## TRAVEL APPLICATION

Request

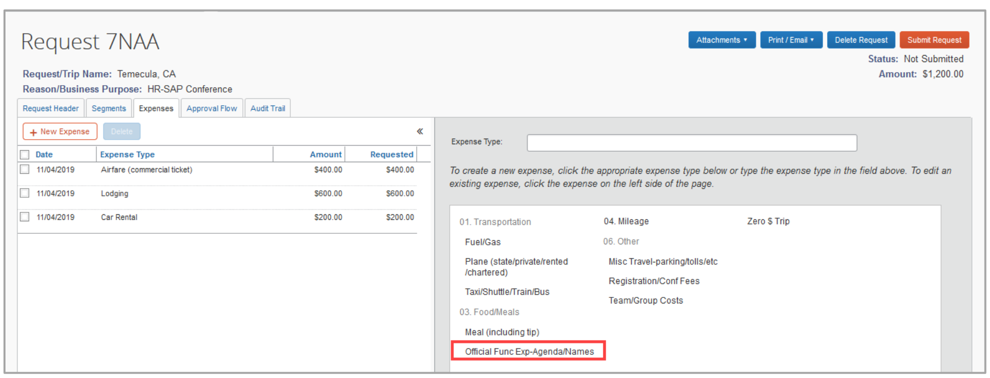
## HELPFUL HINTS

- Expenses for official functions, conferences, hearings, interviews or group meetings while in travel status are allowed for various business purposes.
- An official function should include an estimated attendee list, including the traveler submitting the travel request.
- Group lists and other information (e.g.; meeting agenda) can be added to the overall travel request by selecting the Attachments ▾ dropdown and selecting *Attach Documents*.

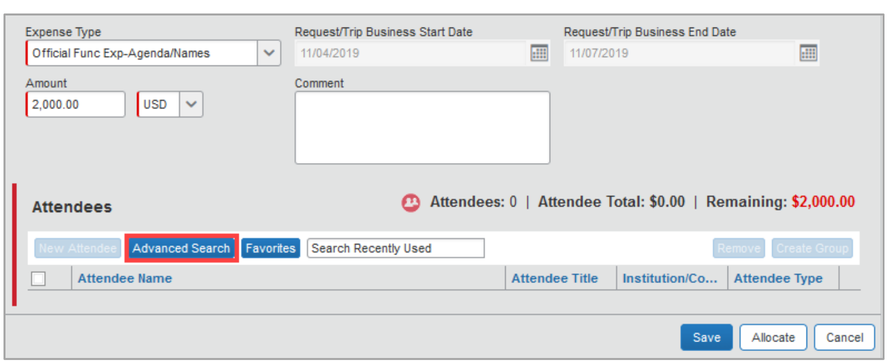
Tip: contact the Accounts Payable/Payment Services office prior to using this expense type if all attendees are University or State College employees.

## PROCEDURE

Complete the request header and segments (if applicable). Click on the Expense tab and select Official Func/Exp-Agenda/Names.

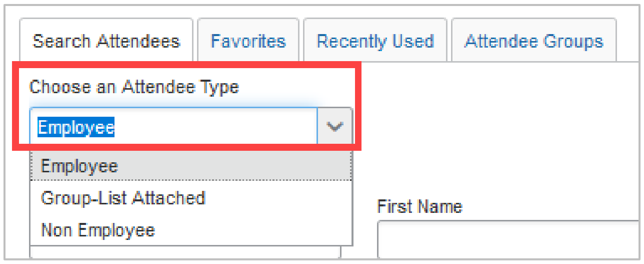



Enter the amount and (optional) information in the comment field. To add attendees, click on Advanced Search.

