ESS Travel
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Overview

Travel requests and expense reports will be completed electronically through the myNKU portal on the Employee Self-Service tab. Workflow is automated and any notifications will be sent to the original initiator on the UWL tab, Notifications sub-tab.

All receipts will be scanned and attached electronically to the expense report. Receipts are to be kept within the department for auditing purposes.

Features

- Save as Draft
- Calendar of Trips
- Integrated with Human Resources (HR)
- Paperless process
- Attachments are electronic
- Automated workflow
- Audit trail
- Direct deposit of reimbursement
ESS Travel

ESS Travel is used to enter a travel request and expense report into myNKU. All travel requires a Travel Request. Travel Requests need to be approved before any expenses are incurred; either by the traveler or on the Procurement Card. Receipts or other supporting documentation are to be scanned and attached electronically for swift approval and processing by Accounts Payable. Receipts paid by non-grant funds are to be kept 3 ½ years. Receipts paid by grant funds are to be kept for 7 ½ years.
Create Travel Request
Travel requests are only required for all travel

1. Click Create Travel Request under Create New

Create New

Create Travel Request
Create a request for a business trip that requires approval.

Create Expense Report
Create an expense report for a trip without a travel request. For trips with existing travel request you can add the corresponding expense report via All my Trips & Expenses.

2. Create Travel Request will launch, enter all pertinent information

**Note:** The proper selection of the Trip Region will control high-rate/low-rate meal selections when entering receipt information. Using the match code to define your region will ensure the selection is accurate.

The Estimated Cost should only include items paid by the traveler (generally meals and mileage but may vary by department) and not items that will be paid with the NKU Procurement Card (i.e. registration, lodging, etc.). Please use the comments section to list the items and amounts (either known or estimated) that will be paid for on the Pro-Card. This offers a cleaner budget and will be easier to monitor travel items during monthly cost center reconciliation.
Example...

**Note:** If the actual expenses are more than 10% higher than the estimate, Accounts Payable will not be able to approve the reimbursement without additional approval.

**Calendar of Trips**

Using the Calendar of Trips button will reflect all dates for which travel transactions have been completed and/or in process.

A range of months will be reflected. This will allow the traveler to view trip requests and trip expenses. The traveler may also select the start date for the trip from the interactive calendar.
Additional Destinations

Enter Additional Destination, City, Start Date, Time, Reason, and Activity Type.

1. Click Enter Additional Destinations button

2. Enter the Additional Destination information
3. Enter the additional Activity
4. Enter the additional Trip Region
5. Click Accept

**Note:** Enter changes to the information displayed in the Additional Destination row by clicking in the appropriate cell(s).

- Additional destination is added to the Event in Itinerary

6. Click Accept

---

<table>
<thead>
<tr>
<th>Additional Destinations</th>
<th>Add Additional Destination</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>Event in Itinerary</td>
<td>Date</td>
<td>Time</td>
</tr>
<tr>
<td>Start of Trip</td>
<td>02/10/2014</td>
<td>05:00 AM</td>
</tr>
<tr>
<td>Trip Destination</td>
<td>02/10/2014</td>
<td>05:00 AM</td>
</tr>
<tr>
<td>Additional Destination</td>
<td>02/12/2014</td>
<td>01:00 PM</td>
</tr>
<tr>
<td>End of Trip</td>
<td>02/15/2014</td>
<td>10:00 PM</td>
</tr>
</tbody>
</table>

---

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Additional destination is now reflected under Destination

To delete a destination

1. Click Enter Additional Destinations button
2. Highlight the destination to be removed
3. Click Delete
4. The line will be removed from the Itinerary, click Accept

The additional destination is no longer reflected under Destination
Change Cost Assignment

The primary Cost Assignment (CA) is reflected under Additional Information in the CA field. To change the CA:

1. Click Change Cost Assignment

2. Click in the Cost Assign cell to edit the percentage for the current CA

   Note: To change CA to 100% new cost assignment, key the new cost assignment without deleting or updating the percentage to the original cost assignment.

3. Click Accept and New Entry

4. Enter the Cost Center number, Order number, or Cost Center and Grant number

5. Click Accept

- The additional CA is displayed
6. Click Accept

- The CA now reflects 2 assignment for 50%

Cost Assignment: 2 Assignments: 50.00 % Cost Center

To delete a CA

1. Click Change Cost Assignment
2. Highlight the row for the appropriate CA
3. Click Delete
4. Change the percentage to reflect 100%
5. Click Accept

- The additional Cost Assignment will be removed; click Accept

Cost Assignment: 100.00 % Cost Center

- The Cost Assignment reflects only one cost center funding 100% of the trip
Save Draft and Save and Send for Approval

ESS Travel allows the travel initiator to Save a Draft of a Travel Request or Expense Report or Save and Send for Approval.

