

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.

Request 7NAA

Request/Trip Name: Temecula, CA
Reason/Business Purpose: HR-SAP Conference

Status: Not Submitted
Amount: \$1,200.00

Date	Expense Type	Amount	Requested
11/04/2019	Airfare (commercial/ticket)	\$400.00	\$400.00
11/04/2019	Lodging	\$600.00	\$600.00
11/04/2019	Car Rental	\$200.00	\$200.00

Expense Type:

To create a new expense, click the appropriate expense type below or type the expense type in the field above. To edit an existing expense, click the expense on the left side of the page.

- 01. Transportation
- 02. Fuel/Gas
- 03. Plane (state/private/rented /chartered)
- 03. Food/Meals
- Meal (including tip)
- 04. Mileage
- 06. Other
- Misc Travel-parking/tolls/etc
- Registration/Conf Fees
- Team/Group Costs
- Zero \$ Trip

Official Func Exp-Agenda/Names

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

Expense Type: **Official Func Exp-Agenda/Names**

Request/Trip Business Start Date: 11/04/2019
Request/Trip Business End Date: 11/07/2019

Amount: USD

Comment:

Attendees Attendees: 0 | Attendee Total: \$0.00 | Remaining: \$2,000.00

Advanced Search | Favorites | Search Recently Used

Attendee Name	Attendee Title	Institution/Co...	Attendee Type

Save | Allocate | Cancel

ADD EMPLOYEE(S)

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

The screenshot shows a form with tabs for 'Search Attendees', 'Favorites', 'Recently Used', and 'Attendee Groups'. A dropdown menu titled 'Choose an Attendee Type' is open, with 'Employee' selected and highlighted. Other options visible are 'Group-List Attached' and 'Non Employee'. A 'First Name' input field is also visible to the right.

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

The screenshot shows the 'Search Attendees' window. The 'Employee' type is selected. The 'Last Name' field contains 'Stark' and the 'First Name' field contains 'Melody'. The 'Search' button is highlighted in red. Below the search fields, the 'Search Results' section shows a table with columns: 'Attendee Name', 'Attendee Title', 'Institution/Co...', and 'Attendee Type'. The table is empty, and the status at the bottom right says 'No data to display'.

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

The screenshot shows the 'Search Attendees' window with the same search criteria as the previous image. The 'Search Results' table now contains one entry: 'melody.stark@n...' with 'Stark, Melody A.' as the name and 'Employee' as the type. A red box highlights the checkbox next to the name, which is checked. The 'Add to Expense' button at the bottom is highlighted in red. The status at the bottom right says 'Displaying 1 - 1 of 1'.

OFFICIAL FUNCTION REQUEST

Updated October 28, 2019

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.

The screenshot shows a form with the following fields and content:

- Expense Type:** Official Func Exp-Agenda/Names
- Request/Trip Business Start Date:** 11/04/2019
- Request/Trip Business End Date:** 11/07/2019
- Amount:** 2,000.00 USD
- Attendees:** 2 | Attendee Total: \$2,000.00 | Remaining: \$0.00
- Attendee List:**

Attendee Name	Attendee Title	Institution/Co...	Attendee Type
Poppe, Shannon M.			Employee
Stark, Melody A.			Employee
- Buttons:** Save, Allocate, Cancel

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

The tooltip shows a detailed view of the attendees:

- Attendees:** 2 | Attendee Total: \$2,000.00 | Remaining: \$0.00
- Attendee List:**

Attendee Name	Attendee Title	Institution/Co...	Attendee Type	Amount
Poppe, Shannon			Employee	\$1,000.00
Stark, Melody			Employee	\$1,000.00

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**.

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A pop-up box appears. Click on **Save**.

Save the expense type.

ADD AN ATTACHMENT

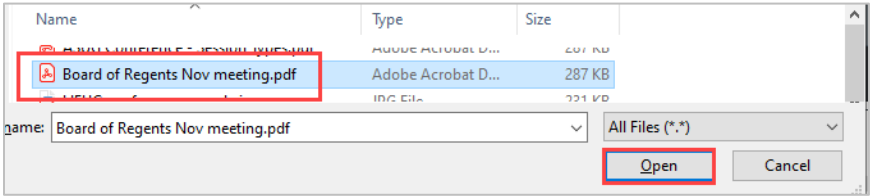
To upload a group list or other items to the request (e.g.; agenda), select *Attach Documents* from the attachment drop-down menu at the top right of the screen.



Click on **Browse...**.

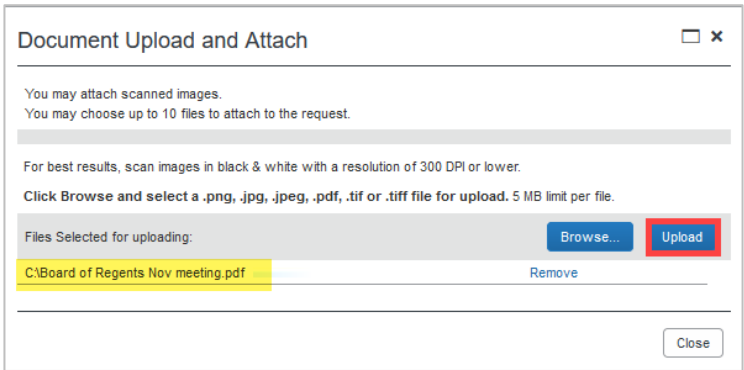
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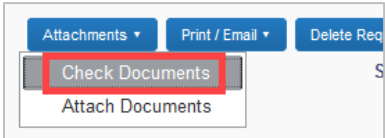
Locate the file and click on .



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



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.