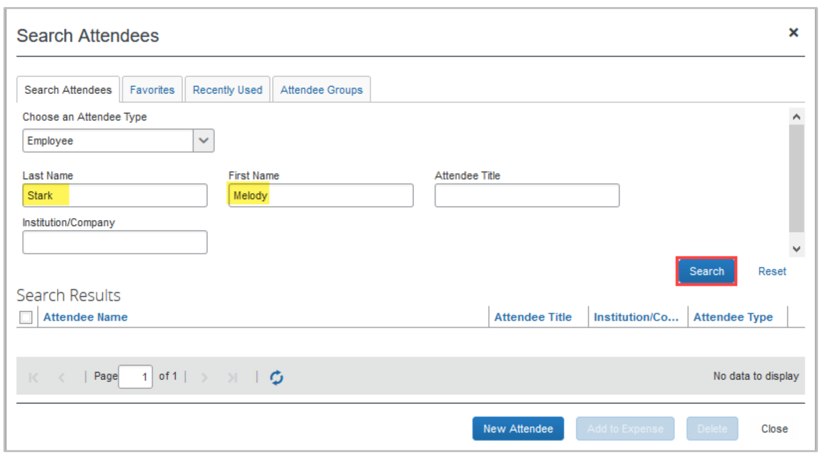


## ADD EMPLOYEE(S)

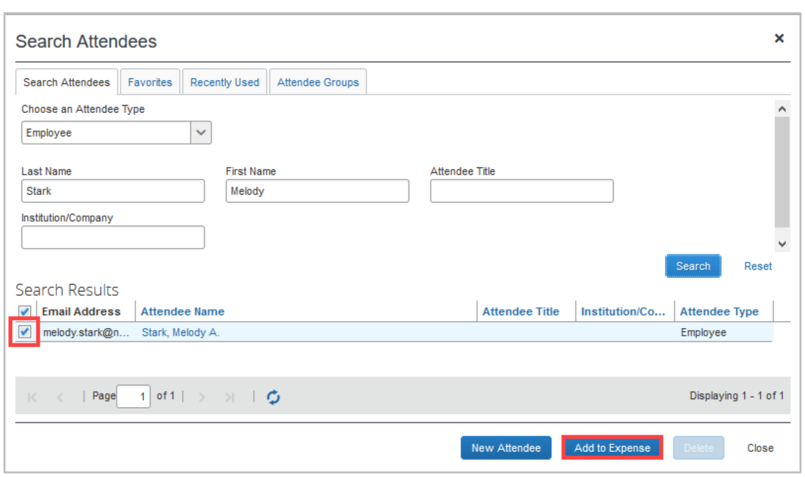
Select *Employee* from the attendee type drop-down menu.




Enter the employee name in the corresponding fields and click on Search.

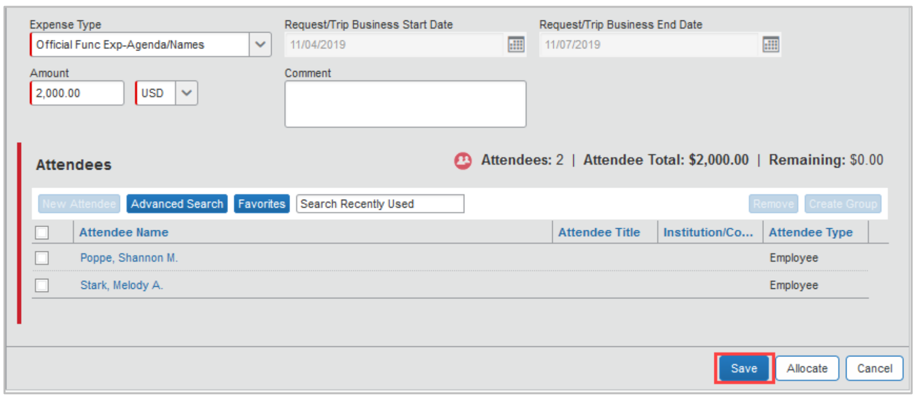



Select an employee from the search results by checking the box next to the name. Click on Add to Expense.

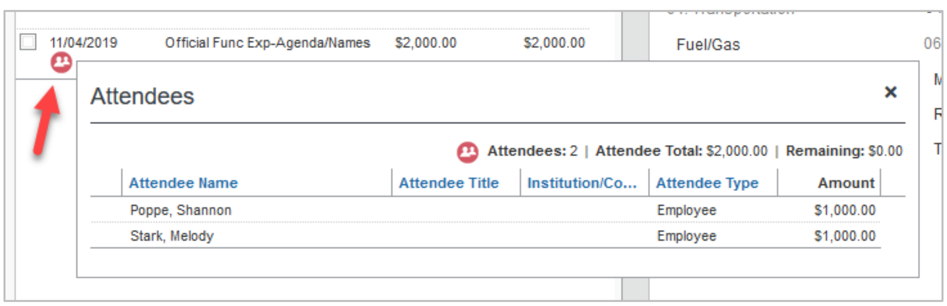


Continue to add employee names, including the name of the employee submitting the request. Non-employee names can also be added at this time (see instructions below). Once all names have been added, click on Close at the bottom right.