Click Save Draft to save the entered information to return and complete the request at a later time.

**Note:** Using the Save Draft feature does not begin the workflow process, does not commit funds, and does not check the budget to ensure funds are available.

- Confirmation message will be reflected
  - Travel request 0000011804 was saved

- The Processing Status will display ‘Draft’ and the Approval Status will display ‘Request Open’

When all information has been entered click Review

OR

Click Previous Step to make further edits

To submit the Travel Request and begin workflow, click Save and Send for Approval

- Confirmation message will be reflected
  - Travel request 000011804 was saved

- The Travel Requests tab on My Trips and Expenses will reflect a Process Status of Released for Approval and Approval Status will be updated to reflect Request Recorded

**Note:** If a budget error occurs, click Previous Step, then click Save Draft
Retrieve Save as Draft

The Save as Draft feature does not check the budget, commit funds, or begin the workflow process.

To retrieve a Travel Request or Expense Report that was saved as a draft:

1. Click My Trips and Expenses

   **My Trips and Expenses**
   Display, change, copy, or cancel one of your existing travel requests or expense reports.

2. Select the appropriate tab; Travel Requests or Expense Reports

3. Highlight the row that reflects the desired trip

4. Click Change

   ![Image of a table showing trip details]

5. Click Review when all information has been entered

   ![Review button]

6. Click Save and Send for Approval

   ![Employee: 16 Training (00003422), Start Date: 02/10/2014, End Date: 02/15/2014]

   ![Previous Step, Save and Send for Approval button]

   **Final Action**
   - Save and Send for Approval
   - I want to save my travel request and send it now for further processing.
   - I confirm that I have entered all data to the best of my knowledge

   **Summary**
   - Estimated Costs: 1,750.00 USD

   **Cost Assignment**
   - 1,750.00 USD Company Code NK01 (Northern Kentucky Univ.), Business Area 100 (Northern Kentucky University), Cost Center

   ![Previous Step, Save and Send for Approval button]

7. A confirmation message will be displayed.

   ![Check box indicating Travel request 0000011804 was saved]
Create Electronic Attachment(s)

1. On the Travel Requests tab, click Add under the Attachments column

   | Attachments |
   | Add         |

   OR Click the Attachments button within the Travel Request

   Attachments (0)

2. Click Browse to locate the attachment on your computer
3. Click Upload to create the attachment

4. The attachment is now displayed in the Attachments window
5. Repeat as needed, then click Close

   Attachments

   | Delete Attachment |
   | Title                | Added By | Added On |
   | travel doc           | 16 Training | 12/13/2013 |

   Add Attachment

   Type:  File

   File Path:  [Path]  Browse...

   Upload

   Close

   • The Attachments column and button reflects the number of attachments created

   Attachments

   | (2)     |
   | Attachments (2) |
To view attachments

1. Click the number in the Attachments column of click on the Attachments button
   - A list of all attached documents will display in a new window

2. Click on the attachment link

3. Click Open or Save as
   **Note:** Files attached in xlsx and docx format cannot be opened unless saved to the desktop first.

To delete attachments

1. Click the number in the Attachments column
2. Highlight the row with the attachment you wish to delete
3. Click Delete Attachment
4. Click Close
   **Note:** You will not receive a message to confirm deletion
Create Travel Expense Report from a Travel Request

A travel expense report must be created from an approved travel request for day or overnight travel.

1. Navigate to the employee and correct trip number
2. Click Create under Expense Report

**Note:** Validate that the Processing Status reflects ‘Approved’ and the Approval Status reflects ‘Request Approved’ before entering the Travel Expense Report. If request is not in statuses below the expense report may be started and click Save as Draft but cannot click Save and Send for Approval.

<table>
<thead>
<tr>
<th>Trip Region</th>
<th>Match Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Selected</td>
<td></td>
</tr>
</tbody>
</table>

Note: The proper selection will control high-rate/low-rate meal selections when entering receipt information.

