

# OFFICIAL FUNCTION REQUEST

## 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)
- Official Func Exp-Agenda/Names**
- 04. Mileage
- 06. Other
- Misc Travel-parking/tolls/etc
- Registration/Conf Fees
- Team/Group Costs
- Zero \$ Trip


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
<input type="checkbox"/>			

Buttons: Save, Allocate, Cancel

## ADD EMPLOYEE(S)

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

The screenshot shows a web interface with a dropdown menu titled "Choose an Attendee Type". The menu is open, showing three options: "Employee", "Group-List Attached", and "Non Employee". The "Employee" option is highlighted with a blue background. A red box highlights the dropdown menu area. To the right of the dropdown is a "First Name" input field.

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

The screenshot shows the "Search Attendees" form. The "Choose an Attendee Type" dropdown is set to "Employee". The "Last Name" field contains "Stark" and the "First Name" field contains "Melody". The "Search" button is highlighted with a red box. Below the form is a table with the following columns: "Attendee Name", "Attendee Title", "Institution/Co...", and "Attendee Type". The table is currently empty, displaying "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" form with search results. The "Search" button is highlighted with a red box. The search results table has the following columns: "Email Address", "Attendee Name", "Attendee Title", "Institution/Co...", and "Attendee Type". The table contains one row with the following data: "melody.stark@n...", "Stark, Melody A.", and "Employee". The checkbox next to the "Email Address" is checked. The "Add to Expense" button is highlighted with a red box.

# OFFICIAL FUNCTION REQUEST

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 data:

- 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
- Comment: (empty)
- 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 window displays the following information:

- 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**.

The screenshot shows a 'Search Attendees' window with a search bar and filters. The 'Attendee Type' dropdown is set to 'Non Employee'. The search results table is empty, showing columns for 'Attendee Name', 'Attendee Title', 'Institution/Co...', and 'Attendee Type'. The window includes buttons for 'New Attendee', 'Add to Expense', 'Delete', and 'Close'.

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

The screenshot shows an 'Add Attendee' window with input fields for 'Attendee Type' (set to 'Non Employee'), 'Last Name' (Johnson), 'First Name' (Andrew), and 'Affiliation' (Nelnet). The window includes buttons for 'Save & Add Another', 'Save', and 'Cancel'.

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**.

# OFFICIAL FUNCTION REQUEST

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

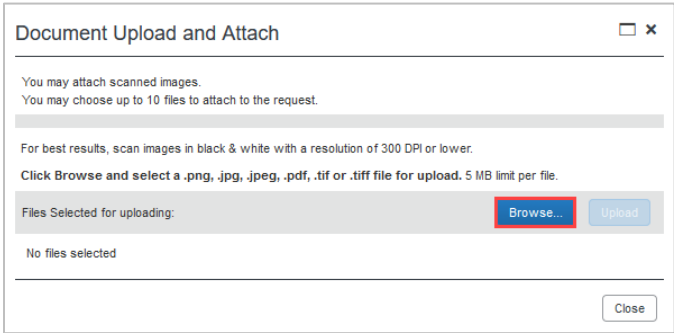
Save the expense type.

## ADD AN ATTACHMENT

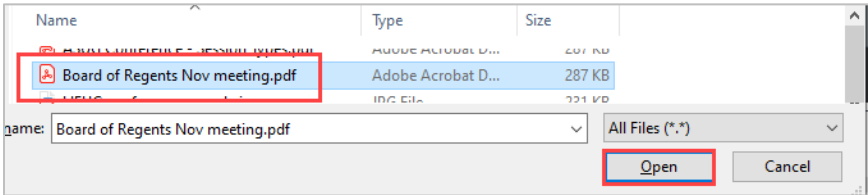
To upload a group list or other items to the request (e.g.; agenda), select *Attach Documents* from the attachment drop-down menu at the top right of the screen.

Click on **Browse...**.

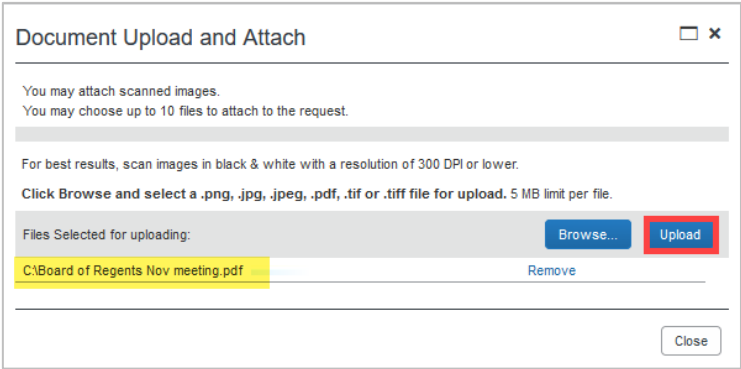
# OFFICIAL FUNCTION REQUEST



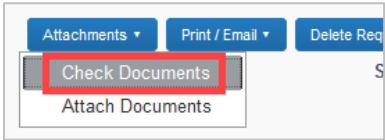
Locate the file and click on Open.



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.

# OFFICIAL FUNCTION REQUEST

Updated October 28, 2019

