WebTravel
User Guide

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LOGGING IN

To log into WebTravel use your Active Directory user id / password combination. Active Directory integration uses the same credentials you need to log in to your computer every morning.

WebTravel does not manage user id and passwords, this is done thru you District's Technology department.

After log in, the main menu will appear *(your view may vary according to your security profile)*

WebTravel's log session timeout is 10 hrs. After 10 hours, the system will redirect you to the login screen.

EMPLOYEE REQUEST

To start a new request, click on the "Travel Application Request" menu option, the following will appear:

New Employee Leave Request

Is there Cost Associated with the Request?

☐ Yes   ☐ No

Trip Type

☐ Out of State   ☐ Out of Valley-same day

☐ Overnight (Out of Valley)   ☐ In-Valley

💾 NEXT

STUDENT REQUEST

New Student Travel Request

How is the Request being funded?

☐ Regular Budget   ☐ Club Account   ☐ Budget & Club Acct   ☐ No Cost

Trip Type

☐ Out of State   ☐ Out of Valley-same day

☐ Overnight (Out of Valley)   ☐ In-Valley

☐ In-District

💾 NEXT

To create a request, click on the type of funding for the request.
Next, click on the type of trip.

Once you have made your selections, click on the [NEXT] button.
This will create an auto generated **Travel ID** which will be referenced throughout the rest of the guide.
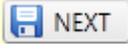
Once this Travel ID comes up as shown below, click on the [CONTINUE] button.
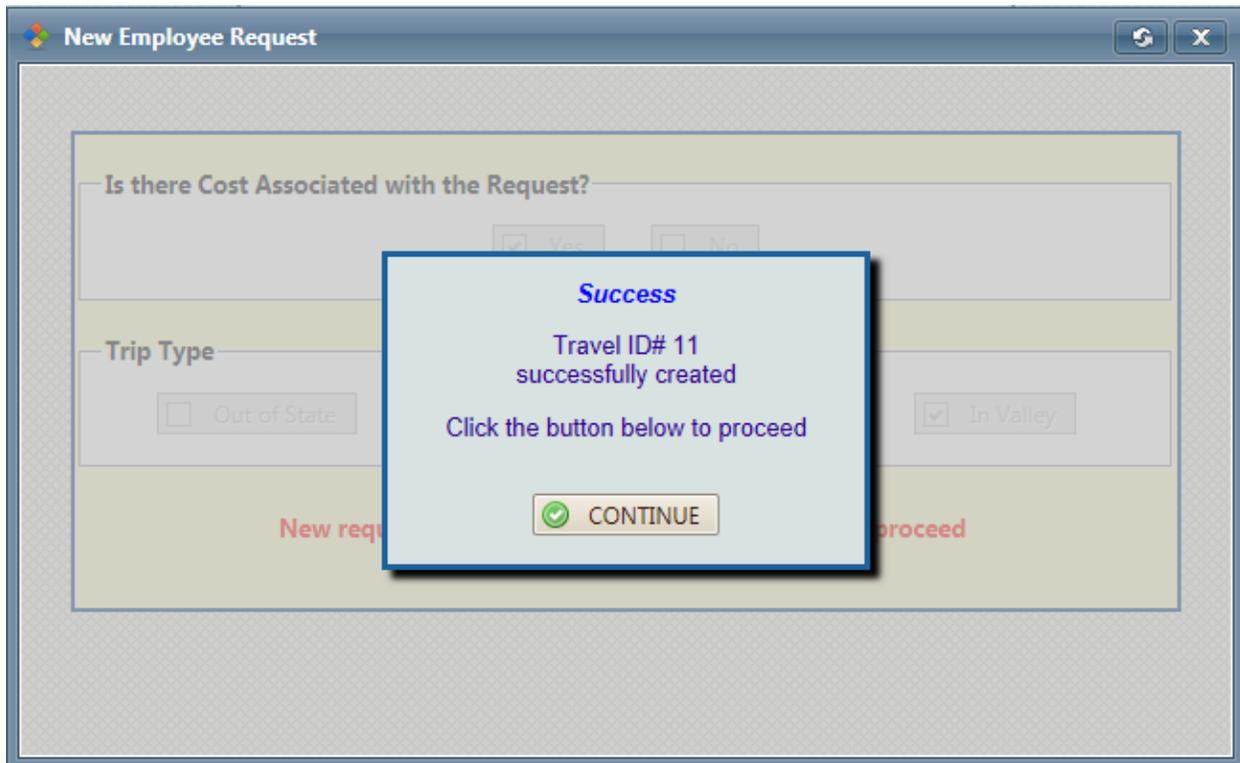
Clicking this button will redirect you to the Travel Request Dashboard
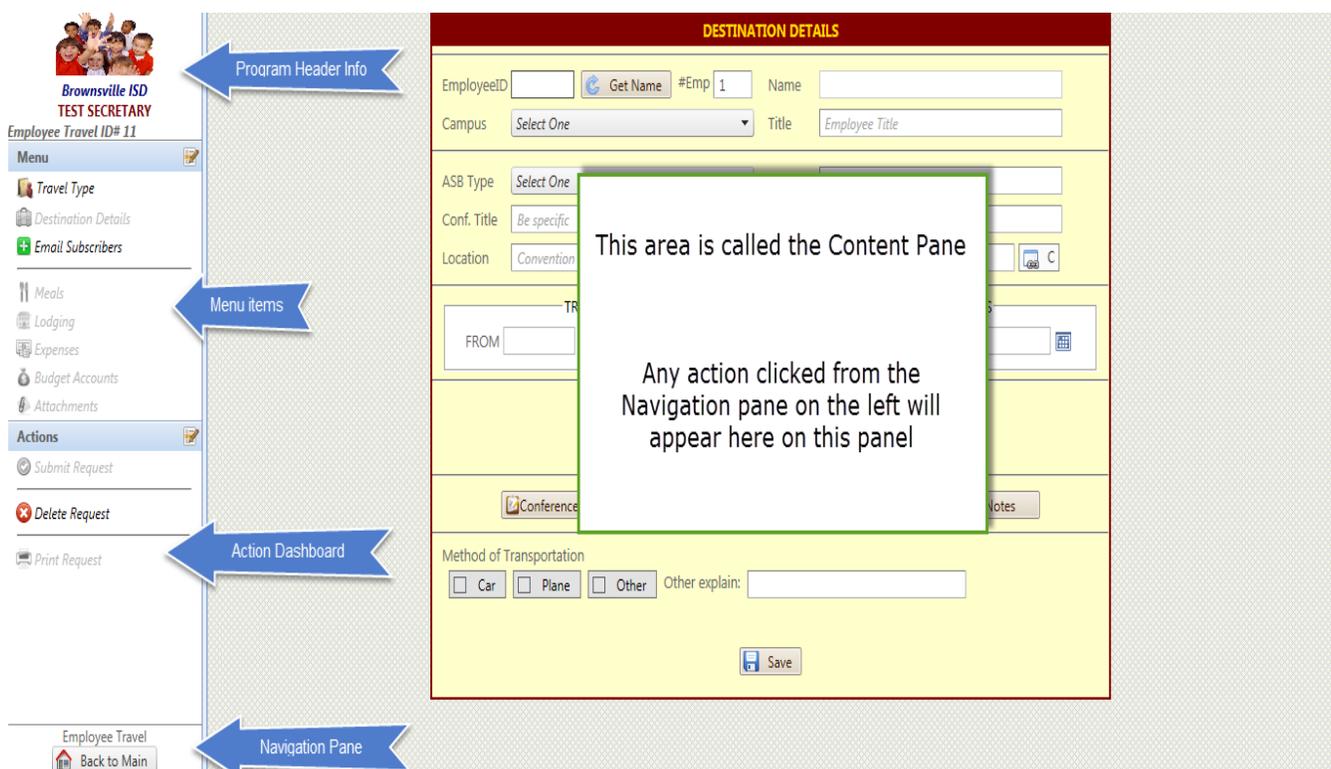
Program Header Info	Contains program information such as: District Name, Current User, Current WebTravel ID
Menu Items	Contains various navigation options used by WebTravel (covered in upcoming sections)
Action Dashboard	Menu Items here trigger system specific functions such as: submit, delete, print
Navigation Pane	To go back to main, click on the button located on this section
Content Pane	This is the main content container for the program. Any action from the Left navigation pane will execute on this pane, except for the "Back to Main" button.