3. Ensure the Trip Region is populated
   - Click the Match Code if the region is not yet populated to select the appropriate Region

**Note:** The proper selection will control high-rate/low-rate meal selections when entering receipt information.

4. Click Accept
   - The Mileage Details are reflected in the grid

- The General Trip Data will pre-populate from the Travel Request. Fields can be modified if needed.

- Ensure the Trip Region is populated
  - Click the Match Code if the region is not yet populated to select the appropriate Region

**Note:** The proper selection will control high-rate/low-rate meal selections when entering receipt information.

- Enter the Miles Driven, Start and End Location, as well as any comments

- The Mileage Details are reflected in the grid
5. Click Accept again

![Mileage Details Table]

6. When all information for the trip is entered, click Enter Receipts

![Enter Receipts Button]

7. Highlight the Estimated Travel Request row
8. Click Delete to remove the estimated amount

- Trip has already taken place

9. Click New Entry to begin entering actual expenses

![Receipts in This Expense Report Table]

10. Click the drop-down arrow for Expense Type
11. Select the appropriate choice
12. Enter the Receipt Amount
   • Check the Receipt Date for accuracy
     o If the receipt date is outside the travel dates, change the receipt date to the first
date of the trip (e.g. Registration fee or Airfare)

13. Enter any Short Info and/or Comments
14. Click Accept

**Note:** If expenses were paid with the department Procurement card, be sure to select the Paid
by NKU Expense Type. Any item that uses the Paid by NKU expense type requires a description.
Please include the last name on the Procurement card as well as the last four-digits of the card
used.

- Click Accept and New Entry if there is more than one expense for the trip
- Click Change Cost Assignment if a different CA is paying for specific expenses

15. All entered expenses will be reflected in the Expense Report

- Click Save Draft to save the entered information and to return to the Expense Report at
a later time

16. Click Review when all expenses have been entered.
17. Click Save and Send for Approval if the Summary breakdown is accurate

**Note:** If a budget error occurs, click Previous Step, then click Save Draft

<table>
<thead>
<tr>
<th>Final Action</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Save and Send for Approval</strong> I hereby certify, subject to the prov</td>
</tr>
<tr>
<td>I confirm all data furnished herewith</td>
</tr>
</tbody>
</table>

**Summary**

- **Total Mileage**: 2024 USD
- **Total Individual Receipts**: 2024 USD
- **Total Paid Receipts**: 1,000.00 USD
- **Total Travel Expenses**: 1,282.24 USD
- **Paid by Company**: -1,000.00 USD
- **Amount Reimbursed**: 202.24 USD
- **Amount Paid Out**: 202.24 USD

**Cost Assignment**

- 202.24 USD  Company Code NK01 (Northern Kentucky Univ.), Business

![Previous Step and Save and Send for Approval]

**For Expense Receipts where there is no appropriate choice**

1. Select Misc Domestic Travel Expenses or Misc Foreign Travel Expenses
   - If paid by NKU, be sure to select Other Travel Exp. -Paid by NKU or Other Foreign – Paid by NKU
2. Enter Amount, Receipt Date, and Short Info
3. Click Accept

![Expense Receipt Table]

- **No.**: 001
- **Status**: Green
- **Expense Type**: Misc Domestic Travel Expenses
- **Receipt Amount**: 17.00
- **Receipt Date**: 09/22/2014
- **Amount**: 17.00
- **Short Info**: Hotel Trip

![Accept and New Entry, Change Cost Assignment, Enter Reimbursement, Check Copy]
My Trips and Expenses (List of All Trips)

My Trips and Expenses is a central composition of all trip requests and expenses in all processing statuses. It allows the ability display/print, change, copy or delete trips.

1. Click My Trips and Expenses
   - **My Trips and Expenses**
     - Display, change, copy, or cancel one of your existing travel requests or expense reports.

2. Highlight a row to display/print, change, copy, or delete a trip
   - **My Trips and Expenses (Training 16, 00004322)**

<table>
<thead>
<tr>
<th>Trip Number</th>
<th>Start Date</th>
<th>End Date</th>
<th>Destination</th>
<th>Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>11836</td>
<td>12/02/2013</td>
<td>12/04/2013</td>
<td>Boulder</td>
<td>SAP Conference</td>
</tr>
<tr>
<td>11825</td>
<td>02/10/2014</td>
<td>02/15/2014</td>
<td>Phoenix</td>
<td>Blackboard conference</td>
</tr>
</tbody>
</table>

