

Business Process	Navigation
1. To enter a travel request	1. Main Menu > Finance Navigation > Employee Self-Service > Forms > Travel Request

Use the following navigation to request travel authorization.

1. From the Menu, select **Finance Navigation** > **Employee Self-Service** > **Forms** > **Travel Request**
2. Select **Add a New Value**
3. **Subject:** Please enter "Travel Request".
4. The Approver may enter comments in the Approver Comments field after approving the form.

5. **Name:** Enter the name of the traveler.
6. **Emp ID:** Enter the employee identification number of the traveler.
7. **Position:** Enter the position or job title of the traveler.
8. **Work Phone:** Enter the work phone of the traveler.
9. **School/Dept. Name:** Enter the school or name of the department where the traveler works.
10. **Add'l Emails:** If there are additional people who should be emailed the travel authorization number other than the traveler, enter the additional email addresses with a comma separating the email addresses.

Event Information:	
*Event Name:	
*Event Location:	
*Initiative:	▼
Travel Purpose:	
*Dates of Event:	
*Number of Travel Days:	
Explain any additional travel days:	
*Total Cost (\$):	
Registration Fee:	
Transportation:	
Lodging:	
Meals:	
Other Costs:	
Other Descr:	
	☐ Trip meets district's criteria for Staff Development/Grant Criteria.
Grant Title:	

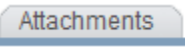
11. **Event Name:** Enter the name of the event or a brief description.
12. **Event Location:** Enter the city and state of the location of the event or the city and country if the event is located outside of the United States.
13. **Initiative:** Choose whether the travel meets a professional growth, district or SCIP (School Continuous Improvement Plan) initiative.
14. **Travel Purpose:** Describe the purpose of your travel.
15. **Dates of Event:** Enter the beginning and ending dates of the event.
16. **Number of Travel Days:** Enter the total number of days of travel.
17. **Explain any additional travel days:** Explain if the number of travel days exceeds the number of days of the event.
18. **Total Cost (\$):** Enter the total expected cost of the trip. If there is no cost to the district, enter 0.
19. **Registration Fee:** Enter the cost of the registration.
20. **Transportation:** Enter the expected cost of transportation which is usually airfare.
21. **Lodging:** Enter the expected cost of lodging.
22. **Meals:** Enter the expected cost of meals.

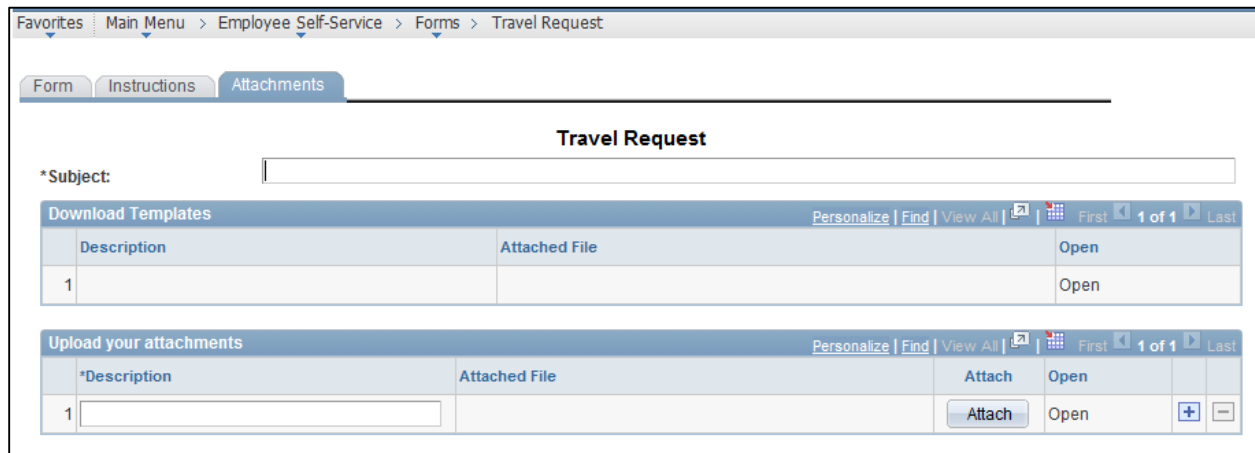
23. **Other Costs:** Enter the expected cost of other travel expenses including ground transportation or baggage handling.
24. **Other Descr:** Enter the text description of the other travel expenses you listed in "Other Costs".
25. **Trip meets district's criteria for Staff Development/Grant criteria checkbox:** Check the box if the trip meets the district's criteria for Staff Development/Grant criteria.
26. **Grant Title:** If the travel is being funded by a grant, enter the title of the grant.

