save destination](#)

City, State	Country	Arrival	Departure	Advisory	Actions
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Click Save Destination.

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

Trip Destinations

[+ Add a destination](#)

City, State	Country	Arrival	Departure	Advisory
Anchorage [Incl Nav Res], Alaska	United States	05/17/2011	05/20/2011	Edit Delete

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.

Trip Destinations [help](#)

*** Please enter at least one destination**

Departure date: 10/19/2011 Return date: 10/19/2011

Country: Afghanistan

[State Department Advisory](#)

City: Kabul

[Save destination](#)

rt.

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.



Personal Travel [help](#)

Does the departure date and return date defined include any portion of personal travel?

- Yes
- No

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.

✚ Originating Location [help](#)

* Originating location is required when the trip destination is Cedar Falls and the traveler is a university employee.

Country
United States

State
Iowa

City
- select a city -

Justification

Save location

City, State	Country	Justification	Actions
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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.

Destination Addresses [help](#)

If available, add information about your lodging.
Lodging details will aid the University to assist travelers in the event of an emergency.

Associated Destination
Bettendorf, Iowa

Type
- select -

Address Line1

Address Line2

Country
United States

State
Iowa

City
Bettendorf

Parent Dest	Type	Address	City, State Country	Actions
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Associated Destination defaults based upon Destination provided above.
Select Destination Type from options below.

Type

- select -
- select -
- Hotel
- Other
- Residence
- School
- Work

Enter Address details and click Save Address.

If the traveler is staying multiple places, you may enter additional addresses. Click Add an address

Destination Addresses (optional)

Parent Dest	Type	Address	City, State Country	Actions
Testing, N/A	Hotel	123 Lark Lane	Testing, - select - Albania	<input type="button" value="Delete"/>

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

Traveler Contact Information (optional)

[+ Add contact](#)

<i>Name/Method</i>	<i>Type</i>	<i>Number/Address</i>
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The screen will open to an editable state. Enter the traveler contact information. Click Save contact.

Traveler Contact Information (optional)

[+ Add contact](#)

How can we get ahold of the traveler during this trip?

Contact type

▼

- select -
- Self/Traveler
- Other/Personal

Contact method

▼

Number / Email

[Save contact](#)

Click Add contact if there are multiple points of contact for the traveler.

Traveler Contact Information (optional)

[+ Add contact](#)

<i>Name/Method</i>	<i>Type</i>	<i>Number/Address</i>	
Self (Cell Phone)	Self/Traveler	319-555-9525	Delete

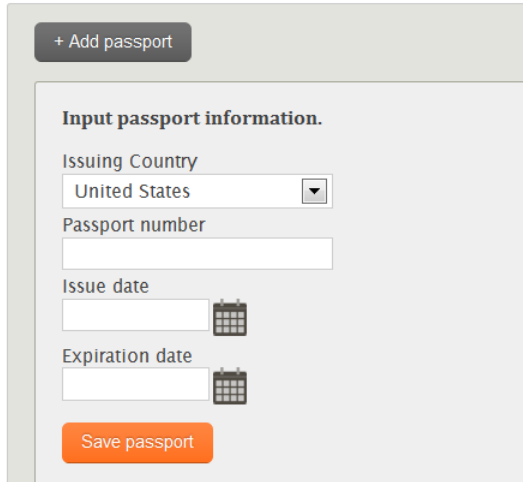
Passport - This information is only requested for UNI faculty/Staff or Students traveling internationally.

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.

 Passport Information (optional)



The screenshot shows a user interface for adding a passport. At the top left is a button labeled '+ Add passport'. Below it is a section titled 'Input passport information.' containing the following fields: 'Issuing Country' with a dropdown menu showing 'United States', 'Passport number' with a text input field, 'Issue date' with a text input field and a calendar icon, and 'Expiration date' with a text input field and a calendar icon. At the bottom of the form is an orange button labeled 'Save 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. 

 Funding Account [help](#)

Please input the Account for this trip.

Fnd	AY	Org	Obj	Prgm	Func	Act	Line	UNI	Fndn	
 			61010							<input type="button" value="Save Account"/>

Account *Actions*

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.

Cash Advance

Would you like to add a cash advance?

[+ Add cash advance](#)

Amount	Payment Method	Justification (if required)
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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.

Would you like to add a cash advance?

[+ Add cash advance](#)

Travel Cash Advance Information close [x]

An approved Request for Travel Advance form, authorizing the advance amount and verifying funding, must be submitted to the Office of Business Operations at least 10 working days prior to the start of the trip in order to obtain a travel cash advance. Travel cash advances will be limited to faculty and staff for foreign travel, athletic recruitment, group travel, and domestic travel over 14 days in duration. Advances will be \$60 for the 1st day and \$20 for each additional day. A statement of explanation and itemized estimate of expenses must be provided on the Request for Travel Advance form for any cash advance exceeding the default limit. Travel cash advances will pay to the traveler's primary address defined in eBusiness no earlier than five working days prior to the start of the trip.

Requested amount

Payment method
Payment method will default to the traveler's identified non-payroll pay method, e.g. check or ACH.

Justification

Terms and Conditions for TRAVELER

THE TRAVELER understands and agrees to the following: The advance 1) is to be used only for University business travel expenses and for no other purpose; 2) must be substantiated and cleared by submission of a travel expense voucher or repaid within 2 weeks of the trip end date; 3) will be withheld from the UNI traveler's payroll if not cleared or repaid within the required time; 4) unsubstantiated amounts that cannot be deducted from payroll will be

Terms and Conditions for DEPARTMENT

THE DEPARTMENT verifies that the trip and advance requested herein are for official university business travel, that funding is available to cover the advance, and that the trip, advance request, and funding have been reviewed and approved by the appropriate individual(s) who has designated approval authority for this department and/or funding source. As a designated departmental "Approver" of expenses incurred in the name of The

[Add cash advance](#)

Amount	Payment Method	Justification (if required)	Actions
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Click, add cash advance. The advance amount will populate below the request box.

Click continue to move to step 3

Add cash advance

Amount	Payment Method	Justification (if required)	
120.00	Direct deposit	test	Delete

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.

Principal Traveler
Name: AMY KLIEGL
Address: BUSINESS OPERATIONS
Phone:
Email:

Trip Essentials
Trip Description: test
Purpose of Travel: Athletic Recruitment
Type of Trip: Individual
Trip Comments:

Anticipated Expenses
Airfare: \$10.00
Hotel: \$20.00
Meals: \$30.00
Mileage: \$40.00
Registration: \$50.00
Other: \$60.00
Total: \$210.00

Trip Destinations

City, State	Country	Arrival	Departure	Advisory
Bettendorf, IA	United States	06/02/2015	06/09/2015	

Destination Addresses

Type	Address	City, State Country	Associated Destination
Hotel	Ramada Inn 200 Scholarly Lane	Bettendorf, IA USA	Bettendorf, IA

Traveler Contact Information

Name	Contact Method	Phone Number/Email Address
AMY KLIEGL	Cell Phone	319-441-1234
Ted Hickey	Cell Phone	319-476-1478

Funding Information

Account
0011-16-48001-61010-0000-71-0000-000-

Cash Advance Amount	Payment Method	Justification (if required)
100.00	ProTrav	Test

Personal Travel

Yes/No	Business Start - Business End
No	

[Submit Trip](#) | [Prev](#) | [Cancel](#)

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.