   - A list of all requests will be reflected under the All My Travel Requests tab
   - A list of all expenses will be reflected under the All My Expense Reports tab
   - A list of all travel will be reflected in All My Trips
View the .pdf summary document

1. Click My Trips and Expenses
2. Highlight the appropriate row
3. Click Display/Print

4. The .pdf file will open in a new window
   - The scroll bar may need to be used to view the entire .pdf file

Note: The pdf summary will reflect the information for the corresponding tab. If you are on the Travel Request tab, the Travel Request summary will be displayed. If you are on the Expense Report tab, the Expense Report summary will be displayed.
Delete a Trip

1. Click My Trips and Expenses
2. Navigate to the correct tab, Travel Requests or Expense Reports
3. Highlight the row that reflects the trip to be deleted
4. Click Delete
   
   • The trip details are reflected
5. Click Delete to confirm deletion
   
   **Note:** Exercise caution when deleting any travel items; deleting a travel item removes the trip number completely, effectively canceling the trip

![Delete Travel Request (11836)](image)

You are about to delete a travel request or an expense report. If you continue, the data will be permanently deleted.

**General Data**
- Trip Number: 0000011836
- Start: 12/02/2013, Time: 08:00:00 AM
- End: 12/04/2013, Time: 05:00:00 PM
- Location: Boulder
- Country: Colorado
- Reason for Trip: SAP Conference

**Summary**
- Estimated Costs: 1,250.00 USD

6. A confirmation message is reflected
   
   - Request and expense report of trip number 0000011836 have been deleted
   
   • The deleted trip is no longer reflected on My Trips and Expenses

**Note:** The commitment will be removed. Check the ZFD1 report to view the commitment information.
Additional functions for Travel Administrator

Create Employee List

Click Travel

The Travel Administrator window will default to the travel page.
Click My Employees

The Employee List will need to be populated by the Travel Administrator. Note: all employees do not have to be added initially.

1. Click Add Employee(s)

2. Enter the Employee Number, click OK

Note: If the Travel Administrator does not have authorization to add an employee, an error message will display.

！ No travel authorization for Eileen Mary Baker (00004220).
- Repeat as needed
- If you do not know the employee number, select the match code.

Enter the last or first name of the employee

**Search: Personnel Number**

**Search Criteria**

- Person ID
- Last name
- First name

**Add Employee(s)**

1. Click in the first blank cell and select the match code

2. Enter the search criteria and click Start Search
3. Highlight the appropriate line
4. Click OK

- The Employee Number is now reflected in the Multiple Selection grid

- Repeat as needed

5. When all employees for the department have been entered click OK.

6. The employee(s) name is now reflected in the Employee List
Filter Employee List
If the employee list is long and you would like to filter for easier access, click the desired column heading. Please note this function is available for any column, not just the Last Name (Surname) column.

- From the context menu, select either sort in ascending or descending order, or select User-Defined Filter to search for a specific name.

<table>
<thead>
<tr>
<th>Last Name (Surname)</th>
<th>First Name</th>
<th>Personnel assignment</th>
</tr>
</thead>
<tbody>
<tr>
<td>29</td>
<td>Trai</td>
<td>Training 00002619</td>
</tr>
<tr>
<td>22</td>
<td>Trai</td>
<td>11000:104 Controller’s Office 30000</td>
</tr>
<tr>
<td>30</td>
<td>Trai</td>
<td>10001:1234567890</td>
</tr>
<tr>
<td>27</td>
<td>Trai</td>
<td>20000:123456</td>
</tr>
<tr>
<td>23</td>
<td>Trai</td>
<td>10000:123456</td>
</tr>
</tbody>
</table>

User-Defined Filter...
- Select User-Defined Filter and enter the search criteria.
- Click Filter

- Only the filtered employee is now displayed in the Employee List.

- To remove the filter, click the column header and select (All).
Create Travel Request On Behalf of Employee
Travel requests are required for overnight travel only.

1. Click My Employees

2. Highlight the row to select the appropriate traveler or add new traveler

3. Click Create New Travel Request under the Travel Requests tab

4. Create Travel Request will launch, enter all pertinent information

- Follow instructions on pages 6 – 15 to complete request
Copy Travel Request to Other Employee

The Copy to Other Employee feature allows the Travel Administrator to enter trip information for a group of travelers with the same destination and estimated cost break-down. This will save time and data entry steps for the Travel Administrator.