By default, once a new request is created or whenever a previously created WebTravel is accessed, the Navigation Pane will display the "Destination Page"
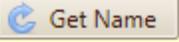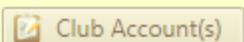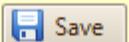
To fill in the Destination page, all the fields shown are required.

1. To get started, type in the Employee ID of the main sponsor then click on the [Get Name] button.
   This will retrieve the Employee name from the District's Personnel employee file.
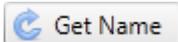
2. Select the Employee campus.

3. Type in the Sponsor's Organization (not their campus) examples of this are: Attendance, National Honor Society (NHS), Counseling, Cheerleaders, Football Team, Mariachi, etc.

4. The number of Employee Attendees increase as you add employees after the first save by using the "Other Employees" button

5. Select an "Absence for School Business (ASB) Type" (these events are defined by the District, if the event type is not listed, contact your website administrator)

6. Type in the "Conference Title", please be as specific as possible. Examples of Activity Titles are: Life Science Adventure at McAllen Museum. This is more specific than "Field Trip to McAllen Museum". Another example: "Learning Teaching Techniques for the 21st Century" instead of "Region One Training".

7. Type in the Activity's Location: Gym, Cafeteria, Convention Center, Region One ESC Room #, etc.
8. Type in the address where the activity will take place, this includes city, state, and county.

9. Type in the "Travel Dates". On most occasions these are the same; however on overnight trips, the date of Travel is earlier than the date of attendance. By default, WebTravel will copy the first date selected on the Travel Date from textbox. Use the 🗓 icon to bring up the calendar picker. Do the same for the remainder of dates.

10. After selecting the dates, type or select the Departure / Arrival times. Clicking 🕐 icon will bring up the time picker selection. If your desired time is not there, click on the Departure or Arrival textbox, and then type in the time. WebTravel allows various entry types for time. For example, users can just type in a 9 and WebTravel will recognize this as 09:00 AM. WebTravel allows you to enter the time as 09:00 AM as well. Military times can also be entered; this means that 1300 is considered as 01:00 PM. Users can also enter the time after 12 pm using the short notation. For example, to enter 03:30 PM, users can just type in 330pm and WebTravel will automatically format this input to 03:30 PM.

11. Type in the "Conference Description" by clicking on the [Conference Description] icon. This brings up a window where you can type in / copy / paste your "Event Description". This description is limited to 1,000 characters including spaces, punctuation, and special characters.
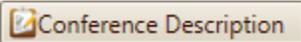
12. Select the "Method of Transportation" by clicking on the method. When selecting "Other", WebTravel requires the "Other Explain" textbox be filled to further explain the method of Travel.

13. When ready to save, click on the [Save] button, this will save the "Destination" request.
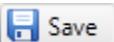
Once created for the first time, the Destination Page will show a dialog like the one shown below
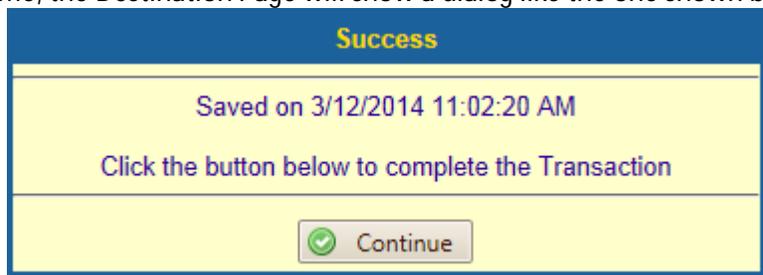
Click the "Continue" button, to continue. This will reload the Dashboard and enable the menu options on the Action Pane.

OTHER EMPLOYEES

To add the names of the "Other Employees" attending, click on the [Other Employees] button.

This will bring up the "Other Employees" window. There are two ways to add an employee to the request
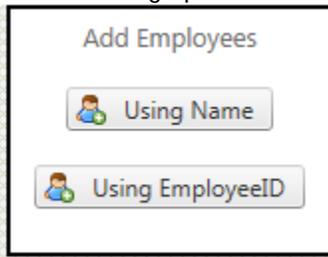
One is by using the "Employee's Name", the other is by using the "Employee's Employee ID"

To add an employee by using "Employee's Name", click on the "Using Name" button, this will bring up the Employee Name Search Screen shown below:

The name search screen is a phonetic search, this means that partial information is OK to search, for example, typing "a" on the Last Name textbox will bring up any employee whose last name begins with "a" This textbox is also case insensitive; therefore, case is not important.

