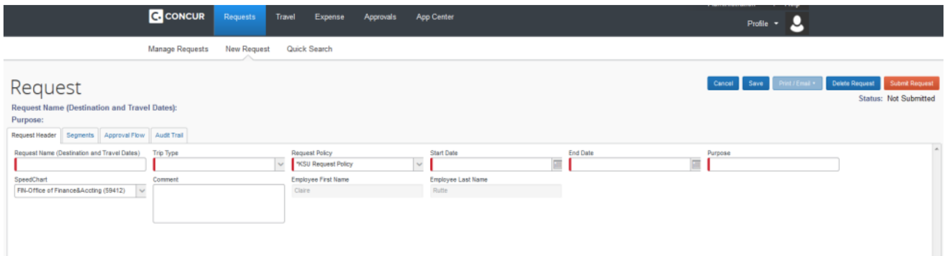
Travel Management System (TMS)

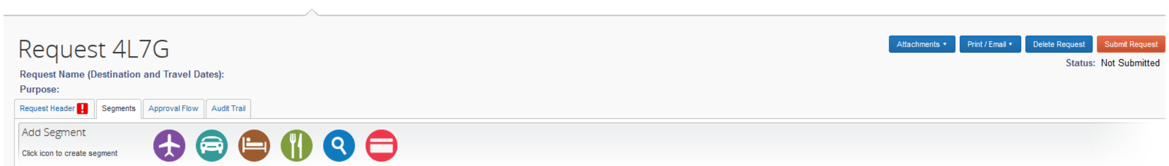
JOB AID # 2.01		Date: 1/31/2015

Job Aid Description: Create a Travel Request

1. Login to the Travel Management System.
2. Click the **Requests** tab, and then **New Request**.



3. Complete the fields on the Travel Request Header tab using the following guidelines:
   a. **Request Name**: Enter the Destination City, State (or Conference name) AND dates of travel. For example: **Orlando, FL 4/15/12-4/19/12**.
   NOTE: Follow the above format and best practice so the info is there for reporting and budget management purposes!
   b. **Trip Type**: From the drop-down box, choose the Trip Type that best describes your travel. You should only choose **Study abroad** if your trip is being funded from an Agency Account.
   c. **Request Policy**: The Policy field will default to the KSU Request Policy. **DO NOT CHANGE!**
   d. **Start Date**: Enter your first day of travel. Click on the calendar icon to view a calendar.
   e. **End Date**: Enter your last day of travel.
   f. **Purpose (of Trip)**: Enter your conference name and/or purpose of travel.
   g. **Speed Chart**: The Speed Chart will default to your department speed chart number. If this trip is being paid entirely by another department or project, you may change the Speed Chart here in the header by clicking the dropdown arrow and selecting the appropriate Speed Chart for this trip.
   h. **Comment**: This field may be used for any kind of information you feel is relevant to your trip. For example, if you are traveling on a grant or plan to take personal time during your stay please note here.
4. Click on the **Segments** tab. This is where you will provide an estimate of costs of the various segments of the requested trip. **Note: The "Pre Paid Registration" segment is where you will provide information regarding registrations and other expenses paid through OwlPay and/or Pcard.**



5. Click on the desired segment and complete the fields based on your estimated costs. (Remember: Red sidebars are Required fields!)
   NOTE: As you add segments, they are kept in a running list. To view your estimates, use your scroll bar to scroll through segments you have entered.
6. Continue with other applicable **Segments**. Then click **Save**.
7. If you need to **Allocate** the trip costs between two (2) or more Speed Charts:
   a. Click the **Allocate** button on any **Segment**.
   b. Click **Allocate By:** and choose **Percentage** or **Amount**.

c. Click **Add New Allocation**.

d. Enter the allocation and the additional Speed Chart number (or use drop down list).
Repeat until **Allocation** is complete for all Speed Chart numbers.

NOTE: You cannot allocate segments individually on the Travel Request.
All segments on a Travel Request share the same allocation percentage.
When you complete your Expense Report, you can be report actual costs for segments.

8. Click on the **Approval Flow** tab to verify and/or edit your workflow. You may add more approvers, such as a Business Manager, before or after your default approval manager. (See Job Aid-2.02) Click **Save Workflow** if changes made.

9. Click **Submit Request**.

NOTE: The Travel Request should be approved before you complete you first booking.
When you complete your expense report, you need to attach/associate the Travel Request to that report.