1. Highlight the row for the traveler with the completed trip information
2. Highlight the appropriate row under Travel Requests tab on My Trips and Expenses
3. Click Copy to Other Employee

4. Select the traveler from the Employee List
5. Click OK

Note: The Overview Trip Data is copied from the initial traveler to the additional traveler.
6. Click Start

**Copy Travel Request**

Employee: Training 29 (00002619)

Start

Copy From
Personnel No.*: 03033219
Trip Number:*: 0003011658

Information
Start Date: 12/09/2013
End Date: 12/13/2013
Location: Dallas
Country: Texas
Reason: Student Motivation and Retention (SMR) conference

Copy To
New Start Date:* 12/09/2013

7. The General Trip data is reflected
8. Enter any necessary changes
9. Click Review or Save Draft
10. Click Save and Send for Approval when all information is accurate

**Copy Travel Request**

- General Data
- Review and Send
- Completed

**Employee** Training 29 (00002619)  **Start Date** 12/09/2019  **End Date** 12/18/2019

- Previous Step  Save and Send for Approval

**Note:** If a budget error occurs, click Previous Step, then click Save Draft
Return Travel for Correction

Location(s): Universal Worklist (UWL)

Purpose: If the travel request or expense report has errors or is missing information, the approver may send it back for correction.
1. Log into myNKU.
2. Select Universal Worklist tab.

3. Click the underlined subject for the travel expense to send back for correction.

Note: The subject line does not need to be highlighted before clicking on the underlined subject.

4. A new window will open.

5. Click Send Travel Expense Back for Correction to return to the initiator.
6. A confirmation will appear at the top of the window.

   ![Successful](checkmark)

7. Click Refresh to update Tasks list.

   ![Refresh icon](refresh_icon)

8. Click the underlined subject that displays Enter CHANGE Text for Trip…

9. Enter the reason the expense report is being sent back.
10. Click Save to save the text.

   ![Save button]

   - A confirmation message will display

     ![Document changed checkbox]

11. Click Send… to send the information to the initiator.

   ![Send button]

   - A confirmation message will display that the document was sent.

   ![Workflow: Execute Operation on Work Item]

   ![Document sent]
Update Travel Returned for Correction

Location(s): Universal Worklist (UWL) and Employee Self-Service (ESS)

Purpose: Follow these steps if a travel request or an expense report has been sent back for an attachment or correction.

1. Log into myNKU.
2. Select Universal Worklist tab.

3. Select the Notifications tab to view the correction(s) needed.

4. Highlight the row that displays Change Trip and view who sent back the travel and the description.

Sent Back for Attachment
Sent Back for Correction
Sent back for Attachment

1. Select Employee Self-Service tab
2. Click My Trips and Expenses link

OR

Click the Travel sub-tab, My Employees if entering information as Travel Administrator.

- Highlight the appropriate employee and trip number.
3. On the Travel Request or Expense Report tab, click Add under Attachments column

4. Upload attachment(s) as needed.

- For detailed instruction on creating an attachment, please view [Create Electronic Attachment](#).

5. Send email to approver that the attachment(s) has been created.
Sent back for Correction

1. Select the Tasks tab.
2. Click the underlined subject that displays Correct trip no…
3. Edit the travel information as detailed from the description reviewed on the Notifications tab.

   **Note:** If a receipt was missing, click in the ExpTy column and select the match code to enter a new receipt. Press Enter on the keyboard to update the information displayed.

4. Click Save.

   - Click Complete Work Item in the new pop-up window.

5. A new window will open, displaying a confirmation message at the bottom.
• Close the window(s) to return to the UWL tab.
The Universal Worklist tab of myNKU will be used to approve travel requests and expense reports. Duplicates are eliminated. Quick Reference Cards for Travel workflow are available at: http://it.nku.edu/mynku/training/FI_Training_Material.php