The results of this search are shown below:

Last Name	First Name	M	EmpID	Cps	Position	Sel
ALDERSON	GREG	F	000000023	007	Production Technician - WC45	✓
ALEXANDER	SEAN	P	000000077	013	Quality Assurance Technician	✓
ANDERSON	NANCY	A	000000084	007	Production Technician - WC60	✓
ACKERMAN	PILAR	G	000000085	015	Shipping and Receiving Supervisor	✓
ARIFIN	ZAINAL	T	000000090	012	Document Control Manager	✓

To select a name, click on the ✓ icon, this will add the selected employee into the request as shown below:

SEQ	CAMPUS	EmpID	Employee Name	Job Description	Delete
1	007	000023	ALDERSON, GREG	Production Technician - WC45	✗

To delete an employee, click on the ✗ icon, a dialog prompt will appear giving the user a chance to confirm their action

Clicking on "Delete" deletes the employee. "Cancel" closes the dialog.

The other way to add an employee is by using an Employee ID

Type in the Employee ID, then click on the [🔄 Get Name] icon to retrieve the Employee name from the District's Personnel employee file.
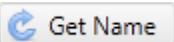
ADD EMPLOYEE TO TRAVEL REQUEST
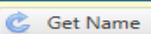
Employee ID	[ ] [🔄 Get Name]
Last Name	[ ]
First Name	[ ]
Middle Name	[ ]
Position	[ ]
Campus	Select One ▼

[💾 ADD]
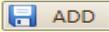
Once the employee name shows up, select the "Campus" for the employee, and then click on [💾 ADD]
This will reload the employee list as shown below:
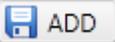
SEQ	CAMPUS	EmpID	Employee Name	Job Description	Delete
1	001	000017	HARTWIG, DORIS M	Production Technician - WC10	❌
2	007	000023	ALDERSON, GREG	Production Technician - WC45	❌

To delete an employee from the request, click on the ❌ icon.

To close the "Other Employees" window, click on the close button for the window as shown below:
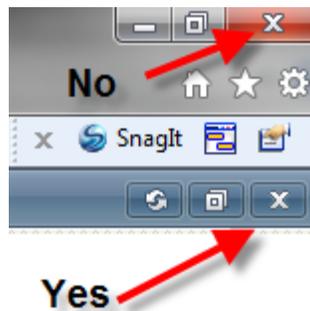
This will return you to the Destination Page of the Request.

If your event type allows for "Multi Day" input, the following button is enabled [☑ Multiday Input]
A multi day input is defined as: An activity that your District has selected as having several days attached to it. An example of this is "Athletics". An Athletics event type can be created for the entire season for one sport.
In addition to having the button enabled, note that the following section is also grayed out:
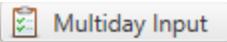
Address	[ ]
City	[ ]
State	[ ] County [ ] [🖼]

It's grayed out because you will be adding addresses and dates on the [☑ Multiday Input] screen.
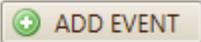
[➕ ADD EVENT]

Day	Activity Description	Time From	Time To	Needs Bus	Edit	Del
No records to display.						

An unlimited number of "Events" can be added to a "Multiday Input" requests.

To add an event, click on the [⊕ ADD EVENT] button.
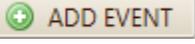
NEW ROW

Event Date	[ ] 🗓
Activity Title	[ ]
Address	[Enter a location]
Time From	[ ] ⏰
Time To	[ ] ⏰
Requires Bus	☐ No

[💾 SAVE]

Start by:

- Selecting the "Event Date", the selection for the available dates is controlled by the "Destination Page"
- Type in the "Activity Title", this can be different for each instance.
- Type in the "Address" for the event.
- Select a "Time From"
- Select a "Time To"
- Select if your event date requires a District Bus, if a Bus is needed, check the box, this will allow the Transportation department to send you a District Bus. Not all event days may require a District Bus, your requirements may vary.
- Click on "Save"

[⊕ ADD EVENT]
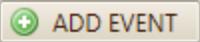
Day	Activity Description	Time From	Time To	Needs Bus	Edit	Del
05/15/2017	Porter HS vs Hanna HS	5:30PM	11:30PM	☑	✎	❌

To edit an event, click on the ✎ icon.

To delete an event, click on the ❌ icon.

DELETE DAY INSTANCE

Are you sure you want to delete the following day instance?

Day	05/15/2017
Activity	Porter HS vs Hanna HS
Address	Sams Memorial Stadium, Boulevard of Champions, Brownsville, TX, USA
Time From	5:30PM
Time To	11:30PM
Requires Bus?	1

[📇 DELETE]   [❌ CANCEL]
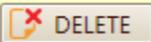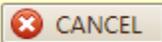
ACTION DASHBOARD

The "Action Dashboard" controls every part of the request.
By clicking on the appropriate button, you will be able to open the content for the button.

Travel Type	Opens the Trip Type window, where changes can be made.
Destination Details	Opens the Destination Details Page, where changes can be made
Email Subscribers	Opens the Email Subscribers Page, this function allows you to add additional employees who may need to be notified in addition to the originator. For example, if a secretary needs to be notified of an approval, he/she can add her name to the list of the email subscribers. All users have this ability
Meals	Opens the Meals Page
Lodging	Opens the Lodging Page
Expenses	Opens the Expenses Page
Budget Accounts	Opens the Budget Accounts Page
Attachments	Opens the Attachments Page
Submit Request	Attempts to Submit the Request
Delete Request	Opens the Delete Page
Print Request	Prints the Current Request

MEALS

Click on the "Meals" brings up the meals window shown below:

Add Meal Instance

An unlimited number of rows can be added to match your WebTravel Request's specific needs.
Clicking on the "Add Meal Instance" brings up the following data entry dialog:

NEW MEAL INSTANCE

Meal Type [Select One]   # of Days [0] $ Amount [0.00]

Breakdown

# Students	1	Total	0.00
# Employees	1	Total	0.00
# Non-Employees	0	Total	0.00
# Bus Drivers	1	Total	0.00
GRAND TOTAL			0.000

Notes   [Enter Vendor Name and any notes here]

ADD   CLOSE

1. Select the "Meal Type": breakfast, lunch, or dinner
2. Type in the number of days to use, minimum is 1
3. The amount shown is the maximum for the destination's county. If the travel type is an "In-Valley" travel, the maximum amount is your District's Max Per Diem amounts for breakfast, lunch, and dinner. If another option other than "In-Valley" is selected, then this amount is controlled by the Maximum Allowance according to the GSA rules for Meal Reimbursement. Note that this amount can be lowered per meal type.
4. Type in any notes relevant to the meal.
5. The breakdown is equal to the Number of Employees attending on the "Destination Page". If This number needs to be increased, then this number can be changed at the "Destination Page" Note: This number can be lowered just in case an employee will not be claiming a meal.
6. To save, click on the "Add" button, this will create the records and reload the "Meals" page.