*Fund:		
*Department:		
*Program:		
*Product:		
*Account:		
*Class:		
Grant Chartfields		
Project:		
Activity:		
PC BU:		
Contract:		
More Information:		

27. **Fund:** Enter the two digit Fund Code portion of the budget code or click on the magnifying glass to choose a Fund Code from the list.
28. **Department:** Enter the three digit Department Code portion of the budget code or click on the magnifying glass to choose a Department Code from the list.
29. **Program:** Enter the three digit Program Code portion of the budget code or click on the magnifying glass to choose a Program Code from the list.
30. **Product:** Enter the three digit Product Code portion of the budget code or click on the magnifying glass to choose a Product Code from the list.
31. **Account:** Enter the four digit Account code portion of the budget code or click on the magnifying glass to choose an Account Code from the list. To quickly find the list of Account Codes in the 6000 range, enter a "6%" (without the '"') in the "Account" Field and click on "Look Up". % is a wild card in PeopleSoft.
32. **Class:** Enter the four digit Class Code portion of the budget code or click on the magnifying glass to choose a Class Code from the list.
33. Grant Chartfields are additional fields required for certain chartfield codes.
34. **Project:** Enter the Project Code or click on the magnifying glass to choose a Project from the list.
35. **Activity:** Enter the Activity or click on the magnifying glass to choose an Activity from the list.
36. **PC BU:** Enter the PC Business Unit or click on the magnifying glass to choose a PC Business Unit from the list.
37. **Contract:** Enter the Contract or click on the magnifying glass to choose a Contract from the list.

38. Enter any additional information in the More Information field.

39. To attach scanned copies of the event brochure and registration form, click .



Travel Request

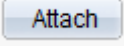
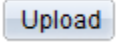
*Subject:

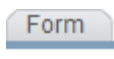
Download Templates Personalize | Find | View All |  | First 1 of 1 Last

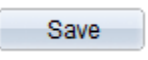
Description	Attached File	Open
1		Open

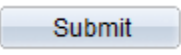
Upload your attachments Personalize | Find | View All |  | First 1 of 1 Last

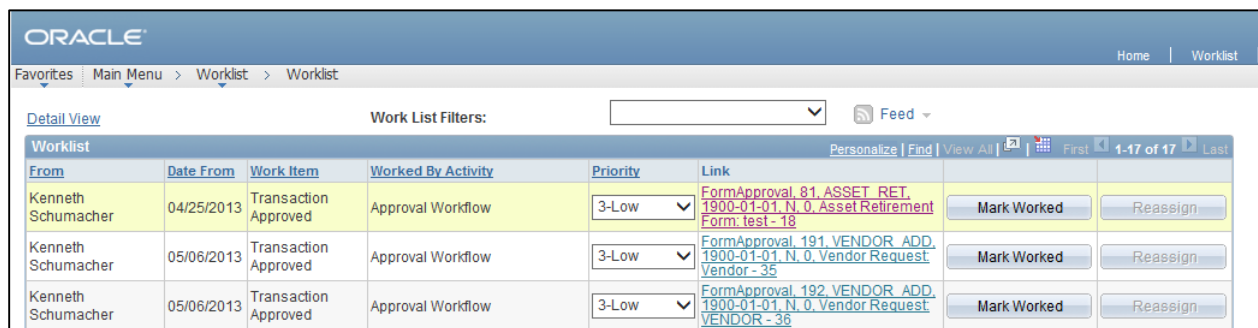
*Description	Attached File	Attach	Open		
1			Open		

40. To upload an attachment, click , then Browse. Select the desired file, and click .

41. Return to the main Form page by clicking .

42. Click  to save the transaction.

43. Click .



From	Date From	Work Item	Worked By Activity	Priority	Link		
Kenneth Schumacher	04/25/2013	Transaction Approved	Approval Workflow	3-Low	FormApproval_81_ASSET_RET_1900-01-01_N_0_AssetRetirementForm_test-18	Mark Worked	Reassign
Kenneth Schumacher	05/06/2013	Transaction Approved	Approval Workflow	3-Low	FormApproval_191_VENDOR_ADD_1900-01-01_N_0_VendorRequestVendor-35	Mark Worked	Reassign
Kenneth Schumacher	05/06/2013	Transaction Approved	Approval Workflow	3-Low	FormApproval_192_VENDOR_ADD_1900-01-01_N_0_VendorRequestVendor-36	Mark Worked	Reassign

44. After action has been taken on your form, you will see activity in your worklist: **Main Menu > Finance Navigation > Worklist > Worklist**. If your travel request was denied please review the comments in the **Approver Comments** field for more information. You may need to add additional information and submit your form again. If it was approved, you will receive an email with your authorization number and further instructions.