Save the expense type.

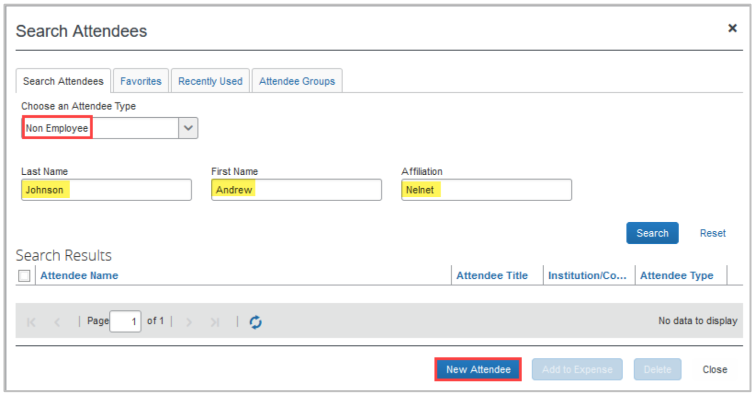



For a quick view of the attendees and amount, hover over the icon on the save expense list.

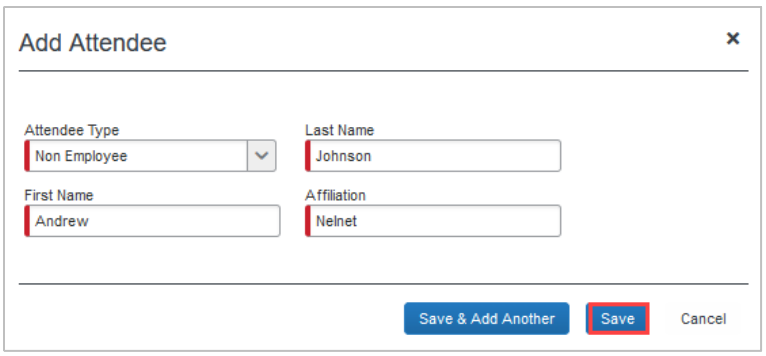



## Add Non-Employees

Select *Non-Employees* from the attendee type drop-down menu. Enter the person's name and affiliation and click on New Attendee.




A pop-up box appears. If adding additional non-employees, click on Save & Add Another. Otherwise, click on Save.



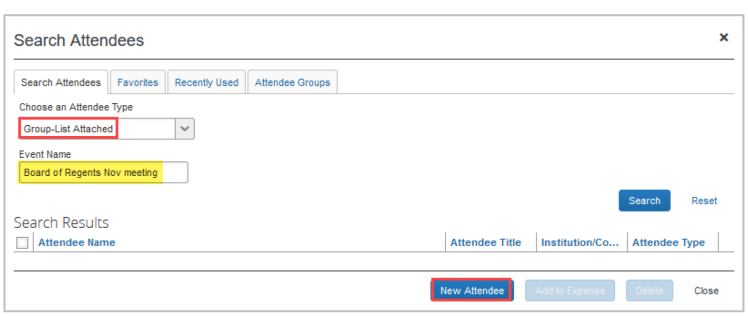

Once all names have been added, click on Close at the bottom right.

## Add a Group List

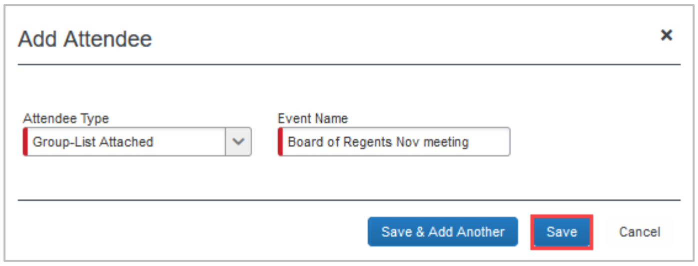
A group list can be added in place of manually entering employees and non-employees. This requires attaching a document with attendee names to the overall request.

See instructions in the next section of this reference guide on attaching documents.