Note that the dialog screen does not close, this is done by design to speed up the data entry. For example, if adding breakfast, lunch, and dinner, all the user has to do is add the breakfast, click on "Add", then select "lunch" as Meal type and click "Add", then click on "dinner" as lunch type then click on "Add". As a last step, clicking on "Close" reloads the Meals page:

Note	M	QTY	Price	E#	E.Amt	NE#	NE.Amt	Total	EDIT	DELETE
Employees get the same amount	B	1	5.00	2	10.00	-	-	10.00	Edit	✖
Employees get the same amount	L	1	8.00	2	16.00	-	-	16.00	Edit	✖
Employees get the same amount	D	1	10.00	2	20.00	-	-	20.00	Edit	✖
Grand Total								46.00		

To "Edit" an instance, click on the "Edit" button for the row, the update dialog screen will show up:

EDIT MEAL INSTANCE

Meal Type [Breakfast ▼]   # of Days [1] $ Amount [8.00]

Breakdown

# Students	25	Total	200.00
# Employees	4	Total	32.00
# Non-Employees	0	Total	0.00
# Bus Drivers	1	Total	8.00
GRAND TOTAL			240.00

Notes   tournament @ McAllen

💾 UPDATE   ✖ CLOSE

Make your changes, and then click on the "Update" button. The "Close" button cancels the dialog.

To delete an instance, click on the ✖ icon for the row you wish to delete. A dialog will show up confirming the delete action.

DELETE MEAL INSTANCE DIALOG
Are you sure you want to delete the following expense?

Note	Employees get the same amount
Meal Type	D
Qty	1
Total	20.00

DELETE   CANCEL

LODGING

Clicking on the "Lodging" menu item will display the lodging page:

TRAVEL ID# 8796 :: LODGING

Add Lodging

An unlimited number of rows can be added to the lodging. Clicking on the "Add Lodging" button will bring up the data entry dialog:

ADD NEW LODGING INSTANCE

# Rooms	0	
Price	0.00	**GSA Max for CAMERON = 114.00**
# Days	0	
Tax Rate	0.00	Help me Select a City
Total	0.00	
Name of Hotel & Notes		

ADD   CLOSE

1. Number of rooms needed
2. Type in the Hotel's room rate
3. Type in the number of days for the stay
4. Type in the City Tax (A school district is not subject to sales tax; however, city taxes are applicable) To see a list of available Tax Rates, click on the "Help me Select a City". This list contains the most widely used cities as determined by your District.
5. On this textbox type in the Name of the Hotel, its address and any other notes that may be required by your request.
6. Click on the "Add" button

#Rooms	$/Room	#Days	Tax %	T.Tax	Total	NOH / Notes	EDIT	DELETE
1	120.00	1	10.00	12.00	132.00	Holiday Inn Express	✏ Edit	✖
	G.Total				132.00			

To edit a row, click on the "Edit" button for that row, the edit dialog screen will show up.

To delete a row, click on the ✖ icon, this will bring up the confirm dialog screen:

DELETE LODGING ROW DIALOG

Are you sure you want to delete the following?

#Rooms	1
Price	120.00
Tax Rate	10.00
Total	132.00

Holiday Inn Express

[DELETE]   [CANCEL]

The maximum amount for the room is controlled by the locally defined GSA table. If a rate is not found for the county you are traveling, please contact your Website Administrator for adding it. Before calling, please make sure that you have typed in the correct County. If you need to locate a list of counties, click on the [C] icon located on the "Destination Page"

DISTRICT VEHICLE

When "District Vehicle" method of Transportation is selected, on the Destination page, the following page becomes fillable:

TRANSPORTATION VEHICLE REQUEST

Attendees

# Students	# Employees	# Non-Employees
1	1	0

Event Type	**Athletic**		Address	**1900 E Price Rd**
Activity Title	**test**		City	**Brownsville**
Location	**central office**		State	**TX County Cameron**

TRAVEL DATES
FROM **1/5/2017**   TO **1/6/2017**

TRAVEL TIMES
Departure **8:00 AM**   Return **1:00 PM**

Sponsor	MARIA D GARZA	Loading Zone	front of building
Phone #	483-5459	Conf.Time	anytime

BUSES

# Buses	1	# Sp. Needs	0	# Mini Bus	0

TRUCKS

# Vans	0	# Suburbans	0

CARGO VEHICLES

# Trailers	0	# Cargo Trucks	0

[Special Instructions]

[Update]

The Destination details for the Transportation form have been pre-filled by the Destination page.

Enter the loading zone, phone # for the sponsor (in case the Transportation department needs to contact them). In the Conf. Time, enter the time when the Transportation department can contact you, in case they have questions. Free form text is allowed here as well as the phone #. For example, you may type in "Anytime after 3 pm" on the Conf. Time textbox. Conversely, "555-4444 or 333-2222" on the phone # textbox.

Select your vehicle type that is needed by typing in the number corresponding to the vehicle that you are requesting. If you have special instructions, type them in the textbox that opens up when the "Special Instructions" button is clicked.

When done, click on the "Save" button.