<table>
<thead>
<tr>
<th>Travel Request authorization</th>
<th>Travel Expense Request</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Initiator</td>
<td>• Initiator</td>
</tr>
<tr>
<td>o Traveler</td>
<td>o Traveler</td>
</tr>
<tr>
<td>o Traveler supervisor</td>
<td>o Unit Administrator</td>
</tr>
<tr>
<td>o Responsible person of cost center</td>
<td>o Accounts Payable</td>
</tr>
<tr>
<td>o Next node – 6</td>
<td></td>
</tr>
<tr>
<td>o Next node - 5, <em>where applicable</em></td>
<td></td>
</tr>
<tr>
<td>o Next node – 4</td>
<td></td>
</tr>
<tr>
<td>o Next node - 2</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Foundation</th>
<th>Grants</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Initiator</td>
<td>• Initiator</td>
</tr>
<tr>
<td>o Traveler</td>
<td>o Traveler</td>
</tr>
<tr>
<td>o Traveler supervisor</td>
<td>o Principle Investigator</td>
</tr>
<tr>
<td>o Responsible person of cost center</td>
<td>o If PI is the traveler, Chair</td>
</tr>
<tr>
<td>o Next node – 6</td>
<td>o Office of the Comptroller</td>
</tr>
<tr>
<td>o Next node – 5, <em>where applicable</em></td>
<td>o Accounts Payable</td>
</tr>
<tr>
<td>o Next node – 4</td>
<td></td>
</tr>
<tr>
<td>o Next node – 2</td>
<td></td>
</tr>
<tr>
<td>o Foundation accounting</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Academic</th>
<th>Academic/Foundation</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Initiator</td>
<td>• Initiator</td>
</tr>
<tr>
<td>o Traveler</td>
<td>o Traveler</td>
</tr>
<tr>
<td>o Traveler supervisor</td>
<td>o Principle Investigator</td>
</tr>
<tr>
<td>o Next node – 6 (Chair)</td>
<td>o If PI is the traveler, Chair</td>
</tr>
<tr>
<td>o Next node – 5, <em>where applicable</em></td>
<td>o Office of the Comptroller</td>
</tr>
<tr>
<td>o Next node – 4 (Dean)</td>
<td>o Accounts Payable</td>
</tr>
<tr>
<td>o Next node – 2 (Provost office)</td>
<td></td>
</tr>
<tr>
<td>o Foundation accounting</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Academic/Foundation</th>
<th>Grants</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Initiator</td>
<td>• Initiator</td>
</tr>
<tr>
<td>o Traveler</td>
<td>o Traveler</td>
</tr>
<tr>
<td>o Traveler supervisor</td>
<td>o Principle Investigator</td>
</tr>
<tr>
<td>o Next node – 6 (Chair)</td>
<td>o If PI is the traveler, Chair</td>
</tr>
<tr>
<td>o Next node – 4 (Dean)</td>
<td>o Office of the Comptroller</td>
</tr>
<tr>
<td>o Next node – 5, <em>where applicable</em></td>
<td>o Accounts Payable</td>
</tr>
<tr>
<td>o Next node – 2 (Provost office)</td>
<td></td>
</tr>
<tr>
<td>o Foundation accounting</td>
<td></td>
</tr>
</tbody>
</table>
Workflow

To view Workflow:

**Note**: Only the initiator is able to do the following steps to see where travel transaction is located in workflow.

1. Click Universal Worklist tab
2. Click Tracking sub-tab
3. Click the Subject hyperlink (the underlined portion) to open the request
4. Click on the Title hyperlink (the underlined portion) to view the transaction
5. Click the Services for Objects dropdown, located in the top right corner
6. Select Workflow Overview
7. Highlight the request with a Status of In Process
8. Click on Information

9. The username who has the transaction for release is reflected
## Appendix A: Available Icons and Status

<table>
<thead>
<tr>
<th>Form</th>
<th>Action</th>
<th>Display/Print</th>
<th>Change</th>
<th>Copy</th>
<th>Delete</th>
<th>Processing</th>
<th>Approval</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trip Request</td>
<td>Save as Draft</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>Draft</td>
<td>Request open</td>
</tr>
<tr>
<td>Trip Request</td>
<td>Save and Send for Approval</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>Released for Approval</td>
<td>Request recorded</td>
</tr>
<tr>
<td>Trip Request</td>
<td>Request Approved</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>Approved</td>
<td>Request Approved</td>
</tr>
<tr>
<td>Trip Expense</td>
<td>Save as Draft</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Draft</td>
<td>Trip completed</td>
</tr>
<tr>
<td>Trip Expense</td>
<td>Save and Send for Approval</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>Released for Approval</td>
<td>Trip completed</td>
</tr>
<tr>
<td>Trip Expense</td>
<td>Expense Approved and not Settled</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td>Approved</td>
<td>Trip approved</td>
</tr>
<tr>
<td>Trip Expense</td>
<td>Settle and Post Expense</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td>Transferred to FI</td>
<td>Trip Approved</td>
</tr>
</tbody>
</table>