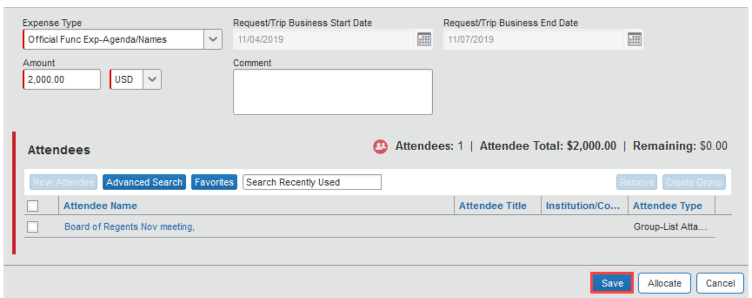
Select *Group-List Attached* from the attendee type drop-down menu and enter the event name. Click New Attendee.



A pop-up box appears. Click on Save.

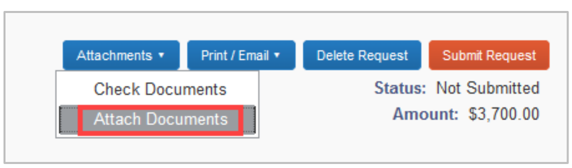



Save the expense type.

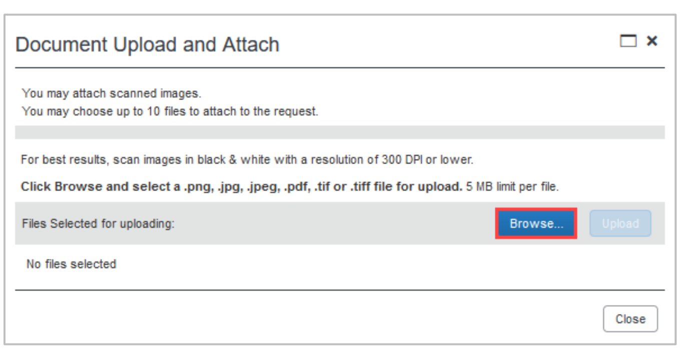



## Add an Attachment

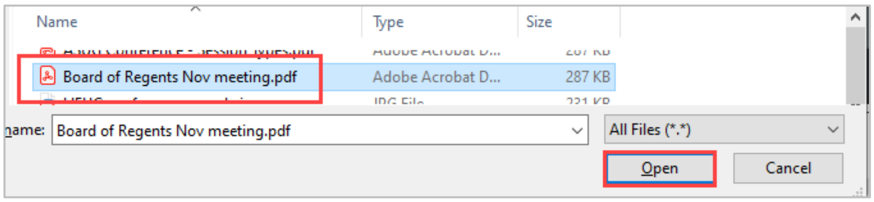
To upload a group list or other items to the request (e.g.; agenda), select *Attach Documents* from the attachment drop-down menu at the top right of the screen.



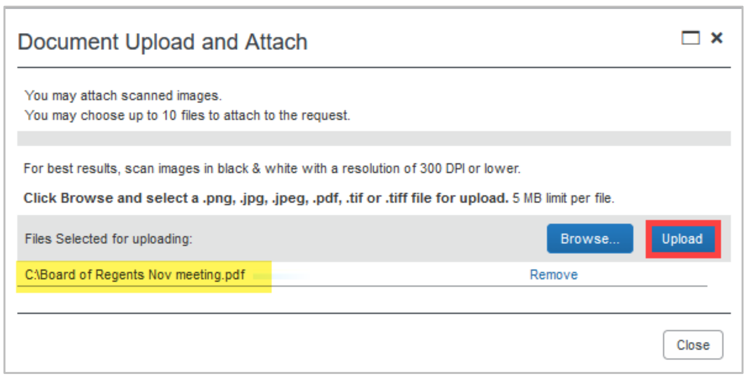

Click on Browse....



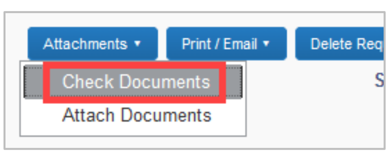
Locate the file and click on Open.




The selected attachment name is displayed. Click on Upload and then click on Close.




To confirm the attachment was successfully uploaded, select *Check Documents* from the attachments drop-down menu at the top right of the screen. A pop-up window will display the attachment.




To add another attachment or delete the current attachment, select the appropriate action from the attachments drop-down menu.