If your request contains a "multi day" for transportation, the following dialog will show up when you click "Save" or "Update"
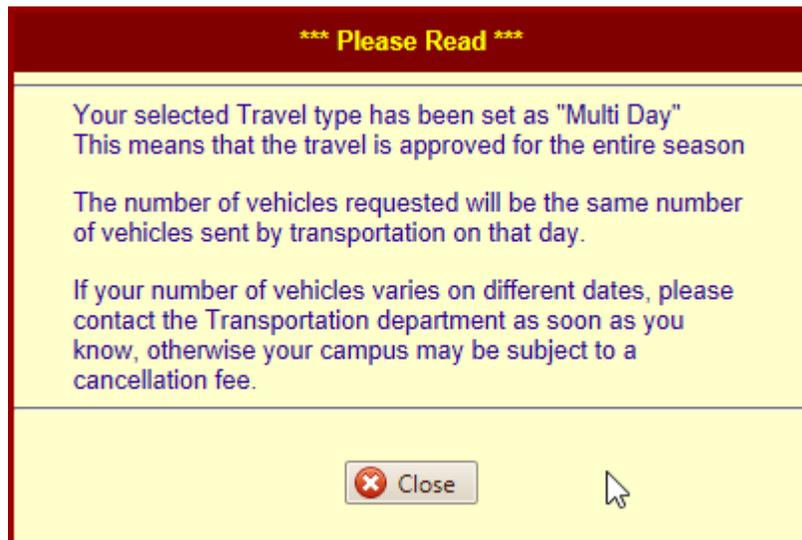
EXPENSES

Click on the [Expenses] icon to bring up the expenses window shown below:
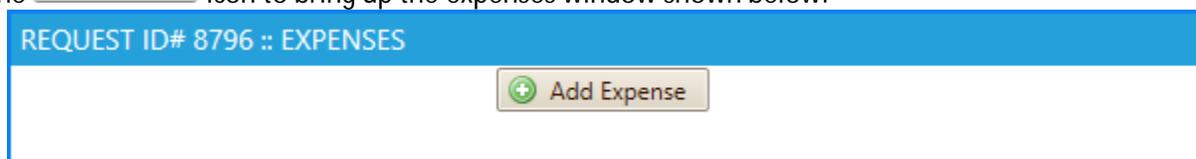
To add an expense, click on the [Add Expense] icon

The following will show up:

To create an expense:
1. Type in the number of units
2. Type in the Fee amount
3. Select the Expense type from the drop down menu
4. If required, type in a small explanation
5. Click on the [ADD] button
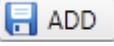
When selecting "District Bus" on the Expense type, the following button shows up: [Mileage]
This button assists the user in determining an expense for a District School Bus.

If the trip will be taking place in the following cities: Donna, Edinburg, Hidalgo, McAllen, Mission, Pharr, San Juan, Alamo, the cost of the Bus is determined by your district as a flat rate. If the destination city is something other than the above, WebTravel will calculate the one way distance using Google Maps.

REQUEST ID# 8796 :: EXPENSES

Units	Fee	Total	Type	Explanation	EDIT	DELETE
1.00	3.40	3.40	District Vehicles	Bus Expense Two way mileage: 1.36 Bus Rate: 2.5 # Buses: 1	Edit	⊝
	Total	3.40				

To edit an expense, click on the [Edit] icon
To delete an expense, click on the ✖ icon
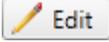
BUDGET ACCOUNTS

The originator does not have to enter a budget account to submit his / her request. This section created to assist the Secretary in obtaining a budget account or Charter Club account where to charge the trip.

When the "Budget Accounts" menu item is clicked, the Budget accounts window opens as shown below:

REQUEST ID# 8796 :: BUDGET ACCOUNTS

Meals	GSA Lodging / Overage	Expenses	Total
-	132.00	3.40	135.40

There are no accounts for this travel request

This section contains totals for the various sections and if there is an overage on Lodging for GSA max, it is noted on the "overage" section.

To add an account, click on the [Add Account] button.

The account input area appears as shown below:

ADD NEW ACCOUNT

	FND	FNC	OBJ	SB	LOC	YR	PIC	PRJ	PYR
Account									

Amount   0.00

Type   ☐ Other   ☐ District Vehicle

💾 ADD   ❌ CLOSE

1. Type the 21 digit account code to pay for the expense in the trip (WebTravel will automatically tab as you enter the budget account)
2. Type in the amount to be covered by the account
3. Select the type of account (If the account is used to pay for the School Bus, select this option. If the account is used for something other than a school bus, select "Other")
4. Selecting "Other" will open up an additional "Other Explain" textbox. In this textbox, enter the rationale for using the account up to a maximum of 350 characters including spaces, punctuation, and special characters. For example you can use the following: "This account will pay for student meals, lodging, and parking fees"
5. Click on the 💾 ADD button

The budget account will be verified against your District's General Ledger. If the account does not exist, an error message will appear. Upon successful insertion of an account, the following will appear:

REQUEST ID# 2013 :: BUDGET ACCOUNTS

⊕ Add Account

Meals	GSA Lodging / Overage	Expenses	Total
-	120.00	196.00	316.00

Budget Account	Total	Type	Explanation	EDIT	DELETE
199 41 6411 23 728 Y 99 000 Y	90.00	Other	Registration Fees	✏️ Edit	⊖
Total	90.00				

To edit an account, click on the ✏️ Edit button.

To delete an account, click on the ❌ icon. A prompt will alert you confirming your choice as shown below:

DELETE BUDGET ACCOUNT DIALOG

Are you sure you want to delete the following account?

Type	Other
Acct	199 41 6411 23 728 Y 99 000 Y
Amount	90.00

Registration Fees

🗙 DELETE   ❌ CANCEL

Clicking on "DELETE" deletes the record.
Clicking on "Cancel" disregards the delete command.

ATTACHMENTS

Click on the [⚓ Attachments] icon to bring up the attachments window shown below:
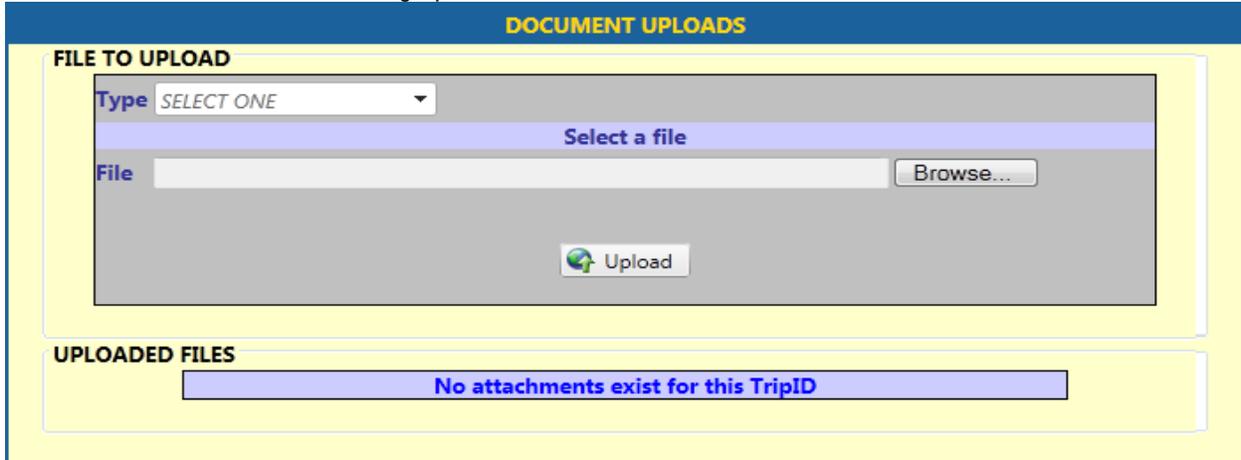
Uploads help WebTravel approvers decide whether to approve a trip or not. This feature reduces the need of paper copies to be handed down along with the copy of the request. In addition, the attachment of supporting documentation is preserved and archived during and after the approval process.

The preferred document type of WebTravel is PDF (Portable Document Format) which is a universal file format from Adobe®. The maximum attachment size of any given document in WebTravel is 3 Mb (Megabytes).

To optimize your attachment file size, please ask your Technology department to configure your scanner to 300 dpi (dots per inch). This resolution allows you to scan up to 200 pages at while remaining well under the 3 Mb maximum set in WebTravel Uploads.

To upload a document:
1. Select the "Type" of upload using the drop down box. If "Other" item is selected, an additional textbox will appear allowing you the flexibility to explain what the attachment is for. This list of "Upload Types" is maintained by your website administrator.
2. Locate your file by clicking on the [Browse...] button will open up a list of your computer's folders and drives.
3. Once you have selected your file, click on the [⬆ Upload] button

Once your document has been successfully uploaded, your screen will look like the following:
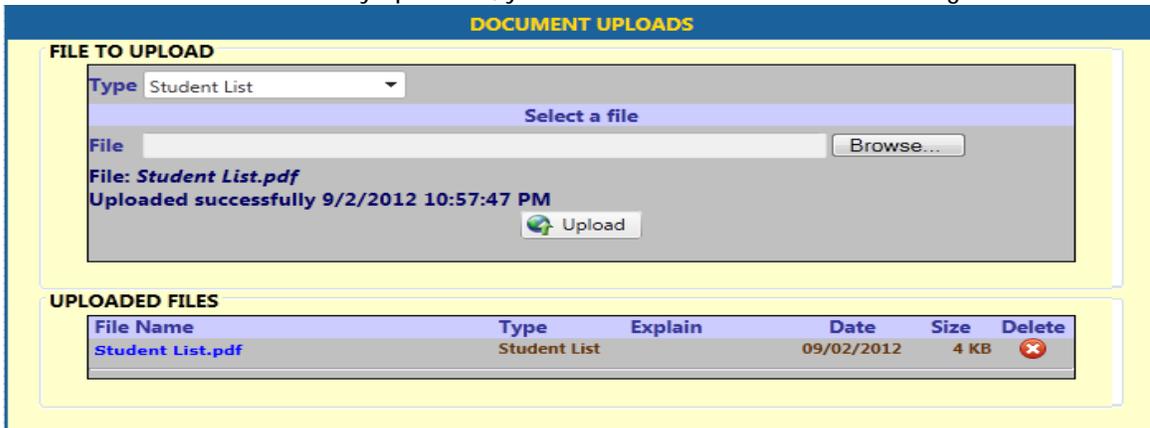
To delete an attachment, click on the ❌ icon.

SUBMIT

Once an originator submits his / her request, WebTravel will automatically assign the request to your Campus / Organizational secretary.

When the "Submit" menu item is clicked, WebTravel performs the following checks:
If a request does not require cost:
1. Destination Page is filled
2. At least an upload has been added to the request

If a request requires cost
1. Destination Page is filled
2. The request meets the "Days in Advance" requirement set by your District.
3. At least one expense is found. This can be from "meals", "lodging", or "expenses" page
4. At least one upload has been added to the request.

Upon successful submission, WebTravel will email your campus / organization secretary a notification of items pending their action. If WebTravel finds any errors, they are displayed on the Submit Page.

DELETE

To delete a request, click on the "Delete" menu item, this will display the "Delete Page" on the Navigation pane
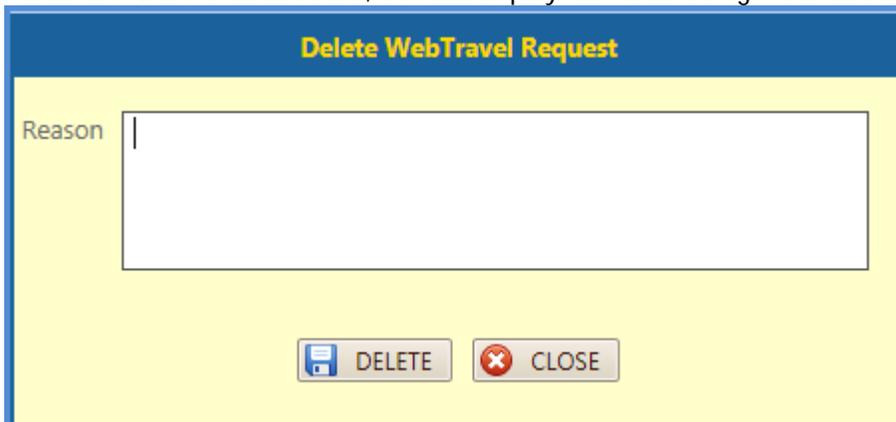
To delete: type in a reason for deleting the request and then click "Delete".
To cancel: click on the "Close" button.

If a user accidently deletes a request, contact your website administrator for assistance in restoring the request.

SAVED REQUESTS

WebTravel automatically assigns a TripID to every request made. A user can write down this number for future reference when inquiring about a specific request, or they can use WebTravel's "Saved Requests" feature.
To access this feature, click the "My Requests" menu option from the "Main Menu"

By default, the "Saved" requests are retrieved first as shown below:

TID	Type	Conference Title	Travel Date	Print	Select
2	E	System Training	03/31/2014	🖨	✅
5	E	Training for Success	03/17/2014	🖨	✅
3	E	No Title	01/01/1900	🖨	✅
4	E	No Title	01/01/1900	🖨	✅

To locate a different type of request, change the "Inquiry type" drop down option.

Note that if a request has a "No Title" for the Conference Title, the request does not have a filled "Destination Page"
To select a request, click on the ✅ icon for the request you wish to select, this will redirect your browser to the Dashboard Page.

SEARCH EMPLOYEE

Search employee assists WebTravel users in finding a specific employee's Employee ID.
Using a phonetic search, WebTravel allows its users to search using partial entries.

Last Name	First Name	M	EmpID	UserID	Cps	Position
SHOOP	MARGIE	W	000000089	MARGIE0	007	Production Technician - WC60
GIBSON	MARY	E	000000106	MARY0	004	Marketing Specialist
HARRINGTON	MARK	L	000000111	MARK0	013	Quality Assurance Technician

LOCATE TRAVEL

Locate Travel is a feature that allows WebTravel's users locate a travel during and after its approval process. It is used to find out where a travel request is at.

LOCATE LEAVE REQUEST

Travel ID #   🔍 Find

Status:

🖨 Print   📋 Notes   🖼 Path   📎 S.Att.   📎 All Att.   📖 Revisions

Back to Main
WebTravel v3.21

To locate a request, type in a TravelID and then click on 🔍 Find

LOCATE LEAVE REQUEST

Travel ID # [1]   🔍 Find

Status: Approved

🖨 Print   📋 Notes   📑 Path   📎 S.Att.   📎 All Att.   🗄 Revisions
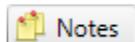
Back to Main
WebTravel v3.21

Searching for Travel ID 1 brings up the above.
In this example, the status of this Travel is: Secretary – this means that the secretary is sitting at the secretary's section waiting to be forwarded.
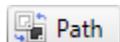
Clicking the following:

🖨 Print   Prints the travel request, if the request is at the Originator, this will be blank
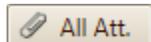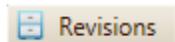
📋 Notes   Shows the cumulative Travel notes

📑 Path   Displays the approval path for the Travel request

📎 Att.   Shows users a list of the attached documentation for the travel

📎 All Att.   Shows a PDF file with all the attachments associated with the request in one file

🗄 Revisions   If a Travel request has been restored more than once, the previous copies are kept here

Order	Revision Name	Created by	Date
1	**WTID 1_DTS_9172014 _195531149.PDF**	SUPER USER	09/17/2014

EMAIL NOTIFICATIONS

Email notifications are an important part of WebTravel.
They notify its users of actions throughout the entire request process.

When a request is submitted by an Originator, WebTravel sends the campus secretary an email notifying them of a request pending an action.

When the secretary, forwards this request, the next approver of the request receives an email of a request pending their approval. If the Approver "rejects" a request, WebTravel will email the Originator and secretary a rejection notice. Each subsequent approver will continue to receive an email until no more approvers exist for a WebTravel request.

Once the request is approved by all the Assigned personnel, WebTravel will email the Originator a notification of approval.

If a request is restored, WebTravel will email a "restoration notification" informing the Originator of the action.
In order to notify more staff about the status of a travel like approvals, restorations, or rejections, you may add them by
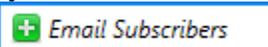
clicking on the ➕ Email Subscribers icon located on the travel request dashboard.

When selected, the following will show up:
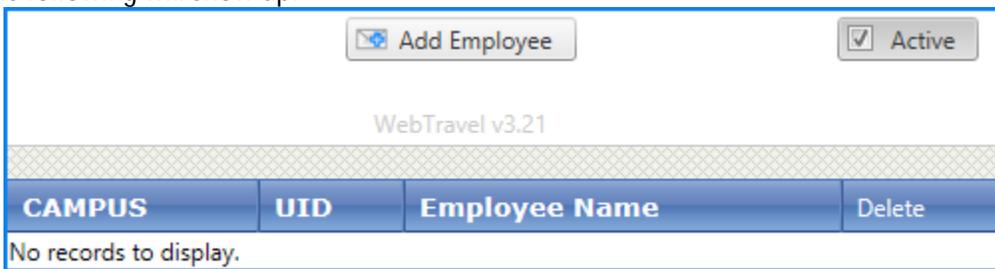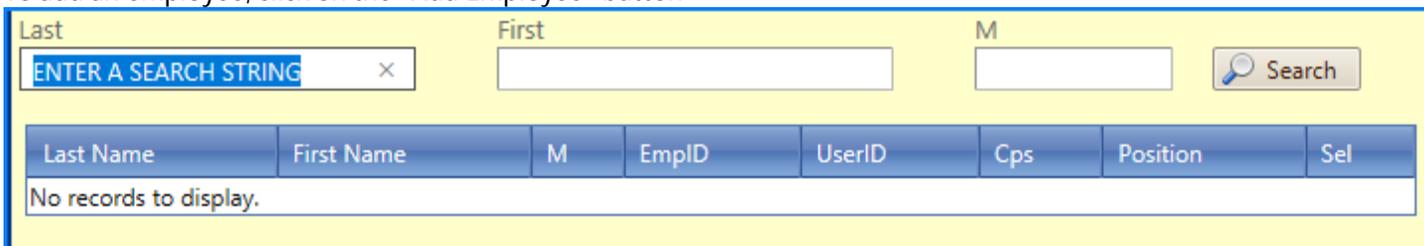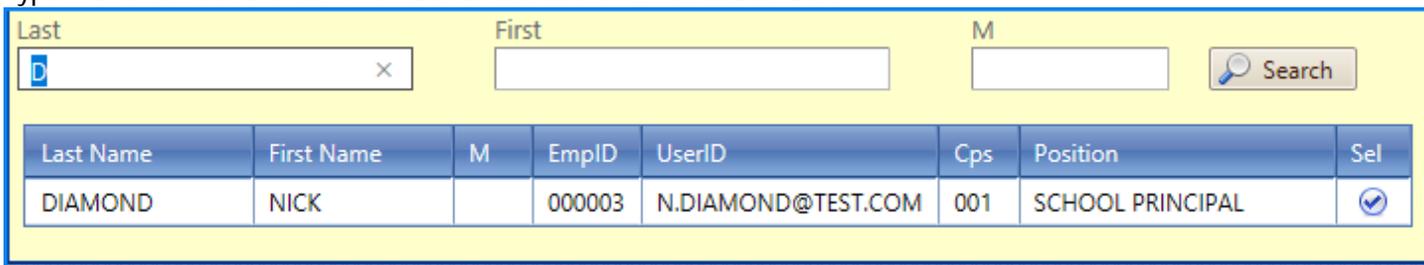

To add an employee, click on the "Add Employee" button

Type in the name of the staff member to add to the "Email Subscribers"

Last Name	First Name	M	EmpID	UserID	Cps	Position	Sel
DIAMOND	NICK		000003	N.DIAMOND@TEST.COM	001	SCHOOL PRINCIPAL	✓

To select a name, click the ✓ icon. You can add an unlimited number of "Email Subscribers".
Remember that each subscriber will always be notified when a travel is: approved, rejected, or restored.

PENDING SECRETARY ACTION

To assist secretaries, WebTravel takes the guesswork out of which requests are pending forwarding.

Clicking on the "Pending Secretary Action" menu item of the main menu will look for any requests currently pending forwarding. If there are requests which need to be worked on, the following window will appear:

Requests Pending Secretary Action

TID	Type	Conference Title	Travel Date	Print	Select
1	E	System Training	01/06/2014	🖨	✓

In this example, we can see that Travel ID #1 is attending the "System Training" conference. To print this request, click on the 🖨 icon.

To select this request, click on the ✓ icon. This will close the redirect the user to the Dashboard.

It is in this form that a secretary can make changes for an Originator by clicking on the appropriate section.

Once all the necessary corrections have been made to a WebTravel request, click on the "Submit" menu option.
In addition to performing advanced checks, clicking this button will once again perform the following checks:

If a request does not require cost:
1. Destination Page is filled
2. At least an upload has been added to the request

If a request requires cost
1. Destination Page is filled
2. The request meets the "Days in Advance" requirement set by your District.
3. At least one expense is found. This can be from "meals", "lodging", or "expenses" page
4. At least one upload has been added to the request.
5. The budget accounts are in balance with the expenses

PENDING APPROVAL

This is where requests awaiting for approval are located.

The columns here are as follows:

TID	WebTravel ID
T	Travel Type (E – Employee; S – Students)
Notes	Opens the cumulative history of the Travel Request
Att	Opens the Attachments screen
Cps	Campus of the Main Requestor
Conference Title	Conference Title
City	City where the travel is taking place
Type	Out of Valley, In-Valley, Overnight
NoE	Number of Employees on travel
DTravel	Date of Travel
Print	Opens a window that displays all the Travel's details
Action	Opens the dialog window with the approval options

Notes view

Attachments view

DOCUMENT UPLOADS

UPLOADED FILES

File Name	Type	Explain	Date	Size	Delete
CR Max Report processing jobs limit.pdf	Conference Description		02/08/2014	132 KB	

Print View

Brownsville ISD
Travel Application Request
Status: Pending Secretary Action

School Year 2013-2014
Travel ID# 1
In Valley

Activity Title	System Training					
EmpID	00015	YTD ASB	TRAVEL	FROM	01/06/2014	Monday
				TO	01/06/2014	Monday
Employee	JEFFREY L FORD					
Campus	Hanna High School		CONF.	FROM	01/06/2014	Monday
Title	Production Technician - WC10			TO	01/06/2014	Monday

Event type	Region One Training	# Employees	2	Cost Association	True
Location	Region One - Ring Gold Room				
Address	1900 W Schunior, Edinburg, TX		Departure	08:00 am	Arrival	05:00 pm

Method of Transportation	Car
Event Description	System Training
	For WebTravel System

Other Employees Traveling		Campus	Employee Position	YTD ASB
00100	LANE M SACKSTEDER	001	Production Technician - WC20	-

MEALS

Note	Meal Type	Qty	Price	EMPLOYEES Num	EMPLOYEES Amount	NON-EMPS Num	NON-EMPS Amount	Total
Employees get the same amount	Breakfast	1	5.00	2	10.00	-	-	10.00
	Lunch	1	8.00	2	16.00	-	-	16.00
Total Meals					26.00		-	26.00

LODGING

# Rms	Price	#Days	Tax Rate	Ttl.Tax	Name of Hotel / Notes	
1	109.00	2	10.50%	22.89	La Quinta	
Total Lodging						240.89

Action view

APPROVAL OPTIONS

SEQ#	Aprover Name	Action	Save
1	JOHN WAYNE	Select One	Save
2	SECONDARY ED SUPERVISOR	Select One	Save
3	ASSISTANT SUPERINTENDENT	Select One	Save
4	SUPERINTENDENT OF SCHOOLS	Select One	Save

The two Approval Options are: Approve and Reject
- Approve
  - Approves the request and forwards to next approver. An email notification is sent to the next approver in the queue. When the last approver approves the request, the originator and every "Email Subscriber" gets notified that the request is approved. In the event of multiple employees in the request, WebTravel looks at their campus number and determines if they are from the same campus. If there are multiple campuses found, WebTravel emails the supervisor for each campus the names of the employees traveling with the approved request.

> **Thank you**
> **JOHN WAYNE**
>
> **You have approved WebTravel ID #8**
> **Next Approver: SECONDARY ED SUPERVISOR**
>
> *Click the button below to complete the transaction*
>
> ✔ CONTINUE

- Reject
  - o As the name states, choosing this option requires the approver to type in a comment to notify the secretary, the originator, and any email subscriber, the reason for the rejection.

> **REJECT WEBTRAVEL**
>
> Comments [   ]
>
> 💾 SAVE   ❌ CLOSE

RESTORE WEBTRAVEL

There are occasions where a WebTravel needs to be restored, whether it's for corrections or for changing a budget account, or simply to cancel a WebTravel request. If this functionality is required, please contact your Website Administrator for performing this task. Please provide him/her a reason for "Restoring" the request. Once done, the originator and any email subscriber will be notified of the reason for "Restoring" the request.